

UO ALUMNI ASSOCIATION



OUR FUTURE. OUR PLAN.

WE ARE OREGON.

We are Ducks.

We are distinct.

Diverse and yet united.
180,000 strong, determined,

To make our way
And to make a difference.

We are Ducks.

We are destined,
For success, for service, for greatness.

We are Doctors and Dreamers, Dancers and Doers
Doing incredible things.

We are Ducks.

Provocative, innovative and active.
Taking risks, and giving back

We respect tradition but challenge convention.
We bleed Green & Gold, Black & Blur (& sometimes Chrome)

We are Ducks.

We flock together.
To celebrate and educate,

Counsel and connect,
With each other and with our alma mater.

We are Ducks.

Once, now and always.
Dedicated,
To our causes and to each other.

Indivisible, unpredictable, unstoppable.

We were born to fly.

We are Different.

We are Ducks.

WE ARE OREGON.

- Written by Corrigan L. Hansen, Class of 1986

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Introduction and Executive Summary

Introduction

It doesn't happen for all the people who call themselves Ducks. But it happens for a lot of them. After years of hard work, blood, sweat and tears, they find themselves indelibly changed.

Years of late nights, studying, class work, reading, dead weeks, midterms, and finals . . . and then it all comes down to one definitive moment: a walk onto the stage to receive a little piece of parchment emblazoned with three simple words: *University of Oregon*.

And it's in this moment most realize just how different this experience has made them. They've evolved, changed and had their futures forever altered. They've also made lifelong friendships and forged relationships with people of all stripes. They've learned how to think critically, how to care openly, and how to work hard to make a difference in the world.

They've become a Duck.

Then they walk off the stage. And the realities of life hit them right in the face.

They begin to use their education in the workplace, with their families and in their communities.

Job. Family. Kids. Life.

And after a while those glorious days in Eugene at the UO are long gone from the memory banks.

But this doesn't have to happen. The University of Oregon Alumni Association can provide the means that can best help Ducks stay connected with the UO – and the UO stay connected with them.

The UOAA is where ongoing, lifelong relationships with the UO begin.

Executive Summary

Founded in 1879 by the first five graduates of the University of Oregon (UO), the University of Oregon Alumni Association (UOAA) was organized with the expressed purpose of providing alumni support to advance the UO's mission. Since its inception, the UOAA has always been integrally linked to the UO and is a key organization designed to make the UO better.

Over these years, the alumni body has helped guide the UO, made significant strides in advancing the UO's mission, provided a strong network for Ducks and helped keep alumni engaged in the life of the institution. Most recently, this engaged group of alumni rallied to build one of the most spectacular alumni centers in the country to provide the UO a gateway for Ducks to flock home.

There have, however, been challenges for the UOAA as membership numbers have declined, revenue sources have dropped, and the internal understanding of its role in the life of the university has become unclear. It is against this setting that the UOAA has decided to make a significant strategic shift in its long-range direction. The model we have operated under for so many years is no longer viable.

Just like the first five graduates, we now count this as a definitive mark in the history of the UOAA. This is our time to focus and invest in our future.

Once, now and always.

We are Ducks.

This plan lays out our approach to engage alumni, solve the challenges facing us, increase our impact on alumni relations efforts that support the UO, increase constituency partnerships and enhances the perception of the UOAA as a relevant part of the life of the UO.

The UOAA needs both clear, long-term strategic direction and a re-branded UOAA that goes to market in a fresh, bold and clear manner, breaking through the clutter and clearly communicating the value proposition of the UOAA. Namely, that the UOAA makes it easy for Ducks to continue, foster and grow their relationships with each other ... and the University of Oregon.

The structure of this long-range plan is simple, but very direct. The UOAA needs to hone its focus, and leverage its limited resources, towards a core mission of fostering lifelong relationships with alumni. The UOAA needs to reverse a trend of nonstrategic expense management and invest in three key areas: its brand, its partnership with key constituents who share in the UOAA mission, and the diversity of the organization. As the

organization aggressively focuses on its core mission of fostering lifelong relationships and intentionally invests in key areas, the UOAA will be better positioned to take control of the health and vitality of its future.

This plan calls for an immediate investment, of both human and financial capital, in the first few years to reset the UOAA and align it with its mission. During this time of focus, the plan additionally calls for increased scrutiny of all critical metrics for success to ensure the organization and its partners are receiving a return on the investments. These questions should be considered: Are we reversing our decline in revenue? More importantly, are we more intently aligning ourselves with our mission of fostering lifelong relationships and making the UO stronger?

This plan must be dynamic, flexible and adaptable. This plan builds in ongoing and consistent review of all tactical initiatives across all levels of the organization to ensure we are advancing our strategies and accomplishing our goals. If we are accomplishing our goals, then we stay the course. If we are not, then we will adjust or drop that tactic. Being bold enough to make these types of tactical adjustments will ensure that this document doesn't sit on a shelf and collect dust. And it ensures that we will accomplish our goals, ultimately fostering strong, lifelong relationships with all Ducks.

While clear and direct, this strategic change of course will need support from the UOAA Board, Chapters and the UO community, as changing the course of an organization may very well result in growing pains. Such a course change can be bumpy, but we remain confident that this direction presents great promise for the UOAA, our alumni and the UO.

Situational Analysis

Competition and Category

The UOAA doesn't have direct competition; not many Ducks are going to join another alumni association. However, there are indirect competitors against whom the UOAA does compete. Many alumni who are not members of the UOAA indicate they are not members because they are not sure what's in it for them.

There are other UO organizations, however, that are in competition for membership dollars. According to alumni interviewed, they are confused about groups such as the Duck Athletic Fund, the Oregon Club, various donor societies, Order of the O, and the Annual Fund Campaign. At some level there is an understanding that the groups are different, but many think that membership in one equates to membership in all. Of the primary areas of confusion is the idea that all alumni are automatically members of the dues-based UOAA. A common comment is, "I think I'm a member . . . After all, I graduated from Oregon."

The UOAA does, however, compete in a dues-based membership/association category. The alumni audience understands this distinction and, as such, clearly looks for member benefits in exchange for dues paid. This model has been set by other organizations such as AAA, Chambers of Commerce, etc. And competing in this category causes the UOAA member, and nonmember, to seek exclusive benefits for dues paid. Upon understanding that dues are not a donation to the UO, alumni are very clear: "What do I get for my membership?"

Stakeholders

There are a number of key stakeholders to take into consideration for the UOAA's long-range plan.

Alumni – Both members and nonmembers, this is a diverse group of caring individuals we serve and to whom we communicate with on a regular basis.

UOAA Board – A key leadership element of the organization, the UOAA Board of Directors is comprised of 44 members representing the entire UO alumni population.

UOAA Staff – The UOAA staff are the tacticians who implement grand ideas and control the day-to-day perception of the alumni association with both alumni and internal UO constituents.

UO Constituents – This body represents every department within the UO organization, including academic units, operating units, athletics, and the student population. As such this is a key group shaping perception, direction and full adoption of strategic change within the alumni association.

UOAA Chapters – This is truly where the rubber meets the road and our alumni start their engagement. Comprised of 22 boards, this group of volunteers acts as our franchise agents and represent both the UOAA and UO in a variety of local events.

UO Friends and Community – Our alma mater is loved by many and its mission shared by those in our Duck family who did not attend the university. There are also those in our community who are aligned with our passion for the UO. As such, our plan will include them in advancing our mission.

SWOT Analysis

The following summary is a compilation of information gathered from interviews of UO audiences, the UOAA Board, alumni, and UOAA staff.

Internal Considerations

Strengths

- Dedicated, hard-working staff
- Great connectors on staff
- Staff enjoy creating relationships
- Ford Alumni Center
- Large concentrations of devoted alumni
- Well-branded university
- Ability to manage a variety of tasks
- Endowment

Weaknesses

- Staff salary equity
- Lack of diversity in UOAA overall
- Lack of focus on key areas
- Not enough staff to execute all ideas
- No clear position and/or value of the UOAA

External Considerations

Opportunities

- Ford Alumni Center
- Create unique member-only benefits
- More academically-related events/activities
- Make primary driver to membership be UO pride
- Increase membership penetration
- Membership growth in Portland

Threats

- Evaluation of events for relevancy and results
- No clear member-only benefits
- Too much focus on athletic events
- No clear reason to join association
- Overall membership penetration is low
- Portland penetration is low

Profile

We serve all Ducks. But who are they? Well, they are evenly split between women and men, most have undergraduate degrees and they are more likely to be from the 1990-2010 graduating classes. While we serve Ducks everywhere, almost two-thirds of Ducks live in Oregon. Three-fourths live in Oregon and Washington combined. And nearly nine out of ten Ducks reside in the four western states of Oregon, Washington, California, and Arizona. So while we serve all Ducks, those Ducks tend to be flocked in the west.

The Ducks we spoke with consider the persona of the University of Oregon to be well-educated, smart, successful, committed to excellence, and personable. Ducks are more likely to associate the UO with personalities such as Ann Curry, Phil Knight, Oprah Winfrey, and George Clooney. They consider themselves reasonably aware of the UO and its activities. Activities they are most aware of are football/athletic events, tailgaters, and fundraising efforts. When they return to the UO pond, Ducks come back mostly for a football game, to visit the town or a friend, or to reconnect with their Greek-affiliated house.

Overall, Ducks have a positive and favorable view of their alma mater.

Now then, what about their view of the UOAA?

The most overwhelming response from Ducks about the persona of the UOAA was, well, nothing. When traits were mentioned, Ducks said that were that we are talented, a bit clickish, that we represent the UO well and are loyal to our alma mater. Almost two-thirds of those we interviewed said they had no idea what the UOAA does. The rest think we “hit them up for money” or do something with athletics. Ducks associate the UOAA with personalities such as Phil Knight, Joey Harrington, Rodney Dangerfield, and Peter Jacobsen.

Interestingly, while Ducks may not know much about what we do, they believe that UOAA membership benefits the UO. The benefit, according to them, is that we keep alumni connected/informed, that we raise money for the UO, that we provide scholarships, and that the UOAA creates support for the UO. Not bad. Those Ducks who are UOAA members joined primarily because of their pride in the university and because they like getting information about the UO. Other reasons were the tailgaters and the benefits/discounts received. Ducks who are UOAA members didn’t join because they aren’t sure what they’ll get – or why they should, it costs too much, they already feel connected to the UO without paying for a membership, and because they don’t want to get on a list and be “badgered for money.” Sensing a trend?

Vision, Mission and Values

Vision – To what do we aspire?

Our vision is to be the very best alumni relations program in the country, enriching both the lives of Ducks and the UO.

Mission – What do we do, and what are we committed to accomplish?

The UOAA community makes the UO stronger by fostering lifelong relationships, helping Ducks become champions and cheerleaders, ambassadors and advocates, for the university.

Values – What values will guide our service to our alumni?

These values define the UOAA and help guide our actions. When used collectively by all parts of the organization, these help keep us all on the same page when it comes to serving our alumni with excellence.

Core Belief:

Stewardship – *Our actions are driven by a belief that a strong alumni base is fundamental to a strong University of Oregon. The UOAA is the steward of the precious relationship that Ducks have with the UO and we, therefore, exercise great care in nurturing this relationship. We give in order that those we serve may find fulfillment in their connection with the UO, and that others may have the opportunities we enjoyed.*

Unique Values:

- **Inclusion** – *We focus on including all alumni, friends, family, students and various stakeholders who desire to make the UO a better place.*
- **Intellectual Curiosity** – *We seek personal growth, development and expansion of the whole person in order to be fulfilled.*
- **Partnership** – *We seek to think, grow and thrive with other departments, schools and colleges, businesses and organizations that share our core values.*
- **Innovation** – *We strive for innovation in all we do, thinking outside the box and approaching problems creatively.*

Expected Values:

- **Respect** – *We carefully cultivate an atmosphere of respect for all.*
- **Excellence** – *We strive for excellence in all we do, going the extra mile in our service to each other and our alumni.*
- **Enthusiasm** – *Reflecting the unique personality of Ducks, we seek joy in all, celebrating life, and working diligently to avoid the boring, stale and antiquated.*
- **Generosity** – *True to the social conscience of Ducks, we seek to make the global community better by playing our part in the virtuous cycle of giving back.*

Strengths and Challenges

Key Organizational Strengths to Leverage

We will use the following strengths and leverage them in solving the challenges facing the UOAA.

- Base of 180,000 loyal alumni
- Strong advocacy network of alumni
- Strong and well-visible UO brand-mark
- Engaged, hands-on Board motivated to help the organization succeed
- Supportive internal constituents and collaborative environment
- Hard-working team
- Healthy endowment base
- Ford Alumni Center

Key Organizational Challenges to Solve

Let's be clear about the challenges we face and what challenges this plan seeks to overcome.

- Clarity and focus
 - UOAA's contribution to the UO is not understood well internally
 - The mission of the UOAA, and its role as an entity, is not clearly understood by alumni
 - The mission of the UOAA, and its role as an entity, is not clearly understood by UO constituents
 - UOAA is not relevant to many UO constituents, or the lives of the alumni it serves
 - UOAA is too scattered in its approach to alumni engagement
- Investment in the UOAA
 - Declining budgets have led to reactive choices of disinvestment
 - Infrastructure of the organization is lacking and not primed for growth
- Revenue
 - Membership numbers have been declining
 - Lack of clear value proposition and/or reason to join
 - Traditional sources of revenue have been eroding and/or are disappearing

Goals and Objectives

Goals

What are our long-term aspirations in addressing the challenges facing us? To create clarity and focus and increase investment in the UOAA, we must ...

- Become the central place all Duck alumni reach out to in order to create, maintain and foster their relationship with the UO.
- Support the advancement of the UO.
- Build awareness, understanding, and support of – and for – the UOAA and its value to the UO, with key internal and external constituencies.
- Build a strong foundation for the UOAA’s continued growth, development and success.
- Create an engaged alumni body and an alumni association that is valuable and relevant to the lives of Ducks.
- Become important to the life of the UO, with both internal and external constituents.

Objectives

Those are great, lofty goals. Now, what specific, intended outcomes will help accomplish our big goals?

- Support a stronger UO by increasing alumni engagement and connection touch-points from 35,279 to 60,000 by December 31, 2014 as defined by ...
 - Monthly unique visits to UOAA website – 8,351 +
 - Monthly number of social media users – 15,725 +
 - Monthly number of social media interactions – 444 +
 - Monthly attendance at UOAA events – 203 +
 - Number of returned exit surveys from UOAA events – 18 +
 - Number of new guests at UOAA events +
 - Average annual membership numbers on a monthly basis - 450 +
 - Average Life Membership numbers on a monthly basis – 23 +
 - Monthly number of opened UOAA e-news – 10,034 +
 - Monthly number of forwarded UOAA e-news – 2 +
 - Monthly number of opened links to School & College e-newsletters from UOAA e-news – 17 +
 - Number of bad e-mail addresses corrected +
 - Number of good e-mail addresses added +
 - Number of personal calls made by UOAA to new members – 10 +
 - Number of personal contacts made to alumni by UOAA – 2

Data measured as of April 30, 2012

- Create a stable, diversified revenue model to provide for the organization's long-term health by June 30, 2016.
 - Double sponsorship and advertising revenue by 2016.
 - Increase internal UO funding through delivered Memos of Understanding (MOUs) for services rendered by 10% per year for each year through FY 2015-2016.
 - Increase new revenue sources by \$20,000 per year by June 2013.
- Improve quality of memberships and achieve membership penetration of 20% of alumni base by December 31, 2018.
 - Improve retention from 67% of renewal to 75% by June 2015.
 - Increase annual memberships from 9,158 to 11,105 by June 2015.
 - Increase three-year memberships from 1,759 to 2,015 by June 2015
 - Increase student memberships from 3,175 to 3,370 by June 2015
 - Increase Life Memberships from 6,560 to 7,955 by June 2015.
- Raise overall UOAA awareness with our alumni base and improve awareness among key brand attributes. This objective to be defined as awareness survey is developed and implemented.

Strategies and Tactics

So now we have a handle on the challenges facing us, the tools are in our toolbox, our aspiration, our goals, and our mission – to forge strong relationships for a strong UO. How do we plan to fulfill this mission and address our challenges? What specific, informed choices will we make in order to be the very best alumni relations program in the country and enrich the lives of Ducks and the UO?

Strategies

To solve the challenges we face, we will put a laser-like focus on our core mission. Then, if we intentionally leverage the resources we have and invest them in ourselves, we will be poised to seize control of our future rather than react to what comes our way.

Focus on relationships.

Invest in ourselves.

Control our future.

That's our plan.

Now let's dive into these three strategies.

Ready?

STRATEGIC INITIATIVE 1

Focus on Relationships – our Core Mission

Good organizations are keenly aware of the concept of focus. When an organization loses sight of its focus, it drifts and serves no purpose. We are in the relationship-building business, pure and simple. This is our core mission. And, as with all organizations, we should allocate precious resources intentionally, and carefully, in advancing our mission. As a membership-driven organization, ultimately the strongest way to keep dues-paying members is to create a deep and meaningful relationship between them, and with the UO. To do this, the UOAA will enrich the lives of Oregon alumni with initiatives that are reflective of the entire university – both the academic mission of the institution and the university’s athletic endeavors.

We will use the strategic filter of *fostering relationships* to evaluate all we do, what we say and how we present ourselves. At every level of the organization, the long-term goal is to consider relationships with alumni in *all* we do. This will mean more focused work, but what we do will be more rewarding.

Specific relationship-oriented tactics we will advance:

- **Enhance and improve the UOAA Alumni Travel experience, starting with 2013 travel program.**
 - The program will include an academic tie, more unique marketing of the UO portion of the trip, and receive a dynamic marketing overhaul. We will look aggressively at improving our commission structure on trips as well.
- **Create a digital space for UO academic webinars/podcasts on relevant topics by June, 2013**
 - This would be a new section to the UOAA website. It provides relevant information for alumni and allows us to partner with the academic units to promote key areas of interest.
- **Launch an Alumni Campus Tour program starting with Homecoming 2012 and continuing.**
 - Add “Tour UO” button on website to sign up for a tour; would also include an audio tour (separate tactic)
- **Develop and launch interactive Ford Alumni Center visitor locator displays by Spring 2013.**
 - Allows visitors to pin their home location and the UOAA to capture visitor data. UOAA would then send personalized notes to visitors.
- **Launch Duck Adoption Program by Winter 2013.**
 - Designed to draw in friends, parents, fans, and others who consider themselves Ducks, but didn’t go to school at the UO, this program would be a fun, engaging way to expand our relationship network (this is our “Friends” membership program just re-marketed).
- **Recognize alumni for membership anniversaries, beginning Fall 2012.**
 - Starting in Fall 2012, begin to highlight Members at 5, 10, 15, 20, etc. years and recognize them for their service as members in the UOAA – on website and in e-newsletter. Work with Oregon Quarterly for in-publication recognition. Work with staff and Board members to send notes/make calls to recognize these members as well.

- **Aggressively promote Chapter events, and integrated Chapter/UOAA events, beginning Fall 2012 in conjunction with a comprehensive Chapter growth plan. UO Development will play a key role in this promotion.**
 - Many of the key touch points for alumni are regionally-based events. These events will be promoted through integrated marketing-communications efforts of the UOAA to increase attendance, participation and involvement of alumni.
- **Launch Alumni of the Year Gala by Spring 2014.**
 - Begin to foster deeper relationships with our alumni, and the recipients of the annual Alumni of the Year awards.
- **Launch Welcome Parties for recent grads in key northwest markets by Fall 2013**
 - Not only a key way for Chapters to re-connect, but a great way to connect recent graduates with alumni in their home turf.
- **Develop an Ambassadorship Program for UOAA Board members by Fall 2012.**
 - This simple program would include a name tag, Chapter event listing, new information about UO and new information about each school and college throughout the year. Board members could use it as an easy reference guide and a tip to remind them of their role as UO ambassadors and to plug into Chapter events in their area.
- **Launch Little Ducklings program by Spring 2014**
 - Great way to foster relationships with local alumni and their children by setting up a four-time per year program designed to get alumni back on campus.
- **Develop data capturing plan beginning Fall 2012 and continuing**
 - Stronger emphasis on capturing, and recognizing, all touch points with alumni.
- **Implement Past Board Engagement Task Force recommendations beginning Spring 2012.**
- **Implement personal touch points to new members, as often as possible, beginning Spring 2012**
 - Have Board members make regionally-specific “thank you” calls to new Life Members
 - Staff and student-callers to make thank you calls to new Members
 - Personal notecards to new Members – from both staff and Board.
- **Implement segmenting process for external communication to alumni, starting January 2013.**
 - Use data captured on alumni to begin segmenting key audiences, allowing us to personalize messages to each audience, demonstrating a true commitment to foster individual relationships with our alumni.
- **Repackage all away-game Tailgaters starting Fall 2012**
 - Aggressively reformat the presentation of away-game events to put more focus on the UO and promote its key messages to area alumni. Increase alumni participation by improving entertainment value of the events and decreasing price point. The events should be used to highlight value of membership, provide gathering point for Ducks, and promote the UO.

STRATEGIC INITIATIVE 2

Invest in the UOAA

Specifically our brand, key partnerships, and our organization's diversity

Invest in our Brand

Given the fact that the UOAA does not occupy a specific brand position in the mind of our alumni, the opportunity exists for us to create the brand of our choice. Our brand should focus on fostering relationships with alumni and the UO. And the UOAA should be the definitive place for alumni to foster their relationship with the UO – their gateway to the UO. So now is the time to invest in our brand – clearly communicate who we are to key stakeholders and, most importantly, demonstrate that brand by living it each and every day.

Brand Communications Effort (under separate cover)

- Initial presentation of brand elements – June 2012
- Implementation Task Force to review final implementation – Fall 2012
- Communication launch – Fall 2012 through Fall, 2013 and ongoing.

Specific Brand Investment Tactics we will advance

- **Update website by Winter 2013 or sooner.**
 - Easier-to-navigate - Mobile version - More focus on people (Board, Staff, scholarship recipients, alumni, etc.) - Easy-to-search listing of events – “Tell us your Duck Story” page/section – Landing pages for Chapters.
- **Look at rebranding ‘Chapters’ (a key way our brand is communicated) by January 2013.**
 - Look at moving to a simpler moniker, such as Denver Ducks.
- **Develop, distribute and use Brand Manifesto for all stakeholders by Fall 2012**
 - Guide for Volunteers, Staff, Board and Chapters to help everyone stay on message and consistently deliver excellence to all alumni.
- **Design & distribute ‘ambassador tool kits’ for university staff by Winter 2013**
 - Tool kit would make it easy for all segments to tell interested alumni how they can get involved – UOAA Board, Chapters, events, website for info, mentoring, meeting with prospective students – and then provides UOAA contact information.
- **Defined communication strategies for all events and standardization of event management by Fall 2012.**

- Makes it so we aren't reinventing the wheel for every event.
- Easier to cross-train and leverage resources.
- Same strategies can be employed by volunteers, resulting in a consistent brand experience.
- **Develop and launch UOAA app by December 2012.**
 - Work with UO Info Graphics Lab to develop an app for alumni to find other registered Ducks in their area, find/pin Chapter and other UO events, and get alumni updates. Include campus web cam links on app.
- **Ongoing customer service training for all segments beginning Summer 2012.**
 - How we behave and how well we welcome, greet and follow-up with our alumni will be key elements to our brand moving forward. Work with staff, Board, and volunteers to give understanding of the level of excellence required to delight our alumni.

Investment in Key Partnerships

Alumni see all interactions with the university as one continuous relationship. Internally, that relationship is divided between multiple entities, creating confusion with key constituents. In addition to our own Chapters, the UOAA should partner with UO Development, Student Enrollment Management, International Affairs, Student Affairs, Schools and Colleges, the Career Center and other departments as necessary, to foster an integrated and streamlined approach to alumni engagement, ultimately resulting in increases in alumni support of the university's mission and more efficiency due to leveraging limited resources.

Partnering in the life of the University, with the UO Foundation, and with UO Development

- **Working with UO Foundation and UO Development, continue data integration program with the Advance database beginning Summer 2012.**
 - On-going dialogue and discussion regarding integration of data collection.
- **Develop data and e-mail clean-up program beginning Fall 2012.**
 - Have students call alumni the first time their e-newsletter bounces back due to a bad e-mail – include 'forwarding' feature - Student calling to collect e-mails – Mail return program and procedure
- **Working with UO Development, start process of developing content-rich programming in key west coast regions (estimate - 3x per year) by Fall 2013. Use new presidential roll-out as beta.**
 - Examine engaging topics and themes, including a State of Oregon "Thought-leader" symposium.
 - Spin off donor events after all-alumni event.
 - Annual survey to alumni about what topics they would like to hear about and learn more about.
- **Leverage existing academic-speaking opportunities beginning Fall 2012**
 - Many professors are already traveling and speaking. The UOAA could use these existing events to promote to our alumni base.
 - The UOAA should also take a more aggressive role in helping promote the Insight Seminars and the OLLI program.

- **Establish the UOAA as an indispensable partner in campus collaboration for alumni relations starting Fall 2012.**
 - The long-term internal communication objective should be to establish the UOAA as the definitive resource for engaging alumni and helping UO partners understand what value and benefit the UOAA can bring to the schools & colleges.
 - The Ford Alumni Center is now the external face of the UOAA and, as such, we should use it as an asset to increase the internal awareness of the UOAA. Look at an annual open house for all campus to visit, learn about UOAA, learn about UOAA events and highlight those in the UO community who are Members.
 - Make it easier for UO departments to submit information for inclusion in e-news, etc. by developing communication templates. Estimate: \$1,500.
 - On-going training and education of various UO departments on the UOAA. Estimate: None.
 - Conduct an internal campus public relations campaign about the value of the UOAA to the mission of the UO. Estimate: None – mostly time.
- **Working with UO Foundation to leverage iModules to serve campus alumni needs by Fall 2012.**
 - Allows UOAA to serve the needs of other campus units for e-mailing and e-communication, leveraging existing resources of iModules.
- **Partner with ExploreOregon and launch quarterly weekend Open Houses beginning January 2013.**
 - As a family-friendly way to develop outreach to alumni, and the community, open up key segments of the campus and promote the Open Houses as an easy entry-point in which to return to campus.
 - Dorms, Museums, CAS, sports clinics, etc.
- **Expand Grad Fair to include Chapter Tables (and reps) by June 2012**
 - Chapter representatives can meet recent graduates and give them information/date of Senior Welcome Party in their region.

Partnering with Student Alumni Association

- **Develop integrated Student Alumni Association (SAA) curriculum and a membership transfer plan (from student to alumni) by Spring 2013.**
 - Our SAA should set the expectations of students for when they become alumni. These should be developed through a four-year curriculum to educate students on their future role as alumni, including a tradition of membership and giving. Work with UO Development and the SAA on a student-led annual campaign.

Partnering with Student Affairs (our soon-to-be alumni)

- **Start moving reunion events to Homecoming beginning Fall 2012**
 - Leverages resources, brings focus of alumni to the weekend and increases spirit & tradition on campus.
- **Demonstrate alumni commitment to philanthropy by launching Ducks Doing Good Day in Spring 2013.**
 - Worldwide Duck alumni gathering on one day to devote time to charity.
 - Promoted on our website, encourage alumni to buy an event t-shirt (proceeds to fund alternative breaks through the Holden Center).
 - Ducks are encouraged to post pictures on UOAA social media outlets of them wearing their event t-shirts while performing philanthropic work in their community.
 - Total hours and publicize.
- **Continue partnership efforts with the UO Career Center**
- **Explore launching Greek Alumni Reunion and membership promotion beginning Fall 2013.**

- **Alumni receptions in partnership with Alternative Breaks through Holden Center and College of Education beginning January 2013.**

Partnering with Chapters – Where the rubber meets the road

- **Launch comprehensive Chapter Leadership Development starting Summer 2012**
 - Chapter Leadership Summit starting June 2012.
 - Chapter Excellence Awards starting June 2013.
 - Quarterly Chapter web-conferences starting Fall 2012.
 - UOAA Board members to Chapter events starting Fall 2012.
 - Implement UOAA Chapter Task Force recommendations starting Fall 2012.
 - Introduce easy-to-use “How To” guide for all Chapters.
- **Launch Chapter Growth & Development program by Spring 2013.**
 - Monitoring system and evaluation procedure for Chapters by Fall 2012.
 - Implement and start tracking Chapter results by January 2013.
 - Post-event surveys, site visits to events, Board meeting visits, site traffic, scholarship funds, etc.

Partnering with Advocacy Efforts

- **Develop and implement integrated approach to advocacy by Spring 2013.**
- **Continue strong partnership with UO Public & Government Affairs for grassroots advocacy of alumni.**

Partnering with Other Organizations

- **Explore formal partnership between UOAA & Oregon Club - proposal by Spring 2013.**

Partnering with International Efforts – We need relationships with Ducks around the globe

- **Develop stronger International partnerships by Spring 2013**
 - Alumni travelers’ receptions with International travelers starting with 2013 travel.
 - Regular Executive Director visits to key International Chapters on set schedule beginning Fall 2012.
 - Partner with Chapters to develop scholarship programs beginning Fall 2012.
 - Partner with Chapters to develop localized programming and events beginning Fall 2013.
 - Use presidential on-boarding for immediate site visits and to engage international alumni in Fall/Winter 2012-13.
 - Explore an International Alumni Membership offering.
 - Partner with UO Development with International Alumni Newsletter.

Partnering with Student Enrollment Efforts – Linking students, parents, and alumni

- **Grow partnership with Student Enrollment Management beginning Spring 2012 and continuing.**
 - Have scholarship recipients attend UOAA board meetings and get to various Chapter meetings (Portland, Eugene, Seattle, etc.).
 - Develop alumni ambassador network, train them, and then use alumni to personally court key students in remote areas.
 - Work with Chapters to submit high school nominations for enrollment at UO.
 - Welcome Letter to the newly admitted Classes from the UOAA welcoming them to the Duck family.
 - Post welcome on Facebook (to the Class of '20XX')

Partnering in Portland Outreach Efforts

- **Launch Portland Plan beginning Summer 2012 (under separate cover)**
- **Partner with UO Advancement for staff support in Portland for immediate needs. Consider hiring Portland staff by 2014.**

Investment in Diversity

To be true to a mission of fostering relationships with all alumni, the UOAA will expand its focus on inclusion of alumni for all under-represented constituents.

- **Monthly highlight of diversity in alumni base beginning Spring 2012**
- **Continue focus on expansion of diversity in the leadership, volunteer, Chapter, and staff infrastructure of the UOAA**
- **Regular cultural-sensitivity training of staff and volunteers on Diversity in our organization and value**
- **Launch internship program by Fall 2013**
- **Have five fully-functioning affinity groups by Spring 2014.**
- **Develop 5-year plan for additional affinity groups by Fall 2013.**
 - Develop affinity group expectations documentation by January 2012
- **Develop a diversity values statement for the UOAA by Spring 2013.**
 - Develop a statement that will guide the Association's staff and volunteers in making activities, programs and services inclusive of all alumni.
- **Work with Board to determine need for staff position to help manage, and grow, affinity groups and integrate scholarship programs with Student Enrollment and Development by FY 2013-2014. Start with part-time student employee to assist in these efforts.**

STRATEGIC INITIATIVE 3

Control our Future

It has famously been said, “No money, no vision.” In order for the UOAA to fulfill its mission of endearing alumni to each other and the University of Oregon through strong relationships, it will need to strengthen and enhance a diverse revenue model of the organization, focusing on these primary areas.

- *Membership* – Based on the belief that association members support their university more, the evidence that dues-paying alumni donate to their alma mater at greater rates than the overall alumni base, and that membership dues allow us to focus on our core mission, we will continue a strong emphasis on our membership structure. To increase the value in alumni relationships with the university, the UOAA will engage them through a dues-paying membership structure that provides them on-going reward as well as opportunities for continued involvement in the life of the university.
- *Philanthropic Support* – Whereas membership focuses on inclusion and access, the alumni association can also attract charitable gifts at all levels to fund programs of excellence.
- *Business Partnerships* – The alumni of the University of Oregon are an affluent market that businesses seek to attract. By forming business partnerships in the form of sponsorships, advertising, affinity programs and benefit providers that align with our mission, we can build additional sources of income.
- *Institutional Support* – Over time, as we demonstrate our value, we will seek to partner with a wide portion of the UO community for funding of our mission to foster lifelong relationships with alumni.
- *Programming* – Generate programming that generates revenue (i.e. basketball events, galas, camps, etc.)
- *Other Revenue Sources* (i.e. merchandise, international travel, etc.)

Specific tactics to advance the strategic initiative of controlling our future with a stable funding model:

Membership

- **Reinstate membership committee of the UOAA Board beginning Fall 2012.**
- **Revamp membership structure by Spring 2013.**

- **Start recognizing Members with Members-only rewards starting Fall 2012.**
- **Launch new Members-only Rewards Program starting Fall 2012.**
 - Begin to address the “What do I get?” value question and start creating unique member and Life Member rewards.
 - Possibilities: Free football game parking at Ford Alumni Center for members, member discounts at events, members-only basketball events, Duck Store discounts, cool/new “insider” members-only digital publication, quarterly call to Life Members from University leadership.
- **Launch improved Life Membership recognition program starting Fall 2012.**
 - Life Members (and higher levels) support the UOAA’s mission significantly and should be rewarded, and recognized, accordingly.
 - Possibilities: Concierge for Life (and higher) Members, special check-in lines for Life Members at events, special recognition for Life Members at key events, special invitations to regional events.
- **Launch Premium Life Membership program by January 2013.**
- **Launch Sustaining Life Membership by January 2014**
- **Engage Annual Fund Student Callers in Membership acquisition campaign starting Summer 2012**
- **Start personally calling all new Members starting Fall 2012.**
 - Using staff, Board, volunteers, and students, all new Members will be personally welcomed to the UOAA as a Member. Thanking them for their membership, explaining benefits, confirming contact information, sharing upcoming event information, and making sure they know they are appreciated will endear them to the UOAA and increase retention.
- **Launch integrated membership acquisition, and retention, plan starting Summer 2012 – Including the hire of a dedicated staff position to focus on membership promotion and revenue generation.**
- **Issue Annual Report to Membership starting January 2013**
 - As part of an on-going focus on the value of membership, begin distributing an annual report to members to remind them of what their membership dues support (scholarships, student tours, alumni relations activities, numbers of connected alumni, reunions, news highlights, etc.).
- **Launch Membership Drive month starting Fall 2012.**
- **Improve Membership kits starting Summer 2012**
- **Develop new Grad Pack and market a cool package to new graduates by June 2013.**
 - A contemporary, cool, and hip re-packaging of new student membership to be more appealing to recent graduates. Would include membership.

Philanthropic Support

- **Implement Alumni Excellence Fund in FY 2012-13 in conjunction with membership program, promote in Year 2.**
- **Partnering with UO Development, develop a comprehensive approach to alumni giving towards UOAA.**

Business Partnerships

- **Assign staff resources to selling sponsorships and advertising for UOAA assets beginning Summer 2012.**
- **Expand and focus revenue affinity programs starting Fall 2012**
 - A more focused approach, including guidelines for success and performance levels, will result in stronger revenue channels to support our alumni relations programs.

Institutional Support

- **Develop a culture of accountability, enter into specific Memos of Understanding for specific deliverables, and then, deliver results.**

Programming

- **Launch Venture Capital Chapter by Spring 2013.**
 - This chapter would not only lead the charge for other interest-group Chapters, but would provide a possible long-term funding stream for the UOAA. The UOAA would receive a pre-determined equity stake in all start-ups in which this Chapter invests.

Other Revenue Sources (i.e. merchandise, international travel, etc.)

- **Implement a comprehensive Volunteer Management Program by January 2013.**
 - As we grow our volunteer ranks, we will be able to use more volunteer employees and leverage paid staff resources.
- **Develop an Alumni Association “members-only” line of merchandise starting in Fall 2012.**

Other Considerations

- **Begin discussions about summer family camps. Not only helps build relationships, but has the potential to drive revenue.**

Organizational Strategy and Tactical Support

That all sounds great. So just how will we accomplish this plan? The UOAA will need to carefully manage all of the resources at its disposal. This will mean intentionally aligning all areas around a strategic direction of excellent service to our alumni, identifying areas of efficiencies at every level of the organization, investing in the right areas and focusing efforts into other critical areas.

In the first year of the plan's roll-out, our organizational focus will be to walk before we start running. We have a number of organizational efficiencies, procedures and processes to iron out before we bite off more than we can chew. Our organizational strategy will be to use our long-range plan to clearly set our direction at fostering life-long relationships between our alumni and the UO. We will then:

- Concentrate our resources and focus all resources, efforts and organizational enthusiasm in this agreed upon direction;
- Maintain consistency in all efforts to maximize return and leverage resources;
- And retain as much flexibility in the implementation of our long-range plan. As we implement our long-range plan, there is a greater chance that certain initiatives become set and the organization resists change. We must never fall prey to the status quo and, therefore, should always assess our organization, our environments, and review possible changes to the plan.

Geographic Efficiencies

To effectively implement our long-range plan, the UOAA will need to strategically devote resources into key geographic regions – specifically where our alumni base reside. Financially, we will monitor expenses carefully, investing in areas more closely aligned to our mission of fostering relationships through alumni membership involvement.

Key geographic filter for focusing resources in order of priority:

- Portland
- Oregon
- Northwest
- Northern California
- Western U.S.
- Continental U.S. & International

Human Resources Efficiencies

The UOAA team has been in neutral far too long and needs to be focused on our core mission of fostering relationship. To do so, we will need to strategically invest in team morale, professional development, streamlining our structure, focusing time into areas of need, and cross-training of functions for maximum efficiency.

- More Efficient Communication – Working with our current Director of Marketing and Communications, we will streamline our communication efforts in order to create a more efficient process to deliver messages to our alumni.
- Student Workers – We have a tremendous opportunity to work with UO students. However, the current system can be managed for more efficiency. Beginning in Fall 2012, each key staff member will have a half-time student worker assigned directly to them. This will allow students to be more focused on their area of responsibility and allow staff to grow their management responsibilities.
- Focus staff time into core mission-centric activities.
- More efficiencies from existing staff by clear definition of roles and cross-training so team members can better provide support across functions.
- Regular team-building and morale development.
- Clear goals and measurable accountability with all members of the team.

Procedural and Organizational Efficiencies

There are a number of procedural and organizational processes which can be reworked to maximize efficiency of staff. Creating these efficiencies will free up more time for staff to be invested in advancing our mission.

- Consistent Systems – We will examine all disparate systems and create consistency so every staff member is operating with the same procedure on like projects. This will also make it easier for staff members to share projects and support each other.
- Consistent Project Management

The Board, Chapters & Affinity Groups

Here is where much of the “rubber meets the road” with our initiatives and our brand perception. With 44 Board members, hundreds of past Board members, 22 chapters (and growing) engaging alumni in dozens of events and activities, it is critical that the UOAA coordinate this volunteer base. We need to maximize our paid staff by integrating our volunteers into the implementation of our plan.

- Franchise Model for Chapters – Recognized chapters are, in essence, franchises of the UOAA. Therefore, we need to manage and support them accordingly. This will mean a long-term commitment to development of chapter leadership, management of events, tracking of event satisfaction, careful management of chapter activities, and appreciation of volunteers.
- Clarity of Mission for Chapters – We should help our chapters understand the mission of the UOAA, their role in advancing the UOAA mission and how their actions help the UO.
- Appreciation – Our volunteers invest a significant amount of time in helping Ducks connect and advancing our mission. We should be showing our gratitude more directly.
- Board – Our Board has a key role in the implementation of this long-range plan. This role should be defined, specific tactics explored and clearly articulated in the implementation calendar.
- Membership – Our chapters are key drivers of membership and should be trained accordingly.
- Staffing for Chapter – To maximize the return of our investment in chapters, we will devote a staff member to their growth, development, and expansion.

Financial Resources

As we consider a short-term investment in the long-term health and vitality of the organization, it is important that we carefully target financial resources into areas where mission is central and/or return on investment is greatest. We will need to strategically use our endowment – our savings – to make critical investments at the front-end of this long-range plan.

Revenue Model

Finally, our revenue model needs more stability. The following revenue model is proposed for the long-term health and vitality of the UOAA.

Membership – Currently the UOAA operates with a membership structure representing 26% of its annual budget and it is recommended this grow to 40% of the operating budget. More importantly, membership is a key driver to alumni engagement and involvement and is essential to the UOAA fulfilling its mission. It is recommended, therefore, that we increase focus on membership within our strategic direction of fostering relationships. This means we will not chase membership with enticements of discounts and benefits, but rather will appeal to our alumni’s passion and pride in UO as the primary driver for membership.

Affinity Programs – Currently affinity programs represent 19% of the annual operating budget of the UOAA. With more focus, this segment has the potential to grow to 30%. With the recent credit card agreement with Oregon Community Credit Union, the UOAA is poised well for growth in the affinity space. In addition to the credit card program, we will seek growth in a debit card agreement, partner programs, insurance, and international travel.

Sponsorship and Advertising – Currently this area represents 4% of the annual operating budget and with aggressive focus, a reformatting of existing assets, and staff focus on sales, it is likely to see this area grow to represent approximately 10% of the budget. Primary areas of focus would be website space, e-newsletters, and sponsorships of key events, such as away-game tailgaters.

Mission-Centric – Here it is recommended that the UOAA look for additional opportunities to leverage its mission-centric work into agreements with UO constituents or specific events. In leveraging these mission-centric activities, additional revenue may be generated. For instance:

- Little Ducklings Program – Aligns with our mission, reaches families and can generate revenue.
- Travel program – Aligns with our mission, reaches key alumni and can generate revenue.
- MOUs with various departments (i.e. University Relations, Development, Athletics) – Requires us to deliver specific value-oriented services related to alumni relations (i.e. Ford Alumni Center management, Tailgaters, etc.) and then deliver on the contract. Very much in alignment with our mission.

Strategic Initiative 1 - Focus on Relationships

This is our core mission. And, as with all organizations, we should allocate precious resources intentionally, and carefully, towards this mission. Ultimately the strongest way to keep dues-paying members is to create a deep and meaningful relationship between them, and with the UO. To do this, the UOAA will enrich the lives of Oregon alumni with initiatives that are reflective of the entire university – both the academic mission of the institution and the university’s athletic endeavors.

Tactics	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
Alumni Campus Tours	Set-up	Online	Refine	Launch	Done	→							
Recognize membership anniversaries	Set Process	Pull Lists	Start	Continue	Refine	Ongoing	→						
Aggressively promote Chapter events	Use Process	Promote	Refine	Promote	Ongoing	Ongoing	→						
Alumni of the Year Gala		Research	Committee	Evaluate	Evaluate	Options	Evaluate	Proposal Due	Board Eval	Exec Eval	Decision		
New Grad Welcome Parties		Process	Chapter Work	Details	Test PDX - Seattle	Debrief	Debrief	Next Steps	Formal Process	Ground work	Ground work	Ongoing	Ongoing
Little Ducklings program		Research	Committee	Evaluate	Evaluate	Options	Evaluate	Proposal Due	Board Eval	Exec Eval	Decision		
Career Service	Ongoing	→											
Data capturing plan	Define	Process	Refine	Launch	Launch								
Implement Past Board Engagement Task Force recommendations	Done	→											
Personal touch points to new members		Set Process	List Process	Start	Ongoing	→							
Segment external communication	Integrate	Launch	Refine	Ongoing	→								
Ambassadorship Program for UOAA Board Members		Copy & Design	Design	Launch			Copy from UO	Design & Prod	Launch		Copy from UO	Design & Prod	Launch
Duck Adoption Program		Copy & Design	Set Up	Test Site & Fulfill	Launch	Refine	Refine	Ongoing	→				
Faculty podcasts on uoalumni.com		Copy & Design	Set Up	Test Site & Fulfill	Launch	Refine	Refine	Ongoing	→				
Enhance UOAA's Alumni Travel	Receptions	Receptions	External Promote	Promote	Promote	Promote	Adjust	Promote	Promote Launch	Launch Promote	Launch Promote	Launch Promote	Launch Promote

Strategic Initiative 2 - Invest in the UOAA

Invest in the UOAA - Specifically our brand, key partnerships, and our organization's diversity

Tactics	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
Brand Investment													
Brand Communication Effort	Review	Design	Launch	Ongoing	Integrate	→							
Brand Guide, Tools, Template, System	Review	Write & Design	Write & Design	Refine	Launch	Implement	Implement	Implement					
Rework Existing Communication material		Comm Audit	Comm Audit		Design	Design	Produce	Produce	Produce		Review & Budget	Next Yr's Material	
Update website		Audit	Audit & Analysis	Navigation	Navigation	Comm Study	Comm Study	Copy & Design	Copy & Design	Launch	Launch		
Rebrand Chapters			Analysis	Launch	Launch								
Brand/Communication toolkit for volunteers		Review	Write & Design	Write & Design	Refine	Launch	Implement	Implement	Implement				
Ambassador toolkits for universtiy staff		Review	Write & Design	Write & Design	Refine	Launch	Implement	Implement	Implement				
Defined event communication strategies & event	Finalize Process	Finalize Process	Refine	Test	Test	Refine	Launch	→					
Ongoing Customer Service	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing (Ongoing	Ongoing
Data integration w/ Advance	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing (Ongoing	Ongoing
Content-rich programming in key west coast regions		Integrate	Set Process	Pres On Board	Rollout Test	Rollout Test	Rollout Test	Rollout Test	Rollout Test	Refine	Refine	FY 2 Plan & Budget	FY 2 Plan & Budget
UOAA app	Specs	Design	Design	Produce	Produce	Produce	Produce	Launch	Launch Promote	Launch Promote	Launch Promote		
Partnerships													
Leverage existing academic-speaking opportunities			As Contacted	←						As Contacted	→		
Establish the UOAA as an indispensable alumni relations partner	← Continuous →												
Leverage iModules to serve campus alumni needs	Evaluate	Evaluate	Analyze UO Found	Analyze UO Found	Analyze UO Found	Implement	Implement	Implement					
Move all reunion events to Homecoming	Planning	Planning		Final Planning	Home coming	Debrief	Refine		Planning	Planning		Plan & Budget	

Strategic Initiative 2, continued

Invest in the UOAA - Specifically our brand, key partnerships, and our organization's diversity

Tactics

June July Aug Sept Oct Nov Dec Jan Feb Mar April May June

Partnerships

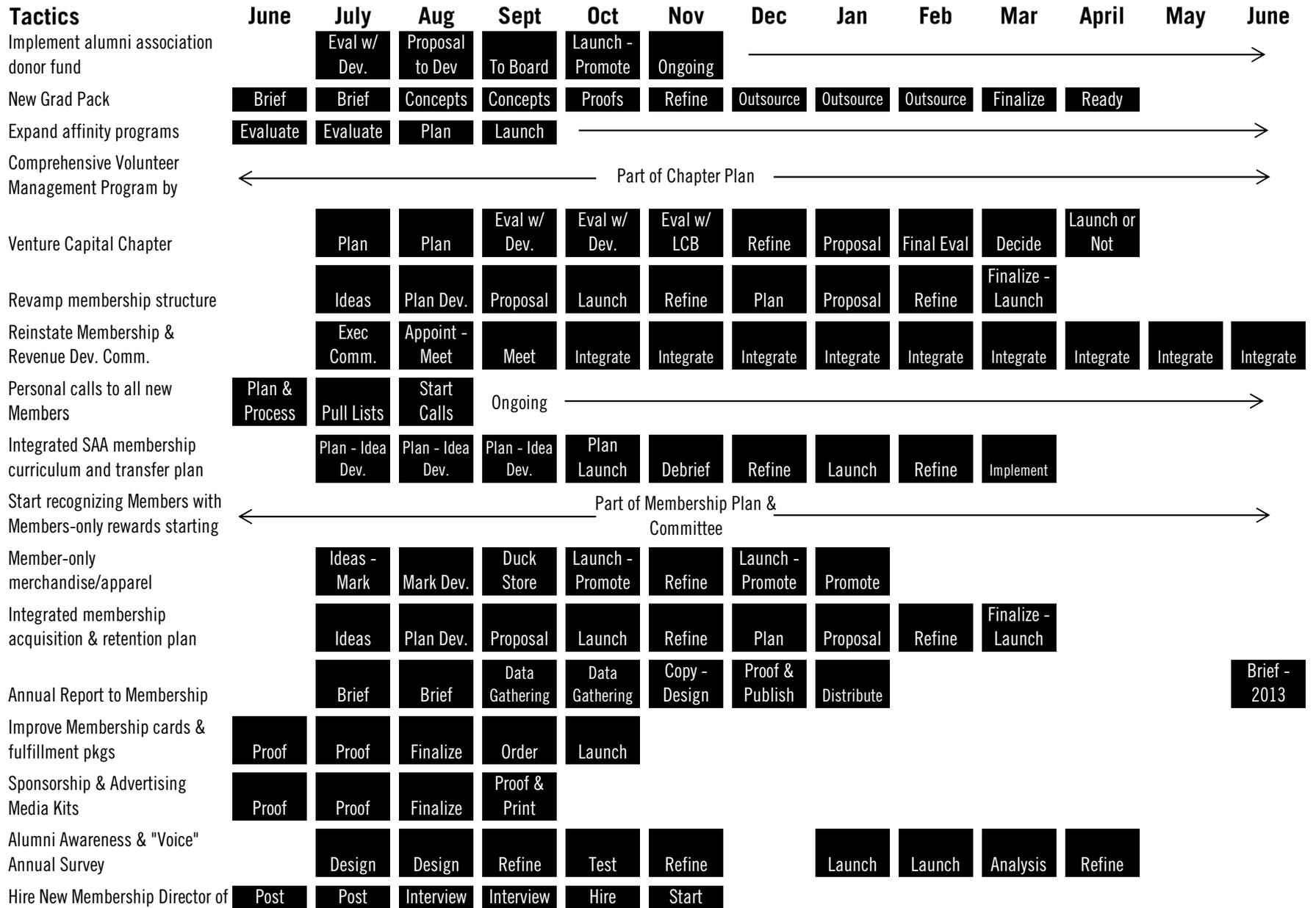
Ducks Doing Good Day	Project Brief	Project Brief	Set Date & Del.	Promo Plan	Promote	Promote	Promote	Promote	Promote	Launch	Launch	Debrief & Plan	New Plan
Chapter Leadership Development	2012 Summit	Debrief	Plan Dev	Plan Dev	Launch Plan	Refine	Implement			Continue	→		
Chapter Growth & Development	2012 Summit	Debrief	Plan Dev	Plan Dev	Launch Plan	Refine	Implement			Continue	→		
Expand Grad Fair	2012 Grad Fair	Debrief	Plan Dev	Plan Dev		Launch	Refine	Final Plan Dev	Launch	Implement	→		
Use Annual Fund callers	Ongoing		Ongoing		Ongoing		Ongoing		Ongoing		Ongoing		Ongoing
Continue partnership efforts with the UO Career Center	←					Ongoing	→						
Develop stronger Intl. partnerships		Plan	Process		Launch	Integrate	Refine		Plan FY2	Plan FY2		Plan & Budget	
Grow partnership with the Enrollment Management	←					Ongoing	→						
Launch Portland Plan	←					Ongoing	→						

Diversity

Monthly highlight of diversity in	←					Ongoing	→						
Regular cultural-sensitivity		Schedule		Train		Train		Train		Train		Train	
Launch minority internship program		Plan & Process	Plan & Process	Plan & Process	Evaluate	Evaluate	Test	Test	Test	Refine	Refine	Budget & Plan	Launch
Five fully-functioning affinity	←					Ongoing	→						
Develop 5-year plan for additional affinity groups		Process	Plan	Plan	Review Plan		Proposal	Refine		Plan & Budget	Launch		
Develop affinity group expectations documentation	2012 Summit		Draft for Exec	Refine	To Board	Committee Finalize	Approval		Publish				
Diversity values statement		Draft	To Exec		Committee	Committee	Proposal	Approval	Publish				
Evaluate staff position to manage, and grow, affinity			Evaluate	Evaluate	Proposal						Recs	Budget & Plan	Launch

Strategic Initiative 3 - Control Our Future

“No money, no vision.” In order for the UOAA to fulfill its mission of endearing alumni to each other and the University of Oregon through strong relationships, it will need to strengthen and enhance a diverse revenue model of the organization, focusing on several primary areas, including membership, sponsorships, institutional support and new revenue sources.



Metrics & Evaluation Strategy

So we want a plan to focus on our core mission and invest in our organization. And just how will we know if we are successful?

- Event Metrics – Did we see more alumni attendance at events? Did we see more alumni prospects at events, for Development? (Measure each and then evaluate annually)
- Customer service measurements – Are we demonstrating a high-level of excellence in engaging our alumni at all levels? (post-event surveys)
- Expenses – Did we come in on budget for mission-specific initiatives?
- Effectiveness – Did we advance our mission, seeing more alumni with stronger relationships with the UO?
- Membership Growth – Are we advancing towards a 20% membership penetration rate?
- Sponsorship Growth – Did we grow our sponsorship revenue?
- Touch-points – Did we increase e-news readership, social media involvement, website traffic, etc.?
- MOUs-Did we deliver on the commitments in the MOUs we entered into?
- Revenue Model – Are we improving our revenue mix, advancing towards a long-term, stable model for the UOAA? Are we hitting annual benchmarks called for in the plan?
- Awareness & Perception – Did we increase the UOAA's awareness, and neutral perception, with key constituents (as measured how?)

Evaluation Strategy

An annual review process will be formalized into the life of our organization. The data collected in our annual review process will be used by the Executive Committee and staff in a new annual session to measure our operations and the advancement of our overall mission. We will hold ourselves accountable and will move the organization to align itself with the university's budgeting cycle. Beginning with the February 2013 Board meeting, involving the entire Board, UO constituents, staff and Chapters, we will collectively evaluate the completion of tactics – and tasks – in the movement of the long-range plan. We will carefully evaluate our actions, being bold to let go of things that aren't working and confident to continue executing those tactics that are working.

Proposed New Annual Plan Evaluation Schedule

- February – UO Constituents and Chapters (What’s working? What’s not? Why?)
- February – Staff to report on progress of projects, tactics, budget, etc.
- February – Board to report on progress of Board-related tactics, goals, etc.
- March – Executive Committee meets to review progress, evaluate budgets, and give staff direction for next FY budgeting process.
- April & May – Refinement of tactics (make any adjustments), budget development
- June – New FY budget and tactical plan presented to Board for review and adoption