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Goals for the University of King's College Alumni Association 17 Jan 06

The *Concise Oxford* says a goal is, “a point marking the end of a race; object of effort or ambition; (Rom. Ant.) pillar at turning-point in chariot race.”

The powerful imagery of a chariot race is suggested for the program and development plan that the Association is seeking to derive from this study.

Context, Origins and Purpose

All organizations gather diverse traditions and activities as they mature, some of which continue to be timely and appropriate, while some others are really barnacles, surely of some value, but not really helpful in navigating and achieving progress. At some point, many organizations become concerned that what they are, and what they are doing is no longer exactly what its constituents want, or what the environment is suggesting. Such concerns lead some organizations to do a self-examination – an exercise where it is all put on the table, considered objectively, and in terms of current and possible conditions and relationships.

In consequence, some organizations change their course dramatically. Some others make minor adjustment. Still others have their policies and programs re-affirmed through this process. The important point here is that a self-examination does not necessarily lead to dramatic changes; however it usually causes a higher level of confidence that the organization is doing the right things, in the right way.

We may never know exactly when and why the first moves were made to establish the UKC Alumni Association. It may have been intended as an organization for continuing fellowship, fund-raising, change lobbying or any one or any several such reasons. Year by year, and sensitive to conditions within the Association's environment as well as the personalities of the individuals running it, the Association evolved, redefined and shaped itself to the needs of the day. Now, we need to either re-affirm, or change course. And to do that, we need to start by setting down our assumptions about who we are and what we are.

We can say with a high degree of certainty that the Association is of, and for the University. Though there is the remote possibility that it could remain operational without the University, it is deemed an inextricable relationship. The significance of this is that what the Association is, or could become, must be defined by the nature and needs of the larger institution, while paying very close attention to the Association's key constituents: its members. To put this another way, we might define the Association as a service and support organization for its members, but those services and supports must be compatible with the needs and interests of the University as a whole.

The purpose of this paper is to set down those assumptions, values, concerns and ideas that we can then articulate as goals – but a very particular kind of goals. They must be goals that can be operationalized by the Association. It is of no value to the Association to proclaim high ideals and ideas that cannot be realized.

The University

There has been evident success in University recruitment, due doubtless to the academic programs and recruitment efforts. There may be no great pressure to build the student population size aside from the need to accommodate a bizarre provincial funding program that tends to over-emphasize the importance of growth. There is however a real need to reinforce the King's "niche" and ensure that there is a steady supply of candidates. The relationship with funding partners and Dalhousie and other related institutions appears to be satisfactory.

The challenges, not unique to King's, include ensuring an ongoing high competent teaching and administrative staff, maintaining a safe and effective physical plant, and continuing to nurture funding sources while building the University's endowment. Endowment building will help fund ongoing College priorities like scholarships and bursaries and new items like speakers series to provide stability for some of the "extras" that define King's. None of these is a minor challenge. Having said that, these functions are being managed by University personnel, under the direction of the President and Board. If the Association has concerns regarding any of these areas, there are channels for bringing such concerns forward.

We can assume that the University will, in the years ahead, be concerning itself with sometimes significant adjustments to its programs, facilities use, inter-institutional agreements, capital asset improvements and additions, and governance. The Association may have views on these and other issues, and both it and the University should be prepared for dialogue. This may be a good time to document and review the existing formal and informal dialogue and participation channels to make sure they are remaining consistent with Alumni conditions and plans.

What is not entirely clear to the Association is what King's is becoming. While we can all see changes in the way the University works, who it attracts and what it produces and how, the future seems blurry. We are unclear on what role the residence plays today,

while it was until recently a key element of the King's experience. We believe the focus today is on academic excellence, but it is less certain that the University is dedicated to educating "the whole person." Indeed, we are of the view that the candidates we attract today are more skewed to the cerebral side than the eclectic mix that came for a very long time. Perhaps there is a greater need than ever to ensure the King's experience includes social broadening as well as intellectual achievement.

The Student Body (as the Association member source)

It is an understatement to say that the nature of the student body has shifted over the years. The residential mix – by age, academic year, sex, socio-economic status, academic credentials and university affiliation – today bears little relationship to what it was as recently as twenty years ago. If one goes back forty years, we could almost be speaking of an entirely different institution.

The academic credentials of the student body – what they bring to King's as freshmen and freshwomen – are unquestionably much higher than previous years. And the quality of the education they are receiving is most certainly better. What does this mean? It means that the (potential) Association candidate is a very different person than what we have seen over the years. They have values and views concerning university, employment, debt and continuing relationships that may vary dramatically from their predecessors. And it is appropriate that the Association – and its Executive – recognize that 30% of the alumni have graduated since 1995.

The implications are that an Association seeking to serve those who have attended this University must be cognizant of these conditions and changes and the extreme likelihood that what new potential alumni might be looking for in an Association could be vastly different from the needs of former generations. Indeed, we need to be conscious of the possibility that significant numbers may not share our "traditional" views about the value of a continuing relationship with colleagues and the University. And indeed, in hindsight, it seems to become less and less clear just what tradition meant for each class and era, and how the level of connectedness to whatever "tradition" eventually played out after students left the University. In practical terms, it is difficult to identify either correlation or causality between the various eras of King's, and the level of interest and activity of alumni members. In short, we're just not sure what works.

There are other considerations, some of which could be mission critical, for which we may or may not have data. Where have King's candidates traditionally come from geographically, and where are they originating today? Are they urbanites? Where do they go when they leave university? What now constitutes a "King's experience"? What proportion of our students / graduates go on to further studies?

These factors – critically important for understanding what appeals to and retains community members – might not be the most critical issue of interest to an institution that is not as focused on building applicant numbers as was the case earlier on.

Association Support

At the moment, the Association enjoys considerable University support. Staff and office accommodations are provided, as is journalism advice and service, meeting space, systems and operating funds. Importantly, the University administration and Board of Governors give direct support to the Association through shared governance, while the President plays several important roles including an ex officio position on the Executive, and opening the Lodge to alumni (just to mention two examples).

It would be quite foolish for the Association to imagine that these key supports are guaranteed forever. While there is no suggestion of change, and while Alumni and Development enjoys significant Administrative support, the Association should be cognizant of the continuing financial pressures on the University. Some time in the future there may well be a need to find alternate, or supplementary funding.

Issues of Capacity and Limitation

King's is a small institution, and so is its Alumni Association. Neither has the resources of a Dalhousie or a UVic, or even a Mount Allison. Graduates disperse around the world, but even if they all stayed in Canada we are speaking of the second largest country on the globe. So to start with we need to be forever aware of our smallness and the largeness of the world that our alumni occupies. We can be brave and ambitious, but our strength might be in managing small projects.

Managing programs, services and projects across vast geographic distances and several time zones is a huge challenge. Communication costs can be considerable, but they pale in the face of travel, meals and accommodation costs. An organization that seeks resources from its members must ensure that its members are not spending all their available resources on just participating.

As indicated earlier, we do not appear as an Association to have all the candidate, student and graduate data that we may need to allow us to better understand emerging trends. What we do have are considerable assumptions about changing profiles without any real depth of understanding about what that means.

It is an over-used truism but we are all busy. We need to be very, very aware that today most couples are employed, that while people are living longer, they are also working longer. Extended family responsibilities take a lot of time. Also on the demographic side, we need to remember that there are new personal and family norms, values and roles that need to be built into all program plans.

It was unthinkable ten years ago that a recent graduate couple would be signing on for a \$250,000 mortgage. Now, any couple in most major cities in Canada that wants a private home or condominium is looking at a mortgage of at least that size. Mortgage payments of up to \$2,000 a month could be facing a couple who have a combined student debt of \$50,000. These are not extravagant but common numbers. While only a small proportion

of King's students are currently receiving student loans, we shouldn't assume that that good fortune will continue on into graduate school or secondary training. And University data suggest that a high proportion *do* continue on to further study.

Should the University seek to "round out" the candidate population by ensuring access by people from various economic backgrounds, then there would likely be an impact on the existing ration having student loans. We need to monitor these plans because of their potential impacts on our Association communications and program development plans.

Our typical graduate today does not have the luxury of academic complacency. Workplaces are demanding and competitive and it is highly likely that the graduate will find himself / herself back in the classroom sooner rather than later. An Association that seeks to appeal and keep appealing to its potential members wants to keep a sharp idea on the facts of time and money.

Strengths

It's not all bad news. The constraints of 21st century living are balanced by some powerful countervailing factors. For examples:

- a) Communications technologies. E-mail is free for computer owners as is document transmission, and telephone services are heading in that direction. Despite the easy availability of these technologies we are only now developing proficiencies in their use.
- b) Travel / accommodation / etc. promotions and advance booking discounts, plus the idiosyncrasies of international travel. Consider that it might be cheaper for out-of-towners to attend a King's (national / global) reunion event in Bermuda than Halifax.
- c) Workers travel. And when they have advance notice of events, they can and will arrange multiple events for the same trip. Too, whether it is a day or a month, people take vacations. And when they take vacations they often like to travel.
- d) The ubiquitous business lunch (and breakfast). People need to eat, and organizations are discovering that it is far easier to schedule well-attended events when a meal is included. That also implies a short event. And a highly charged (value laden) event as well. People come together for physical and mental nourishment.
- e) King's has been characterized by strong on-campus relationships that lead to marriages and friendships for life. That characteristic, and that bond, are strengths to build on and something that ties the generations together. There are also key value links between people such as you will rarely find outside other small colleges, private schools, the military or fraternities / sororities. Relationships + value share suggests a very strong platform to build from.
- f) King's communications-out has always been good to excellent. *Tidings* is highly successful and appreciated.
- g) The availability of the residence and other campus facilities is a tremendous potential asset, though underutilized.

- h) The City of Halifax (yes we outsiders still call it that and always will) is a strong potential draw given its attractions. Combining events with the community environment offers possibilities.
- i) Alumni have proven they are ready and willing to help make it work.

Goals and Activities for a Recommended Five Year Planning Cycle

[These items are somewhat prioritized, but not at all sequential. It is suggested that the Executive should define – for Planning Year One – a “handful of tangible goals” – as suggested by a member of the Executive. There appears to be, however, a high level of consensus that the Executive Committee needs to re-invent itself, establish operational sub-committees, and start the “movement away from Halifax” process]

1. Become a task-oriented executive board with operating committees. Reduce executive board meeting frequency – suggest quarterly. Empower committee leads by establishing formal terms of reference for each. Committee chairs should be members of the Executive. Each member of Executive Committee should chair at least one operational committee, and be responsible for recruiting alumni to work with him / her.
2. Become a plan-based organization. The plans have defined objectives, activities, success measures and milestones. (Success can be % of alumni “active,” % attending / contributing; number of events, etc.) Good plans have clear links between activity and outcome.
3. Become a member - driven organization. Test ideas and plans before all or select member audiences. Seek ideas and advice. Seek approvals. Establish a “knowledge base” of existing and potential alumni. Examine history of alumni concerns and complaints.
4. Become an investment / sales - funded organization as far as practicable. While the Association may never become funded through earnings alone, it should have a robust source of independent, self-sustaining income. Some degree of freedom from revenue-generating activities can better allow the Association to focus on program development and delivery. In addition, if a Halifax City Chapter is established, then local program event revenues will go to that organization.
5. Become the King’s Brand. In the planning period, the University’s focus will likely not be on promotion and recruitment which tend to favour University images and messages. This is an opportunity for the Association to help drive the marketing program from a *graduate perspective*. Question: Could there ever be a stronger endorsement for a product?
6. Engage members. Support and use the “volunteer database” that is being developed to identify workers for the Association, University, Chapters, elsewhere.
7. Establish a “Vertical Initiative.” Integrate the alumni experience with the student experience. Expose alumni to students through guest lectures. Hold Chapter events during school breaks and ensure students / candidates invited. Etc. Etc.
8. Establish a “Horizontal Initiative” to address Chapter to Chapter, member to member, group to group. (As one Executive member said: “The vast majority of

- UKC alumni are interested in associating with each other). Should embrace new technologies, cost and resource issues and opportunities, facilitating events.
9. Plan for stability and managed change. Establish an accord with the University to govern relations and expectations for the five year planning period. Define mutual financial expectations; i.e., operational resources vs. fund-raising. Probe the opportunity / appropriateness for Administration -Alumni consultations on “The King’s Experience.” Seek opportunities to bring challenging ideas and plans before the Administration.
 10. Define ways and means for supporting activities of the University Development Office; as well as defining a means for providing advice and feedback. Establish a King’s 2014 (225th anniversary) committee with immediate target for a Canadian commemorative stamp and souvenir medallion. Help the Development Office find ways to raise profile of venerable King’s institutions such as The Haliburton and Quintillian.
 11. Make the Association multi-locational. Establish a framework of capital city / large city Chapters in Canada. Support existing initiatives in areas outside Canada and initiate developments in inactive areas by identifying prime contacts. Ask existing Chapters to partner with new or struggling chapters. Adjust Executive orientation and program planning to outside-Halifax and defer local program planning to a Halifax metro Chapter.
 12. Establish a five year plan for major alumni social events with a low-flexible schedule. De-emphasize the notion of “class reunions.” Emphasize elements that bound students: residence, non-residence, campus activities (theatre, sports). Assign jobs. Find ways that members can connect with each other.
 13. Establish a strategic plan for “planned giving” to the University, its institutions and organizations, students and members of the Alumni. Planned giving should be a vehicle for advancing Alumni objectives. It should be endowment based, low on award conditions, operated independently from the Alumni operating accounts and managed by a sub-committee of the Executive.

Conclusions

King’s needs a solid, well financed and well planned alumni organization. But at the same time, that organization needs to be adventuresome, experimental, risk taking. The Association needs to put fear to one side as it tests, and discovers formulae that work.

Upon approval, the 2006 plan should be submitted to all Chapter leads / prime city contacts and key stakeholders for their information. This document should take the Association to its next planning horizon – which we suggest should be in 2011.

In that year, the Association could convene a conference on alumni structure, programs and activities: an opportunity for reviewing what worked and what didn't and where the Association should go next. The participants at that event should be delegates from the international executive, and the Chapter organizations.

David G. Jones, Chair

ALUMNI FUTURE PLANNING COMMITTEE