



Medical Alumni Society Strategic Plan

**(accepted by Medical Alumni Society
Board of Governors on 4/25/09)**

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1. EXECUTIVE SUMMARY

1.1. OVERVIEW

Universities around the world are focusing on their alumni and the benefits that accompany developing a strong connection with them. Alumni not only provide philanthropic support but they can heighten the institution's reputation and they can enrich the student experience through their involvement in the educational programs.

The challenge really lies with how to thoughtfully engage this group to recognize the positive benefits that come with having a strong alumni base. This is particularly true considering today's environment where a university is vying for their alum's time against a multitude of competing interests.

1.2. GOALS

In support of the Medical Center's goal of becoming a Top 20 Academic Medical Center and the following goals were identified for the Society to achieve in the 5-year time horizon beginning fiscal year 2010.

- 1.2.1 Continuously increase the engagement through a 5% annual increase in participation of on and off-campus events coordinated by The Medical Alumni Society.
- 1.2.2 Develop a portfolio of services for the various stakeholders of the Medical Alumni Society.
- 1.2.3 Provide a variety of communication strategies designed to promote and enhance the reputation of the Ohio State University Medical Center.
- 1.2.4 Increase annual contributions from alumni by 5% annually.

2. PROGRAM DESCRIPTION

2.1. PROGRAM DEFINITION

The Medical Alumni Society encompasses former medical students, residents, fellows and current students of The Ohio State University College of Medicine. The Office of Alumni Affairs within the college provides support to the Society as it strives to engage its members, reach out to current students and gain philanthropic support.

2.2. MISSION STATEMENT AND VALUES

As a result of research and the strategic planning process the mission and vision of the Medical Alumni Society was revised to incorporate the renewed direction of the organizations.

The mission of the Medical Alumni Society is to maintain and foster relationships to support the advancement of The Ohio State University Medical Center/College of Medicine through service, engagement and communication with its alumni faculty and student body.

It embraces the following vision to direct its mission.

Through lifetime service, commitment and stewardship, members of the Medical Alumni Society will continuously strengthen the tradition and prominence of medical education and scholarship at Ohio State.

2.3. STEERING COMMITTEE & SUB-COMMITTEE MEMBERS

The steering committee for the plan was comprised of the Society's board of governors at the plan's inception in summer of 2008. This body acts in an advisory capacity to the Department of Alumni Affairs responsible for executing the strategies and tactics for the Medical Alumni Society.

Board of Governors

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3. MARKET TRENDS/EXTERNAL ANALYSIS

3.1 NATIONAL INDUSTRY TRENDS

The trends that impact the medical community in general will also impact the societies whose members are significant stakeholders in the medical community.

3.1.1 Physician supply and enrollment

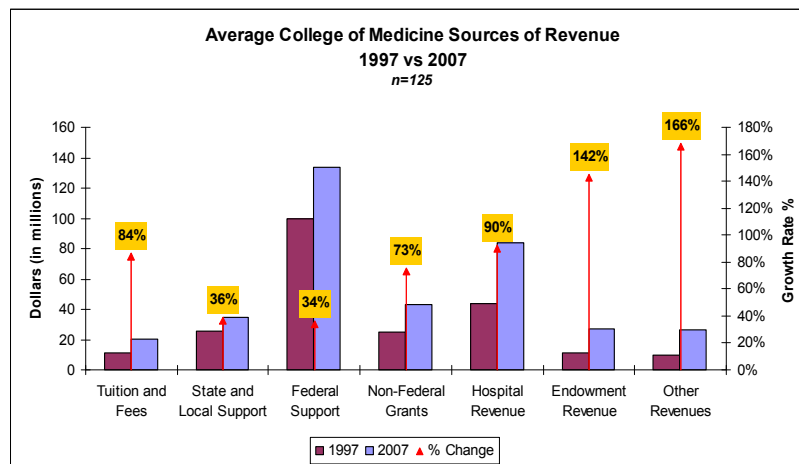
The growth in full time physicians for total patient care in relation to the population is declining. By 2020, the growth rate on a per capita basis is negative.¹ Exacerbating this trend is the choice that students are making to pursue the more lucrative careers in specialties leaving a larger gap in the supply of primary care physicians.² The pipeline of students may not be increasing enough to accommodate this. From 1997 to 2007, the number of applicants in medical school has fluctuated but actual enrollment in medical schools across the country has remained relatively constant increasing only by about 1% per year.³

3.1.2 Tuition trends and student indebtedness

From 1997 to 2007 the national average for in-state tuition fees has increase eighty-eight percent while the out-of-state tuition has increased slightly less by about eighty percent.⁴ Over the course of the same time period, the average debt accumulate in medical school increased by 67%.⁵

3.1.3 Medical school funding sources

One of the largest increases of medical school funding from 1997 to 2007 was from endowment revenue.⁶ This acknowledges the significant contribution that philanthropic efforts play in sustaining the well-being of medical colleges across the country.



¹ *Physician Supply and Demand: Projections to 2020*, U.S. Department of Health and Human Services

² http://www.mlive.com/businessreview/annarbor/index.ssf/2008/09/med_students_choose_specialtie.html

³ AAMC, Medical School Data Reports

⁴ AAMC, Medical School Profile System

⁵ Ibid.

⁶ Liaison Committee on Medical Education Part I-A Annual Medical School Financial Questionnaire Fiscal Year 2006, compiled by the AAMC, October 2007

3.2 COMPETITIVE BENCHMARKING

Personal interviews with contacts at Vanderbilt, Iowa, Washington University and Duke helped supplement the external analysis to understand how other alumni organizations are structured and are responding to the external environment.

3.2.1 Mission and goals

Across all benchmark institutions the missions were consistently focused on alumni engagement and relationship building, facilitating a communication network and enhancing educational opportunities.

3.2.2 Member definition

The matrix below reflects how the various institutions defined their members. The inclusiveness of the societies varied from organization to organization.

	MDs	Former House Staff	Current Students	Current House Staff	PhDs/ MS	Faculty	Former Faculty	Number	Annual Class Size
Vanderbilt	X	X	X	X	X	X	X	12,000	105
Iowa	X	X			X			19,000	148
Washington University	X	X	X	X				17,000	122
Duke	X	X						12,000	100
OSU Medical Alumni Society	X	X	X	X				14,000	210

3.2.3 Operations

And the structure to support these operations varied by institution except the fact that none of the societies charged dues to their constituents.

	Alumni Dept FTEs	Alumni Members/ FTE	Board Members	Dues Paying
Vanderbilt	4.5	2,666	20	No
Iowa	5	3,800	31	No
Washington University	3	5,666	35	No
Duke	4	3,000	30	No
OSU Medical Alumni Society	2	7,000	22	No

All organizations faced challenges around extending the geographic reach, measuring outcomes and setting metrics, creating programs for residents and fellows and balancing the dual objectives of relationship-building and fundraising.

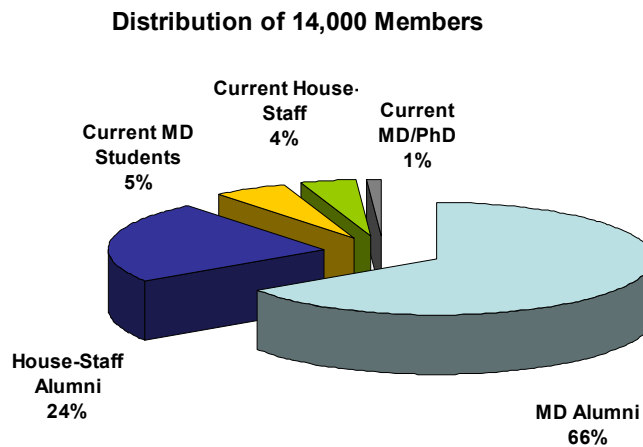
4. INTERNAL ANALYSIS

The Medical Alumni Society has a rich history at The Ohio State University College of Medicine. The Office of Alumni Affairs operates under the umbrella of the Department of Development and was created to assist in fulfilling the mission and vision of The Medical Alumni Society for the College of Medicine.

4.1 STAKEHOLDERS

4.1.1 Members

There are over 14,000 members in the Society comprised of MD graduates, residents, fellows and current students. How these constituencies are distributed is represented in the graph below:



4.1.2 Board of Governors

The board is comprised of 20 physicians who serve 3-year terms and can serve a maximum of 3 consecutive terms. The bylaws dictate that the terms should be staggered so that every year new board members are elected. In 2008, there were 6 new board members. Membership in The Ohio State University Alumni Society and the Medical Alumni Society is required for eligibility but no minimum fiduciary contributions are imposed on the members.

4.1.3 Department of Alumni Affairs

The Office of Alumni Affairs is staffed by 3FTEs.

4.2 GEOGRAPHIC FOCUS

Most of the alumni are currently living in Ohio but the second and third highest states with populations of medical alumni are California and Florida respectively. Historically, the Society has been primarily focused on activities designed to bring alumni back to the main campus in Columbus. However, as competing priorities continue to increase for the physician alumni base and the alumni base becomes more dispersed geographically, the resources that a member can devote to a return trip be it in terms of time or money are increasingly compromised.

4.3 OPERATING BUDGET

The budget has remained consistent over the past five years.

<i>Fiscal Years</i>	Actual	Actual	Actual	Actual	Budget
<i>2005 - Budgeted 2009</i>	FY05	FY06	FY07	FY08	FY09
SOURCES	390,792	419,135	490,037	476,512	496,183
USES	335,808	361,014	404,378	297,695	296,395
NET REVENUE	54,984	58,121	85,659	178,817	199,788

4.4 OPPORTUNITIES

As part of the internal analysis several key stakeholder groups were surveyed for input. There were 734 responses to an alumni survey conducted in 2007 and in 2008 personal interviews were conducted getting feedback from the board members, OSU Medical Center internal leaders, engaged alumni and students. As a result of these interviews several key opportunities were identified.

4.4.1 Events and activities

Less than half of the respondents have returned for the reunion or other Medical Alumni Society events hosted on campus. From personal interviews we were able to discern that this was in large part due to time constraints. This is particularly true of those alumni not in the immediate vicinity. While less than half have actually participated nearly half of the respondents indicated that they would like to participate in events at OSU Medical Center specifically citing interest in sporting events and CME activities.

4.4.2 Connecting alumni to one another and students

Alumni expressed an interest in connecting with each other and with current students.

4.4.3 Programs that add value for alumni

Less than half of the respondents have returned for the reunion or other Medical Alumni Society events hosted on campus. From personal interviews we were able to discern that this was in large part due to time constraints. This is particularly true of those alumni not in the immediate vicinity. While less than half have actually participated nearly half of the respondents indicated that they would like to participate in events at OSU Medical Center specifically citing interest in sporting events and CME activities.

5. GOALS, STRATEGIES & TACTICS

5.1 ENGAGEMENT: CONTINUOUSLY INCREASE THE ENGAGEMENT THROUGH A 5% ANNUAL INCREASE IN PARTICIPATION OF ON AND OFF-CAMPUS EVENTS COORDINATED BY THE MEDICAL ALUMNI SOCIETY.

5.1.1 Strengthening alumni relations through face-to-face interaction on campus

This strategy is about planning and hosting events that will bring alumni back to the main campus in Columbus, Ohio. The list below represents the tactics that the Society will use to accomplish this strategy:

- Alumni reunion weekend
- Board of Governor's meetings
- Mullet student-alumni forum
- Alumni/faculty awards program
- Annual fund donor stewardship program

5.1.2 Strengthen alumni relations by generating opportunities for alumni interaction beyond the Central Ohio campus.

Acknowledging the constraints that constituents face in terms of time, the Society hopes to facilitate engagement through initiatives in strategic locations around the country where alumni are concentrated. Some of the planned tactics related to this strategy are:

- Regional welcome receptions for admitted students hosted by alumni in the area
- Expanded and strategic alumni dinners in key cities/regions

5.1.3 Build the student connection to the Alumni Society.

To foster relationships with current residents and students is another strategy to increase engagement. Planned tactics related to this strategy are:

- Girls Night Out
- Student Alumni Golf Scramble
- Mullet student and alumni tailgate
- Med4-alumni "Help Our Students Travel" (HOST) program
- Support for the MSAC program
- Supporting a planned parent/council weekend
- Financial support to the white coat ceremony and Match Day

5.1.4 Cultivate under-represented alumni groups

Creating specific programs designed for targeted populations within the alumni. Planned tactics related to this strategy are:

- Minority alumni preferred programming
- Adding new awards (ie...young career, service award)
- Partner with departments to establish a presence at national conventions

5.1.5 Expand interactive technology use

The Alumni Society can use technology effectively to engage by:

- Enhancing web communication
- Making alumni aware of the lifetime email address

5. GOALS, STRATEGIES & TACTICS (CONT.)

5.2 PORTFOLIO OF SERVICES: DEVELOP A PORTFOLIO OF SERVICES FOR THE VARIOUS STAKEHOLDERS OF THE MEDICAL ALUMNI SOCIETY.

5.2.1 Develop and support programs that connect alumni to students

Most of the tactics that connect alumni to students are also tactics that are designed to increase engagement.

- Girls Night Out
- Student Alumni Golf Scramble
- Mullet student and alumni tailgate
- Med4-alumni “Help Our Students Travel” (HOST) program
- Support for the MSAC program
- Supporting a planned parent/council weekend

5.2.2 Implement a “medical education home” concept

- Offer alumni-sponsored CME at the alumni reunion
- Investigate coordinating an alumni event at the clinical skills lab

5.1.3 Outreach to departments to support respective resident-alumni events

- Partner with departments for receptions at national conventions
- Developing a program that supports the decentralized efforts by department yet reinforces the support of the Medical Alumni Society

5.3 COMMUNICATION: PROVIDE A VARIETY OF COMMUNICATION STRATEGIES DESIGNED TO PROMOTE AND ENHANCE THE REPUTATION OF THE OHIO STATE UNIVERSITY MEDICAL CENTER.

5.3.1 Create and distribute materials that reinforce the mission and vision of the Medical Alumni Society

- *Alumni Update* newsletter
- *Discovery* magazine (online access)
- Annual fund solicitation
- Alumni Society services/involvement brochure

5.3.2 Use technology to disseminate communication

- Online alumni directory
- Develop the social networking site

5.3.3 Facilitate alumni-to-alumni networking and communication

- Enhance the web page to drive and track “hits”
- Archive electronic copies of past publications
- E-newsletter
- Expanded and strategic alumni dinners in key cities/regions

5. GOALS, STRATEGIES & TACTICS (CONT.)

5.4 PHILANTHROPY: INCREASE ANNUAL CONTRIBUTIONS FROM ALUMNI BY 5%

5.4.1 Communicate achievements made through philanthropic efforts

- Donor/philanthropy stories in *Alumni Update* newsletter
- Annual fund solicitation
- Accomplishments report included once/year in Dean's communication to alumni

5.4.2 Educating alumni about the breadth and depth of vehicles for giving

- Promote fund and giving opportunities through website and Alumni Update
- Alumni Society information/donor brochure
- Develop a master communications calendar to coordinate mailings/touchpoints
- Thank you call from Board member

5.4.3 Increase participation in College of Medicine Annual Fund and other priorities set by the Dean

- Continued support of the Medical Alumni Merit Scholarship
- Event sponsor program
- White coat sponsor program
- Parent council/weekend
- Reunion-giving/class give program

6. FINANCIAL PLAN & REQUIRED RESOURCES

The true costs of the planned tactics going forward are listed below. These costs do not take into consideration incoming sponsor revenues to offset the actual costs. Such revenues may not be consistent from year to year.

In terms of staff, the assumption at this time is that the plan can be accomplished with current staffing levels.

Tactic	Annual Budget
Develop a program that supports decentralized efforts by department yet reinforces the support of the Medical Alumni Society	TBD
Investigate coordinating an alumni program at the clinical skills lab	TBD
Reunion-giving/class gift program	TBD
Alumni Reunion weekend	\$80,000
Annual Fund solicitation	\$17,000
Continued financial support for student activities	\$15,400
Continued support of the Medical Alumni Merit Scholarship	\$10,000
Review vendor contract for web services/online directory	\$10,000
Student and alumni golf scramble	\$8,000
Expanded and strategic alumni dinners in key cities/regions	\$7,500
Alumni Society donor brochure: ways to give	\$3,000
Alumni Society services/involvement brochure	\$3,000
Board of Governor	\$3,000
Annual Fund donor stewardship plan	\$2,500
Alumni Update newsletter	\$2,450
Regional welcome receptions for admitted students hosted by alumni in area	\$2,000
Med4-alumni "Help Our Students Travel" (HOST) program	\$1,500
Partner with departments for receptions at National Conventions	\$1,500
Girls Night Out	\$1,000
Minority alumni preferred programming	\$1,000
Continue Medical Student Alumni Council (MSAC) program	\$750
Parent council/weekend	\$500
Alumni/Faculty Awards Committee	\$250
Bolster alumni award program by adding new awards (young career, service award) and identified "distinguished alumni"	\$250
Accomplishments report included once/year in Dean's communication to alumni	\$0
Archive electronic copies of past publications	\$0
Develop a social networking site	\$0
Discovery Magazine	\$0
Donor/philanthropy stories in Alumni Update	\$0
E-newsletter	\$0
Enhance the web page to drive and track "hits"	\$0
Enhance web communication	\$0
Event sponsor program	\$0
Issue lifetime email address	\$0
Master communications calendar to coordinate mailings/touchpoints	\$0
Mullet student and alumni tailgate	\$0

7. IMPLEMENTATION TIMELINE




	FY10				FY11				FY12				FY13				FY14			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Mullet student-alumni forum	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Board of Governor	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Alumni Reunion weekend	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Alumni/Faculty Awards Committee	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Girls Night Out	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Student and alumni golf scramble	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Mullet student and alumni tailgate	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Continue Medical Student Alumni Council (MSAC) program	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Continued financial support for student activities	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Review vendor contract for web services/online directory	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Offer alumni-sponsored CME at alumni reunion	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Alumni Update newsletter	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Discovery Magazine	TBD	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Annual Fund solicitation	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Print alumni directory	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Develop a social networking site	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Enhance the web page to drive and track "hits"	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Donor/philanthropy stories in Alumni Update	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Continued support of the Medical Alumni Merit Scholarship	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Annual Fund donor stewardship plan	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Regional welcome receptions for admitted students hosted by alumni in area	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Expanded and strategic alumni dinners in key cities/regions	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Med4-alumni "Help Our Students Travel" (HOST) program	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Minority alumni preferred programming	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Booster alumni award program by adding new awards (young career, service award) and identified "distinguished alumni"	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Partner with departments for receptions at National Conventions	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Enhance web communication	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Issue lifetime email address	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Investigate coordinating an alumni program at the clinical skills lab	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Develop a program that supports decentralized efforts by department	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Alumni Society services/involvement brochure	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Archive electronic copies of past publications	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
E-newsletter	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Accomplishments report included once/year in Dean's communication to alumni	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Alumni Society donor brochure: ways to give	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Master communications calendar to coordinate mailings/touchpoints	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Thank you call from BOG member or medical student	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Event sponsor program	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
White coat sponsor program	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Parent council/weekend	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
Reunion-giving/class gift program	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆

8. METRICS

The metrics proposed to measure the success of the strategies and tactics are based on results from a variety of sources. Such sources would include but should not be limited to completed event evaluation forms, web surveys administered annually, web site "hits", philanthropic levels as measured in the annual fund as well as anecdotal feedback.

The snapshot below represents a proposed framework to be incorporated into an annual balanced scorecard for the Society. Assigned performance ratings (arrows) are not accurate but were inserted as a sample. Considering this data may not be available from previous years, the first year of the plan should be devoted to establishing a baseline.

Key Result Area	Target*	Actual vs. Target*
Engagement		
Total Participation	Participation in on and off-campus events.	↑
Satisfaction	Satisfaction as measured by surveys distributed at the end of events programs.	↑
Portfolio of Services		
Service Participation	Level of participation in value-added programs by constituents of the Society.	↑
Service Satisfaction	Satisfaction as measured by programmatic evaluations.	↑
Communication		
Newsletters	Effectiveness as measured through responses to calls for action in the newsletters.	↔
Awareness	General awareness of the programs and events conducted by the Society.	↔
Website	Number of "hits" generated by the website.	↔
Philanthropy		
Annual Fund	Increase in dollar amount accumulated to the Annual Fund.	↓
Gifts From Alumni	Increase in number and amount of gifts from alumni.	↓
* Target to be determined from initial metrics in FY10 and to increase thereafter.		

-  **Exceeding target**
-  **At or near target**
-  **Below target**