



YAA STRATEGIC PLAN

YAA Strategic Plan Guiding Principles:

- **Evolution** – Growth of personnel and programming through listening and strategic evaluation
- **Collaboration** – Taking the time to ask questions and seek input to make the most of everyone’s time and effort
- **Trust** – Creating working relationships based on mutual respect and having the autonomy and flexibility to manage your work in a sustainable and balanced way
- **Transparency** – Building stronger relationships with colleagues and volunteers through clear communication about roles, responsibilities, and how decisions are made
- **Excellence** – Aspiring to be industry-leading in the work we prioritize, given available resources, that enhance the University and YAA missions



YAA ALUMNI LISTENING

How Did We Get Here:

- May 2024 – New ED starts and assesses organization
- September 2024 – CASTLE Priorities established (1-2 years)
 - **C – Campus Connections:** Connecting Yalies to one another and also to the opportunities and priorities on campus.
 - **A – Alumni Listening: Learning what alumni are looking for from the YAA post-pandemic.**
 - **S – Student Engagement:** Developing an engagement curriculum for students while they are on campus so they know all the ways the YAA and alumni can support them from matriculation and beyond.
 - **T – Technology:** Investing in tools that help our volunteers do their work more efficiently and help us capture accurate data about how alumni are engaging with Yale.
 - **L – Lifelong Learning and Travel:** Making these integral experiences more accessible and inclusive for all alumni.
 - **E – Education Across YAA:** Enhancing collaboration across all of our teams to provide the best possible experience for our alumni.



YAA
ALUMNI
LISTENING

Time To Listen:

- **November/December 2024:** Planning with YAA Staff Committee and Board of Governors on Alumni Listening (**A in CASTLE**)
- **January 2025:** All Alumni Questionnaire sent to 140,000 alumni with responses from over 11,000
 - Questionnaire developed with support from OIR
 - Follow-up communication carefully curated to invite responses from all demographics, including unengaged alumni
 - Four pillars emerged from responses:
 - Service
 - Social connection
 - Professional development/mentoring
 - Lifelong learning



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LISTENING

Listening Continues:

- **April/May 2025:** Staff and alumni leaders (current and former Board of Governors members) trained in focus group facilitation and focus group questions developed around four pillars
- **May-Nov 2025:** Focus groups facilitated, and communications carefully curated to include a wide variety of perspectives (classes, SIGs, regional clubs, and **unengaged alumni**)
 - Learning
 - Career & Professional Life
 - Friendship
 - Service
 - Retirement & Third Act (emerged as common theme)
 - Creative & Artistic Hobbies (emerged as common theme)
- **November 2025:** Open feedback form on website announced at Assembly/Convocation

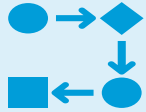


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LISTENING

You Talked...We Listened...Now What:

- **November – February 2026:** Data analysis: Qualitative reports from focus groups along with data from events and programs from 2022-2025.
- **February 2026:** Evidenced based, design thinking strategic planning process begins
- **September 2026:** Strategic plan is announced and launched

YAA STRATEGIC PLAN



Design thinking oriented planning:

Empathize
Define
Ideate
Prototype
Test



Working group:

Staff
Current board members
Former board members



Evidence based:

Alumni questionnaire
Focus groups
Open form
Event data from past four years



Areas of focus:

Four pillars: Lifelong Learning,
Service, Professional
Development/Careers,
Friendship/Social connection,
Promoter & Convener of content
Investment in digital programming
Assessment and measuring success

STRATEGIC PLANNING GROUPS

Lifelong Learning

Marv Berenblum
Stephanie Hartnett
Xiaoyan Hung
Julian Liby
Arikha Moses
Rahul Prasad
Lauren Summers

Professional Development | Careers

Vishal Agrawal
Steve Blum
Serena Cherry Flaherty
Alisa Masterson
Sterling Thomas
Magda Vergara

Service

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Johnnie Bird
Renata Cesar
Lauren Graham
Mindy Marks
Belinda Wu

Friendship | Social Connection

Mara Balk
Julisa De Los Santos
Rob Greenly
Yoshiko Inoue
Kim Perlak
Stefanie Stevens
Betsy Sullivan

Convener & Promoter of Content

Jeannie Daniel
Kaela Heaslip
Jerry Henry
Pippa Jack
Darlene Kaplan
Susie Krentz
Ali Mohamadi

Digital Events & Programs

Mark Badger
Becca Byrd
Heather Corbett
Peggy Edersheim
Kalb
Ken Inadomi
Ed Sevilla



YAA STRATEGIC PLAN

Process:

- **February 2026:** Pre-planning work by Sub-Committee
 - Review of all reports and data for key themes
 - SWOT analysis by focus area
 - Identify critical overlap with other areas
- **April 2026:** Full day working group retreat
 - Define descriptive and actionable opportunities by sub-committee
- **May 2026:** Sub-Committee Group Work
 - What programming/events do we keep, stop, add
 - Benchmarking against best practices
 - Coordinate with upcoming Board meeting discussions
- **June 2026:** Full day retreat
 - Compare against financial and staff resources
 - Are these scalable, sustainable, adaptable
 - How to measure success
- **July/August 2026:** Write the final plan
- **September 2026:** Strategic Plan Launch