



## **Yale Alumni Nonprofit Alliance Strategic Plan Prepared 2016**

### **TABLE OF CONTENTS:**

	<b>Page:</b>
<b>INTRODUCTION</b>	<b>1</b>
<b>MISSION, DRIVERS AND COMPETENCIES</b>	<b>2</b>
<b>FUTURE OBJECTIVES</b>	<b>2</b>
<b>BUDGET</b>	<b>5</b>
<b>DEVELOPMENT</b>	<b>6</b>
<b>TIMETABLE CHARTS</b>	<b>8</b>

### **INTRODUCTION:**

**(A) History:** The Yale Alumni Nonprofit Alliance (“YANA”) was formed in January 2011 in New York City, its creation driven by the bold vision of uniting Yale’s nonprofit and social purpose community and leveraging its resources for the greater social good. Based on Association of Yale Alumni data and reinforced by data collected by YANA’s founders shortly after its inception, over 100,000 Yale alumni, or two out of three, were estimated to be involved in the nonprofit world as board members, donors, practitioners or volunteers.

**(B) Program Initiatives and Recognition:** Since its founding five-and-a-half years ago, YANA has:

(1) Instituted programs and events such as monthly meetings at the Yale Club in New York City, a landmark panel on women’s rights in Africa, a full-day social enterprise conference, quarterly Roundtable discussions on board membership issues, mentoring opportunities for students and professionals new to non-profit fields, a spotlight forum featuring diverse nonprofits and a 300-person fund-raising gala honoring Barbara Bush ’04.

(2) Created a structure, including the formation of YANA as an independent 501 (c) (3) as of 2014; added regional chapters either launched or in formation in six cities, and collaborated with Yale and non-Yale alumni groups on present programs.

(3) Received acknowledgment of this initial successful execution of its mission by being selected as a four-time winner of the Association of Yale Alumni's (AYA) Excellence Award for Outstanding Shared Interest Group and Outstanding Volunteer Leadership.

**MISSION, DRIVERS AND COMPETENCIES:**

(A) **Overview:** YANA seeks to continue building a vibrant, engaged community of Yale alumni united by their shared Yale experience and their dedication to working in the public interest, by: (1) creating networking and mentoring opportunities; (2) promoting lifelong learning opportunities; (3) developing ongoing opportunities (e.g., on-campus events, mentoring and internships) for Yale students to explore career paths in the nonprofit and social purpose world; (4) contributing to the Yale community, and (5) contributing to the greater social good. The board will continue to discuss the degree to which YANA will provide resources and programs tailored specifically to the nonprofit community and the degree to which YANA will support the broader social purpose community.

(B) **Drivers:** YANA members and the YANA community offer: (1) a high level of expertise; (2) the intrinsic motivation to participate in YANA; (3) the self-fulfillment realized from identifying new ideas and opportunities for collaborations in the social impact sector. It incorporates (4) the diverse and inclusive nature of Yale; (5) Yale's desire to engage with YANA, and (6) the intention to present the Yale "brand," which is already identified by the quality of its people and knowledge, to the nonprofit world.

(C) **Core Competencies:** (1) **Convening** – bringing people and organizations with a common purpose of service together; (2) **Connecting** – creating and building a network of like-minded mission-driven people and organizations; (3) **Channeling** – being a conduit for education, best practices and achievement.

**FUTURE OBJECTIVES:**

**In order to continue to fulfill its mission**, at its February 2016 retreat YANA leadership identified five near-term and intermediate-term objectives, as follows: (1) extending and increasing impact through deploying additional resources; (2) continuing, expanding and improving YANA core educational programs; (3) driving engagement by serving as a premier platform/hub for exchanging knowledge and opportunities; (4) expanding and continuing to

## Yale Alumni Nonprofit Alliance Strategic Plan

integrate members of Yale's campus community and regional chapters into the YANA national organization, and (5) measuring success on a continual basis.

**(A) Extending and Increasing Impact through Deploying Additional Resources:**

- (1) Technology Upgrade:
  - a. Create a comprehensive, customized, searchable database of YANA members, Yale alumni and students, and others who want to participate in YANA’s mission. The database will allow for the formation of a Matching Program to connect volunteers and pro-bono services with those seeking assistance, mentees and mentors, funders and organizations looking for funding, job seekers and employers, advisors and advisees, board vacancies and potential board members, as well as initiation of other ad hoc opportunities.
  - b. Redesign the website to include an “intake platform” to gather membership information in a database and to add flexibility to allow multiple editors to post and revise content.
- (2) Technical and Administrative Staff:
  - a. Add a database architect, website designer and programmer.
  - b. Add a part-time paid administrative assistant.

**(B) Continuing, Expanding and Improving YANA’s Core Educational Programs:**

- (1) Mentorship Program: Expansion beyond the New York/New Haven program; use of the database and infrastructure to set up programs throughout the organization; increased use of the multifaceted Matching Program in new categories, and strengthened collaboration with Yale’s 70 Shared Interest Groups (SIGS).
- (2) Roundtables and Other Learning Programs: Development of a set of national YANA board-approved written policies to insure that programs are of the highest quality; standardization of the process for YANA membership to establish forums and other educational programs; creation of a national calendar of programs, and expansion of media presence, including using the website and other digital media to share information from programs, document resources and knowledge shared at events, toolkits, guides to best practices, and other instructional material.
- (3) Spotlight Forum: Continue to identify organizations aligned with YANA values and mission to showcase, allowing opportunities for exposure for the featured nonprofit and for the Executive Director to share information and receive candid feedback, ideas and suggestions for resources.

- (4) Fellows: Reconstitute the Fellows program to provide more opportunities for Yale undergraduates and graduates to learn from nonprofit organizations, including protocols for identifying organizations that will participate in the Volunteer Consulting program and matching their needs with available student resources, and to develop a support system for the students to allow them to more effectively meet the needs of the nonprofit organizations.

**(C) Driving Engagement by Serving as a Premier Platform/Hub for Exchanging Knowledge and Opportunities:**

- (1) Physical Space: Continue to host issue-based, skill and governance-oriented special events, such as regular conferences, inter-chapter events, and fund-raising events; increase partnerships with other social enterprise alumni groups.
- (2) Virtual/Digital Space: Develop webinars to post on website, including those based on recording speakers at events, webinar series on one topic; record, live stream and post video of YANA events; experiment with live streaming versus podcasts; organize links to external resources that are relevant to the nonprofit community; use social media to drive awareness of YANA, especially expanding use of the existing YANA LinkedIn group and increasing the number of posts and tweets on Facebook and Twitter.
- (3) Increase international outreach through focusing on relationships and webinars in countries where Yale has a campus or wants to reach out; seek strategic participation with international organizations; and plan an international big idea conference.

**(D) Expanding and continuing outreach and service to members of Yale’s campus and alumni communities:**

- (1) Involve and educate alumni, student groups, Office of Career Strategy (OCS) and undergraduate and graduate professors and more about YANA.

**(E) Expanding the regional chapters and continuing to integrate their members into YANA’s national organization:**

- (1) Expand number, size and impact of chapters; develop and refine “How to Start a Chapter” and “How to Grow a Chapter” resources; establishing a national chapter relations committee.
- (2) Strengthen definition of roles between national YANA and YANA chapters;
- (3) Develop YANA board-approved policies for chapters.

- (4) Develop national committees (differentiated from NY-specific committees) consisting of alumni from all chapters

**(F) Measurement for Success: In Years I and II, YANA will seek to measure, wherever possible, whether it has achieved its near-term and intermediate-term goals.**

- (1) YANA will collect and use data to constantly inform and improve its programs and services.

**BUDGET:**

**The 2016 YANA budget is intended to facilitate the primary objectives.**

(A) The budget maintains current key programs and funds the costs for regular meetings at levels comparable to 2015. These expenses are shown in the “Meeting & Regular Events” category in the table below and total \$4,650.

(B) A modest increase in fundraising costs, bringing the total to \$17,550, is incorporated to continue and expand fundraising efforts begun over the last two years.

(C) Significant costs associated with building the data infrastructure needed for future program enhancement are included. These costs are expected to total \$13,100.

(D) Finally, a significant increase in administrative costs is contemplated to support each of the first three efforts. In this last category is the salary of a part-time administrator, YANA’S first employee.

Yale Alumni Nonprofit Alliance Strategic Plan

<b>Meeting &amp; Regular Events</b>		
	Roundtables and Conferences	\$ 2,350
	Regular Meetings	\$ 1,450
	Recruiting & Networking Events	\$ 850
	Subtotal	\$ 4,650
<b>Fundraising</b>		
	Fundraising Benefit	\$ 15,000
	Other Fundraising	\$ 2,550
	Subtotal	\$ 17,550
<b>YANA Programs</b>		
	Database Development for Program Support	\$ 9,000
	Program Development	\$ 4,100
	Subtotal	\$ 13,100
<b>Administration</b>		
	Media and Communications	\$ 6,690
	SG&A	\$ 5,075
	Staff	\$ 4,000
	Subtotal	\$ 15,765
<b>TOTAL EXPENSES</b>		<b>\$ 51,065</b>

**DEVELOPMENT PLAN:**

**Below is an outline for a fundraising plan, with a proposed timeline in italics next to each initiative.**

**(A) Grants & Corporate Sponsorships**

- (1) Extract key highlights from strategic plan to create a streamlined Case for Support. Ongoing/through 2016.
- (2) Some grant and prospect research would be useful. A part time staff person or dedicated volunteer, or perhaps a YANA Fellow would be needed to accomplish this, and some training in prospect research for that individual would be ideal. Because YANA is quite new, a meeting or phone call with any potential funder before submitting an application would be a good course of action. Identify prospects in 2016 for funding in 2017.
- (3) Prepare and submit grant applications/funding requests: A part time staff person or dedicated volunteer would be needed. Aim to secure 2 grants in calendar year 2017, followed by adding a new foundation or corporation each year following.

**(B) Membership**

- (1) Set defined benefits of membership and defined terms for renewals (e.g., annual).
- (2) Identify various forums in which we can ask YANA participants to become supporting members (i.e. monthly meetings, Roundtables, other events) and create an easy mechanism by which people can join – perhaps a small hard copy “reply card”, which includes a link to the membership page of the YANA website. Summer 2016, to have on hand for next major event.
- (3) By next major fundraising event, further clarify the rules around deductible and non-deductible contributions with regard to benefit events and the benefits of being a member.

**(C) Events**

- (1) It is important to continue to host one major annual fundraiser as a surefire way to support YANA’s operations. We could explore a model where we promote the annual fundraiser as supporting a particular YANA project or big-picture goal, such as “matching.” A clear fundraising pitch should be developed around each major fundraiser.

- (2) It would be ideal to have one or two smaller events to generate additional income, where some portion of a ticket is considered a contribution to YANA, (i.e. fundraising is “built in” rather than the main focus of an event) or there is some smaller-scale benefit event with a lower ticket price to encourage support at any level.
- (3) A Winter and perhaps a Summer event could complement the Gala.
- (4) The fundraising purpose (case for support) for events should be clear.

**(D) Other**

- (1) Identify a system for sorting out the fundraising activities and proceeds of YANA nationally versus the chapters. Calendar year 2017.

**TIMETABLE CHARTS:**

The following charts set forth the timetables for achieving YANA’s five objectives.

(Year 1 ends on June 1, 2017).

GOAL	YEAR 1	YEAR 2 or YEARS 2-3
<b>(A) Extending and Increasing Impact through Deploying Additional Resources:</b>		
Design & maintain infrastructure to gather, archive and share data, systemize YANA’s administration & communications, build customized member database.	Designer: Website, graphic assets, database interface w/site), Programmer, Consulting (to integrate database into website as password-protected element)	
Improve website design and function to support national/chapter administration and program management.	(Overlapping with above)	
<b>(B) Continuing, Expanding and Improving YANA’s Core Educational Programs:</b>		
YANA to be a quality source for matching of skills and needs	Institute the infrastructure needed to implement the program. Hardware and software in place. Human resources needed to manage the program in place.	Expand the Mentorship program to other matching programs.
YANA to be a quality source of educational programs	Continue existing Roundtables and Forums. New York and San Francisco Roundtables: At least one per quarter, Health and Art Forums: Establish goals, Establish Chapter Roundtables, Establish guidelines for organizing Forums under the YANA brand, Develop criteria to monitor the quality, engagement and learning effects. Use feedback to improve, expand or eliminate programs. Develop the website as a tool to share the learning developed.	Monitor the quality, engagement and learning effects of the program. Monitor the quality, engagement and learning effects of the website postings. Adjust accordingly.

Yale Alumni Nonprofit Alliance Strategic Plan

GOAL	YEAR 1	YEAR 2 or YEARS 2-3
<p>YANA to be an educational resource for students as well as Not for Profit and Social Enterprise organizations</p>	<p>Help new Fellows student leadership implement plans to reinvigorate the Fellows program including more timely and extensive recruitment.                      Assist Fellows in identifying and securing dynamic speakers to help with membership build and Speaker series.                      Work with Fellows to launch scaled-down pilot Volunteer Consulting program for fall semester. Help them attract appropriate projects, ideally YANA-submitted ones that have been thoroughly vetted by one or more alumni mentors to:                      Be realistic in scope to be accomplished by the undergrads and                      Have an attached mentor to oversee each project so that the deliverables of each will be satisfactory.</p>	<p>Monitor the quality, engagement and learning benefits of the program.                      Adjust accordingly.                      Help Fellows fine-tune program as a whole for greater student engagement and impact on campus.</p>
<p>YANA to be a resource for Not for Profit and Social Enterprise organizations</p>	<p>Gauge the effectiveness of the Spotlight Program.</p>	<p>Monitor the quality, engagement and learning effects of the program.                      Monitor the quality, engagement and learning effects of the website postings.                      Adjust accordingly</p>
<p>(C) Driving Engagement by Serving as a Premier Platform/Hub for Exchanging Knowledge and Opportunities:</p>		
	<p>ONGOING</p>	<p>ONGOING</p>

Yale Alumni Nonprofit Alliance Strategic Plan

GOAL	YEAR 1	YEAR 2 or YEARS 2-3
(D) Expanding and continuing outreach and service to members of Yale’s campus and alumni communities:		
YANA to be known at Yale as the nonprofit Yale brand	Deepen/create relationships on campus <ul style="list-style-type: none"> <li>● Dwight Hall</li> <li>● OCS (undergrad and grad/prof)</li> <li>● Faculty</li> <li>● Grad/Prof Schools</li> <li>● Student groups</li> </ul> Send targeted email to Yale Clubs, SIGs, Grad Schools, Student Groups, and relevant professors about YANA; Identify and contact alums in local areas who have indicated interest in starting YANA chapter	<ul style="list-style-type: none"> <li>● [Co-]host at least one major program/event on campus</li> <li>● Build out other YANA matching resources (mentoring, regional, alum-alum, boards)</li> <li>● Increase and improve YANA presence at University on school webpages, nonprofit resources, alumni services, OCS</li> <li>● Plan and hold at least 1 leadership development and strategy session per year</li> </ul>
Help create at Yale a curricular aspect focused on nonprofit/social impact	Research and document: <ul style="list-style-type: none"> <li>● Existing models at other universities</li> <li>● Precedent for creating new majors and curricular aspects at Yale</li> <li>● Who is doing what in the NP/SI space at Yale (including professors, classes, research)</li> </ul>	<ul style="list-style-type: none"> <li>● Focus on the school, department, or faculty member most likely to align in mission to reach goal and start to develop pilot programs.</li> <li>● Pilot class/seminar/faculty-led project with eye to have formally adopted within 1-3 years.</li> </ul>
(E) Expanding the regional chapters and continuing to integrate their members into YANA’s national organization:		
National vs. NYC and Chapter policies, committees, and other matters needing distinction	National Board to identify policies, committees, and other matters needing distinction. Establish Board--Chapter Relations Committee.	Update and assess as needed
(E) Measurements for Success		
	ONGOING YANA will create templates and forms to make data collection standard and part of every function.	ONGOING