



## Launching a SIG: The Story of YaleWomen

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In December 2011, YaleWomen, an organization of Yale alumnae, held its first Council meeting and was officially launched. The first meeting was the culmination of focused efforts since March 2009, but also the result of events and interest going back to 2001, and, in some ways, long before that. YaleWomen represents the largest Shared Identity Group (SIG) at Yale, representing over 50,000 female graduates of the college, graduate and professional schools.

While the organization is still in its infancy, many lessons have been learned that may apply to other groups who wish to launch. While the story below may not be a perfectly relevant blueprint for others, this sequence of events and process of collaboration hold some valuable insights for other networks and groups.

### The Case for YaleWomen: A Groundswell of Events

During Yale's Tercentennial, Yale's Women Faculty Forum and the Association of Yale Alumni (AYA) hosted *Gender Matters: Women at Yale*, examining the role of women at the University, and featuring alumnae speakers (September 2001).

Three years later, in 2004, the AYA sponsored a first "reunion" of alumnae with a multi-day conference entitled *In the Company of Scholars: Yale Women in a Changing World*. Over 500 alumnae, spanning all of Yale's schools and crossing the decades, experienced the importance of coming together as Yale women.

### Support and Context: The AYA Strategic Plan

The 2008 AYA Strategic Plan identified the fostering of a SIG for alumnae as a high priority, based on the desire of alumnae to build on the 2004 conference and to find ways to continue to gather and to act together *as Yale alumnae*. The AYA and alumnae volunteers initiated a number of activities in support of this effort, including:

- **Celebrating Yale Women:** *40 Years in Yale College, 140 Years at Yale* conference, held on the Yale campus with 300 attendees in March 2010. During the planning for this event, the organizers, which included current and former AYA Board members, worked with alumnae in the "major cities" to hold pre-conference events to spark interest in the event and a potential women's organization
- After the "**Celebrating**" event, AYA leadership held listening sessions with groups of alumnae in major cities nationally and at the AYA Assembly, in 2010 and 2011, to gather ideas and volunteers to work toward an organization



- At the same time, **volunteer-driven alumnae programming and gatherings** in Los Angeles, San Francisco/Silicon Valley, Chicago, Boston, New Haven, New York and Washington, D.C. were happening throughout 2010 and 2011

### **Galvanizing Event: Retreat in New York**

An organizing “retreat” for an alumnae organization was held in New York City in February 2011:

- **Attendees:** The AYA has catalyzed the renewal of existing alumni organizations and the birth of new ones by providing leadership training to alumni and leading strategic planning retreats. The task for the alumnae interested in forming a Yale alumnae organization was to reach out to other alumnae to determine if they could get at least 35 women to attend a retreat. With the help of Jenny Chavira, '89, the Director for Volunteer Engagement at the AYA, Ellen Gibson McGinnis, '82, who was, at the time, the Immediate-Past Chair of the AYA Board of Governors and Nancy Stratford, '77, the immediate past Chair of the Yale Alumni Fund, worked together to contact hundreds of Yale alumnae, including active volunteers in regional clubs, classes, other shared interest groups (SIGs, YAF and AYA activities, as well as women who had attended the 2004 “**Company of Scholars**” and 2010 “**Celebrating**” events. As a result, the retreat was over-subscribed and, in the end, approximately 50 alumnae attended.
- **Leadership:** The retreat was led by Ellen McGinnis, Nancy Stratford, Mark Dollhopf, '77, the Executive Director of the AYA, and Jenny Chavira.
- **Kick-Off:** A cocktail reception was held the night before the retreat, at the home of Bobbi Mark, '76, so that the attendees could get to know each other ahead of the meeting.
- **Location:** The retreat was held at the offices of Kirkland & Ellis, made available through the generosity of Dale Cendali, '81.
- **Agenda:** The agenda for the meeting included:
  - Introductions. Each attendee stated her name, Yale affiliation(s), and how Yale changed her life.
  - Welcome by Ellen and Nancy. Emphasis on creating a “circle of leadership” to begin strategic discussions about forming an organization. Goals for the day were set forth, including (a) beginning a discussion about mission and shared values, (b) creating a list of “next steps”, rough deadlines and overall goal setting, (c) getting to know each other.
  - Background by Mark. Mark presented an update on the AYA Strategic Plan and some of the exciting new ways that alumni are making a difference for Yale alumni and their communities.
  - Group Discussion. Nancy and Ellen led a discussion about the recent events for Yale women and the momentum that led to the retreat, and started to elicit ideas.
  - Motivation. Mark introduced break-out sessions by informing the group about what motivates volunteers. The break-outs addressed why we should create a “YaleWomen” organization (what primary needs would be met?), what values should be at the core of such an organization, and what programming might the



organization offer. Categories for discussion were needs, stakeholders, reasons *not* to form an organization, core values, and program areas.

- Lunch. Discussions continued over lunch.
- Reporting. After lunch, the small groups reported on their findings. Flip chart pages were used to take notes and tape them to the wall so the group could see the ideas, and the larger group debated, in particular, the list of values.
- Guest Speaker. The group then heard from Cynthia Hallenbeck, President of the Harvard Business School Women's Association of Greater New York, who described her organization and its programming.
- Initiation of Strategic Planning. After a quick overview of the strategic planning process by Mark Dollhopf, the women broke into four groups to come up with questions to be addressed under the topics of research (benchmarking, surveys, constituent interviews, *etc.*), strategic plan, (mission statement, writing a plan, governance issues), campus partnerships (identify student, faculty and administration groups that might have common cause), and local chapters (volunteer recruitment, listening sessions, events). Each group reported back.
- Wrap-up. The group talked about "ah ha" moments of the day, priorities, and started to explore mission and vision.
- Next Steps. Each participant filled out a card with her name, contact information, and what area or areas she wanted to get involved with.

### **Post-Retreat Activity: Organizing Committees**

After the retreat, Jenny Chavira from the AYA sorted the information submitted on the cards, and created a list indicating each person's interest. Added to that list were names of alumnae who could not attend the retreat, but had been contacted prior to it and voiced interest in participating.

Based on the work at the retreat, five committees were formed:

- **Strategic Planning** (to develop and draft the strategic plan)
- **Campus Partnerships** (to investigate potential partnerships with campus organizations)
- **Chapters** (to determine how to interact with, encourage the formation of and generally promote local and "particular-interest" chapters of the central organization)
- **Marketing/Branding/PR** (to develop a plan for getting the word out, and to help determine the name of and tag line for the organization)
- **Research** (to provide research support for the other committees)

Ellen McGinnis, Nancy Stratford and Jenny Chavira (the "*Initial Team*") worked together to identify co-chairs for each committee, from among the women who had declared an interest in each area. The rest of the list was assigned to one (or, in a few cases, more than one) committee.

Once the co-chairs accepted their roles, the Initial Team contacted them to ask them to contact the women on their committees, set up periodic meetings, and report back with goals and a timeline for meeting the goals. Some women were members of more than one committee, and were tasked



with keeping those committees informed about each other's work. The Initial Team had been, and continued to, hold weekly ½-hour phone calls to plan, deal with issues as they arose, and to keep the process moving. Once co-chairs were selected, a second weekly call was scheduled to be held immediately after the Initial Team call, so the co-chairs could report to each other, get input, and keep the process going.

The Strategic Planning Committee was co-chaired by Amy Bevilacqua, MBA '97 and Carolyn Kenady, '74. Amy and Carolyn decided to aim to complete the draft of the strategic plan by June (starting in March). They broke the plan up into 9 sections, and assigned sections to teams of drafters. The committee held hour-long meetings via conference calls weekly, starting at the end of April 2011. Drafters of the various sections held additional meetings, and the draft Strategic Plan was finalized by July.

At the same time, the Chapters, Marketing, and Campus Partnerships committees held periodic calls and began to develop guidelines. The organizers realized that, although some research needs were identified, much of it could be handled by the committee that required the information, and the Research committee did not really get off the ground.

Throughout the process, and as a complement to sustained and focused committee action, when particular expertise was required, specific alumnae were asked to help. For example, Susan Yecies, '71, a marketing professional who advised the committee co-chairs, brought to the process her considerable expertise in naming and branding as names for the organization were considered. Employing a variety of decision-making modes led to effective outcomes.

The AYA provided additional support by making the expertise of Michael Morand, of the Yale Office of Public Affairs & Communications, available to the Marketing committee for consultation.

Though the group of alumnae currently active in YaleWomen includes women of all ages, it was very difficult in the beginning to engage the youngest classes of alumnae (known as "*Graduates Of the Last Decade*" or "*GOLD*"), due largely to their stage in life and career commitments. To reach out to this group, the organizers distributed a survey specifically directed to GOLD alumnae seeking to confirm that we were building an organization relevant to them and, in the process collecting names of people who were interested in becoming involved.

### **Moving from Plan to Action: Mobilizing the Council**

One of the sections of the YaleWomen Strategic Plan addressed how to actually launch the organization, identifying key dates and actions. The central task was to form a governing body, which the Strategic Plan named the "Council."

Weili Cheng, '77 was asked to lead a committee to select the first Council, and to recommend a slate of officers from the names on the Council. Weili was a trusted past Chair of the AYA Board with a sensitive understanding of what skills were needed in Council members and Officers, and



was a neutral party not personally interested in being on the Council herself. All of the women who had signed up to assist with planning, whether or not they were active on a planning committee, were asked whether they would like to serve on the Council, and, if not, if they would serve on the selection committee (this is the 100+ list of alumnae).

The committee was charged with selecting a diverse Council in terms of age, geography, source of degree (College or G&P school), ethnicity, race, and whatever other factors it deemed important. Once the list of willing participants was identified, the committee reached out to other alumnae, identified with the help of key stakeholders and the AYA, to yield as diverse a Council as possible. The committee worked over the course of a month, and released their results with a charge to the Council to seek participants over the next several years who would significantly add to the diversity, in particular with respect to age and ethnicity.

Once formed, the Council's first charge was to vote on the slate of officers, a vote conducted online and anonymously via Survey Monkey. The nominees, who were all elected to serve in these Officer roles, were Ellen McGinnis (Chair), Nancy Stratford (Vice-Chair), Amy Bevilacqua (Secretary) and Carolyn Kenady (Treasurer). The Council held its first meeting via conference call in early December 2011.

In advance of the first meeting, the presumptive officers plus a few Council members worked with Mindy Marks, '00 who, during the course of the planning had moved from the Secretary's office to the staff of the AYA, and with Marta Moret, '84 MPH (a Council member), to develop a survey which was sent out to the 35,000 alumnae for whom the University has email addresses, to both publicize the launch of YaleWomen and to determine areas of interest and discover what ideas the membership might have for the organization. The survey generated a very high response rate and yielded not only confirmation that the organization was on the right track, but provided ideas and names that formed the foundation and beginnings of a member database—a critical asset as the organization continued to mature.

### **Managing Multiple Stakeholders**

Identifying and staying in touch with key stakeholders has been an ongoing effort, and has been critical to the success to date of the organization. It is important for, among other things, reaching different segments of the alumnae. Some of our specific efforts included:

- **Checking in early with University leadership.** At the point after the February 2011 Retreat that the committees were formed and about to start their work, Nancy Stratford and Ellen McGinnis reached out to Linda Lorimer, '77 J.D., the Secretary of Yale and Vice President who oversees the AYA, and current and former women members of the Yale Corporation. A meeting was held in April of 2011, informing a group of influential University leaders about planning efforts and soliciting their views. The meeting was attended by Linda Lorimer, Margaret Marshall, '76 J.D., Mimi Gates, '81 Ph.D, Indra Nooyi, '80 M.P.P.M., Donna Dubinsky, '77, Margaret Warner, '71, Nancy Stratford, Ellen McGinnis, as well as



Eve Rice, '73 (member of the University Council) and Mindy Marks, who was then on Linda's staff.

- **Tying in historical perspective.** Former AYA Chairs Susie Krentz, '80 and Weili Cheng were on the Strategic Planning committee, and provided both historical perspective and informed voices in the process. Other "wise women" stakeholders, who were very involved volunteers, some of whom work at Yale, were kept informed.
- **Allowing for previews of key documents.** A draft of the Strategic Plan in near-final form was provided to Linda Lorimer for review and comment, and some of her comments were incorporated into the Strategic Plan before it was finalized.
- **Sharing information with peer groups and regional networks.** YaleWomen sent the Strategic Plan to leaders of other SIGs, both to get their reactions to the plan content, and to begin to discuss potential collaborations. YaleWomen also shared the Strategic Plan with leaders of regional Yale clubs and associations, classes and SIGs.

### Critical Success Factors...So Far

The organizers identified the following decisions and behaviors as critical to the success of the strategic planning process:

- **Support from AYA and the University.** Perhaps the most important element of success was that the AYA assigned a talented AYA staff person, Jenny Chavira, to assist with the planning efforts. It was part of her job to move the effort along, and she was focused on keeping the volunteers on a schedule. Jenny had access to resources such as the alumni database, but also was in a position to inform the process with insights from the University in general and the AYA and other SIGs. There is little doubt that the launch process would have taken longer and may not have been as successful without Jenny's able assistance.
- **Leveraging momentum.** Soon after the March 2010 "**Celebration**" a list was constructed of interested alumnae and the initial team held "listening sessions" and brought alumnae together for the February 2011 retreat. Regional activity, especially in the "major cities," helped create momentum, kept alumnae engaged with other alumnae, and demonstrated kinds of and level of activity that validated the potential for the success of the organization. Watching and learning from the regional activity form key, as it provided lessons on what worked, what women wanted, and how volunteers were motivated. Regional groups also became critical sources of volunteers to work on the national planning.
- **Broad, but strategic, outreach.** Engaging large numbers of alumnae and inviting them to the February 2011 retreat was important because it started to get the word out, as well as bringing into the planning process a relatively diverse group of alumnae. It was important, though, that those alumnae had some exposure, through attendance at an event, or involvement in volunteer activities, to Yale alumni affairs and, to some extent, the new direction of alumni engagement at Yale catalyzed by the AYA and its 2008 Strategic Plan.
- **Convening a galvanizing event.** The Retreat itself was the critical launch event that allowed identification of leaders who were committed to immediately working on planning.



Forming committees out of the retreat helped focus planning efforts and let alumnae gravitate to areas of their particular interest.

- **Setting aggressive deadlines and not expecting perfection.** The Strategic Planning co-chairs made a critical decision early on to set an ambitious deadline for completion of a draft plan, set frequent meetings and short interim drafting deadlines, and accepted that they might sacrifice perfection for speed. A 70% complete plan was thus circulated to the entire committee for comments, and although there were extensive edits at that point, the entire process was completed in less than 3 months. The concept of focusing on moving ahead to form a governing board and start the work of the organization, as opposed to engaging in a lengthy planning process, was extremely effective, as this group of Yale alumnae tended to focus on getting the words perfect, which could have led to an unending drafting process.
- **Finding the right people and personalities for leadership roles.** Key factors of success were the selection of the co-chairs, and the overall attitude of the entire group. The co-chair selection process was a combination of (a) being able to identify women who, by their volunteer efforts known to the AYA and the core organizers, or demonstrated in the February 2011 retreat, seemed likely to be good listeners, organized, and practical and (b) luck. The Strategic Planning co-chairs, in particular, were focused on keeping the conference call agendas on track, moving the discussion along as necessary, doing a lot of interim work via email, and were notably low key, calm, polite and respectful of the views of the participants. The group tried to interact with transparency, and exhibited respect for one another. It agreed to disagree when full consensus was not reached, with most participants understanding that the decision was made in the interest of time and the good of the effort as a whole.
- **Balancing inclusion and forward motion.** There were strong feelings about most of the plan components, and clear disagreements expressed. There was some concern that the loudest voices dominated the agenda at times, and that some women dropped out of the process because of the time taken up with some of those voices. However, the co-chairs and drafters tried to step back and be aware when one person's point of view represented only that person, and take into account the consensus of the group, which may have been expressed privately or more quietly.
- **Using a variety of decision-making models.** Identifying expertise among alumnae, and using a combination of consensus and decision-making by leaders guided by expert advice, was critical to achieving goals and implementing steps to completing the Strategic Plan.