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UNIVERSITY OF ALBERTA ALUMNI ASSOCIATION  
**STRATEGIC PLAN 2016-2018**

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Dated: January 17, 2016

## INTRODUCTION

This strategic plan is a framework for action over the next three years (2016-2018). Its directions are fully aligned with Office of Advancement's goal *"to deepen engagement of alumni across life cycles"* and it begins to address alumni relations as a university-wide endeavour. The plan includes an updated vision of the future, and the goals and strategies to be undertaken toward that vision. It will be supported by annual operating plans and program specific plans developed and conducted by the Office of Alumni Relations, and in collaboration with faculties. The strategy will be reviewed and modified, as necessary, to align with the new institutional strategic plan, which is expected to be finalized mid-2016.

The plan was developed using an iterative consultation process with university leadership, Alumni Council, and Alumni Relations staff. Input was received and discussed during interviews, meetings and workshops.

## PLANNING CONTEXT

Alumni are the most likely people to endorse, support and invest in their alma mater, and that likelihood increases the more engaged they become. Alumni relations is about increasing alumni engagement. Efforts to engage alumni ultimately support the University's fundraising and community engagement efforts.

Alumni engagement is a shared responsibility, involving the University of Alberta Alumni Association, Office of Alumni Relations, Advancement Strategic Communications, faculties and partners across campus. Together we work to foster lifelong relationships with alumni.

### Our Evolution

The University of Alberta Alumni Association has proudly served the U of A and its alumni for more than 100 years, creating initiatives and programs that connected alumni to their University and to each other. In the early years, the focus was on keeping alumni informed and fostering connections among alumni through reunions, clubs, chapters and branches. Programs expanded over time to include awards, volunteering, mentoring, education, student outreach, family events, social media, and a variety of services and benefits. We will build on this work in the coming years and bring attention to the impressive impact of alumni on their communities, city, and province. We will engage alumni in helping the University achieve its desired future, and we will support alumni so that the relationship is mutually beneficial.

## Some Strategic Considerations

- With 267,400 living U of A graduates to engage, our capacity to involve all alumni is constrained, requiring assessment of how to deploy resources. With 75 per cent of graduates residing in Alberta and nearly 50 per cent in Edmonton, however, opportunities exist to take advantage of geographical proximity and build community-based strategies for engagement.
- Community outreach is a shared goal of the Senate, University Relations, faculties, university senior leaders, the Alumni Association and other campus partners. Coordination of effort is essential to any engagement strategy.
- Alumni engagement continues to grow, as does our understanding of our alumni audiences. At present, 30 per cent of alumni are graduates of the last decade, 29 per cent are at a life stage focused on family and career, 25 per cent are at midlife (25 to 40 years from graduation), and 16 per cent are seniors or retired. Understanding the life stages of alumni and better aligning outreach by audience will further our ability to more strategically engage them.
- The pathway to engagement starts on campus. Grads of the last decade, which make up 30 per cent of our alumni, are currently the least engaged. Students must be deliberately and purposefully motivated to become engaged alumni – this transition and relationship cannot be left to chance. An institution-wide strategy to effectively engage students and student leaders and to prepare them for their roles as active alumni in a supportive community is essential to feeding the engagement pipeline and supporting future fundraising goals.
- Many of the current programs and events offered to alumni are award-winning and highly-rated by alumni – 98 per cent rate programs as good to excellent, and 50 per cent excellent. This foundation provides a strong base on which to build. Programs will be reviewed and assessed to identify how they might be refined to align with plan goals.
- A student's experience has a significant influence on their future engagement as an alumnus. That experience is in the hands of educators and staff across the University. Collaborating with faculties to foster a culture that expresses pride openly and prepares students for the transition to becoming a connected alumnus is key.

## OUR VISION OF THE FUTURE

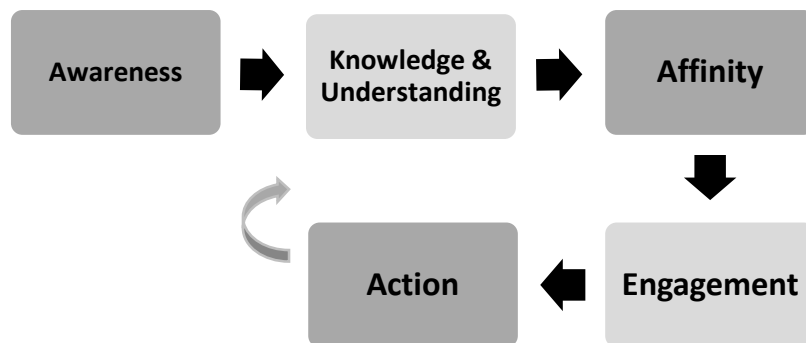
A proud and inspired community of alumni and students engaged in the life and success of the University.

## THE MISSION WE PURSUE

To build one of the world's great universities for the public good by creating mutually beneficial relationships and lifelong connections between the University of Alberta and its alumni and students

## THE ENGAGEMENT PATHWAY

The work of the Office of Alumni Relations and the Alumni Association is to create the environment, opportunity and motivation for alumni and students to engage in the life and success of the University. The following framework is the pathway to initiate, foster and deepen relationships and increase commitments to the University. The cycle repeats with each alumni programming experience and interaction with the university, ideally building a stronger relationship between alumni and the university, and deepening the understanding, affinity and contributions of alumni to the university each time.



## GOALS and STRATEGIES

Over the next three years, the University of Alberta Alumni Association and Office of Alumni Relations will focus on five goals in collaboration with our Advancement and University partners. The primary strategies to be undertaken toward these goals over the life of this plan are outlined below each goal. Work to achieve these goals could extend beyond the life of this plan.

### **Goal A: Highlight and increase alumni pride and profile in Edmonton and Alberta**

*Seventy-five per cent of alumni live in Alberta and 50 per cent live in Edmonton. While U of A grads significantly contribute to the success of our province and our communities, the impact of alumni isn't well known or promoted. We will engage in activities that more visibly highlight the U of A and its alumni, celebrating the social, cultural and economic impact of alumni past, present and future.*

#### **Strategy:**

#### **Showcase and demonstrate the positive impact of alumni on the life and success of their communities, professions and workplaces**

- Develop a systematic approach to identifying and promoting alumni accomplishments beyond *New Trail* and the Alumni Awards, including online and through social media, and facilitating self-identification and self-promotion by alumni
- Publically promote the work and impact of alumni in their communities
- Leverage the positive momentum of “Do Great Things” to create and organize initiatives, programs, events and communications that bring the professional, leadership and community contributions and milestones of alumni to the attention of target audiences within the University, alumni and the public.
- Enable alumni leaders to take an active role in identifying points of pride and encouraging others to do so
- Use a full range of communications avenues and program initiatives to enhance awareness of alumni success and broadly distribute messages, stories and points of pride

## **Goal B: Cultivate a culture of pride and loyalty among students and alumni**

*Pride and loyalty fosters support and engagement. The earlier alumni connect and engage, the more likely they will remain engaged and involved. We will undertake best practices in alumni and campus-wide student engagement by advancing a consistent outreach strategy at key milestones in the life of a student and over the life stages of an alumnus. We will demonstrate green and gold pride and open the doors of campus for alumni to enjoy and participate in the many opportunities an active campus presents.*

### **Strategies**

#### **Maximize opportunities at key touch points with students to demonstrate the value of belonging to the alumni community**

- Continue to have an alumni presence at key milestones in the life of students (e.g. Week of Welcome and convocation) and ensure this presence leads students to understand how alumni connection can support them beyond their campus university experience
- Develop a best practice outreach strategy that is consistent across campus, takes full advantage of key touch points in the life of a student and continues the prominent presence of individual alumni, as well as the Association
- Collaborate with campus partners (such as the Registrar's Office, orientation team, Convocation Committee and Faculties) to shape key messages to students and execute efforts to demonstrate the value of engaging as a student and belonging to the alumni community as students move beyond their campus experience (e.g. via job shadow opportunities, mentoring)
- Identify, get to know and cultivate student leaders, e.g., pilot program to mentor student leaders
- Actively support pride-building activities on campus, i.e., Pep Rally, Green & Gold Day, and seek ways to bring these events to the community, and the community to these events

#### **Make the University more accessible to alumni**

- In partnership with faculties and departments, invite alumni to campus to showcase athletic, cultural and educational activities aligned with alumni interests
- Pilot new online initiatives to increase our capacity to share our programs more widely, e.g., webinars, web content
- Work with University partners to demonstrate and promote pride in the University and in alumni and student accomplishments, e.g., wear green and gold; celebrate

and highlight pride points at events and in speeches; refresh programs to profile university, alumni and student achievements

- Continue to showcase research successes in educational programs and to ensure featured speakers align with key University priorities
- Provide alumni and University leaders with easy access to messages, stories, pride points and ways alumni can get involved

## **Goal C: Motivate first-time participation and engagement of alumni**

*We will learn more about alumni audience cohorts and align programs with their interests to inspire new participants to become involved, particularly grads of the last decade. Grads of the last decade are proportionately the least engaged and involved. Increasing the number of engaged alumni from this cohort is key to maintaining a pipeline of ever more engaged and invested alumni.*

### **Strategy**

#### **Develop targeted outreach initiatives by age and stage, with particular emphasis on motivating grads of the last decade**

- Conduct ongoing assessments of the interests and needs of target groups to ensure programs, services and benefits align with those interests and needs
- Refresh, refine and create program offerings and volunteer opportunities that reflect the expressed needs and interests of alumni across ages and stages
- Develop efforts that align with the unique life stages of new grads and grads of the last decade, e.g., career resources
- Clearly articulate and widely communicate the benefits of lifelong affiliation with the University, e.g., library, Extension, MOOCs, activities, services, perks
- Share assessment findings with faculties and partners who also serve the needs and interests of alumni

## **Goal D: Deepen relationships with alumni already engaged in our programs**

*The deeper a person's relationship is with their University, the more engaged he/she is likely to become, and the more likely he/she is to meaningfully contribute time and resources, and inspire others to do the same. We will get to know our highly engaged alumni much better and create opportunities to involve them in the important work of helping the University achieve its future. We will collaborate with and connect alumni and partners to create pathways that enrich involvement and contribution to the University and fellow alumni.*

### **Strategies**

#### **Use data to identify and better understand highly engaged audience cohorts**

- Apply statistical analysis and interpretation to existing programs and to the design of pathways to deeper engagement, which could include new programs, approaches and opportunities
- Share learnings with faculties and partners who also engage and serve alumni

#### **Provide and promote opportunities to meaningfully engage target alumni in the mission of the University**

- Increase the variety of volunteer experiences that involve alumni in the “work” of the University, e.g., student mentoring, career support preceptor programs, expert advice, advocacy support, networking
- Pilot a regional engagement program to identify and enrich relationships in each region, using customized experiences based on a individuals'/groups' specific needs and interests
- Actively promote volunteer opportunities to target alumni groups and individuals, and continue programming and opportunities that generate a pipeline of people becoming increasingly engaged



## **Goal E: Coordinate with Advancement and university partners to maximize resources and effort**

*We serve a large and growing constituency that interacts with the University in a variety of ways. We must work collaboratively to maximize resources and influence experiences that could inspire a supportive and involved alumni community. We will work with faculties and partners to coordinate efforts and share knowledge and resources. We will work together with our Advancement colleagues to shape and execute mutually-beneficial approaches that enhance the philanthropic support for the University. While doing so, we will keep the alumni experience top of mind.*

### **Strategies**

- Lead coordinated efforts to identify opportunities, leverage resources and to streamline programs and processes – both internally and with our partners.
- Establish common understanding of alumni audiences and their wants and needs.
- Develop and execute communications and marketing plans that advance our strategic directions and initiatives
- Maximize connections where appropriate between alumni relations programming and Advancement activities in support of the University’s engagement and fundraising goals.
- Increase affinity revenue and maximize other additional program revenue to support program growth.
- Strive to do a few things well, remaining focused on the core goals of the plan.
- Align our efforts to the broader institutional plan.