O ALUMNI ASSOCIATION

Strategic Plan

# Section I. What Guides our Strategic Plan

UOAA BOARD COMMITTEES

The UOAA Board of Directors initiated a strategic planning process in the fall of 2018, a process partially delayed due to transition in the Executive Director role. In 2019, the board established six sub-committees to focus on different elements of the plan. The co-chairs of each sub-committee served on a combined Strategic Planning Committee. The sub-committees were:

- Board Role
- Communications
- Equity & Inclusion
- Membership
- Mission, Metrics, & Segmentation
- Students & Recent Alumni

Each sub-committee delivered a set of strategic goals, compiled in Section II of this document and organized under the over-arching UOAA goals they support.
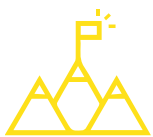
VISION, MISSION, AND VALUES

The following statements were crafted by the Strategic Planning Committee and adopted by the full UOAA Board of Directors in the spring of 2019:
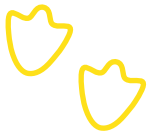
OUR VISION

Uniting and engaging Ducks in all stages of flight.

OUR MISSION

The University of Oregon Alumni Association fosters lifelong relationships, deepens engagement, and advocates on behalf of the university and Duck alumni around the world.

OUR VALUES

- Inclusive
- Welcoming
- Innovative
- Accountable
- Curious
- Equitable

AUDIENCES AND DEMOGRAPHICS

The UOAA seeks to serve and engage five main audiences:

1. Alumni
2. Students
3. Parents and families
4. Faculty and staff
5. Non-affiliated members

The demographic information below was drawn from the database on a range of dates between June 30 and September 30, 2020. As of September 9, 2020, the University of Oregon had 247,240 living alumni. The UO and UOAA define "alumni" as those who earned a degree or a minimum number of credits in a degree or certificate program, equal to one full-time year.

Type of Degree	# of Alumni	% of 252,880
Undergraduate Degree Only	172,511	69.8%
Graduate Degree Only	6,746	2.7%
Undergraduate & Graduate Degrees	2,241	0.9%
No Degree on Record	30,514	12.3%
Undefined or Certificate	40,868	16.5%

Alumni are affiliated with nine different schools, including just over half at the College of Arts and Sciences. Alumni with multiple degrees are counted in more than one place.

College	Living Alumni	% of 247,240
College of Arts and Sciences	128,691	52.1%
Lindquist College of Business	35,689	14.4%
College of Education	26,452	10.7%
School of Design	22,827	9.2%
School of Journalism & Communication	17,219	7.0%
School of Law	8,185	3.3%
School of Music & Dance	4,700	1.9%
Robert D. Clark Honors College	3,611	1.5%
Graduate School	3,095	1.3%

The UO and UOAA share a single alumni database of record. Email address capture falls far short of mailing addresses and phone numbers.

Contact Method	# of Alumni	% of 247,240
Paper Mail Address	232,802	94.2%
Phone Number	184,849	74.8%
Email Address	126,211	51.0%
No Contact Info	15,060	6.1%

UOAA alumni live in 148 countries around the world, with 93% of known addresses in the U.S.

Top 10 U.S. States	Alumni as of 10/9/2020	% of 247,240
Oregon	118,860	48.1%
California	32,964	13.3%
Washington	19,714	8.0%
Colorado	3,888	1.6%
Arizona	3,322	1.3%
Texas	3,140	1.3%
New York	2,518	1.0%
Idaho	2,497	1.0%
Hawaii	2,425	1.0%
Nevada	1,947	0.8%

Top 10 Countries Outside U.S.	Alumni as of 10/9/2020	% of 247,240
Japan	2,354	0.95%
Canada	2,174	0.88%
China (not Hong Kong)	2,122	0.86%
Taiwan	1,091	0.44%
Republic of Korea	939	0.38%
Singapore	859	0.35%
Indonesia	641	0.26%
Germany	621	0.25%
Hong Kong	566	0.23%
Australia	451	0.18%

A majority of alumni are concentrated in a small number of metro areas.

Top 6 Metro Areas	# of Alumni	% of 247,240
Portland	49,410	20.0%
Lane County	39,368	15.9%
Bay Area	11,655	4.7%
Seattle	10,057	4.1%
Los Angeles	6,216	2.5%
Central Oregon	5,687	2.3%

Student enrollment at the UO has grown over time. While age is unknown for 20% of alumni, at least 50% of all alumni are under age 50 and have graduated since the early 1990s.

Age	# of Alumni	% of 252,880
19 and Under	305	0.1%
20 - 29	45,774	18.5%
30 - 39	45,254	18.3%
40 - 49	37,881	15.3%
50 - 59	31,646	12.8%
60 - 69	20,886	8.4%
70 and Over	21,165	8.6%
Age Unknown	49,969	20.2%

Graduation Decade (Degreed alumni only)	# of Alumni	%of 224,252
2020's	4,338	1.9%
2010's	53,134	23.7%
2000's	41,806	18.6%
1990's	36,860	16.4%
1980's	31,542	14.1%
1970's	30,519	13.6%
1960's & Earlier	25,930	11.6%
No Decade	224	0.1%

Over half of all alumni have self-reported ethnicity data to the university, but much more data are available for recent alumni, and recent classes are far more diverse than earlier ones. Because of this, alumni with unknown ethnicity are presumed to be primarily White/Non-Hispanic.

Ethnicity	# of Alumni	% of 246,254
Asian or Pacific Islander	15,546	6.3%
Black/Non-Hispanic	2,829	1.1%
Hispanic	5,650	2.3%
Native American	1,696	0.7%
Other/Multiple	4,134	1.7%
White/Non-Hispanic	107,358	43.6%
Unknown	109,041	44.3%

The university has roughly equal numbers of male and female alumni.

Gender	# of Alumni	% of 252,880
Female	125,258	50.7%
Male	127,321	51.5%
Other or unknown	301	0.1%

UNIVERSITY ADVANCEMENT INITIATIVES

The UOAA is a 501(c)3 entity distinct from the university. But we operate inter-dependently with the University Advancement division. For example, we rent space in the Ford Alumni Center, the UOAA staff are all university employees, and a majority portion of our personnel budget is provided by the university. As such, we recognize four major Advancement initiatives and the role the UOAA plays in each of them. Specific strategies in support of these initiatives follow in Section II of this plan.

1. University Campaign
   The university is in the final stages of a decade-long fundraising campaign, launched publicly in 2014, with an initial $2 billion goal that was later expanded to $3 billion. Because membership dues paid to the UOAA are categorized in part as university donations, the UOAA participates directly in the campaign.

   - Raise $10 million in memberships and contributions to the UOAA before the conclusion of the university campaign.

2. Portland Initiative
   Portland is the business and population center of our state. It is the greatest source of UO students and the primary location of our alumni. University Advancement launched an effort in 2019 to increase its presence in Portland, and the UOAA participates in this goal.

   - Increase staff presence in Portland by hiring and/or re-locating staff to the area.
   - Increase engagement opportunities for alumni and volunteers in Portland.
   - Segment communications to better serve our Portland community.
   - Pilot a summer student internship program in Portland.

3. Data/Social Media Initiative

   In partnership with the University of Oregon Foundation, the Advancement division launched an initiative in 2019 around alumni and donor data and making data-based decisions. The initiative seeks to increase the quality and integrity of information in the alumni and donor database, to upgrade the tools and technology used by Advancement and the Foundation, to clarify staff roles and responsibilities around the database, and to launch a robust digital strategy with a focus on the use of social media as an engagement tool. Of note, the capture of alumni email addresses stood at 46 percent at the start of this initiative, a low figure that limits the UOAA's ability to effectively communicate with alumni.

   • Increase the quality of contact information in the alumni database, with a particular emphasis on email capture.
   • Increase the tracking of program participation and volunteer service in the alumni database.
   • Provide alumni and volunteers with access to technology that helps to foster a sense of community.
   • Empower and support volunteers in communicating directly with our alumni communities.
   • Launch a UOAA social media strategy in partnership with University Communications.
   • Implement a social media content calendar to increase social engagement, and promote a social media strategy that invites and stewards bi-directional communications with alumni.
   • Maximize the relevance of email communications with alumni by targeting, customizing, and limiting the use of this channel.

4. Oregon Values Initiative

   In 2020, the university launched the Oregon Values Initiative with a goal of better communicating with Oregon residents the value of higher education and the ways in which the university's research supports the well-being of the state. Funding for this initiative has been postponed, but the university remains dedicated to pursuing these goals through existing programs and channels.

   • Maintain and support an informed cadre of volunteers to advocate on the university's behalf at the state and federal levels.
   • Develop content and programming that highlight research at the UO and campus and alumni stories around ways that the university supports the well-being of the state of Oregon.

CORONAVIRUS AND THE UOAA

As we develop our strategic plan, the coronavirus and Covid-19 have had a profound effect on the world, including the operations of the UOAA and the university. The pandemic currently prevents us from hosting large, in-person gatherings, including many of our traditional events. At the same time, the pandemic presents opportunities for us to engage and communicate with alumni in new and expanded ways. We assume that the virus will continue to affect operations for a significant time to come.

That said, while the tactics we use to reach our goals may change, the underlying goals and strategies of this plan are largely unaffected by the virus. We have two new goals inspired by the pandemic, which are incorporated into the plan that follows:

- Develop content and programming that highlight research at the UO and campus and alumni stories around the pandemic and its effect on our communities.
- Make the UOAA a locus of expertise in producing virtual events, and engage and support UO schools and units that can provide content with broad appeal.

BLACK LIVES MATTER

As we develop our strategic plan, our country is engaged in a renewed conversation about issues of race, ethnicity, and social justice. We recognize that the UOAA has a role in this conversation, and we commit to the following goals, which are incorporated into the plan that follows:

- Recruit, retain, and promote into leadership positions a high-performing staff that reflects the diversity of the communities we serve.
- Recruit, support, and promote into leadership positions a cadre of alumni volunteers that reflects the diversity of the communities we serve.
- Feature speakers, panelists, and honorees that reflect the diversity of the communities we serve.
- Develop content and programming that highlight the research at the UO and campus and alumni stories around issues of diversity, equity, inclusion, and social justice.
- Represent and communicate the voice of the university to its alumni and the voice of alumni to the university.
- Promote support of scholarships that increase student access to education at the UO.
- Empower alumni to opt in to affinity group communications that interest them.

Section II. Our 5-Year Goals and Strategies

GOALS

Five over-arching goals will guide out work over the next five years:

Goal 1: Move alumni through progressive stages of engagement.

Goal 2: Provide the financial and human resources to sustain and grow alumni engagement.

Goal 3: Target key audiences to lay the foundation for future engagement.

Goal 4: Leverage data for decision making and measuring success.

Goal 5: Activate the UOAA Board and other volunteer leaders as ambassadors.

STRATEGIES

Goal 1: Move alumni through progressive stages of engagement.

- Double the number of recorded UO alumni who engage in at least one alumni program per fiscal year.

Level 1: SHOWING DUCK PRIDE – Appreciating the UO and its alumni

- Celebrate alumni by producing compelling, image-rich, news-breaking content across diverse platforms, reaching strategic audiences and exciting and moving them toward deeper engagement and irrational Duck pride.
- Persistently connect alumni to campus through heartfelt, targeted communications, bridging alumni memories to today's student experiences, while building enthusiasm for tomorrow.
- Create channels to highlight the career accomplishments of recent alumni.
- Promote Oregon Quarterly and Class Notes as a vehicle to celebrate UOAA members.

Level 2: TAKING FLIGHT – Leveraging the UOAA for personal and professional growth

- Expand alumni career networking to include access to career coaching services.
- Increase academic programming for alumni, including a particular focus on the coronavirus pandemic and its effect on our communities; issues of diversity, equity, inclusion, and social justice; and the way the university supports the well-being of the state of Oregon.
- Make the UOAA a locus of expertise in producing virtual events, and engage and support UO schools and units that can provide content with broad appeal.
- Increase engagement opportunities for alumni and volunteers in Portland.
- Host "marquee" cultural and athletic events in the five top markets of Portland, Eugene, Seattle, Los Angeles, and the San Francisco Bay Area.
- Create a career playbook for college seniors and recent alumni.

Level 3: FLOCKING TOGETHER – Creating and sustaining the alumni network

- Leverage Homecoming to create a tradition of multiple alumni reunions in milestone years.
- Expand affinity group reunions to engage different alumni communities.
- Create mechanisms to connect new graduates and newly arrived alumni with local chapters.
- Develop and support international alumni communities alongside domestic chapters.
- Provide opportunities for student groups to engage with corresponding alumni communities.

Level 4: TENDING THE NEST – Supporting the next generation of students and alumni

- Maintain and support an informed cadre of volunteers to advocate on the university's behalf at the state and federal levels, and communicate issues that affect the UO and Duck alumni.
- Pilot a summer student internship program in Portland, and recruit alumni who can host interns.
- Secure technology to facilitate alumni-to-student and alumni-to-alumni mentoring.
- Recruit, support, and promote into leadership positions a cadre of alumni volunteers that reflects the diversity of the communities we serve.
- Feature speakers, panelists, and honorees that reflect the diversity of the communities we serve.
- Represent and communicate the voice of the university to its alumni and the voice of alumni to the university.
- Promote support of scholarships that increase student access to education at the UO.
- Increase the effectiveness of scholarship fundraising by chapters and the UOAA board.

Goal 2: Provide the financial and human resources to sustain and grow alumni engagement.

- Raise $10 million in memberships and contributions to the UOAA before the conclusion of the university campaign.
- Retain annual members and grow new annual memberships at least 3% per year.
- Explore partnerships with other membership programs affiliated with the UO.
- Maximize the return on alumni travel programs and discontinue unprofitable trips.
- Establish a policy on when and how the UOAA may make donations.
- Provide grant funding for UO proposals that aim to increase alumni engagement.
- Recruit, retain, and promote into leadership positions a high-performing staff that reflects the diversity of the communities we serve.
- Increase staff presence in Portland by hiring and/or re-locating staff to the area.

Goal 3: Target key audiences to lay the foundation for future engagement.

- Segment the student audience by class year, major, and career interests to target programs and marketing.
- Create volunteer and internship opportunities for Student Alumni Association (SAA) members early in their college career to create long-term engagement in SAL that mirrors alumni volunteer leadership.
- Focus on engaging recent alumni, especially in our five major markets, with stand-alone programming and communications.
- Partner with Athletics in integrating athlete alumni into UOAA programs.
- Partner with campus groups and departments to engage alumni and students during celebratory months or days (Black History Month, Coming Out Day, etc.).
- Revive dormant affinity groups, and expand to include Asian/Pacific Islander and veteran alumni.
- Increase support of international chapters and explore expansion to additional population centers.
- Partner with UO schools to support engagement of alumni by academic program, in particular launching a Sports Product Marketing group.
- Pursue technology to segment and customize communications geographically.

Goal 4: Leverage data for decision making and measuring success.

- Increase the quality of contact information in the alumni database, with a particular emphasis on email capture.
- Increase the tracking of program participation and volunteer service in the alumni database.
- Provide alumni and volunteers with access to technology that helps to foster a sense of community, and empower and support volunteers in communicating directly with alumni communities.
- Launch a UOAA social media strategy in partnership with University Communications.
- Implement a social media content calendar to increase social engagement, and promote a social media strategy that invites and stewards bi-directional communications with alumni.
- Maximize the relevance of email communications with alumni by targeting, customizing, and limiting the use of this channel.
- Survey key alumni populations for membership insights: individuals whose memberships have lapsed, renewing members, never-before members, etc.
- Partner with Student Life, Advancement, and the Foundation to get student activity participation lists into the database at the end of each academic year.
- Empower alumni to opt in to affinity group communications that interest them.
- Create a dashboard for staff and the UOAA board that tracks engagement, finances, and data capture.
- Pursue a data-based segmentation model that allows the UOAA to target programs and communications to the alumni most likely to engage with them.

Goal 5: Activate current and former volunteer leaders as ambassadors.

- Clarify the expectations of UOAA board members and the opportunities for them to serve as alumni ambassadors.
- Re-engage past UOAA board members with quarterly communications and occasional reunions.
- Increase communication with chapter and constituent volunteers.
- Remove membership as a pre-requisite for entry-level alumni volunteer service.
- Facilitate the sharing of best practices among chapter volunteers, and revive the periodic chapter leader workshop.
- Educate SAA leaders as advocates on how the UOAA can be a resource.
- Create a community of former SAA student leaders as a feeder for alumni volunteer roles.