

University of Illinois Alumni Association

Adding Impact To Excellence

As it has at various points in time throughout its 138-year history, the University of Illinois finds itself at a crossroads. Can a highly regarded, first-class institution of higher education that has grown from one humble campus into three distinct universities under one banner make the next major leap in its evolution to that of true *world*-class powerhouse with significant impact and benefit not only to the people of the state of Illinois, but to the world's citizenry?

The University and all its many diverse and related components are preparing for that next major leap through a collective and collaborative strategic planning process. The task is to determine how the University can operate smarter in order to achieve a competitive edge in today's dynamic global environment.

In concert with this effort, the University of Illinois Alumni Association presents its strategic plan that sets a bold course for the next 10 years. It is a plan that outlines aspirations – both worthy and attainable – for an organization that already has a reputable history of excellence. The Association asserts that the implementation of this plan will effect a sea change among its various constituencies and inspire an active, engaged culture of University of Illinois citizenship.

Such an impact is not only compatible with the University's plan for a brilliant future, but an essential component of its success.

Historical Impact

In 1872, 20 students comprised the first graduating class of the Illinois Industrial University (later the University of Illinois), thus becoming its first alumni. On June 5, one year later, 15 of those graduates met in the old Mechanical Building and formed the Illinois Alumni Association. They elected officers, adopted a constitution and planned a little "entertainment" for the following year's commencement ceremony.

Humble beginnings, to be sure, but these few recognized the need for graduates to maintain a connection to their alma mater beyond their student days. They realized the value of alumni coming together independently of the University in order to advocate and guide the growth and development of this new, fledgling institution of higher education for the people of the state of Illinois.

It wasn't long before the Alumni Association began to make an impact.

From persuading the state Legislature to empower trustees to grant degrees instead of certificates to changing the name of the institution to the University of Illinois to presenting Lorado Taft's Alma Mater statue group to establishing a medical college in Chicago after buying the old College of Physicians and Surgeons and giving it to the University as a gift in 1913, alumni and the Alumni Association have been key factors in determining and bolstering the future of the University of Illinois.

By the early 20th century, it was apparent to alumni leaders that the purpose of the organization had evolved – recognizing what their President J.G. Wadsworth described in 1907 as the "pleasure of association" being eclipsed by a "field of usefulness" opening up before it. Even then, direct references to legislative advocacy, trustee selection, student recruitment and the importance of knowing where alumni were located and how to reach them were significant points of concern and the focus for united action.

They remain so today.

The Encouragement of Private Giving

The UIAA has long been a proponent of what has become known as "development." It was the Alumni Association that first raised private funds to support the University, and the building of Memorial Stadium in Champaign was its first widespread capital campaign. Upon the UIAA's recommendation, the Board of Trustees established the UI Foundation in 1935 to be the independent-but-related fund-raising organization for the University.

As a distinguishing factor between the two organizations, the Alumni Association serves as the most broadly based connection point to the University for graduates who self-identify their affinity to the institution through the payment of annual and life membership dues. In exchange, the Alumni Association delivers periodic communications, programs and services to its members to sustain and nurture their loyalty and pride. However, it is from among these loyal Alumni Association members that the University, its academic units and related organizations overwhelmingly draw their donors, volunteers, fans and patrons.

Nowhere is the positive impact of Alumni Association membership more strongly felt than in the area of fund-raising:

- UIAA members are, on average, 5.3 times as likely to be donors than nonmembers.
- Within any given college on any UI campus, UIAA members are 2 to 9 times more likely to be donors than nonmembers.
- UIAA members are 4 times as likely to be major gift donors (\$5,000 or more) than nonmembers.
- UIAA members represent 21% of the total alumni population, but 59% of total alumni contributions.
- 32% of all UIAA members are donors, while 6% of all nonmembers are donors.

(based on 2003 UIAA statistics)

United Action in the Best Interests of the University

The UI Alumni Association also has a long history of advocacy on behalf of the University when it comes to legislative funding appropriations and institutional governance.

From the very first issue of its alumni publication in January 1907 to a mass email sent to thousands of in-state alumni in 2003, the UIAA has informed and mobilized alumni to utilize their influence within their state legislative districts on behalf of the University.

And for more than 100 years, the Alumni Association had a significant role in determining qualified candidates for UI trustee in statewide elections. The UIAA established the slates that were presented to both major parties' conventions. However, in 1996, the elective process changed to gubernatorial appointment, and the UIAA's role in vetting candidates was diminished to the point of nonexistence.

Clearly, the alumni constituency is among those most interested in the quality and welfare of any university. More than half of Illinois' 550,000-plus alumni live in the state. Tens of thousands are leaders in their professions. A substantial majority regard their U of I experience as a positive one. The long-term value of their degrees is permanently linked to whatever reputation the institution holds in higher education, research, public service and economic development.

Effective Information Management

One of the University of Illinois' greatest resources is the good will of its alumni. That good will has been documented and chronicled by the UIAA since its earliest days – from hand-written 3" x 5" card files to the sophisticated relational databases of today.

The UIAA's goal is to leverage the good will of Illinois alumni to benefit the University, fellow alumni, and currently enrolled and prospective students. The more that is known about Illinois alumni, the more it is possible to match their knowledge and skills, interests, goals and preferences with opportunities to serve the University and the University family. While the fund-raising potential of the database is important, its role in fostering a sense of family and UI community is no less desirable.

There are two critical and equally important directions necessary for more effective information management: data collection and access to the data.

The UIAA, UIF and the University have an opportunity to work together to ensure that biographic, demographic, attitudinal and participation records of both students and alumni are proactively collected and maintained on a continuous basis. Information that is collected but not incorporated into a centralized data warehouse, or not recorded at all, regarding both student life and alumni life is a missed opportunity for connection throughout an individual's lifetime. Given the mobility of 21st century society, it is imperative to maintain contact with alumni. Mobile graduates cannot be expected to initiate change-of-address dialogue with their many personal contacts, business and professional affiliations and affinity groups. If the University wishes to maintain contact, it must take the lead. In the 2005-2015 timeframe, e-mail and mobile telephony will likely be the contact methods of choice; therefore the UIAA strongly advocates that the University provide lifetime e-mail to all graduating students.

In addition to actively collecting and maintaining pertinent information about students and alumni, it is essential to maximize the value of that information by providing user-friendly, intuitive interfaces to anyone with a need to know (faculty, staff, students, alumni) in order to foster a culture of lifelong UI citizenship. A variety of access levels and analysis tools should be made available for appropriate uses while scrupulously safeguarding individual privacy and contact preferences.

In summary, using business intelligence, a data warehouse and Customer Relation Management technologies, as a minimum, is essential to being able to effectively execute the critical goal of maintaining lifelong, meaningful relationships with students and alumni.

The Need for a Collective Strategy

These issues are of significant interest to the Alumni Association because they are recognized areas where united alumni action has proven to be effective. However, as structures evolved within the University over time to focus specifically on these issues, they became compartmentalized, and the contributions other related organizations could make have been diminished. As such, these are topics that the UIAA cannot act on unilaterally, but require cooperation and partnership with the University, the UI Foundation and the three campuses. The UIAA and the University have the opportunity to work together to forge new and more collaborative ways to address these issues for even greater benefit and effectiveness.

THE STRATEGIC PLAN OF THE UNIVERSITY OF ILLINOIS ALUMNI ASSOCIATION

2005 - 2015

PURPOSE

Mission

To foster a spirit of loyalty and fraternity among the graduates and former students of the University of Illinois, and to effect united action in promoting the welfare of the University.

Vision

The University of Illinois Alumni Association will be a self-governing alumni association, respected by all as representing the independent voice of alumni. It will be a strong and collaborative partner with the University of Illinois and related organizations. It will be largely self-reliant for funding, while at the same time offering cutting-edge programs and communications, as well as state-of-the-art technology. Extensive outreach programs will connect with young alumni, and intentional efforts will be made to engage Asian, Hispanic and African-American alumni. The Association will maximize its resources and facilities to continuously demonstrate professionalism and build lasting relationships with its constituencies.

Guiding Values

The University of Illinois Alumni Association will always strive to demonstrate the following qualities and characteristics:

- Fiscal stability/financial growth
- Ethical responsibility
- Cutting-edge programs, communications and technologies
- High degree of professionalism
- Membership retention and growth
- Significant outreach to alumni, including underrepresented populations, voung alumni and international alumni
- Student-alumni interactions
- Quality service

Mandates

Among the basic mandates that guide the operations of the University of Illinois Alumni Association is its current bylaws, last revised in May 2001 and ratified by the Association's governing body, the Board of Directors. This board is composed of 30 University of Illinois alumni who hold regular membership in the UIAA. There are also

eight ex officio members and one student representative from each campus who do not have voting rights on the board.

In addition, the Association has a contractual agreement for services with the University that is negotiated between the two entities on an annual basis. Of course, the UIAA also operates under a number of legislative and regulatory acts and guidelines. A few of the key ones are as follows:

- Section VI of "University Guidelines 1982" (amended 1997) as adopted by the State of Illinois Legislative Audit Commission defines University-Related Organizations and lists certain permitted and prohibited activities.
- From a financial point-of-view, UIAA is considered a "component unit" of the University. As such, UIAA financial statements are audited by the Special Assistant Auditors for the Auditor General, State of Illinois and consolidated within the University's annual financial report.
- With regard to tax status, UIAA received a determination letter from the Department of the Treasury in May 1954 (and reaffirmed October 19, 2001) that recognized UIAA as tax exempt under what is now section 501(c)(3) of the Internal Revenue Code of 1986.

STRATEGY

Strategic Intent

The University of Illinois Alumni Association will combine alumni relations excellence with an unprecedented commitment to innovation, quality and service so that it builds lifelong, meaningful relationships with a greater number of alumni and students and is the best among its peers and competitors and recognized as such.

Environmental Assessment

The key findings from an assessment of relevant environmental factors affecting the University of Illinois Alumni Association are as follows:

- Alumni associations in general have been experiencing a declining trend in membership in recent years as connection points between alumni and their institutions become broader, more numerous and more decentralized.
- Alumni associations are playing a more significant role in fund-raising, while continuing to emphasize the importance of building lifelong alumni relationships.
- Alumni associations are recognizing the need to connect with young alumni in new ways that have relevance to them.
- Affinity organizations are leveraging technology to become more competitive, and innovation is driving value.
- Alumni relations strategies need to consider the demographic trends of who is attending the University of Illinois.
- Across the UI campuses, students continue to report a high satisfaction rate of their UI experience.
- The current process for the selection of UI trustees is by gubernatorial appointment.

- The current legislative advocacy structure for the University of Illinois consists of a governmental relations department and a statewide coalition of approximately 400 select advocates, both of which are housed within the University's central administration.
- The University of Illinois brand and that of the three campuses provide some insight as to how to customize alumni relations strategies at each of those levels.
- The UIAA recognizes that its competitors are not just other alumni associations, but also include internal University departments that perform similar functions and other affinity organizations that compete for the attention of UIAA "customers."

Competitive/Benchmark Analysis

Benchmarking for alumni relations is somewhat limited. Some measurable factors are reported by the Council for Alumni Association Executives, but because there are a variety of organizational structures for alumni associations, it is not always possible to find true comparisons. The UIAA is looking at various competitors beyond other alumni associations for its best practices. For example, the membership acquisition of the Smithsonian Institution, the customer service structure and satisfaction rating of Land's End, etc.

	UIAA	Average	Who does it better?
% Addressable Alumni	89.8%	87%	99.9% - Univ. of Pittsburgh
			99.5% - Univ. of Tennessee
			97.1% - Univ. of North Carolina
			96.6% - Arizona State Univ.
			95.3% - Kansas State Univ.

	UIAA	Average	Who does it better?
E-mail Addresses on File	170K	62K	239K – Stanford Univ.
			180K – Univ. of Michigan
			173K – UCLA

	UIAA	Average	Who does it better?
% E-mail of Total on Database	20.1%	22.2%	57.7% – Yale Univ.
			51.0% – UCLA
			49.2% – Duke Univ.
			47.6% – Univ. of Virginia
			47.3% – Univ. of Connecticut

	UIAA	Average	Who does it better?
Total Members	113,859	36,119	152,553 – Penn State Univ.
			123,553 – Ohio State Univ.

	UIAA	Average	Who does it better?
Average Renewal/Retention Rate	68.9%	72.7%	93% – Univ. of West Virginia
			91% – Univ. of Connecticut
			90% – Ohio State Univ.
			90% – Univ. of Maryland
			79% – Penn State Univ.

By Campus	UIUC	Wisconsin	Michigan	Penn State
% Addressable Alumni	86.0%	92.3%	89.1%	87.0%
	UIC 90.0%	Cincinnati 84.9%	Arizona State 95.0%	UC-Davis 93.6%
	UIS 92.0%	UW-Green Bay 78.0%	Charleston 80.0%	Marist 99%

By Campus	UIUC	Wisconsin	Michigan	Penn State
% E-mail Addresses	24.0%	24.0%	24.5%	18.5%
	UIC 19.0%	Cincinnati 14.3%	Arizona State 26.0%	UC-Davis 11.3%
	UIS 23.0%	UW-Green Bay 3.0%	Charleston 25.0%	Marist 36.0%

By Campus	UIUC	Wisconsin	Michigan	Penn State
Average Renewal/Retention	68.9%	78.0%	76.0%	79.0%
Rate	UIC	Cincinnati	Arizona State	UC-Davis
	64.0%	72.0%	73.0%	72.0%
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	UIS	UW-Green Bay	Charleston	Marist
	67.0%	N/A	60.0%	N/A

SWOT Analysis

The UIAA Strategic Planning Committee conducted a SWOT analysis exercise (strengths, weaknesses, opportunities and threats) to identify the internal and external contexts in which the UIAA operates. The key themes are summarized as such:

- *Strengths:* Independence of governance; high-quality of board members; physical plant (alumni center); large alumni base; financial/constructive support from the University; loyalty of alumni (also to their college/departments); student alumni programs; concentration of alumni in state; UIAA's national reputation/history/tradition; UIAA's name recognition (primarily among Urbana campus alumni).
- Weaknesses: Divided allegiances; motivating alumni; lack of awareness of UIAA in UI colleges/departments; insufficient financial resources; weaknesses in database functionality and content; UIAA is not very "nimble" when it comes to seizing opportunities; uncertainty in revenue stream(s) and other funding sources; UIAA viewed as a cost center rather than an investment or profit center; lost connection to the trustee selection process; lack of involvement in legislative advocacy; perspective of other campuses that UIAA CEO is based in Urbana; finesse of optimizing efficiencies at corporate level vs. campus level; sense of internal competition.
- *Opportunities:* Ability to help sell the UI Strategic Plan; leverage alumni leaders in various markets to participate and get their buy-in; greater ability to assert leadership in trustee selection process; build the student base as part of data collection; enhance student involvement; enhance revenue base; identify opportunities for active alumni involvement in advocating for state funding/support, corporation/foundation relationship-building, student recruitment; fund-raising and career/job networking; civic and political activism on behalf of the University; connection with more diverse groups/individuals; a new president that prompts a "fresh look" and impetus for change; unify/integrate college/department alumni groups to the main UIAA; assist/partner with development in annual fund participation, scholarships, etc.; utilize alumni leaders in appealing to other alumni via e-mail; build a strong, mobilization strategy for Chicago and other regions.
- *Threats:* Lack of finances; lack of support for higher education in state Legislature; cross-currents regarding Chief Illiniwek issue; lack of appreciation and understanding by University community for what UIAA and UIF do; soft economy; limited resources of customers; life membership (i.e. lack of annual membership revenue stream); funding formula for UIAA operations and funding other entities; that independence and survival are based on a purpose that is complimentary to the alumni relations efforts in the units; emphasis on an orientation to decentralization; UI understanding/appreciation of UIAA and UIF independence; becoming irrelevant; being perceived as the catch-all to do the grunt work that no one else wants to do.

Strategic Issues

- 1. How can the UIAA engage more alumni with each other and with the University in meaningful ways? What is an effective way to define (and be able to measure) meaningful engagement? How can the UIAA better inform/educate/mobilize alumni to prompt their action and involvement with and on behalf of the full University community, including other alumni?
- 2. How can the UIAA help instill a lifelong, vested interest in the University among students, prospective students, faculty and staff? How can it foster a "culture of philanthropy" or a "culture of UI citizenship," in which individuals want to give back to the University community through their volunteerism, activism, financial support, etc.? How can the UIAA create a pipeline for producing future alumni who have the mindset of support and activism for their Alma Mater?
- 3. Given that there is a decentralized system of alumni relations activity at the college and department level that does not have a direct reporting relationship to the UIAA, who ultimately has the responsibility and accountability for alumni relations at the University of Illinois? Who determines the policies for contacting and engaging alumni, as well as the monitoring and enforcement of those policies?
- 4. How can the UIAA ensure that it will have the resources it needs to accomplish its mission and realize its vision? What can it do to perpetuate its financial security? Attract and retain appropriate staffing? Maintain and improve its infrastructure and facilities?

Strategic Goal 1

Benefit to Alumni

The UIAA will build meaningful and lasting relationships with University of Illinois alumni through effective programs, communications and technologies in order to increase loyalty and fraternity with each other and with the University.

- Foster a UIAA culture of innovation, quality and service that will inspire pride and trust in the UIAA and the University among alumni
- Expand and enhance the technological capability for communication to and between alumni and the University and among alumni themselves, regardless of their membership status
- Become an extraordinarily inclusive community where alumni feel welcome and valued
- Define, track and measure alumni engagement
- Provide effective, high-quality programs, services and communications that reinforce a sincere interest in alumni by the UIAA and the University, not only as a resource, but as former students
- Operate in a bi-partisan manner

Action Items

A. To help achieve this goal, the UIAA will develop the **authoritative Alumni Data Warehouse** at the University of Illinois, in which the UIAA will operate, maintain and then provide access to appropriate data through user-friendly interfaces. This will empower the UIAA and the University community to transform information into critical knowledge in order to build and sustain those relationships with alumni.

An effective way to do this is to implement the Alumni Module of the Banner ERP system, capitalizing on the \$200 million-plus investment made by the University. The UIAA would continue to update and maintain the FACTS database, as well, to fulfill the UI Foundation's data needs if it does not wish to migrate from that system.

- B. The value of the information the UIAA has will decline in accuracy and, ultimately, credibility if it is not refreshed on a periodic basis. The UIAA will develop a **continuing stream of data collection** by implementing a regular schedule of alumni censuses, plus an annual census of the graduating class.
- C. In order the increase the number of alumni (and future alumni) with whom the UIAA and the University can communicate, the UIAA will implement and manage a new permanent **e-mail program for all alumni** of the University of Illinois. The UIAA and the University will work together to implement a transition from student e-mail address to alumni e-mail address that is as seamless as possible. This is necessary to sustain a communications link with and among alumni, in the manner in which many of them prefer, regardless of their location.

- D. The UIAA will devise specific and effective strategies to connect with and engage the large alumni population in the Chicago metropolitan area.
- E. The UIAA will conduct an **evaluation of the membership model** both overall and by campus to determine the most effective model with maximum benefit for each UI campus alumni body and campus culture. The UIAA believes there is an element of intrinsic satisfaction for alumni to be members of such an organization, and that membership serves as a discipline tool for the UIAA to ensure that it stays on task as to what is delivered to alumni in exchange for their membership.

Strategic Goal 2 Benefit to University

The UIAA will work in partnership with the University of Illinois and related organizations to be supportive of the University's mission for which the UIAA can mobilize alumni involvement and help effect a positive outcome.

- Become a key partner in an integrated legislative advocacy strategy for the University
- Secure a consultative role in the trustee selection process
- Increase awareness, interest and involvement of alumni in fulfilling the mission and goals of the University
- Mobilize alumni who are leaders in their fields
- Promote support of the University, private giving and higher education among alumni, especially citizens of the state

Action Items

- A. The UIAA will **lead and reinvent an effective, integrated, bipartisan legislative advocacy program** on behalf of the University and those who would attend the University of Illinois and become future alumni. This is a prime opportunity for UIAA partnership with the University and its leadership. As an alumni-governed, not-for-profit corporation with diversified sources of revenue, the UIAA is uniquely positioned to engage alumni to advocate on behalf of the University with respect to political issues that impact higher education and the institution. Both highly focused and broad-based initiatives will be coordinated so that alumni know what they can do to be of assistance, how to do it and when. Currently, the University's advocacy program, Illinois Connection, receives \$25,000 per year from the UIAA, but with no input from the UIAA as to how those funds get used.
- B. The UIAA will implement a plan to **regain a significant role in the trustee selection process**. The primary objective is to have an official mechanism to ensure alumni representation. A secondary objective is to advocate for highly qualified candidates by engaging alumni in the selection process and to ultimately enhance the excellence of the Board of Trustees. Alumni represent the University's largest and only permanent constituency.
- C. As stated in *Strategic Goal 1-Action Item E*, the UIAA will conduct an **evaluation of the membership model**. In addition to the alumni benefit of this exercise, such an evaluation will also address any internal challenges to the model so that the University community better understands, and in fact embraces, the role and value of membership in advancing the University's mission.

Some key strategies involving membership that benefit the University include:

- Count tax-deductible membership dues toward University annual giving totals and alumni participation rates. Since the UIAA is a component unit of the University for financial reporting purposes, the membership fund and the college account surpluses should be included in the University's total endowment and investment totals.
- 2 **Count regional alumni club scholarship contributions** made by individuals and jointly funded by the UIAA toward University giving totals and alumni participation rates.
- Increase membership promotion by the University community, as well as by the UIAA. Membership is highly correlated to private giving. It is also an efficient mechanism for identifying alumni who are more likely to engage with the University, thus signaling where resources should be directed to achieve the highest return-on-investment. A portion of membership revenue is also currently directed to the colleges for alumni relations support.
- 4 **Provide membership to nonmember donors** at an appropriate financial threshold through a mutual agreement with the UI Foundation. This practice would eliminate the awkwardness of membership solicitation to major contributors who believe themselves to be engaged with the University, and in many cases think they are UIAA members when they aren't.
- 5 **Institute a student fee** that would provide all students with the benefits of UIAA membership while enrolled in the University.
- D. The UIAA proposes the **University-wide adoption of an expanded definition of the Advancement Model.** In order to realize the shared vision of a brilliant future for the University, integrated efforts among the traditional advancement partners (alumni relations, development and communications) should be expanded to include other key partners such as admissions, student affairs, athletics, governmental relations and career services. The quality of the student experience significantly impacts the effectiveness of future alumni relations and development efforts.
- E. In anticipation of the next capital campaign, the UIAA will **enhance its active support of development** efforts through a number of proactive initiatives in the areas of communications/marketing (especially with regard to annual giving), alumni data delivery to development officers and administrators, and event planning through UIAA programs and facilities.
- F. As referenced in *Strategic Goal 1-Action Items A through D*, the UIAA's plans to **enhance its information management systems** are equally significant and beneficial to the University for transforming information into critical knowledge. Enhanced content and increased accessibility to appropriate alumni data will enable the University to leverage even more alumni resources on its behalf.

Strategic Goal 3

Benefit to Colleges/Departments/Units

The UIAA will take more of a leadership role in adding value and providing strategic direction to the alumni relations efforts conducted throughout the University of Illinois by serving as consultant, information resource and tool provider.

- Maximize, coordinate and integrate the alumni relations efforts at the campus, college and departmental level
- Provide a leadership role in developing Chicago, state, national and international advancement strategies
- Develop and provide data tools in support of alumni relations and advancement efforts at the college and departmental level
- Leverage UIAA strengths to the advantage of the University and its departments
- Increase UI internal recognition of UIAA as a valued service provider

Action Items

A. The UIAA will maximize, coordinate and integrate the alumni relations efforts at the college/department level. While each UI campus's colleges and departments offer unique strengths and contributions in the area of alumni relations because of the academic affinities held by former students, they lack the overall benefit of being fully integrated into a complete advancement effort.

Since the inception of major capital campaigns at public universities prompted by the trend of decreasing state support, there has been a significant increase in the number of development personnel in the colleges and departments. Funded by the campuses and the UI Foundation, these positions are charged to bring in more gifts, especially Annual Fund gifts, for their specific unit. Over time, this structure seems to have spurred more internal competition for alumni resources and loyalties, rather than focusing on the overall affinity that an individual develops from his/her total University experience – of which the academic connection is certainly a significant part.

In order to achieve college and department development goals, development personnel often find themselves conducting more alumni relations activities to build the ongoing relationships necessary to inspire financial support. Consequently, personnel time funded by development to achieve its financial goals is increasingly diverted to alumni relations activities – which diminishes return-on-investment expectations.

However, these alumni relations activities are often focused very narrowly on the college or department itself, fostering a limited, college- or department-centric view of the University. Efforts at this level are also directed to all alumni in order to maximize their reach, but wind up diluting the role and value of the UIAA membership model in an overall alumni relations effort that focuses on the encouragement of nonmembers to join the UIAA as a fundamental step of engagement with the University.

- B. In order to achieve successful coordination of college and department alumni relations efforts into a more integrated advancement model, the UIAA proposes the **creation of a Vice Chancellor for Alumni Relations position** (or other appropriate position that fits within the established structure and academic culture of a particular UI campus). Such a position would have the authority and credibility to direct more alumni relations resources to the colleges and departments as part of an integrated advancement model, while still supporting each unit's specific goals. This would enable the deans to increase administrative focus on their academic mission and high-level fund-raising initiatives in concert with development confident that the necessary communication, relationship-building and engagement are taking place with alumni even those who may not be directly associated with the unit but still have an interest in its success.
- C. The UIAA also will provide **consultative expertise and resources to non-academic campus units** that already have relationships with various alumni constituencies i.e. student affairs and the registered student organizations, nonacademic units and other established affinities. As more points of contact are created between University and alumni, there is a greater need for a level of centralized coordination to ensure an integration of efforts, consistency of message and quality standards in building and nurturing those relationships.
- D. The UIAA will work in partnership with the colleges and departments to **utilize key alumni in recruiting high-quality faculty and campus administrators**. Hiring and retaining excellent faculty, staff and administrators is essential to securing a brilliant future for the University. Having alumni leaders from a variety of disciplines participate in the recruitment process can be a tremendous factor in persuading highly-sought-after candidates to come to the University of Illinois.

Strategic Goal 4

Benefit to Students

The UIAA will be a key facilitator of an integrated effort to perpetuate a culture of citizenship and lifelong loyalty with all University of Illinois students and prospective students.

- Expand Collegiate Membership program to all enrolled students
- Facilitate alumni participation in student recruitment initiatives
- Educate students, faculty and staff about the role of alumni relations and overall advancement
 - o Facilitate alumni-student interactions
 - o Expose students and faculty/staff to alumni recognition programs
 - o Actively market and build brand in relation to UI and campus brands
- Record and track student involvement, engagement, information
- Expand access to and utilization of alumni network
- Utilize UIAA student groups as consultants and advocates to other UI student organizations (RSOs, fraternities/sororities, student affairs, etc.)
- Utilize UIAA facilities to foster student connection and loyalty to the University
- Utilize UIAA facilities for employer recruiting of students
- Support existing student leadership programs
- Promote increase in and awareness of alumni contributions to scholarships
- Connect with students in ways to which they can relate and have relevance

Action Items

- A. The UIAA will **expand the Collegiate Membership program to all students** enrolled at the University. This provides the opportunity for students to feel a part of the University family, to benefit from the vast alumni network, to learn about their role and responsibility as future alumni, and to develop a culture of University support and engagement.
- B. The UIAA will work in partnership with the admissions offices to **utilize key alumni in recruiting high-quality students**. Attracting and retaining excellent students is essential to securing a brilliant future for the University. Having alumni leaders from a variety of disciplines participate in the recruitment process can be a tremendous factor in persuading highly-sought-after students to enroll at the University of Illinois. This process will also help students feel welcome at the University and that they are joining a family that fosters a lifetime of mutual loyalty and support.

Strategic Goal 5

Resources

The UIAA will have the resources required for the fulfillment of its mission and the realization of its goals.

- Create an effective organizational structure that is aligned with the UIAA mission/vision and affords flexibility to seize opportunities in a timely manner
- Identify, cultivate and lobby for new sources of financial support, possibly including:
 - o Endowment
 - o Beneficiary of development efforts
 - Student fee to support Collegiate Membership and student relationship building
 - o For-profit subsidiary
 - o New affinity programs of value to the University and/or alumni
- Identify cost efficiencies and reallocations
- Utilize physical plants on campuses to increase engagement and interaction
- Promote perception of UIAA as being critical to the success of the University
- Reinforce among internal and external stakeholders that UIAA membership is worthwhile and of value beyond the Association itself

Action Items

A. As is the case with other non-academic entities that support the University mission, the UIAA should **qualify as a direct beneficiary of development efforts** included in, but not limited to, the upcoming capital campaign. As an independent, University-Related Organization, the UIAA demonstrates through its actions, and in this document, how it supports the mission and goals of the University as a key component of its own charter dating back to the late 19th century. The University relies on the UIAA to provide a variety of services that are essential to its success, and so the UIAA should be considered by the University to be a viable recipient of private support generated by another URO, the UI Foundation.

RESOURCE PLAN

The resources required to achieve the Alumni Association's goals set forth in this strategic plan will, as with the University's own plan, include a mix of people, money, facilities and technology. To an extent, *Strategic Goal 5* addresses the identification of some possible financial resources, but ultimately, many of the resource solutions for the UIAA are interdependent with those of the central administration, the UI Foundation, the three campuses and their respective academic and nonacademic units.

MONITORING/EVALUATION

Insofar as the University of Illinois Alumni Association has control over its own destiny, it will devise appropriate methods and timelines for evaluating the progress of achieving the goals set forth in its strategic plan. However, the UIAA recognizes that some of its key areas for beneficial impact must first be worked out in a collective strategy with the University, the UI Foundation and the three campuses before a complete set of metrics and timelines can be determined.

The UIAA Strategic Planning Committee did begin to identify some key indicators per strategic goal. It will rely on UIAA staff to help determine ambitious, but achievable levels in a realistic time frame.

Strategic Goal 1

- Increase annual and lifetime memberships
- Increase instances of positive media coverage of UIAA
- Increase number of valid e-mail addresses in database
- Increase UI donor base
- Increase defined, valuable instances of engagement
- Increase member retention/renewal rates
- Track and increase utilization of Alumni Center and other UIAA facilities
- Increase participation in UIAA affinity programs

Strategic Goal 2

- Achieve an agreement on the role of the UIAA in advocacy
- Achieve an agreement on the role of the UIAA in private giving
- Increase alumni participation in annual fund giving
- Achieve an agreement on the role of the UIAA in student recruitment
- Achieve an agreement on the role of the UIAA in trustee selection

Strategic Goal 3

- Solicit input from UIAA's internal stakeholders (central administration, UIF, three universities, academic and nonacademic units) to determine a baseline and then provide data analysis, reports and tools
- Determine a baseline, then establish and build the utilization of the Alumni Center by the internal stakeholders, as well as corporate entities (for student recruitment, alumni job fairs, etc.)

Strategic Goal 4

- Increase number of students who transition from Collegiate Membership to paid membership
- Increase student participation in philanthropy to the University
- Combine student and alumni records in a data warehouse environment
- Increase number of alumni involved in student recruitment
- Increase number of alumni who contribute to student scholarships

Strategic Goal 5

- Increase revenue generation
- Generate services that the University needs and for which it will provide funding
- Estimate UIAA progress in building the case to be perceived as an investment for the University, rather than as a cost center

CONCLUSION

Throughout its long history, the University of Illinois Alumni Association has proven to be a viable and valuable asset for – as one early alumni leader described it – "the upbuilding" of the University and its alumni. The progress achieved in the past has positioned the Association to realistically aspire to setting a new standard in the alumni relations profession and adding impact to its excellence.