



THE OHIO STATE UNIVERSITY

Symposium Recap & High Points to Remember

September 27, 2017

Craig Little, Interim Director, Alumni Societies and Regional Engagement

Brendan Braaten, Regional Engagement Officer: Southeast



Overview of Presentation:

- **FY 17 Alumni Group Highlights**
- **Retreat Planning**
- **Event Resources**
- **Program Breakout Session Highlights**
- **Q & A**



In year Two!

- \$220,000 awarded in Incentive & Reward Funds
- Up \$20,000 from last year
- Over 1,077 club and society events hosted in FY 17
- 43 co-sponsored OSUAA events, up from 31
- 143 websites maintained, up 10
- 475 emails sent on your behalf, up from 282





Buckeyes Give Back

Since 1980, The Ohio State University Alumni Association groups have been supporting Ohio State students through scholarships. Because of you, thousands of students have been able to experience life as a Buckeye. Take a look at all we've done together.

Congratulations to clubs and societies that have awarded over \$10,000 in scholarships in 2016-2017:

CLUBS

Atlanta, GA
Broward County, FL
Erie County, OH
Greater Cleveland, OH
Hardin County, OH
Lucas County, OH
Naples, FL
Palm Beach County, FL
Richland County, OH
Ross County, OH
Shelby County, OH
Sarasota-Manatee Counties, FL

SOCIETIES

TBOGTL
Nursing
Vet Med
Alumnae Scholarship
Housing
Army ROTC
Medichio
Chorleaders
Stadium Scholarship
Civil Engineering
Scarlet & Gray

Congratulations to clubs and societies that have awarded more than 10 students in 2016-2017:

CLUBS

Allen County, OH
Erie County, OH
Greater Cleveland, OH
Hardin County, OH
Muskingum County, OH
Ross County, OH
Tuscarawas County, OH
Sarasota-Manatee Counties, FL

SOCIETIES

TBOGTL
Vet Med
EE/ECE
Alumnae Scholarship
Housing
Chorleaders
Nursing
Army ROTC



1980

Clubs are inspired to create scholarships for new Buckeyes. In the first year, 49 groups support 86 scholarships totaling nearly \$43,850.



1985

Scholarships increase to 110 from 1985 to 86.

1990

From 1990 to 91, a total of 127 scholarships is awarded from a combined \$83,767.



1995

Between 1995 and 1996, scholarship funds more than doubled in the previous five years to \$175,335.

1997

Societies' scholarship awards begin to be tracked in the Ohio State data base. They awarded to 45 students \$24,965 in financial aid.



2000

A combined 109 clubs and societies support 451 students with \$361,038 in scholarships.

**\$100K+
IN SCHOLARSHIPS.**

2005

Societies celebrate their second year awarding \$100k+ in scholarships.

2010

A total of 125 clubs and societies around the country supports student scholarships.

2015

After 35 years, 145 clubs and societies now support 605 students through \$923,998 in scholarships.



2017

For the first time, clubs, groups and societies award more than \$1 million in scholarships.



ALUMNI CLUB OF THE YEAR

JACKSONVILLE

ALUMNI SOCIETY OF THE YEAR

STADIUM SCHOLARSHIP

ALUMNI CLUB PROGRAMS OF THE YEAR

NC TRIANGLE : PACK SHACK

WASHINGTON, D.C. : HIDDEN FIGURES

SAN DIEGO : BEACH CLEAN-UP

ALUMNI SOCIETY PROGRAMS OF THE YEAR

STADIUM SCHOLARSHIP : CAPES FOR KIDS COMMUNITY SERVICE EVENT

RETIREES : FALL CONFERENCE EVENT

NURSING : PROFESSIONALISM WEEK

ALUMNI CLUB INNOVATIVE PROGRAM OF THE YEAR

JACKSONVILLE : SPECIAL PLAY FOR GROWING BUCKEYES

ALUMNI SOCIETY INNOVATIVE PROGRAM OF THE YEAR

HSMP : MANAGEMENT INSTITUTE

PAY IT FORWARD – ALUMNI CLUBS

PATRICIA KELLY : AUSTIN

TERRY KOPCHAK : MUSKINGUM COUNTY

DEBBI LEWIS : SAN DIEGO

DENISE HERMAN MCCOLLEY : NORTHWEST OHIO

LEYLA HAWKINS : FRANKLIN COUNTY

PAY IT FORWARD – ALUMNI SOCIETIES

SHIRLEY FIELDS MCCOY : RETIREES

MARK MORSCHER : EE / ECE

SUSAN REED : VETERINARY MEDICINE

CRAIG FRIEDMAN : ARTS AND SCIENCES

DAVID HIATT : ARMY ROTC

CARL(s) of the Year



LTC James Bunyak: ROTC



Colleen Pelasky: Nursing



AWARD WINNERS

OUTSTANDING ALUMNI CLUBS

Alumni Club of Athens County, Ohio
Alumni Club of Atlanta
Austin Texas Alumni Club
Bluegrass Alumni Club
Alumni Club of Central Florida
Alumni Club of Charleston, South Carolina
Charlotte Buckeyes Alumni Club
Alumni Club of Chicago
Alumni Club of Cleveland
Alumni Club of Columbiana
Alumni Club of Dallas
Alumni Club of Delaware County, Ohio
Alumni Club of Denver
Alumni Club of Detroit
Alumni Club of Erie County, Ohio
Alumni Club of Fayette County, Ohio
Alumni Club of Franklin County, Ohio
Alumni Club of Greater Cincinnati
Alumni Club of Greater Jacksonville
Alumni Club of Greater New Orleans
Alumni Club of Greene County, Ohio
Greenville Buckeyes Alumni Club
Alumni Club of Hawaii
Alumni Club of Houston
Alumni Club of Knox County, Ohio
Alumni Club of Los Angeles
Alumni Club of Lucas County, Ohio
Alumni Club of Mercer County, Ohio
Alumni Club of Middle Tennessee
Alumni Club of Minnesota
Alumni Club of Muskingum County, Ohio
Alumni Club of Naples
Alumni Club of New Mexico
Alumni Club of Northeast Ohio
Alumni Club of New York Capital Region
Alumni Club of Oklahoma
Alumni Club of Orange County, California
Alumni Club of Phoenix
Alumni Club of Portland
Alumni Club of Richland County, Ohio
Alumni Club of Ross County, Ohio
Alumni Club of the Sacramento Valley
Alumni Club of San Antonio
Alumni Club of San Diego

Sarasota-Manatee Ohio State Alumni Club
Alumni Club of Seattle
Alumni Club of Shelby County, Ohio
Alumni Club of Southern Arizona
Alumni Club of Southwest Florida
Alumni Club of St. Louis
Florida Suncoast Alumni Club
The Alumni Club of Treasure Coast, Florida
Alumni Club of the Triangle-North Carolina
Alumni Club of Tri-County Florida
Alumni Club of Tuscarawas County, Ohio
Alumni Club of Van Wert and Paulding Counties
Alumni Club of Washington, D.C.
Alumni Club of West Michigan
Alumni Club of Wood County, Ohio

OUTSTANDING ALUMNI SOCIETIES

Air Force ROTC Alumni Society
Alumnae Scholarship Housing Alumni Society
Army ROTC Alumni Society
Aviation Alumni Society
College of Arts and Sciences Alumni Society
Black Alumni Society
Cheerleaders Alumni Society
Circle K Alumni Society
Dance Team Alumni Society
College of Dentistry Alumni Society
College of Education and Human Ecology Alumni Society
Electrical Engineering / Electrical Computer Engineering Alumni Society
Environment and Natural Resources Alumni Society
College of Food, Agricultural and Environmental Sciences Alumni Society
Health Services Management and Policy Alumni Society
Honors and Scholars Alumni Society
John Glenn College of Public Affairs Alumni Society
Knowlton School Alumni Society
College of Medicine Alumni Society
Navy ROTC Alumni Society
College of Nursing Alumni Society
Ohio State University Retirees Association Alumni Society
College of Pharmacy Alumni Society
College of Public Health Alumni Society
Rund Emergency Medicine Alumni Society
Scarlet and Gay: The Ohio State University LGBTQ Alumni Society
College of Social Work Alumni Society
Stadium Scholarship Alumni Society
Varsity O Alumni Society
College of Veterinary Medicine Alumni Society
Welding Engineering Alumni Society



Special Welcome to our new groups:

- Asian & Pacific Islander Alumni Society
- Latinx Alumni Society
- Women in STEM Alumnae Society
- Alumni Club of Knoxville, TN
- Alumni Club of Northwest Arkansas

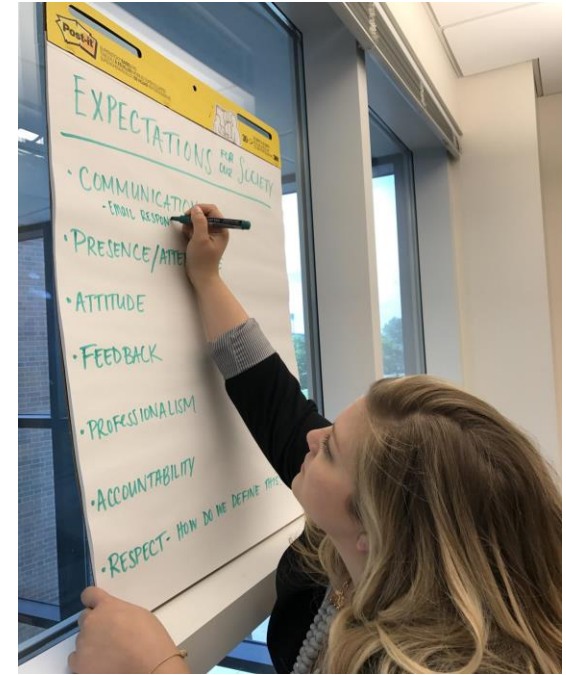


THE OHIO STATE UNIVERSITY

Regional Breakout Session

Retreat Planning

- Plan Retreat
- Set the Tone for Year
- Identify goals, challenges and resources to accomplish
- Energize board
- Secure Buy-In



Short-Term Goals

- Events
- Football Season
- Fundraising

Long-Term Goals

- Event Calendar for Year
- Membership Growth
- Succession Planning



STRENGTHS

- What are some ways your group excels in this area?

WEAKNESSES

- What are some areas of growth for your group on this topic?

OPPORTUNITIES

- What elements could the group utilize to its advantage in this area?

THREATS

- What environmental factors cause trouble for the group?

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS



Fall 2017

Strengths

- Well funded
- Large membership pool / potential
- Smart board

S

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Weaknesses

- FB tickets are primary motivation
- Need to delegate more w/ board and to athletics.
- No determined spending policy

Opportunities

- Specified / energetic support from Athletics (Mitch and Maddy)
- Collaborate w/ other clubs / societies
- Create sport specific subgroups
- Strategic planning / retreat

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Threats

- Administrative burdens from Alumni / Athletics
- Long term plan from university around governance is unclear
- Churn and Change in Athletics / Alumni and it's impact on us



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ALUMNI ASSOCIATION

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ALUMNI GROUP PLANNING CALENDAR FY18

GROUP: _____

JULY Start of Fiscal Year Buckeye Book Club (BBC)	AUGUST Football Season Begins New Buckeyes, New City	SEPTEMBER Symposium Labor Day National Hispanic-Latino Heritage Month	OCTOBER Homecoming BBC Author Visit National Disability Employment Awareness Month
NOVEMBER TTUN Game National American-Indian Heritage Month	DECEMBER Pearl Harbor Remembrance	JANUARY	FEBRUARY Buckeye Love African American History Month
MARCH Women's History Month Irish-American Heritage Month	APRIL Month of Service Spring Game Graduation Events	MAY Asian / Pacific American Heritage Month Jewish American Heritage Month Memorial Day	JUNE End of Fiscal Year LGBTQ Pride Month



THE OHIO STATE UNIVERSITY

ALUMNI ASSOCIATION

Sample Calendar of Events for The Ohio State Alumni Association Clubs

The Ohio State University Alumni Clubs serve to advance the mission and values of the Alumni Association and the University. Clubs can achieve different levels of engagement which will reflect the Alumni Association's fiscal support. Below you will find a sample calendar clubs can use to plan and participate in events, fundraising, and meetings.

Month	Scarlet (\$2000 at end of fiscal year)	Gray (\$1000 at end of fiscal year)	Carmen
January	Board Meeting Championship Game Day	Board Meeting	
February	Scholarship Committee Review	Scholarship Committee Review	
March	Game Day (Basketball)	Game Day (Basketball)	Game Day
April	Board Meeting 5K Race Event (up to \$250)		
May	Guest Speaker Event & Dinner (up to \$250)	Guest Speaker Event & Dinner (up to \$250)	
June	Annual General Body Meeting & Social	Annual General Body Meeting & Social	Annual General Body Meeting
July	Buckeyes After Work (up to \$500)		
August	Board Meeting Student Send-Off (up to \$250)	Student Send-Off (up to \$250)	
September	Attend Club & Society Leadership Symposium	Board Meeting Attend Club & Society Leadership Symposium	Attend Club & Society Leadership Symposium
October	Board Meeting Game Days (Football)	Game Days	
November	Game Days	Game Days	Game Days
December	Board Meeting Volunteer at Local Soup Kitchen (up to \$250) Holiday Party	Holiday Party Volunteer at Local Soup Kitchen (up to \$250)	

Category I Events: Community Service, Student Recruitment & Retention, Networking, Special Interest Events, Cultural/Arts, Lifelong Learning

Category II Events: Social, Family, Sports/Game Watches, Board Meetings



THE OHIO STATE UNIVERSITY

ALUMNI ASSOCIATION

Sample Calendar of Events for The Ohio State Alumni Association Societies

Month	Scarlet (\$2000 at end of fiscal year)	Gray (\$1000 at end of fiscal year)	Carmen
January	Board Meeting & OSU Men's Basketball Tailgate and Game	Board Meeting (up to \$50)	
February		Buckeye Love Annual Fundraising E-Mail Campaign (up to \$250)	
March	Wine Tasting Scholarship Fundraiser (up to \$250)	Buckeyes & Broadway (up to \$250)	
April	Board Meeting Graduating Senior Reception (up to \$250)		
May	Guest Speaker Event & Dinner (up to \$250)	Guest Speaker Event & Dinner (up to \$250)	
June	Family Picnic Event at the Columbus Zoo		
July	Buckeyes After Work Young Alumni Networking (up to \$500)	Board Meeting (up to \$50)	
August	Board Meeting (up to \$50)	FYE Book Club Program (up to \$250)	
September	Attend Club & Society Leadership Symposium	Attend Club & Society Leadership Symposium	Attend Club & Society Leadership Symposium
October	Homecoming Tailgate & Annual Membership Meeting	Homecoming Tailgate & Annual Membership Meeting	Board Meeting
November	Buckeyes & Broadway (up to \$250)		
December	Board Meeting Volunteer at Local Soup Kitchen (up to \$250) Holiday Party	Holiday Party Volunteer at Local Soup Kitchen (up to \$250)	



THE OHIO STATE UNIVERSITY

Programming Sessions



Programming for Buckeyes of All Ages

- While you cannot generalize things to an entire group of people, it is helpful to understand what a certain-aged alumnus might be experiencing at that point in their life to cater to their needs or desires in terms of timing, cost, venue, marketing strategies, and type of program/speaker.
- There are ways to work with your REO to get data on where different ages tend to live in your area and make sure to seek feedback and survey your alumni after any programs you have.
- Make sure to give detailed information (parking, food options, etc.) prior to the event so that attendees can be prepared and thank attendees upon arrival or afterward (where you can also encourage further engagement).

The Alumni Life Cycle

Students	Young Alumni (30 & Under)	30-50	50+
<ul style="list-style-type: none">• Tech savvy• Very involved• Financial implications (working/scholarships)• Interested in networking with alumni	<ul style="list-style-type: none">• Time of transition (job, family, etc.)• Community/service efforts• Networking• Inexpensive but meaningful programming	<ul style="list-style-type: none">• Interest in community or global issues• Family programming/child-friendly• Cultural Programming & Self-betterment• Academic Focus	<ul style="list-style-type: none">• Connect back to institution• Invested in family (adult children & grandchildren)• Personal interactions• Nostalgia• Impact-focused

Contact: Lauren Luffy

luffy.2@osu.edu

Sarah McLeod

mcleod.79@osu.edu

Lindsey Seitz

seitz.92@osu.edu

Presentation Link:

<https://groups.alumni.osu.edu/symposium/2017-symposium/>



Reporting Smarter not Harder

- Alumni Groups report membership/officer rosters, post-event forms and requests for reimbursements. This presentation walked members through the various forms and processes for how groups submit these.
- The presentation covered some best practices of how to save/collect information to keep the reporting process organized and simplified.
- Reporting timeline: report after 30 days for events using DocuSign. Make sure receipts are itemized and attendance sheets are attached. For board meetings, Scarlet/Gray groups can be reimbursed up to \$50/meeting ten times a year.

Contact: **Natasha Kanakkanatt**
kanakkanatt.1@osu.edu

Presentation Link:
<https://groups.alumni.osu.edu/symposium/2017-symposium/>

The screenshot shows a web form titled "THE OHIO STATE UNIVERSITY ALUMNI ASSOCIATION Club & Society Post Event & Reimbursement Form". The form includes fields for "Name of person submitting report", "Email of person submitting report", "Phone of person submitting report", "Name of Club/Society", "Event Name", "Event Date", "Event Time", "Category / Event Type", "Number of Attendees", "Reimbursement Amount", "Do you have receipts?", "Do you have an attendance sheet to attach?", "Attach Receipt(s)", "Attach Attendance Sheet", "Description of Event", and "Board Member Approval". The form is partially filled out with example data. A "NEXT" button is visible on the left side of the form.



It's Toolkit Time

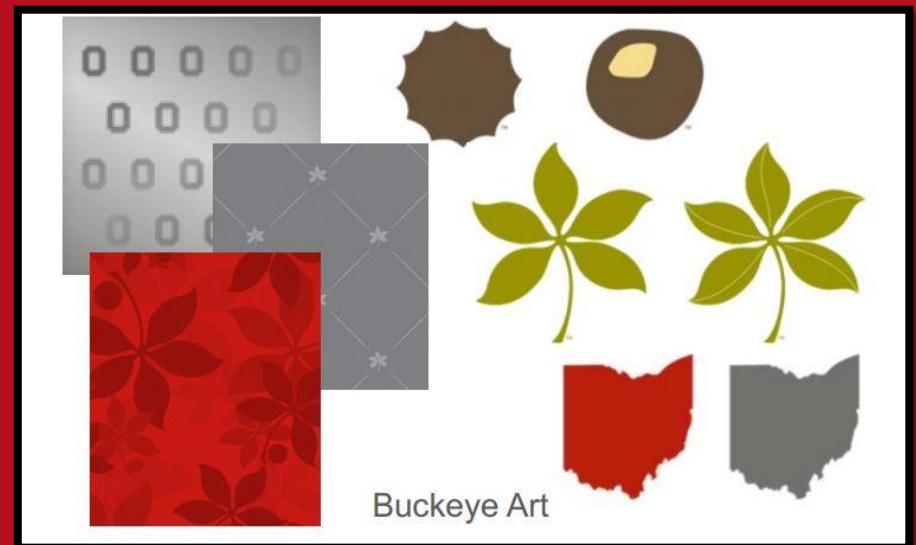
- Marketing your alumni group and events is easy when you start with templates in your toolkit.
- Anything missing? Contact Erin Howell!
- We are always coming out with new items for special events like month of service.

Contact: Erin Howell

Howell.491@osu.edu

Presentation Link:

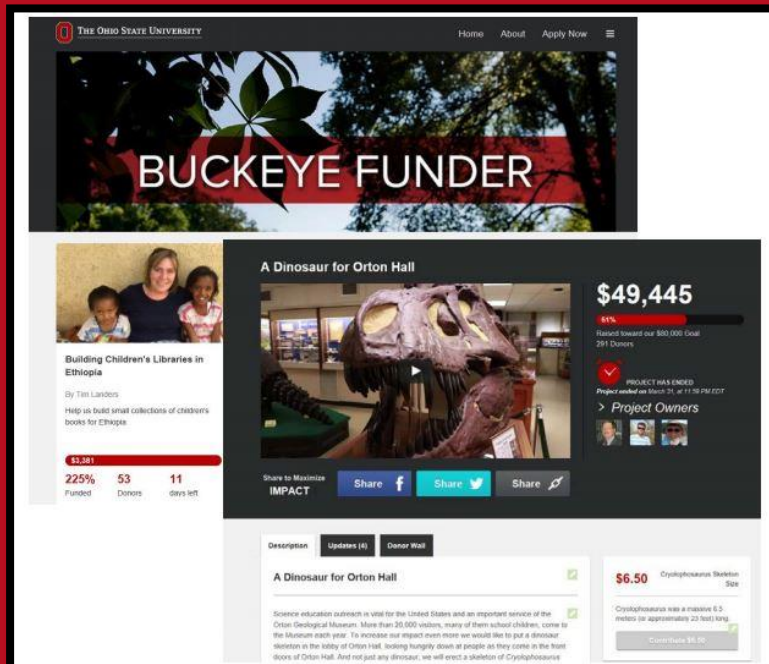
<https://groups.alumni.osu.edu/symposium/2017-symposium/>





In- & Out-of-the-Box Fundraising Strategies

- Annual Giving can support groups who are looking to fundraise via online platforms in a few different ways
- Peer to Peer fundraising opportunities are available and more information can be provided by Annual Giving (like a YouCaring or GoFundMe site.)
- Traditional Fundraising opportunities are a great way to raise money for your scholarship. Before enacting any fundraiser, please check your state and local laws as there are different laws in different locales about money.



Contact: Maggie Sweeney
Sweeney.186@osu.edu
Kindra Samons
samons.7@osu.edu

Presentation Link:
<https://groups.alumni.osu.edu/symposium/2017-symposium/>



Campus Updates with Brendan

- Identify easily accessible sources of information on current The Ohio State University facts, stats and updates beyond the athletic field.
- Formulate strategic methods for sharing information with alumni group members, so that Buckeye Nation is further informed on Ohio State news and achievements.
- Present overview of current Ohio State facts, stats and updates to inform alumni group leaders.

Contact: **Brendan Braaten**
braaten.8@osu.edu

Presentation Link:
<https://groups.alumni.osu.edu/symposium/2017-symposium/>





The Million Dollar Question: How to Recruit New Board Members

- The alumni association has a number of tools at your disposal to understand your ever-changing audience and reach out to alumni: Interactive/heat Maps, Surveys, Targeted E-mails to alumni based on their background/industry, Volunteer Meet & Greet Events and Postcards.
- Online tools such as LinkedIn, Alumni Fire, and social media advertising are other methods to communicate and reach out to alumni in your area.
- Alumni Groups should also create succession plans, delegate responsibly, and create a fun volunteer environment to retain board members.

Contact: Brendan Braaten

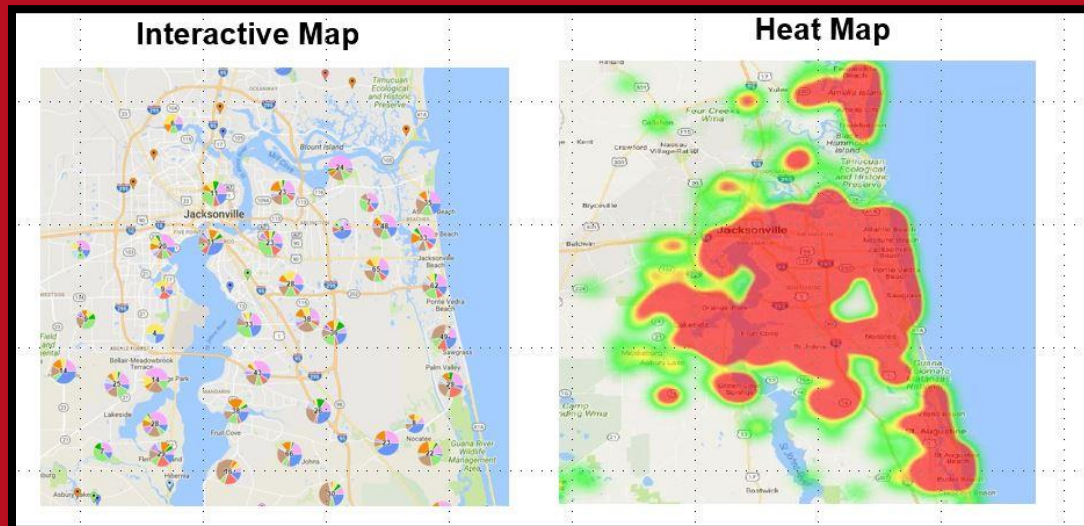
braaten.8@osu.edu

Leslie Smith

smith.6863@osu.edu

Presentation Link:

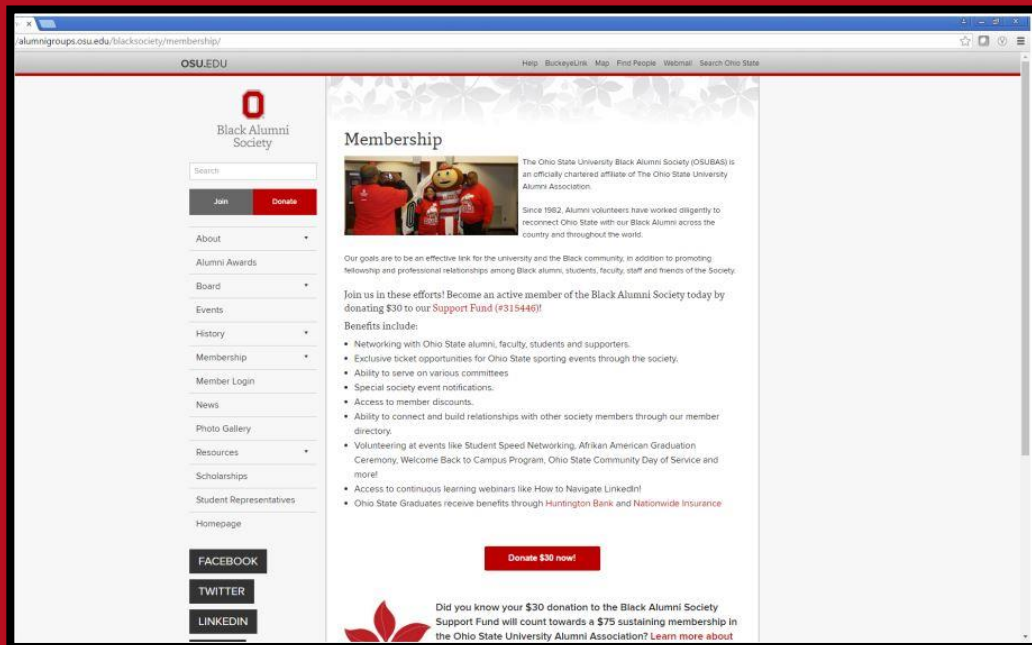
<https://groups.alumni.osu.edu/symposium/2017-symposium/>





Dues or No Dues!

- If you are going to have dues, you need compelling membership benefits
- OSUAA has templates to help with membership drives and membership benefits pages for your website
- Advantage to have a donation based dues model, similar to OSUAA, by creating a current use fund
- Provide your members with an annual budget of how their dues money was spent



Contact: Craig Little
little.128@osu.edu

Presentation Link:
<https://groups.alumni.osu.edu/symposium/2017-symposium/>



Merchandising Your Brand

- Use your toolkit for your logo and buckeye art.
- Don't be nervous to order. Work with our approved vendors and they'll make it easy! Or let us know and we'd be happy to help.
- Find examples on our groups site.

Contact: Erin Howell

Howell.491@osu.edu

Presentation Link:

<https://groups.alumni.osu.edu/symposium/2017-symposium/>



All approved color combinations



.eps files for vendors



Use text too!



Resources, Resources, Resources!

- Bookmark on your computer - <https://groups.alumni.osu.edu/>
- Marketing Resources - <https://groups.alumni.osu.edu/best-practices/marketing/>
- Blog - <https://groups.alumni.osu.edu/category/blog/>
- Engagement Strategies - <https://groups.alumni.osu.edu/engagement-strategies/>
- Tax help – good through May 1, 2018
- Co-branded programming

Contact: Craig Little

little.128@osu.edu

Presentation Link:

<https://groups.alumni.osu.edu/symposium/2017-symposium/>



Let's Talk About Events!

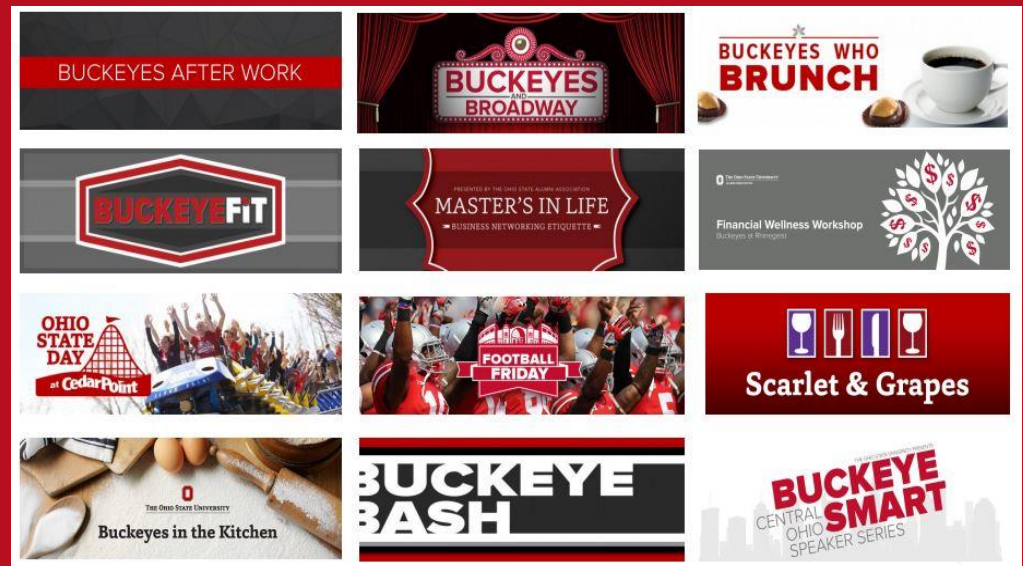
- Walkthrough of Category I events, category-by-category, providing examples, ideas, and best practices.
- Provided Event Timeline for planning along with an Event Planning Checklist

Contact: Maggie Sweeney

Sweeney.186@osu.edu

Presentation Link:

<https://groups.alumni.osu.edu/symposium/2017-symposium/>





Deep Impact: How Service Builds Community and Strengthens your Membership

- The steps to creating a well-coordinated volunteer opportunity
- Posting your opportunity on Ohio State VolunteerMatch is the preferred way to advertise.
- The Office of Volunteer Relations is here to support you in brainstorming an opportunity, utilizing Ohio State VolunteerMatch and sending you t-shirts for your volunteers.
- Mark your calendars: April is the Month of Service



Contact: **Michell Domke**

domke.8@osu.edu

Nadine Holmes

holmes.115@osu.edu

Presentation Link:

<https://groups.alumni.osu.edu/symposium/2017-symposium/>



Integrating Inclusive Practices and Facilitating Meaningful Events on Diversity

- Brainstorm ways to expand engagement of alumni in meaningful and impactful cultural or diversity programming regionally.
- Understanding Social identities, diversity, culture, and inclusion to expand alumni involvement and programming best practices
- Recognizing diversity and inclusion as a group value and ways to demonstrate this in all areas of alumni engagement

Social Identity Wheel



- Diversity Programming that is not one dimensional and beyond the Black/White or ethnic conversation
- Ex. Special Play for Buckeyes
- Ex. Networking→ For those who are management or owners have a HR professional or diversity consultant come in to talk about hiring practices that are inclusive or how to build a culture of inclusion.
- Ex. Local Matters→ Food Justice→ SNAPs
- Ex. Poverty Simulation attend as a group

Contact: Ashely Pryor

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La'Rez Wilson

Wilson.1879@osu.edu

Presentation Link:

<https://groups.alumni.osu.edu/symposium/2017-symposium/>



WEBINAR CALENDAR

SEPTEMBER 27

12 p.m. EST / 8 p.m. EST

Symposium Recap and High Points to Remember

OCTOBER 18

12 p.m. EST / 8 p.m. EST

Alumni Scholars Program for Clubs

NOVEMBER 9

12 p.m. EST / 8 p.m. EST

Category 1 Events & You!

JANUARY 17

12 p.m. EST / 8 p.m. EST

Speaker's List Update

FEBRUARY 7

12 p.m. EST / 8 p.m. EST

Month of Service and Utilizing VolunteerMatch

MARCH 21

12 p.m. EST / 8 p.m. EST

Creating a Mentoring Program

APRIL 4

12 p.m. EST / 8 p.m. EST

Maximizing the Remainder of the Fiscal Year

MAY 9

12 p.m. EST / 8 p.m. EST

Early Engagement

JUNE TBD

12 p.m. EST / 8 p.m. EST

Officer Training 1 (President / Vice President)

JUNE TBD

12 p.m. EST / 8 p.m. EST

Officer Training 2 (Treasurer / Secretary)

Webinar Schedule



Thank you for all that you do!



Save the Date for next year's Symposium: Sept. 7, 2018!



Q & A