

# UCI Alumni

Strategic Plan 2016-2018

NEWKIRK ALUMNI CENTER





# Overview of UCI Alumni

The future is bright for UCI as it moves into its second half-century. Few universities can match UCI's growing reputation, location, and opportunity for greatness in the years ahead. Integral to UCI's ascension will be realizing the potential held by its more than 166,000 alumni to open doors, generate ideas, support students, and elevate UCI with their time, talent, and treasure. UCI is making a significant investment in alumni engagement and we are creating a strong plan to deliver on its promise.

The UCI Alumni Association (UCIAA) is nearly as old as the institution itself and like UCI, it is seeking to expand. In recent years, UCI has begun to realize the potential of its alumni and has worked with the Association's volunteer leadership to elevate within the UCI hierarchy. With a beautiful new alumni center, a very engaged Board of Directors, and new leadership, UCIAA is poised to grow.

This strategic plan creates the path forward for the next three years. From it, current and new staff will develop detailed work plans and metrics with the goal of creating strategies that can be updated twice a year to ensure all stakeholders can see the progress toward achieving our goals.



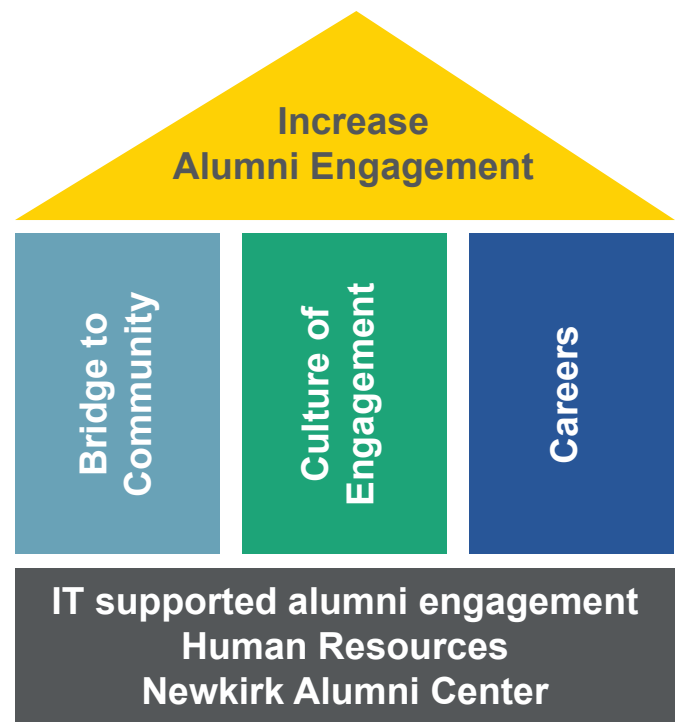


UCI Alumni Association Board of Directors. (Not all pictured.)

# Process

Our strategies find their roots in the following components: the history of UCIAA, a 2014 survey of alumni, UCI branding research, industry best practices, input from alumni and conversations with them, input from campus leadership, and most importantly, the outcome of the 2014 Board Retreat.

At the December 2014 retreat, the Board, having reviewed the research and background documents, agreed upon three strategic foci for UCIAA and their foundational requirements. These strategies were then tested with the newly formed Young Alumni Council. Task groups were subsequently formed to further develop the thinking in several areas. The plan was finalized in September 2015.

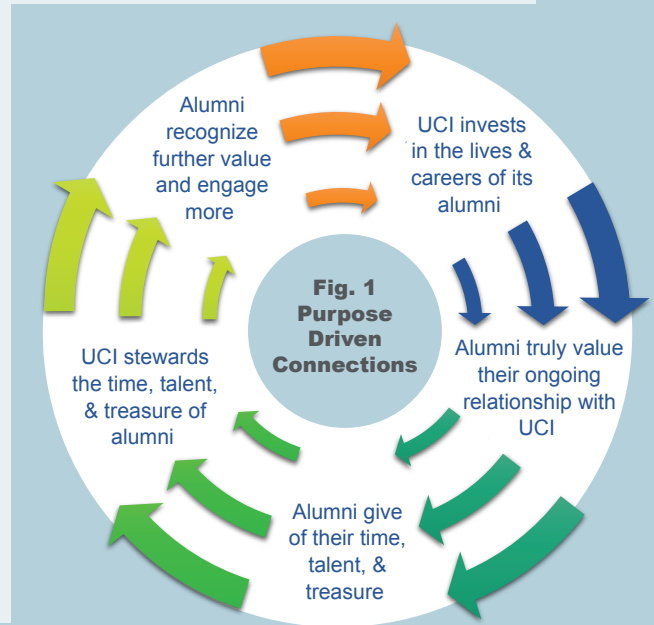


# Purpose Driven Connections

UCIAA engaged WPA Research in the fall of 2014 to survey a significant sample of UCI's alumni to ascertain the value for UCI's alumni to engage with UCI. The core question in the research was, "What can UCI do for you that no other organization to whom you give your time, talent and treasure can?" The results of the research were overwhelmingly positive and informed the creation of this plan. In short, engaging with UCI gives alumni an opportunity to connect with something bigger than themselves.

Alumni are very proud of the education they received and of the university's research. They want to be connected to UCI for personal and career enrichment. If UCI supports and invests in our alumni, they will support and invest in UCI with their time, talent, and treasure.

*Fig. 1: Purpose Driven Connections - Demonstrates the increasingly positive relationship between UCI and its alumni.*



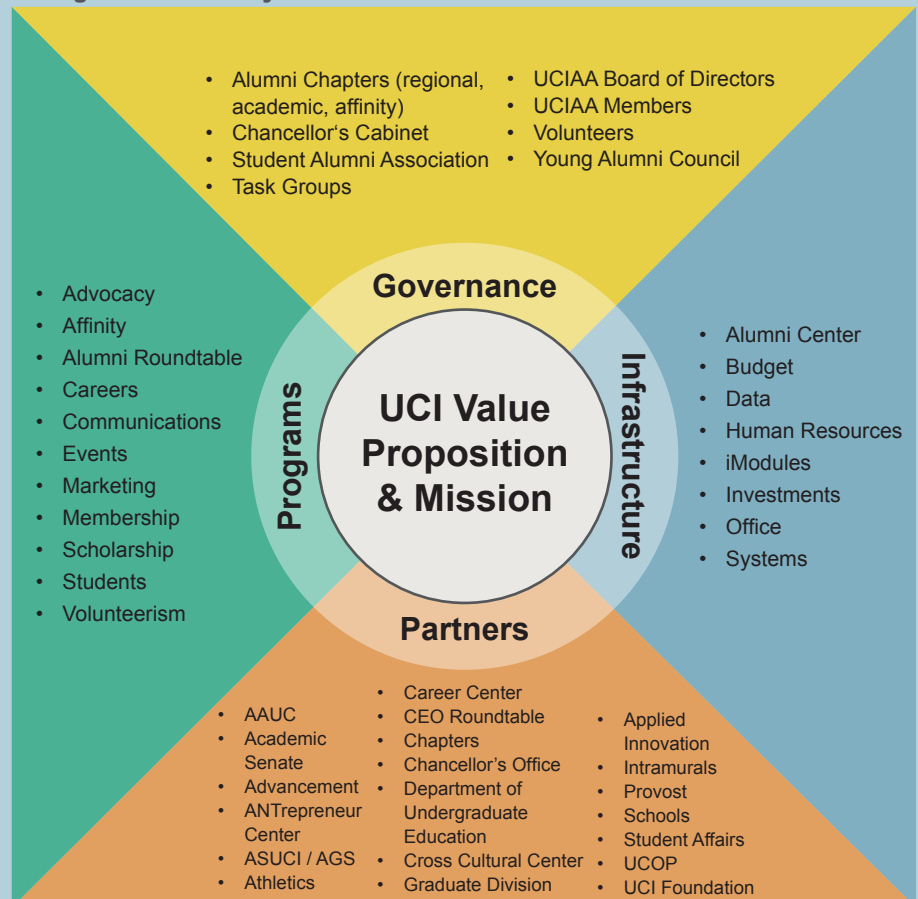
## Ecosystem

Alumni engagement at UCI will only realize its potential if alumni are fully integrated into the fabric of UCI, starting at the very heart of the enterprise and expanding outward. Positioned in the Chancellor's Office, alumni engagement is symbolically and strategically at the heart of UCI.

Central to the Association's work is its mission:  
To enrich the lives of alumni and engage them in a lifelong advancement of UC Irvine.

*Fig. 2: UCIAA Ecosystem - Outlines the alumni "ecosystem" of what we do, who we partner with to do it, what resources are required, and who holds us accountable.*

**Fig. 2 UCIAA Ecosystem**





# Goals and Action Items

In 2016-2018, UCIAA will focus on three core strategies that it believes will be crucial to impacting the alumni community's desire to share their time, talent, and treasure. In 2016, UCIAA aims to strengthen the central alumni function for UCI and in 2017, drive expansion of alumni staff into UCI's schools and key departments.

## Strategy 1

### Bridge to Community

Alumni opening doors for UCI into the community and for the community into UCI

## Strategy 2

### Culture of Engagement

Creating lifelong Anteater pride and an expectation for giving back

## Strategy 3

### Careers

Supporting the career aspirations of our students and alumni





# Bridge to Community

Goal: Engage alumni so they see the opportunities to open doors for UCI into their community, and for their community into UCI, creating a culture at UCI that welcomes alumni and community participation.

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## Top Five Objectives:

1. Establish pathways into UCI for alumni, making it easier to access faculty experts, graduate students, interns and volunteers.
2. Educate faculty and campus departments on the value of engaging with alumni and community organizations.
3. Collect and share testimonials and examples of this strategy in action.
4. Increase and tailor communication with alumni as to what is happening at UCI.
5. Build presence locally, nationally, and globally through presenting excellent programs for alumni and engaging them in relevant community events.





Steve Zylius/ UC Irvine

## Annual Tactics:

### Year 1:

- Implement a task force to fully develop the strategy.
- Strengthen and grow our alumni chapters.
- Create a presence in the local Orange County community through profile building at key community events.
- Support the development of the OC Working Together Summit.
- Present first rate events that can engage the alumni community such as Homecoming, Lauds & Laurels, and chancellor events locally, nationally, and internationally.
- Engage alumni and community leaders with the Chancellor through Leadership Conversations.
- Elevate the profile of the Board of Directors and the Young Alumni Council on campus and in the community.
- Advocate for robust volunteer policies, metrics and training across campus.
- Collect stories of powerful alumni community connections.
- Work with UCI Parking to continue to improve access.

### Year 2:

- Create online tools that facilitate a two-way engagement among alumni and community with UCI.
- Hold an annual gathering for alumni chapters.
- Work with the Provost's Office, Academic Senate, and Human Resources to engage faculty and staff in UCIAA's strategy.
- Identify and engage key alumni groups such as Dean's Leadership Councils, etc.
- Continue to host excellent and engaging events and programs.
- Develop a community ambassadors program to support alumni community presence.
- Work with UCI Applied Innovation to support social enterprise and non-profit startups.
- Create ways for alumni to connect with each other and the community through UCI projects that matter to them.

### Year 3:

- Assess the program's effectiveness and revise the strategy for the next three years.



# Culture of Engagement

Goal: Create lifelong Anteater pride and commitment to the UCI family. Start by engaging alumni with prospective and accepted students, then, enrich the culture and spirit at UCI by delivering alumni value to students, staff, faculty, and the community.

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## Top Five Objectives:

1. Become a strong partner with key campus partners to onboard students as future alumni and deliver meaningful alumni engagement. (Student Services, Enrollment Services, Career Services, Student clubs, Athletics, faculty, staff, parents program, etc.)
2. Increase the presence of the Student Alumni Association (SAA) on campus as a bridge to the student population.
3. Ensure key student life activity is recorded in the university system upon graduation.
4. Create a strong slate of young alumni programs to demonstrate value for alumni engagement early in the lives of alumni.
5. Offer a diverse array of marketing and programmatic strategies, targeted to different alumni market segments and demographics to constantly encourage the idea of engaging with and giving back to the university.



# Annual Tactics

## Year 1

- Implement a task force to develop the strategy.
- Implement iModules. (Platform for email, events, and chapters)
- Hire a campus relations coordinator.
- Increase participation in SAA events: Dinners for 12 Anteaters, Inside the Alumni Studio, and UCI Care-A-Thon.
- Engage with campus student organizations and the Greek system.
- Have a strong alumni presence at Welcome Week.
- Suggest changes to graduation that incorporate a stronger alumni presence.
- Implement “What Matters to Me and Why” for alumni.
- Establish the volunteer “auction” tech platform to engage students with high profile alumni.
- Refine the definition of alumni and finalize the association’s membership strategy and make it automatic upon graduation.
- Create segmented marketing messages based on demographics, not the “one size fits all” approach.
- Create web tools for campus partners to access.
- Collaborate on messaging alignment with annual giving office.



Photo courtesy of UCI Alumni Association

## Year 2:

- Increase UCI’s schools and departments ability to engage their alumni through dedicated staff.
- Establish goals for all schools and major departments.
- Raise more money for student scholarships.
- Further develop the alumni staff and faculty programming on campus and at the medical center.
- Insert greater alumni messaging into the annual staff awards.
- Engage more schools and departments on iModules.
- Ensure creative alumni branded items are available through The Hill and our website.
- Further develop alumni graduation messaging.
- Develop systems to ensure all student data is captured in the alumni database, Advance.
- Develop a webpage on how to show your Anteater pride.
- Build on students community service work so they can continue serving the community as alumni.

## Year 3

- Assess the program’s effectiveness and revise the strategy for the next three years.



# Careers

Goal: Support the career aspirations of our students and alumni. Alumni, existing in the space between the working world and UCI, can engage students as interns, recruit recent graduates, and support each other's career aspirations.

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## Top Five Objectives:

1. Implement a technology platform to support a scalable mentoring program and career education opportunities.
2. Work with campus partners to engage alumni in career mentoring, internship opportunities, and job placement.
3. Advocate for alumni to be active in supporting the career aspirations of our students and young alumni.
4. Create a physical place for mentoring at the Newkirk Alumni Center.
5. Provide ample social and professional networking opportunities for alumni through special events.



# Annual Tactics

## Year 1

- Work with campus partners to further develop the strategy.
- Continue to partner on the emerging Anteaters for Life campus-wide career strategy.
- Build the Very Important Anteater (VIA) Lounge for mentoring at the Newkirk Alumni Center.
- Research and purchase a new mentoring software platform.
- Revise UCIAA's website's career resources.
- Work with UCI Extension to promote relevant career related content and provide their content on UCIAA's career page.
- Work with the Career Center to develop a strategic partnership for making existing and new career resources available to alumni.
- Collaborate with the UCI Applied Innovation.

## Year 2

- Implement a mentoring platform.
- Recruit alumni mentors.
- Implement the alumni component of the Anteater for Life campus-wide career program.
- Develop young alumni networking events.
- Create ways for alumni to do business with fellow alumni.
- Develop a "Hire an Anteater" campaign.

## Year 3

- Assess the program's effectiveness and revise the strategy for the next three years.



# Foundation Elements

## Alumni Data

The success of these strategies relies on the quality of our data. University Advancement is a crucial partner and we will continue to work with them to ensure innovative methods of obtaining as much alumni data as possible. Part of the solution is technology that encourages access to alumni data such as LinkedIn; part is creating programs that are “sticky” enough to attract the participation of our alumni; and part of it is disciplined practices by staff to ensure data capture.

*Key requirements: Partnership, investment in IT, staff practices, new tech platforms, implementation of iModules.*

## Bridge Media = IT Driven Alumni Engagement

UCI must develop a new platform that enables alumni to curate their on-line experience with UCI. Alumni need a system that is elegantly initiated and easy to use. This idea is imperative. We will develop a new platform in partnership with UCI OIT. Because this may be a first for the university, it will require a lot of work. Online engagement is the main form of engagement for our alumni. As a leading research university, we must be leaders in the field and on-par with the technology experiences of our predominantly young alumni.

*Key requirements: Detailed project overview and research to develop the idea further and design a project plan to deliver the solution.*

## Communications

The only scalable form of alumni engagement is communication. With an alumni population of 50% under 35 years of age, our communication strategy must be timely, relevant and consistent, at the level of the market in which our alumni exist.

*Key Requirements: Increase staffing. Brand identity document. Flexible technical platform.*

## Endowments

UCIAA is fortunate to have over eight million dollars in endowments for student scholarships, Alumni Center maintenance, and membership/programming. These endowments are carefully managed and monitored by the UCI Alumni Association Finance Committee. We need to significantly grow our programming endowment to ensure we can meet the increasing demand for alumni engagement.

*Key Requirements: \$1 million for the programming endowment to be raised through an Alumni Center room naming campaign.*

## Finance and Administration

A solid administrative platform is essential for growth. We will continue to refine our administrative systems to ensure they are as efficient as possible while being accountable to both UCI and our membership. It is important that each staff member have the resources they need to execute their work plans as effectively as possible.

*Key requirements: New technology for staff, streamlined accounting practices.*

## Human Resources

Our staff and volunteer resources are core to our success as we grow. We will create a team that is cohesive, innovative, and willing to take risks. To do this, we will grow our team of staff members and invest in the professional growth of each individual. We also plan to strategically increase our volunteer talent pool. Strong campus-wide volunteer practices are needed to ensure that every alumnus who volunteers for UCI has an excellent experience.

*Key requirements: Investment in staff training and development. Strengthening of volunteer practices within UCIAA and all of UCI.*



# Measuring Success

## Newkirk Alumni Center

The generous gift of the Alumni Center by the visionary Newkirk family has created a new home for UCI's alumni and laid a strong foundation for future alumni engagement. We now need to fully realize the potential of the center through powerful Anteater branding in the building to ensure all alumni who enter the building leave as proud Anteaters, inspired to be graduates of UCI.

*Key Requirements: \$1,000,000 to fund Anteater branding. Undertake improvements to the space and enhancement for programming.*

## Partnerships

The whole goal of this strategic plan is to foster powerful alumni engagement that will benefit both the alumni and the university. This will require mutually beneficial partnerships both on campus and within the community.

*Key Requirement: A new position in the central office to focus on partnerships.*

An alumni points system will be developed for the 2016 year that will enable UCIAA to track alumni engagement in a measurable way. The program will take a year to implement, as systems take time to implement. Units engaging alumni need to be trained and incentivized to participate. Within two years, the program will enable us to set goals, show the return on investment, and undertake program assessment.

Point Allotment	Category
1 Point	<ul style="list-style-type: none"> <li>• Social media: likes, joins, forwards, shares</li> <li>• Opening the magazine or newsletter online</li> </ul>
2 Points	<ul style="list-style-type: none"> <li>• Change of address notification</li> <li>• Provide a viable email</li> <li>• Event RSVP</li> </ul>
3 Points	<ul style="list-style-type: none"> <li>• Making a donation</li> <li>• Attending an event</li> <li>• Booking the Newkirk Alumni Center</li> <li>• Becoming a General member of UCIAA (free)</li> <li>• Sending in a class note</li> </ul>
4 Points	<ul style="list-style-type: none"> <li>• Volunteering – General</li> <li>• Mentoring</li> <li>• Hiring an Anteater intern</li> <li>• Travel program participation</li> <li>• Becoming an Annual Member of UCIAA</li> </ul>
5 Points	<ul style="list-style-type: none"> <li>• Board/Council/Foundation/ Advisory committee member</li> <li>• Chapter leadership volunteer</li> <li>• Becoming a Lifetime Member of UCIAA</li> <li>• Joining the Chancellor's Club</li> </ul>

## Tracking Methodology

Our goal is to track all measurable forms of alumni engagement. The program will begin with the obvious measurable indicators (event attendance, volunteering, etc.) and expand as it becomes more robust and technologically easier to implement across UCI. The chart to the right is an example of the point system that will be developed.

*Full Performance Metrics breakdown cont. pg. 14.*

Core Area	Key Deliverables	2015 Baseline	2016 Metrics	2017 Metrics	2018 Metrics
<b>A. Strategies</b>					
<b>1. Bridge to Community - Engaging alumni to open doors in the local, national, and international community.</b>					
	Alumni chapters	19 chapters	24 chapters	30 chapters	40 chapters
	OC alumni community	6 OC community events	10 OC community events	15 OC community events	18 OC community events
	Programming - Anteater meet-ups, chancellor events, campus events focused on engaging alumni with the mission of UCI	21 total events/ 1,500 attendees	30 total events/ 2,500 attendees	40 total events/ 3,000 attendees	50 total events/ 3,500 attendees
	Homecoming	5,000 attendees	5,500 attendees	6,000 attendees	6,500 attendees
	Lauds & Laurels	\$135,000 raised/ 400 attendees	\$175,000 raised/ 400 attendees	TBD based on previous year	TBD based on previous year
<b>2. Culture of Engagement - Building a culture of alumni engagement across UCI that begins before a student's first days on campus.</b>					
	Alumni giving	4.6% alumni giving	5.6% alumni giving	6.6% alumni giving	7.6% alumni giving
	Student Alumni Association (SAA)	<ul style="list-style-type: none"> <li>\$25,000 raised at Care-a-thon</li> <li>27 D12 dinners hosted/ 300 attendees</li> <li>300 Inside the Alumni Studio attendees</li> </ul>	<ul style="list-style-type: none"> <li>\$30,000 raised at Care-a-thon</li> <li>37 D12 dinners hosted/ 500 attendees</li> <li>400 Inside the Alumni Studio attendees</li> </ul>	<ul style="list-style-type: none"> <li>\$40,000 raised at Care-a-thon</li> <li>47 D12 dinners hosted/ 600 attendees</li> <li>800 Inside the Alumni Studio attendees</li> </ul>	TBD based on previous year
	Welcome Week	5,000 student participants	5,500 student participants	6,000 student participants	6,500 student participants
	"What Matters to Me and Why" alumni/student speaker program	0 events	2 events	4 events	6 events
	Scholarships - awarding more than \$100,000 in scholarships per year	\$102,500 awarded / 28 scholarships	\$102,500 awarded / 28 scholarships	\$127,500 awarded / 29 scholarships	\$152,500 awarded / 30 scholarships
	Graduation activities (Grad Expo, Senior BBQ, Senior Send-Off)	5,000 attendees	5,500 attendees	6,000 attendees	TBD based on previous year
	UCIAA Membership	10,200 UCIAA Members	12,200 UCIAA Members	14,000 UCIAA Members	15,000 UCIAA Members
	Student recruitment support		<ul style="list-style-type: none"> <li>30 Admissions yield events / 150 regional alumni attendee</li> <li>Develop alumni/ student calling program</li> </ul>	<ul style="list-style-type: none"> <li>30 Admissions yield events / 150 regional alumni attendees</li> <li>Implement alumni/ student calling program</li> </ul>	<ul style="list-style-type: none"> <li>30 Admissions yield events / 210 regional alumni attendees</li> <li>Calling program metrics TBD</li> </ul>
<b>3. Supporting the Careers of our Students and Alumni - This is one of the top priorities for our alumni, 50% of whom are under 35 years old.</b>					
	Online mentoring and career support via Evisors or equivalent platform	0 mentors/mentees	50 mentors / 150 mentees	TBD based on previous year	TBD based on previous year
	Webinars - Increase UCIAA webinar offerings in partnership with UCI Extension and Career Center	0 career webinars	9 career webinars	TBD based on previous year	TBD based on previous year
	VIA Mentoring Lounge - Creating a dedicated space for alumni, mentors and students	0 mentor program meet-ups	20 mentor program meet-ups	TBD based on previous year	TBD based on previous year



Core Area	Key Deliverables	2015 Baseline	2016 Metrics	2017 Metrics	2018 Metrics
<b>B. IT Supported Engagement</b>					
<b>Developing a new approach to how alumni interact with UCI online which is the primary form of alumni engagement.</b>					
	iModules - A new platform for emails, events and chapters available to all of UCI	0 schools/depts., 0 chapters on iModules platform	5 schools/depts., 5 chapters on iModules platform	10 schools/depts., 20 chapters on iModules platform	15 schools/depts., 30 chapters on iModules platform
	Bridge Media- IT Driven alumni engagement	NA	Bridge Media developed	Bridge Media in place	Bridge Media adopted by campus
	Other software to build new IT platform - Oracle, Evisors, Volunteer Auction, etc.	NA	<ul style="list-style-type: none"> <li>Online mentoring platform development</li> <li>Volunteer auction system development</li> </ul>	<ul style="list-style-type: none"> <li>Online mentoring platform in place</li> <li>Volunteer auction system in place</li> </ul>	Metrics TBD
<b>C. Infrastructure</b>					
<b>Alumni Data (projected)</b>					
	Total alumni	170,000 alumni	177,000 alumni	183,500 alumni	190,000 alumni
	Total degreed alumni	164,000 degreed alumni	170,000 degreed alumni	176,000 degreed alumni	182,000 degreed alumni
	Addressable alumni	151,000 addressable alumni	161,000 addressable alumni	167,000 addressable alumni	172,000 addressable alumni
	Alumni email addresses	100,500 emails	116,500 emails	126,000 emails	136,000 emails
<b>Professional Staff</b>					
	16 FTE representing a 5.5 FTE growth to reduce staff burnout and support the three strategies	<ul style="list-style-type: none"> <li>9.7 FTE</li> <li>1:16,494 staff to alumni ratio (1:8,756 industry average, CAAE 2012)</li> </ul>	<ul style="list-style-type: none"> <li>15 FTE</li> <li>1:11,066 staff to alumni ratio (1:8,756 industry average, CAAE 2012)</li> </ul>	<ul style="list-style-type: none"> <li>16 FTE</li> <li>1:10,812 staff to alumni ratio (1:8,756 industry average, CAAE 2012)</li> <li>5 additional FTE within schools &amp; departments</li> </ul>	<ul style="list-style-type: none"> <li>17 FTE</li> <li>1:10,558 staff to alumni ratio (1:8,756 industry average, CAAE 2012)</li> <li>5 additional FTE within schools &amp; departments</li> </ul>
<b>Volunteers</b>					
	Support for the UCI Board of Directors, Young Alumni Council and general alumni volunteers	200 volunteers	250 volunteers	TBD based on previous year	TBD based on previous year
<b>Newkirk Alumni Center - Operating as a front door for the university. Ongoing operations and building improvements.</b>					
	NAC rental revenue	\$27,000 rental revenue	\$30,820 rental revenue	TBD based on program assessment	TBD based on program assessment
	NAC catering revenue	\$6,000 catering revenue	\$6,000 catering revenue	TBD based on program assessment	TBD based on program assessment
	NAC tile fund / Spirit Wall campaign	\$22,500 tile funds raised	\$106,500 tile funds raised	Completed	Completed
	NAC space naming opportunities	\$100,000 raised	\$250,000 raised	\$500,000 raised	\$1,250,000 raised
<b>Overhead</b>					
	<ul style="list-style-type: none"> <li>Office / Admin</li> <li>Market research</li> <li>Staff development</li> </ul>	21 collective days spent on staff development	90 collective days spent on staff development (5 days each)	95 collective days spent on staff development (5 days each)	100 collective days spent on staff development (5 days each)

Note: These metrics will be updated once an alumni points system is developed.



# UCI Alumni

Let's continue the journey together and strengthen the Anteater Network!

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