RUTGERS UNIVERSITY ALUMNI ASSOCIATION
STRATEGIC PLAN

Rutgers
University Alumni Association
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**Strategic Goal 5 (18-19)**
Increase awareness of the RUAA through enhanced, cohesive brand management and strengthening of marketing and communications efforts that foster understanding, excitement, and engagement

- Rationale & Alignment
- Tactical Measures
- Needs Assessment

**Strategic Goal 6 (20-21)**
Strengthen and improve organizational training, education, professional development, and infrastructure in support of the RUAA staff to better serve the alumni community

- Rationale & Alignment
- Tactical Measures
- Needs Assessment

**Strategic Goal 7 (22-23)**
Create a best-practice alumni association business model through enhanced revenue streams and targeted budgeting approaches

- Rationale & Alignment
- Tactical Measures
- Needs Assessment

**Appendix: RUAA Mission, Vision, Objectives (24)**
FOREWORD

It is with great pride that we share the Rutgers University Alumni Association (RUAA) strategic plan. We are at an exciting moment in the university’s long history, and this plan highlights the seven most important goals for the RUAA to accomplish over the next three years.

The plan, guided first and foremost by our mission to “engage all alumni,” is predicated on the understanding that, in the years ahead, our alumni and university community will expect more from the RUAA. With the formation of Rutgers Biomedical and Health Sciences in 2013, the RUAA has undergone significant growth and now comprises 450,000 living alumni. The university also completed its first strategic plan in 20 years, which builds on the legacies of the past and propels us toward an even greater future. In addition to these developments, in 2014 Rutgers joined the Big Ten, which is providing unique academic and athletic opportunities, as well as increased national visibility. Together, these changes are dramatically transforming the university as we approach Rutgers’ 250th anniversary. Now more than ever, the alumni association has a critical role to play in cultivating, leveraging, and sustaining resonant opportunities to educate, excite, and unite alumni, students, and friends in support of Rutgers.

The plan focuses heavily on increasing alumni engagement, and we recognize that engagement comes in many forms, at different times, and through various channels. The RUAA strategic plan, therefore, sets a rigorous agenda to facilitate the continued growth and enhanced service we must provide to advance the lifelong connection of our growing and evolving alumni community. With this strategic plan, the RUAA as part of the Rutgers University Foundation stands ready to work in concert with the entire university community to celebrate our rich history and traditions and help secure the university’s bright future.

In Rutgers spirit,

Maurice A. Griffin N LAW'94
Chair, Rutgers University Alumni Association

Donna K. Thornton
Vice President, Alumni Relations
EXECUTIVE SUMMARY

The 2014 Strategic Plan for the Rutgers University Alumni Association (RUAA) builds on the foundation provided by the 2009 RUAA Strategic Plan and aligns with the 2014 University Strategic Plan and Rutgers University Foundation strategic priorities. Providing a blueprint for the future success of the RUAA, this plan represents the collaborative efforts and thought leadership of the alumni association's volunteer leaders and staff members.

Following an introduction to the alumni association, the plan's background and development, and the RUAA's aspirations and alignment efforts, this document outlines the alumni association's key goals (not listed in order of importance):

1. Engage alumni through innovative and relevant programming and events with particular attention to high-density markets
2. Add value to the student experience at Rutgers through relevant programming and volunteer opportunities
3. Increase engagement of alumni volunteers through enhanced service and support to alumni chartered organizations and volunteer leaders with particular attention to those in high-density markets
4. Contribute to creating a culture of philanthropy at Rutgers through support of and participation in the Rutgers University Foundation
5. Increase awareness of the RUAA through enhanced, cohesive brand management and strengthening of marketing and communications efforts that foster understanding, excitement, and engagement
6. Strengthen and improve organizational training, education, professional development, and infrastructure in support of the RUAA staff to better serve the alumni community
7. Create a best-practice alumni association business model through enhanced revenue streams and targeted budgeting approaches

It is important to note that the RUAA deems all of these goals as extremely important and closely intertwined. They are not listed in hierarchical order, but rather numbered for convenience and easier reference.

Supporting each goal is a rationale statement, a list of strategic measures, and a needs assessment of the resources (communications, data, relationships) necessary to achieve the goal, as well as a discussion of any resource gaps.
To achieve these strategic goals, the RUAA will need to:

- focus on cultivating relationships with critical collaborators;
- obtain IT resources that better enable staff to complete work collaboratively, make data-driven decisions, and manage workflows with less meetings (e.g., cloud-based project management system, cloud-based document sharing capabilities, increased email capacity, more comprehensive content management system for website, more automated reporting functions);
- align staff to priorities and make strategic hires;
- align budget to priorities;
- enhance use of evaluative metrics; and
- centralize all alumni association communications functions.
**INTRODUCTION**

*About the Alumni Association*

The Rutgers University Alumni Association (RUAA) envisions a future in which all living alumni are engaged in the life cycle of the university in a manner that is meaningful to them. Toward this end, the RUAA works to engage alumni through:

- **increasing awareness** of the RUAA and its brand/identity to elevate the profile of the RUAA and establish the RUAA as a valuable resource to and for its alumni;
- **increasing event participation** to help alumni maintain connections with one another, the university, chartered organizations, and the interests alumni formed as students and to recognize alumni leadership (internally and externally);
- **increasing participation in programs** to ensure relevance with alumni and provide them with unique benefits and services (discounts, career services, university access, email accounts, etc.);
- **increasing philanthropy** to foster financial contributions to the university in support of its strategic priorities; and
- **increasing volunteerism** to cultivate support of the university community and incorporate alumni thought leadership into the RUAA, foundation, and university.

*About the RUAA’s Aspirations*

Through its work, the RUAA aspires to fulfill priorities in three key areas: alumni engagement, organizational improvements, and philanthropic initiatives.

The RUAA’s engagement aspirations center around being recognized for the association’s impact on the specific engagement-related priorities identified by the university, the foundation’s Executive Leadership Group, and the RUAA. The RUAA can work toward this aspiration by first building a student engagement program that develops future alumni leaders and donors. Another avenue includes building a volunteer network that generates enthusiasm and effective calls-to-action and is self-curating. Finally, to achieve the engagement aspirations, the RUAA must build a stronger brand to foster pride, excitement, and loyalty among alumni.

Being valued as an integral partner by the Rutgers University Foundation is another key aspiration for the RUAA. Through educating alumni on the value of giving back to their alma mater, leading by example through staff and chartered organization philanthropic participation, and showcasing university priority areas in multimedia communications and events, the RUAA aspires to be a leader in fundraising support and philanthropic initiatives.
From an organizational standpoint, the RUAA aspires to become a best-practice and respected alumni association with our Big Ten alumni association peers across the country. To do this, the RUAA must work toward creating a self-curating community, becoming an employer of choice, and aligning resources with areas proving to demonstrate the greatest return on investment.

These three aspirations, engaging alumni volunteers and students, becoming a best-practice organization, and having an impact on the fundraising of the institution, represent the alumni association’s high self-expectations. While working toward these ends, the alumni association aims to position itself as a true leader in alumni relations.

About the Strategic Plan

The RUAA developed a strategic plan in 2009 and has progressed well under the guidance of that plan. Following the release of the Rutgers University Strategic Plan, which was adopted by the Board of Governors on February 4, 2014, and the review of the Rutgers University Foundation strategic priorities established by the Executive Leadership Group, the RUAA developed a new plan. This new plan ensures the alumni association will better align with university and foundation priorities as the RUAA improves its alumni program in all areas. The priorities clearly set out by these plans give the RUAA focus and provides opportunities for new and innovative thinking with regard to the delivery of a best-in-class alumni relations program through:

Organizational Improvements

1. Develop better metrics and more transparent operations.
2. Become more action-oriented and less bureaucratic.
3. Redefine priorities and programming to support the university and align resources accordingly.

Fundraising Improvements

1. Increase the undergraduate alumni participation rate.

Engagement Improvements

1. Refocus the RUAA’s efforts in the priority areas identified in the university’s plan and foundation’s strategic priorities.
2. Engage students in a way that is meaningful and fulfilling for them.

This new plan was developed with input from the RUAA staff and volunteer board of directors and represents the collective thoughts of each group. Each group was provided the University Strategic Plan; information about the foundation’s strategic priorities; and the RUAA’s mission, vision, and objectives to consider in advance of providing input. The RUAA captured each group’s reactions to the plan and thought leadership about aspirations, implications, and priorities.
The entire RUAA staff met on February 18, 2014 for a day-long discussion ending with a brainstorming exercise to identify tactics to undertake in support of the priorities. The RUAA priorities were those that were identified by the foundation’s Executive Leadership Group that the RUAA staff thought had a direct impact on alumni relations activities.

The RUAA Board of Directors were given the same information and were asked to provide feedback via email. That feedback was reviewed by the RUAA Executive Committee, along with the staff input. A conference call was held with the full board of directors on March 3, 2014 to discuss the priorities and review the tactics important to the board as a result of this process.

A review of the RUAA’s mission, vision, and objectives was conducted (see Appendix), and the consensus of the staff and board of directors was that these are still relevant as they exist and that the work that is being done now and in the future will continue to support this important foundation upon which the RUAA was created in 2008.
STRATEGIC GOAL 1

Engage alumni through innovative and relevant programming and events with particular attention to high-density markets

Rationale & Alignment:

For many alumni and friends, engagement equates to engaging the university and alumni association through relevant and accessible programming. The RUAA must be recognized for high-quality and relevant offerings in every program and initiative that is implemented. The alumni association’s legacy (Homecoming and Alumni Weekend/Reunion) and signature events offer the greatest opportunities to engage our alumni, and these two key program areas represent high-impact engagement opportunities.

With nearly 275,000 (more than 60 percent of) Rutgers’ alumni living in six high-density market areas (central New Jersey, northern New Jersey, southern New Jersey, New York City, Philadelphia, and Washington, D.C.), the RUAA must have an increased focus in these particular markets. An increased focus on these areas does not negate our responsibility to reach alumni in other areas, such as California (12K+ alumni in the state), Florida (13K+ alumni in the state), and other regions across the country and globe. Rather, the RUAA must realize the potential in these six strategic areas and focus on each as a priority for additional, not necessarily replacement, programming and outreach.

This table highlights the alumni association’s six high-density markets:

<table>
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<th>Central NJ (e.g., Middlesex)</th>
<th>Northern NJ (e.g., Bergen, Essex)</th>
<th>Southern NJ (e.g., Camden)</th>
<th>New York City metro area</th>
<th>Philadelphia, PA metro area</th>
<th>Washington, D.C. metro area</th>
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<td>&gt;90K (20%)</td>
<td>&gt;62K (14%)</td>
<td>&gt;50K (11%)</td>
<td>&gt;40K (9%)</td>
<td>&gt;12K (2.7%)</td>
<td>&gt;11K (2.4%)</td>
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This strategic goal supports these RUAA objectives: including all chartered organizations, emphasizing the importance of Rutgers, supporting Rutgers, developing a world-class alumni relations program, instilling high regard for Rutgers, and developing a service mindset; supports these foundation priorities: deploying resources to focus on priorities, enhancing our reputation, increasing participation, capitalizing on the Big Ten entrance, and evaluating Alumni Weekend/Reunion and Homecoming; and supports the university’s strategic priority area of: enhancing public prominence.
**Tactical Measures:**

1. Increase Homecoming participation through relevant and meaningful programming and initiatives at all Rutgers locations
2. Refine the process of Alumni Weekend/Reunion development, establish innovative approaches at each university location, and consider alumni leader engagement, volunteer development, chartered organization participation, and young alumni involvement
3. Provide added focus and central support through RUAA events and programming to Rutgers University–Camden, Rutgers University–Newark, and RBHS—with particular attention to priorities set in consultation with each respective chancellor/dean
4. Review and restructure, where appropriate, signature event offerings
5. Introduce a new signature event series focused on the six key high-density markets
6. Develop cross-functional teams for all major program initiatives to ensure appropriate staff are addressing areas of expertise
7. Partner with chartered organizations, when appropriate, around RUAA programs and events
8. Introduce a comprehensive program planning process to include a tool that allows the RUAA to gauge the potential impact of a program/event, a thorough briefing process, and a post-program/event reporting and evaluation mechanism
9. Review and rework, where necessary, the alumni benefits program to ensure the services the RUAA provides are desirable, relevant, and meaningful to alumni
10. Create and implement a data-driven, targeted marketing and communications plan to grow awareness of the RUAA and to raise the visibility of, educate alumni about, and drive participation in events and alumni benefits programming

**Needs Assessment:**

**Communications:** robust marketing/communications plans and customized resources based on data. Successful execution of communication and marketing strategies will require follow-up, attention to detail, creativity, and collaboration. To achieve desired goals, the effectiveness of the marketing plan should be gauged against established benchmarks, and ongoing programs should be fine-tuned as needed. Metrics for evaluating the effectiveness of the communication plan should also be established, along with short-, medium-, and long-term goals.

**Data:** post-event feedback, SMSA or SMA reports (Standard Metropolitan Statistical Area), tracking of communications, timely reporting

**Relationships:** community outreach offices, event teams on Rutgers University–Newark and Rutgers University–Camden, chartered organizations, athletics, internal teams, foundation leadership, Office of the President, provost, academic units, Office of Institutional Research, Corporate & Foundation Relations (CFR)

**Resource Gaps:** staffing needs, resources to fund new initiatives in high-density markets
STRATEGIC GOAL 2

Add value to the student experience at Rutgers through relevant programming and volunteer opportunities

Rationale & Alignment:

The university’s strategic plan makes it clear that the student experience at Rutgers must improve. Being engaged with students is a new and necessary area of focus for the RUAA. The RUAA has a place at the table when looking to transform the student experience and a responsibility and need to connect with students early on and throughout their time at Rutgers.

This strategic goal supports these RUAA objectives: emphasizing the importance of Rutgers, supporting Rutgers, developing a world-class alumni relations program, instilling high regard for Rutgers, and developing a service mindset; supports these foundation priorities: deploying resources to focus on priorities, enhancing our reputation, and implementing a student alumni relations program; supports the university’s strategic priority areas of: transforming the student experience and enhancing public prominence.

Tactical Measures:

1. Create and fund a student involvement unit or student alumni association at the RUAA to focus on pride, mentorship, athletics, history, philanthropy, and programming of large-scale and accessible events to engage students during their entire student experience
2. Engage students at RUAA offices and with staff and volunteers
3. Explore student-centric member benefits
4. Partner, when appropriate, with other university departments (e.g. student life, athletics, greek organizations, etc.) to augment current initiatives
5. Utilize social networking and student communication vehicles (systemwide) to engage and communicate with current students
6. Enhance chartered organization support to students through scholarship fundraising, partnership with admissions for recruiting purposes, service projects, mentorship initiatives, and a robust student send-off program
7. Examine the possibility and advantages of engaging the student presidents/leaders from Rutgers University–Camden, Rutgers University–Newark, Rutgers University–New Brunswick, and RBHS to better connect with the RUAA board
8. Develop a plan to engage award recipients with academic units to ensure student access to high-profile and accomplished Rutgers alumni
9. Create and implement a data-driven, targeted marketing and communications plan to engage, empower, and raise the visibility of current Rutgers students and their involvement with the RUAA

**Needs Assessment:**

**Communications:** robust marketing/communications plans and customized resources based on data. Successful execution of communication and marketing strategies will require follow-up, attention to detail, creativity, and collaboration. To achieve desired goals, the effectiveness of the marketing plan should be gauged against established benchmarks, and ongoing programs should be fine-tuned as needed. Metrics for evaluating the effectiveness of the communication plan should also be established, along with short-, medium-, and long-term goals.

**Data:** Student warehouse data, tracking of “members,” tracking of communications, timely reporting

**Relationships:** Student affairs, athletics, annual giving student program, and admissions

**Resource Gaps:** Staff and funding to support the new initiative
STRATEGIC GOAL 3

Increase engagement of alumni volunteers through enhanced service and support to alumni chartered organizations and volunteer leaders with particular attention to those in high-density markets

Rationale & Alignment:

The RUAA volunteers represent a key constituency when looking to advance the RUAA, the foundation, and the university through service, philanthropy, pride, and beyond. It is imperative that the RUAA strengthen chartered organizations in leadership, local reach, and through the support received from the alumni association and the university. Also, strengthening and aligning volunteer leadership through the board and Alumni Leaders Council (ALC) structures are critical to the RUAA’s success.

The staff has worked hard to care for and help the chartered organizations grow in size and activity over the past five years. However, the investment in the groups, from a resource standpoint, has been constant with little growth. This graph demonstrates the chartered organization growth (in sheer numbers) since the RUAA’s creation in 2008. With limited budget growth, the RUAA now has 151 chartered organizations (as of 4/14), a 110 percent increase since 2008.
More than 60 percent of Rutgers’ alumni living in the six high-density markets of central New Jersey, northern New Jersey, southern New Jersey, New York City, Philadelphia, and Washington, D.C. (see table in goal 1). The RUAA must program heavily in these areas to demonstrate relevance, ensure visibility, and engage alumni. Again, increased focus on these areas does not negate our responsibility to reach alumni in other areas. However, the RUAA must realize the potential in these six strategic areas and focus on each as a priority for additional, not necessarily replacement, programming and outreach.

Volunteer leaders on the RUAA board and ALC also represent an area of interest for the RUAA. The RUAA must make every attempt to ensure a robust ballot process exists that attracts leaders from diverse backgrounds and is reflective of the volunteer needs that mirror the organizational priorities. Also, the RUAA should regularly examine its leadership organizations in an attempt to align the committees with the alumni association’s strategic priorities.

This strategic goal supports these RUAA objectives: including all chartered organizations, emphasizing the importance of Rutgers, supporting Rutgers, developing a world-class alumni relations program, instilling high regard for Rutgers, and developing a service mindset; supports these foundation priorities: completing the Our Rutgers, Our Future Campaign, deploying resources to focus on priorities, enhancing our reputation, increasing participation, and evaluating charter processes and outcomes; supports the university’s strategic priority area of: enhancing public prominence.

Tactical Measures:

Organizational Tactics:
1. Review and refine the charter process for all group types
2. Institute standardized basic requirements for chartered organizations
3. Audit and update the funding and support model of chartered organizations to ensure success and the ability for groups to maintain RUAA expectations
4. Develop tools to gauge success and identify opportunities for chartered organizations
5. Examine and expand chartered organization recognition and award programs
6. Introduce chartered organizations into high-density markets, including throughout the state of New Jersey
7. Align volunteer leadership committees with organizational priorities (Charter Relations Committee and others)
8. Create and implement a data-driven, targeted marketing and communications plan to engage, empower, and raise the visibility of alumni volunteers

Alignment Tactics:
9. Strengthen chartered organization participation in the RUAA and foundation
10. Support and assist alumni relations activities within each academic unit
11. Improve relationships with academic units across the university system
12. Leverage entry into the Big Ten through aspirant peer interaction
Training & Education Tactics:
13. Continue to develop a comprehensive training and education program for chartered organizations and volunteer leaders
14. Clarify and communicate board member expectations throughout all volunteer groups, with particular attention to the RUAA board
15. Ensure a robust staff to ensure volunteer interaction plan is in place
16. Communicate relevant and timely information on a regular basis with affiliate group and volunteer leaders—elevating interest and knowledge about Rutgers pride, stories of interest, best practices, and more

Needs Assessment:

Communications: robust marketing/communications plans and customized resources based on data, web tools, turnkey resources such as Print on Demand (POD). Successful execution of communication and marketing strategies will require follow-up, attention to detail, creativity, and collaboration. To achieve desired goals, the effectiveness of the marketing plan should be gauged against established benchmarks, and ongoing programs should be fine-tuned as needed. Metrics for evaluating the effectiveness of the communication plan should also be established, along with short-, medium-, and long-term goals.

Data: ability to code volunteers in database, tracking of communications, timely reporting, data share

Relationships: RUAA board and committee members, volunteer leaders to buy-in

Resource Gaps: budget to reflect increased commitment and staffing to address academic schools and RBHS relationships
STRATEGIC GOAL 4

Contribute to creating a culture of philanthropy at Rutgers through support of and participation in the Rutgers University Foundation

Rationale & Alignment:

Demonstrating the importance of philanthropy throughout the university community can have an immense impact on many aspects of Rutgers. The success of the university and the RUAA will become increasingly reliant on private philanthropy. The RUAA must do its part to ensure the success of the current campaign and all future fundraising endeavors.

This strategic goal supports these RUAA objectives: including all chartered organizations, emphasizing the importance of Rutgers, supporting Rutgers, developing a world-class alumni relations program, instilling high regard for Rutgers, and developing a service mindset; supports these foundation priorities: completing the Our Rutgers, Our Future Campaign, launching a suite of mini-campaigns during the 250th anniversary, enhancing our reputation through communications, deploying resources to focus on priorities, increasing participation, and reducing reliance on university budgetary support; supports the university’s strategic priority areas of: enhancing public prominence, building faculty excellence, envisioning tomorrow’s university, and transforming the student experience.

Tactical Measures:

1. Impact alumni participation rates
2. Train and educate alumni relations staff with respect to development efforts
3. Encourage RUAA chartered organizations to support fundraising initiatives to increase chartered organization endowments through the foundation
4. Promote the establishment of an alumni house at each of the three university locations: Rutgers University–Camden (in progress), Rutgers University–Newark, and Rutgers University–New Brunswick
5. Launch and grow a targeted RUAA annual giving program
6. Explore on-site gifting technology
7. Create and implement data-driven, targeted marketing and communications plan to educate alumni about the need for increased alumni financial support, empower alumni to give, and raise the visibility of alumni philanthropic support
Needs Assessment:

**Communications:** robust marketing/communications plans and customized resources based on data. Successful execution of communication and marketing strategies will require follow-up, attention to detail, creativity, and collaboration. To achieve desired goals, the effectiveness of the marketing plan should be gauged against established benchmarks, and ongoing programs should be fine-tuned as needed. Metrics for evaluating the effectiveness of the communications plan should also be established, along with short-, medium-, and long-term goals.

**Data:** tracking of communications, timely reporting, aspirant peer data

**Relationships:** development colleagues, in particular, Annual Giving, Athletic Development, and Campaign Communications

**Resource Gaps:** need to streamline processes and systems to close data and action gaps between RUAA initiatives and development outreach
STRATEGIC GOAL 5

Increase awareness of the RUAA through enhanced, cohesive brand management and strengthening of marketing and communications efforts that foster understanding, excitement, and engagement

Rationale & Alignment:

This strategic goal underpins the success of all organizational, fundraising, and engagement aspirations of the RUAA and all goals identified in this plan. Without awareness building, the RUAA will not be positioned to engage alumni and current students, recruit staff, or support the foundation and the university.

This strategic goal supports these RUAA objectives: emphasizing the importance of Rutgers, supporting Rutgers, developing a world-class alumni relations program, instilling high regard for Rutgers, and developing a service mindset; supports these foundation priorities: enhancing our reputation through more effective communications, implementing dashboard analytics, and enhancing recruitment of staff; supports the university’s strategic priority area of: enhancing public prominence.

Tactical Measures:

1. Increase relevance and value of communications
   - Conduct research and organizational self-assessment, including, but not limited to, benchmarking against our peers and aspirational peers, collecting baseline data, identifying barriers, and analyzing existing outreach efforts, to help contextualize future efforts and determine opportunities
   - Segment audience based on research findings
   - Identify proof points and competitive claims appropriate for each audience and initiative
   - Develop key and supporting messaging appropriate for each audience and initiative based on the research findings and identified target audiences
   - Increase availability and use of proof points in all digital, verbal, and written communications
   - Increase availability and generation of shareable (“freemium”) content
   - Unify messaging and visual cues

2. Centralize communications to provide cohesive oversight of branding, messaging, and visual elements

3. Review and rework, where appropriate, marketing and communications plans so they are data-driven, measurable, timed, and employ innovative, emerging, and targeted approaches
4. Review and rework, where appropriate, a content development plan for all communication channels
5. Review and enhance how the university defines “alumni”
6. Develop an arsenal of tools and resources to empower volunteer leaders and alumni relations staff and facilitate consistency in branding, messaging, and visual identity across all university locations and outreach efforts
7. Use dashboard analytics to track all outreach, evaluate efforts, and implement changes as needed

Needs Assessment:

Communications: robust marketing/communications plans and customized resources based on data, web tools, website with information architecture and infrastructure prepared to effectively move individuals from awareness through the funnel to loyalty. Successful execution of communication and marketing strategies will require follow-up, attention to detail, creativity, and collaboration. To achieve desired goals, the effectiveness of the marketing plan should be gauged against established benchmarks, and ongoing programs should be fine-tuned as needed. Metrics for evaluating the effectiveness of the communication plans should also be established, along with short-, medium-, and long-term goals. Additionally, the development of a comprehensive shared foundation and alumni association communications calendar is a priority so the RUAA can better leverage outreach opportunities and ensure alumni are not over-contacted.

Data: handle big data implications of including more people in the RUAA, collection of baseline data, tracking of all communications, timely reporting (these data collection and management processes should be automated as much as possible to lessen impact on staff time)

Relationships: build stronger relationships with alumni relations staff members at all three university locations, alumni leaders, as well as colleagues across the three university locations, especially those in the foundation, student life, athletics, and university communications

Resource Gaps: To successfully manage the brand, the communications team will need to (A) centralize the branding, budgeting, strategic planning, and messaging functions of all communications (systemwide and across initiatives); (B) conduct an IT audit and obtain more comprehensive IT support; and (C) increase collaborative communications efforts (systemwide and across initiatives). Although the communications team already underwent some restructuring since November 2013 to streamline processes and workflows and accommodate this impending transition, there will be budgetary and staffing implications as the team takes on additional duties and redefines “alumni.”
STRATEGIC GOAL 6

Strengthen and improve organizational training, education, professional development, and infrastructure in support of the RUAA staff to better serve the alumni community

Rationale & Alignment:

The RUAA is committed to recruiting and retaining the most talented staff members—a critical area in connecting with alumni and achieving the goals found in this plan. To that end, the RUAA will continue to focus on staff training and education. With an ever-increasing number of events, programs, and initiatives, the number of staff at the RUAA has actually decreased in size since the RUAA was first conceived in 2008. In fact, in FY09, the RUAA comprised 30 staff. Today, that number stands at 27 (a 10 percent drop in staff resources). The decrease in RUAA staff numbers is in light of significant gains in productivity. The RUAA will continue to work toward a more efficient and lean team. However, the alumni association must be considerate of staff burnout, satisfaction, and effectiveness, especially as the RUAA looks to increase programming offerings in high-density areas, expand our membership and revenue benefits, increase chartered organization support, build out a new student program, and improve upon and centralize our strong communications infrastructure.

This strategic goal supports these RUAA objectives: supporting Rutgers, developing a world-class alumni relations program, and instilling high regard for Rutgers; supports these foundation priorities: deploying resources to focus on priorities, enhancing our reputation, enhancing the recruitment, retention, and development of staff, making meetings more strategic, and engaging staff in planning; supports the university’s strategic priority area of: enhancing public prominence.

Tactical Measures:

1. Conduct a staff needs assessment
2. Align staff to address strategic goals and better serve alumni
3. Create positions, when appropriate and needed, based off of organizational priorities
4. Periodically review staff classification
5. Maintain and expand focus on professional development and staff participation in CASE, BTARI, industry-specific sessions, advanced degrees, etc.
6. Work toward creating a vibrant, fun, and inclusive workplace for all employees of the RUAA
7. Explore more opportunities for staff self-assessment
8. Facilitate career pathing and explore opportunities for growth
9. Encourage and expect more strategic and focused staff meetings at all levels of the organization
10. Conduct an assessment of tools and resources and ensure staff have each to effectively and efficiently complete their work
11. Insist on transparency when and where appropriate
12. Ensure accountability through the setting of clear expectations and goals for staff
13. Create and implement a data-driven, targeted marketing and communications plan to engage, empower, and raise the visibility of staff and their accomplishments with the RUAA—and to create and enhance affinity with the RUAA and wider Rutgers community

Needs Assessment:

Communications: robust marketing/communications plans and customized resources based on data. Successful execution of communication and marketing strategies will require follow-up, attention to detail, creativity, and collaboration. To achieve desired goals, the effectiveness of the marketing plan should be gauged against established benchmarks, and ongoing programs should be fine-tuned as needed. Metrics for evaluating the effectiveness of the communication plan should also be established, along with short-, medium-, and long-term goals.

Data: exit interview data, tracking of communications, timely reporting

Relationships: university and foundation HR teams, foundation IT colleagues

Resource Gaps: explore the need to redirect some professional development funds, IT infrastructure that allows for cloud-based sharing of documents (to enable staff to work collaboratively and share large documents that email system does not allow), cloud-based project management system for all staff (to enable team to more effectively manage workflows, approve tasks/documents, and also make meetings more strategic), increased email capacity (so staff can maintain and easily access older emails), automation of work where possible (so staff can spend more time on priorities)
STRATEGIC GOAL 7

Create a best-practice alumni association business model through enhanced revenue streams and targeted budgeting approaches

Rationale & Alignment:
Aspirant peers within alumni relations maintain a mix of university/foundation funding and third party income sources to support priority areas. The RUAA should work to strengthen its approaches with respect to income generation and budgeting of priorities with high returns on investment. A renewed focus on budgeting of priorities found within this strategic document is necessary.

The RUAA benefits program (third party) plays a vital role in financial stability—with over $650,000 in revenue. The increase of revenue for the RUAA is reliant on revenue growth, particularly through our benefits portfolio, consisting of a new credit card and financial package, insurance, travel, and entrepreneurial programs. The credit card program (through a new RFP) offers significant opportunity for expanded revenue. In FY13, the RUAA saw slightly over $18,000 in private support. Beyond direct support—the role of the RUAA, with respect to development, can be realized through visibility in support of development efforts and a sustained and concerted effort toward funding RUAA priorities.

The following graphic demonstrates the alumni association’s funding streams (FY13):

Funding Sources

- University: 50%
- Foundation: 28%
- Third Party: 16%
- Private Support: 6%
- Cost Recovery: 0%
This strategic goal supports these **RUAA objectives**: emphasizing the importance of Rutgers, supporting Rutgers, and developing a world-class alumni relations program; supports these **foundation priorities**: completing the *Our Rutgers, Our Future* Campaign, launching a suite of mini-campaigns during the 250th, enhancing our reputation through communications, deploying resources to focus on priorities, increasing participation, and reducing reliance on university budgetary support; supports the **university’s strategic priority areas** of: enhancing public prominence, building faculty excellence, envisioning tomorrow’s university, and transforming the student experience.

**Tactical Measures:**

1. Implement a budgeting process grounded in the funding of priorities
2. Encourage RUAA volunteer leadership to support the RUAA through program endowments
3. Promote the establishment of an alumni house at all three university locations: Rutgers University–Camden (in progress), Rutgers University–Newark, and Rutgers University–New Brunswick
4. Launch and grow a targeted RUAA annual giving program
5. Strengthen and expand corporate relationships, underwriting, and sponsorships
6. Explore new entrepreneurial programs and relationships to increase revenue to the RUAA and benefits to alumni
7. Refine the RUAA program cost-recovery model
8. Expand member benefits program to build relevance with Rutgers alumni—with particular attention to career services and alumni travel
9. Secure a new credit card and financial portfolio partner
10. Leverage success and increase revenue from insurance programs
11. Create and implement data-driven, targeted marketing and communications plan to raise the visibility of, educate alumni about, and drive participation in the alumni benefits program, the alumni house campaigns, and the RUAA’s annual giving efforts

**Needs Assessment:**

**Communications:** robust marketing/communications plans and customized resources based on data. Successful execution of communication and marketing strategies will require follow-up, attention to detail, creativity, and collaboration. To achieve desired goals, the effectiveness of the marketing plan should be gauged against established benchmarks, and ongoing programs should be fine-tuned as needed. Metrics for evaluating the effectiveness of the communication plan should also be established, along with short-, medium-, and long-term goals

**Data:** tracking of communications, timely reporting

**Relationships:** development, in particular, Annual Giving, Athletic Development, Corporate & Foundation Relations (CFR), and RUAA corporate contracts, Athletics, Career Services, and travel partners

**Resource Gaps:** streamline processes and systems to close data and action gaps between RUAA initiatives and development outreach
APPENDIX

Mission of the Rutgers University Alumni Association:

“Advancing Rutgers University by Engaging All Alumni”

Vision/Purpose:

“The purpose of the Association is to advance the best interests and well-being of Rutgers University by engaging all alumni in the life of the institution through communication, programming, services, and volunteer opportunities.”

Objectives:

1. Include all alumni organizations
   • The RUAA respects and nurtures a full and inclusive range of alumni organizations

2. Emphasize the importance of Rutgers
   • The RUAA emphasizes the importance of Rutgers to the state of New Jersey, the nation, and the world

3. Support Rutgers
   • The RUAA adds value to Rutgers and supports its mission

4. World Class Alumni Relations Program
   • The RUAA partners with all members of the Rutgers community to build a world-class alumni relations program

5. High Regard for Rutgers
   • The RUAA strengthens Rutgers’ high regard for its alumni

6. Service Mind Set
   • The RUAA commits to integrity, service, and diversity