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**California State University Maritime Academy  
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**TITLE:** Alumni Relations Professionals at Educational Institutions - Principles of Practice

**DIVISION:** University Advancement

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I. Principles of Practice for Alumni Relations Professionals at Educational Institutions - *Adopted by the CASE Board of Trustees in March 2005*- These principles are intended to supplement and to complement the [CASE Statement of Ethics](#) adopted by the CASE Board of Trustees in 1982.

A. Education at all levels has never been more essential to the well-being of the global community. Yet, educational institutions face an increasingly challenging environment in which to attract students, faculty, and benefactors, as well as to earn alumni allegiance, government support, and public respect. As a result, alumni relations professionals perform increasingly strategic and complex roles serving their institutions and alumni including: championing the institution's mission, encouraging and fostering alumni involvement with their institutions, building long-term relationships with alumni and other constituencies, and collaborating with the advancement team to maximize efforts on behalf of the institution and its alumni. The principles below are intended to assist alumni relations professionals in fulfilling their role in a manner that will benefit their institution, its alumni, their profession, and the academic community.

B. Ethical Principles

1. Alumni relations professionals have a fundamental obligation to:
  - a. advance the mission of their institutions and serve and support its alumni in an ethical and socially responsible manner.
  - b. reflect in their work the basic values of educational institutions, including an abiding respect for diverse ideas, interests and constituencies.
  - c. reinforce through words and actions the principles of honesty, integrity, and trust, which form the basis for long-term relationships and engagement with the institution's alumni and other constituencies.
  - d. place the welfare of the institution and its alumni above personal gain, avoid conflicts of interest, take responsibility for their decisions, and treat colleagues, alumni and the public with courtesy and respect.

C. Operational Principles

1. Alumni relations professionals are most successful at advancing their institutions and serving alumni when:
  - a. their efforts support the institution's strategic plan and the best interests of alumni.
  - b. they are present in the management circle of their institutions, where they provide strategic counsel to their institution's leadership, convey the viewpoints and interests of the alumni, and participate in the formulation of institutional policies.

- c. they base their work on research that informs their understanding of the institution's alumni and measures progress toward established goals in support of the institution and its alumni.
  - d. they view themselves as educators on special assignment in alumni affairs.
  - e. they undertake multiple programs for reaching and engaging alumni.
  - f. they utilize a wide spectrum of communication devices, including electronic mail, to reach and engage alumni.
  - g. they seek feedback from the alumni to help align services with existing and emerging needs of this constituency.
  - h. they involve internal constituencies across the organization in alumni engagement.
  - i. they employ historically proven methods, as well as promising new approaches in the field, as part of a commitment to continuous improvement in their service to the institution and its alumni.
- D. Alumni Engagement Principles
- 1. Alumni relations professionals best serve the needs and interests of the alumni and ensure the involvement of alumni with the institution when they:
    - a. Respect
      - 1.) Acknowledge and embrace alumni as vital stakeholders in their institutions.
      - 2.) Serve as an advocate for alumni, representing their interests in working with institutional departments and constituencies as well as the broader community.
      - 3.) Provide alumni with relevant financial information concerning the work of the alumni association and its activities.
      - 4.) Ensure personal information provided by alumni is handled in a professional and confidential manner at all times.
      - 5.) Recognize alumni contributions of time, talent and treasure.
    - b. Inform
      - 1.) Inform alumni about institutional mission, goals and programs.
      - 2.) Inform alumni about alumni association mission, goals and programs.
      - 3.) Ensure the mission, goals and programs of the alumni association are consistent with, and support the mission, goals and programs of the institution.
    - c. Involve
      - 1.) Encourage alumni to participate in and support the programs, services and events of the alumni association and the institution.
      - 2.) Encourage alumni to pursue leadership opportunities in the alumni association and throughout the institution.
      - 3.) Involve alumni - seeking their ideas, input and feedback - in any planning process that seeks to define or modify the alumni association mission or its system for selecting its leadership.
      - 4.) Encourage alumni to serve in the broader community as ambassadors for their alma mater and for education in general.

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