

The Scenes of Their Youthful Studies

**The Next Era in Alumni Relations
University of Virginia**

**Report of the Alumni Relations Task Force
June 2004**



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At the University of Virginia

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Executive Summary

Envisioning the Ideal Alumni Relationship

The stature of the University of Virginia rests on three strong foundations: its heritage, its core values, and its people—the students, faculty, staff, parents, and alumni who are continually shaping and re-shaping the institution. This report focuses on the University’s engagement with a critically important branch of its family: the alumni.

In the fall of 2003, University President John T. Casteen III convened the Alumni Relations Task Force. Comprising alumni volunteers who represent schools and programs across the Grounds, the Task Force was given the charge of developing a comprehensive proposal for cultivating meaningful and lasting ties with an increasingly diverse body of alumni. The Task Force was also asked to propose an organizational structure, a financing model, and an implementation plan for realizing its goals. To fulfill its charge, the Task Force developed a set of recommendations aimed at creating the ideal alumni relationship (for more information on the Task Force’s charge and members, see Appendix A.).

One can imagine the following scenario:

Over morning coffee, an alumna logs onto her computer to check e-mail messages received through her U.Va. lifetime e-mail address. She will then access the daily line-up of U.Va. news stories on Headlines@UVa, read an in-depth article on cancer research in her weekly e-newsletter, click to updates on Virginia baseball and women’s lacrosse, and check for postings to a HoosOnline bulletin board about cycling, a pastime she shares with many fellow alumni. Before leaving home, she will register online for Reunions Weekend, which offers a wide range of academic seminars, a special gathering for members of her sorority, and a full calendar of class activities.

Once at work, she will check HoosOnline again for messages from other U.Va. alumni in her career field to reason through an issue related to a current project. At lunchtime, she will attend a faculty lecture, organized by the local U.Va. club with the help of a regional alumni relations officer. Before returning home that evening, she will meet with fellow volunteers for the University Singers, of which she was member, to coordinate a local stop on the group’s national concert tour. Once home again, she will take advantage of one of U.Va.’s many lifelong learning options, such as an online class on Greek art or ethical dilemmas in business, or perhaps she will log into the U.Va. digital library or look at a Webcast of Bob Woodward speaking at the Miller Center. And before retiring, she will review a brochure on a U.Va. travel program targeted at young singles.

In essence, the program envisioned in this report will enable and encourage alumni to make the University a tangible presence in their daily lives. Investment in this initiative will yield significant and measurable returns, including up-to-date contact information for all alumni (addresses, phone numbers, cell phone numbers, e-mail addresses), increased participation in reunions and other alumni activities, increased volunteer involvement, and increased philanthropic support, which will be indispensable as the University pursues goals far beyond what can be achieved with state support as its core source of financing.

The Benefits of Alumni Engagement

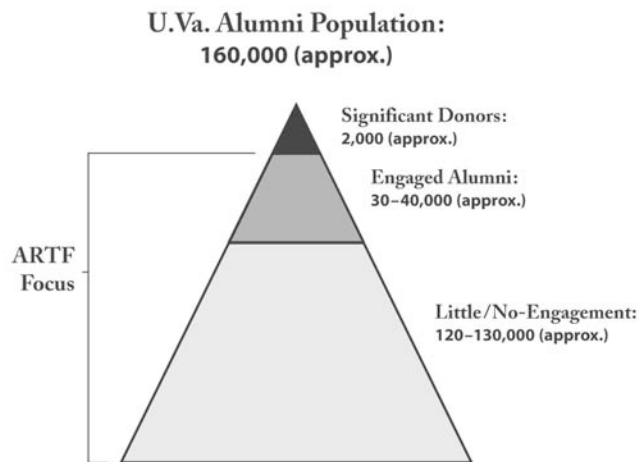
Over the past 25 years, the University has striven to increase its self-sufficiency, recognizing that it can no longer depend on the shrinking share of state tax dollars in its budgeted revenues to achieve and sustain the distinction to which it aspires. Indeed, in 2003-2004, the University reached a significant milestone: It received more of its operating support from gifts and endowment income than from state appropriations. Today the University is taking steps to forge a new relationship with the Commonwealth of Virginia, seeking greater autonomy as a public institution largely financed with non-state resources.

To establish this new model, the University will depend more than ever on the generosity of its alumni. In the fund-raising campaign that concluded in December 2000, alumni were by far the largest single source of giving, providing 45 percent of the \$1.43 billion in gifts, pledges, and other commitments. As the University enters the early stages of a new fund-raising effort that is expected to be more than twice the magnitude of the last campaign, there is an obvious need to cultivate alumni support. This report, however, looks beyond the near-term need for alumni giving. It calls for an institution-wide commitment to a strong and collaborative alumni engagement program that will reap benefits long after the new campaign.

Although its alumni programs compare well with those of its public peers, the University must adopt practices long followed by the leading private institutions (Stanford in particular), as well as novel approaches that take advantage of new developments in technology, communications, and marketing. If alumni are given convenient and compelling opportunities to interact with the University on a regular, even daily basis, they will benefit U.Va. not only with greater financial support but also by helping to uphold the values and ideals that define the institution across generations.

Reaching Out to All Alumni

In its last campaign, the University was successful at cultivating the loyalty and support of its top tier of alumni, i.e., those with the capacity to make significant gifts. Events, special mailings, publications, new volunteer opportunities, and presidential visits were aimed at the very top of the alumni pyramid. These activities are sure to increase in scope and sophistication as the University enters a new campaign. The great majority of alumni, however, largely remain unengaged and underserved. This has led to dissatisfaction with the University's alumni relations programs, and it has given far too many alumni the perception that they do not matter to the institution.



Lifetime alumni engagement leads to lifetime giving. Studies of alumni contribution patterns among the nation’s elite colleges and universities document this fact. As its dependence on private support grows, the University must cultivate not only today’s donors but also the donors of the future. It must turn its attention to the full breadth of its alumni base and make a greater and more concerted effort to reach out to a constituency that will be critical to the University’s long-term vitality.

As private institutions have long recognized, the alumni engagement process begins well before graduation. If students understand they are beginning a lifetime relationship with U.Va. and its community of alumni, they will have a stronger sense of ownership of the University and a stronger sense of obligation to support it.

The Task Force Recommendations

This report calls for a new kind of University-alumni partnership that will continue to educate alumni well beyond their time on Grounds, will enable the University to tap into alumni skills and expertise, will provide a greater sense of community among alumni, and will make all alumni aware that they are critical stakeholders in their university’s future. Though focusing on seven areas (Regional Engagement, Reunions, Technology, Lifelong Learning, Alumni Periodicals, Volunteer Opportunities, and Marketing and Market Research), these recommendations are not stand-alone initiatives. They are designed to support one another, and thus should be considered as a whole. Moreover, *how* these changes are implemented is as important as the improvements themselves. For this reason, the Task Force recommends a new organizational structure for alumni engagement at the University.

The recommendations can be summarized as follows:

1) Regional engagement

- Set a “Gold Standard” for regional alumni programs under a new regional engagement producer
- Create a team of regional alumni relations officers

- Enhance regional programming and communications and provide more academic experiences
- Mount “road shows” rich in academic content and that showcase U.Va.’s strengths and highlight needs across schools
- Enhance opportunities for reaching out to parents and prospective students around the country, expanding the Parents Program to include regional outreach

2) Reunions

- Appoint a pan-University producer/business manager to coordinate reunions
- Add more academic and thematic content to Reunions programming
- Explore new organizational models (including affinity interest group reunions) to maximize alumni participation
- Invest more staff and more resources into Reunions
- Enhance efforts to cultivate class affinity before students graduate

3) Technology

- Establish a new center of competence in technology to serve the University, alumni, and the schools/foundations
- Improve existing functionality and connectivity through basic tools such as volunteer management software, broadcast email, networking capabilities
- Create a robust and coordinated electronic communications program
- Capture and maintain all e-mail addresses, starting with students by offering lifetime @virginia.edu e-mail addresses
- Provide a single access point for alumni interaction with the University and each other
- Create programming that takes advantage of electronic media

4) Lifelong Learning

- Appoint a “producer” to coordinate existing and expanded offerings
- Consider a variety of delivery/organizational options
- Create and market new programs
- Use technology for virtual offerings
- Explore lifelong learning as a revenue generator
- Develop tailored travel programs rich in content and showcasing academic leaders

5) Alumni Magazines and Periodicals

- Develop University-wide themes and messages, which should be incorporated into editorial planning and content for an improved University-wide magazine and other vehicles, including online communications
- Create an upgraded, centralized magazine for communicating with all alumni
 - Provide a more academic editorial focus for the magazine, guided by a multi-school editorial board
 - Ensure that key school/unit messages are integrated into a pan-University magazine
 - Mail every issue to all alumni and other constituencies
- Over time, reduce the need for separate mailings of school and unit magazines; encourage deans to communicate with their alumni with twice-yearly communiqués

6) Volunteer opportunities

- Offer more numerous and more varied ways alumni can provide volunteer service
- Improve communication on volunteer opportunities
- Establish a search function to allow the University to tap into alumni skills and expertise

7) Marketing and Market Research

- Mount a coordinated effort to market alumni programs and services
- Integrate the marketing function with expanded capabilities in communications and technology
- Create a system for conducting recursive, agnostic surveys to determine objectively what alumni want and need and to evaluate the effectiveness of alumni programs
- Improve coordination and communication among schools and units in this area

Implementing the Recommendations

What we are proposing represents a change in the culture of institutional advancement at the University of Virginia. If they are to succeed, these initiatives will require the full backing of the President and the Board of Visitors, as well as the vice presidents, deans, faculty and program directors whose operations will increasingly rely on the loyalty of alumni. They will also require a substantial investment of new resources. To estimate the funds needed to implement its recommendations, the Task Force conducted an analysis of institution-wide spending on alumni engagement activities and the additional funding required to finance new and expanded programs. The analysis takes into account the current and projected revenues of the Alumni Association and how these funds could be allocated if the association is reorganized to place greater emphasis on alumni services. While the analysis shows that more than \$6 million will be needed to implement the Task Force's recommendations, it also indicates that the University can recoup its investment with a modest increase in alumni giving, which can be expected due to improved alumni engagement and good will.

Organizational Structure

The Task Force considered a wide range of structural options for effecting and sustaining the recommended improvements. These range from adjustments to the status quo, to full separation of the alumni engagement functions from the Alumni Association, to full University oversight of alumni programs. The option recommended by the Task Force follows a recommendation by the Alumni Association's Board of Managers. It calls for creating a new alumni engagement subsidiary of the Alumni Association that would be a separate 501(c)(3) organization. It would be overseen by an Alumni Engagement Board that includes members of the Alumni Association's Board of Managers as well as representatives of schools and foundations, the President's Office, and the Board of Visitors. Though it would have representatives on the Alumni Engagement Board, the Board of Managers would not have a controlling interest. Board representation could reflect the proportional alumni populations of the various schools. The Executive Director of the new program would report jointly to the Alumni Engagement Board and the President of the University, and would have a position on the President's cabinet. Larger policy decisions would be handled through joint reporting to the Board and the President, but day-to-day oversight of the Executive Director would be handled by the President.

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On July 4, 1838, only 13 years after the University of Virginia enrolled its first students, a group of alumni and faculty gathered to form the Society of Alumni. Its purpose: “to offer to the Graduates of the University an inducement to revisit the scenes of their youthful studies.” Such an organization, it was recognized, “cannot be but attended with the happiest effects; and in more ways than one, prove propitious to the interests of the University.” Today, 166 years later, the University seeks to reinvigorate its engagement with alumni, whose support has never been more vital to the interests of the institution.

Recent surveys reveal that nearly 90 percent of alumni view the University favorably and value greatly their academic and student-life experiences. For many alumni, this affection inspires a willingness to help sustain the University through philanthropic support. Each year, more than 25 percent of baccalaureate alumni make gifts or pledges to the University. While this is an impressive figure among public institutions, it falls short of the alumni participation rates at the leading private institutions. Princeton, for example, reports a participation rate of 61 percent; Harvard, 49 percent; Notre Dame, 48 percent; Duke, 46 percent; and Stanford, 38 percent.

As the University envisions its future and develops strategies for pursuing ambitious goals with a dramatically reduced share of state support in its budgeted revenues, it must adopt advancement practices followed by its private peers. Foremost among them is a sustained and compelling alumni relations program.

In August 2003, University President John T. Casteen III convened the Alumni Relations Task Force, a panel of alumni representing all of the University’s schools and many of its programs, and comprising a number of current and former members of the Alumni Association’s Board of Managers. The President’s charge: to conduct a close and objective examination of the University’s alumni relations efforts and to develop recommendations for enhancing the University’s ability to build and maintain ties with an increasingly diverse community of former students.

Specifically, the Task Force was asked to do the following:

- Identify the defining elements of a University-wide alumni relations program
- Catalogue current alumni relations activities and communications, as well as outreach capabilities that could be used to engage alumni
- Create an aspiration group of exceptional alumni relations programs against which the University could benchmark its alumni engagement activities
- Envision new opportunities for broadening alumni engagement at the University
- Recommend ways to organize, fund, staff, and sustain a substantially improved alumni relations program at the University.

Over the course of the 2003-2004 academic year, the task force and its leadership gathered extensive data from within the University and from peer institutions, conducted interviews with deans and other institutional stakeholders, and analyzed what the University wishes to gain from its relationship with alumni and what alumni want from the University in the way of programs, services, and information. (See Appendix A.)

Objectives of the Alumni Relations Task Force

The Task Force set specific objectives to meet the President's charge. These include:

- **Identify best practices:** Determine the characteristics of an effective alumni relations program
- **Meet institutional and school needs:** Strike a balance between the need for school-based alumni engagement and the need for a broader University presence among alumni in key regions
- **Offer customizable programs:** Recommend University-wide programs and communication vehicles that can be employed and customized by individual schools and units
- **Focus on key messages:** Encourage the University to create a clear vision, compelling messages, and an effective institutional voice for communicating with all alumni
- **Make better use of technology:** Improve the University's on-line presence among alumni and create mechanisms for harnessing new advances in technology as they become available
- **Use alumni skills and talents:** Expand alumni volunteer opportunities, both for the University and for schools and units and their foundations
- **Offer an implementation plan:** Recommend the best ways to organize, finance, and deliver improved alumni programs and services

In accordance with these objectives, the Task Force has developed a plan for an institution-wide alumni relations program that will make the University a more prominent part of the daily lives of its graduates and that will offer them greater and more varied opportunities to engage with the institution and each other.

Alumni Engagement Today

To begin this process, the Task Force sought to answer two fundamental questions: 1) Who are our alumni, and 2) what do they want? The answers can be summarized as follows:

Who Are Our Alumni?

There are 160,000 living alumni. We estimate that between 20 and 30 percent are reliably accessible by e-mail. Demographic data reveal that they can be described broadly as having the following characteristics (See Appendix B.):

- affluent (25 percent have household incomes greater than \$150,000)
- geographically diverse (nearly 60 percent live outside Virginia)
- relatively young (58 percent are under 45)
- 59 percent male and 41 percent female
- highly educated
- technologically literate (81 percent are self-reported as active Internet users)
- growing in racial diversity

The Task Force identified several characteristics of the alumni community that must be taken into account in the development of new engagement strategies. These include the following:

- **The relative youth of our alumni population.** This is a product of enrollment growth, which jumped significantly in the 1970s with the introduction of full coeducation, and which has continued slowly but steadily since then.
- **Decreasing class affinity.** Although the University remains relatively small among flagship state universities, its graduating classes are considerably larger than those of the elite private institutions we seek to emulate with our alumni programming. The baccalaureate class of 2004, for example, numbers 3,200. As a result, baccalaureate alumni tend to identify less with their class as a cohort than with fellow alumni who engaged in the same interests and activities, such as working for the *Cavalier Daily*, volunteering for Madison House, singing with the Glee Club, or taking part in student government. Since the mid-1980s, the Alumni Association's Class Trustees program has helped to cultivate class affinity, but class membership is by no means the only or even the primary way alumni identify with each other.
- **Increasing diversity.** The growing ethnic and racial diversity of our student body has naturally led to growing diversity among our alumni. This points to the need to avoid a "one-size-fits-all" approach to alumni programming.

What Do Alumni Want?

The Alumni Association and other units have conducted occasional surveys of alumni to determine their interests and their needs for programming and services. The results show that, in general, alumni desire the following:

- **Stronger connection with the University:** Alumni crave a stronger connection with the greater University and have an abiding interest in pan-institutional messages and communications.
- **Greater connection with other alumni:** Alumni are interested in connecting with their peers for reasons that vary by age group: social (for alumni in their 20s); professional development (for those in their 30s); and intellectual enrichment (40s and beyond).
- **More opportunities for lifelong learning:** Across all age groups, alumni express a desire for additional opportunities for professional, intellectual, and cultural development and enrichment.
- **Improved technological access:** In recent months the University has undertaken one-time efforts to acquire accurate e-mail addresses for roughly 30 percent of its alumni, but substantially

more will be needed to reap the full benefits of the alumni engagement process. As more alumni use technology in their personal and professional lives, they view it as a natural tool for interacting with the University and with each other. They are eager to use the Web as a means to receive news, take courses, to purchase products, and to exchange ideas with other members of the Virginia family.

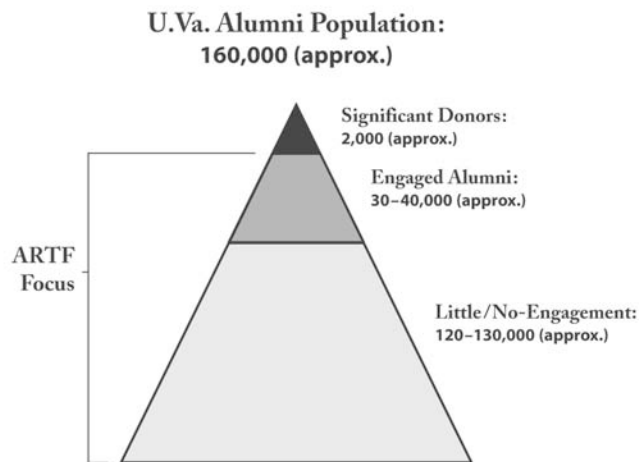
- **A wide variety of volunteer opportunities:** Current volunteer activities at the University tend to be focused on alumni with high giving capacity, who are invited to serve on boards and advisory committees. Volunteer opportunities need to be afforded to the broader body of alumni, such as the chance to mentor students and young alumni or to encourage prospective applicants to consider U.Va. among their college choices.

Development and Alumni Engagement Activities

Over the past 25 years, a period in which the University launched two groundbreaking campaigns, advancement resources have been targeted at what can be described as the “top of the pyramid”: the alumni and friends who have the greatest capacity to give to the University. They receive special mailings, they are invited to special events, they are asked to serve on boards and committees, and they are given the opportunity to join the President and other academic leaders in discussions about the future direction of the institution. The success of the University’s \$1.4 billion campaign, completed in 2000, confirms the wisdom of this approach.

As its advancement programs mature, and as it looks increasingly to private philanthropy as a core source of support, the University must complement this targeted approach with a more comprehensive and sustained program of engagement that reaches out to all alumni, not just the top-tier of donors and prospective donors. Over the long term, the investment of personnel and resources necessary to achieve this goal will reap substantial dividends for the University. By providing a larger community of institutional stakeholders, a broad-based alumni relations program will help to uphold the University by encouraging year-to-year giving, volunteer service, and good will. Private institutions have long appreciated the collective philanthropic power of an active alumni community, and studies of both private and public institutions show that early engagement is vital to cultivating the major benefactors of the future.

Although the Task Force’s recommendations coincide with the beginning of what is expected to be a \$3 billion campaign, the program we are proposing reaches beyond the current fund-raising initiative. It is aimed at nurturing alumni support not only for this endeavor but for the fund-raising efforts that are sure to follow.



The Engagement Continuum

Alumni engagement is part of a continuum of lifetime involvement with the University that should begin as soon as a student enrolls, or perhaps even as early as when a student applies. If students feel a sense of connection with the University right from the start, they are more likely to maintain that connection after they leave the Grounds. Furthermore, if the University does its part to nurture this bond, this connection will manifest itself as consistent and generous philanthropic support over time.

The importance of this continuum has been documented by the CORE Group (See Appendix C.), a private research organization that studies giving patterns at the leading private and public institutions, including Stanford, the Ivy League schools, and distinguished public universities, such as Michigan, Berkeley, Texas, and Virginia. Looking at U.Va.’s gift data from 1980 to 2000, the Core Group documented that alumni who give regularly from year to year also increase the size of their gifts over time. In fact, alumni who contribute to the University consistently over 20 years provide nearly nine times more gift support than alumni who give consistently over ten years.

The CORE Group study also indicates that large gifts are much more likely to come after many years of engagement with the University, even if initial gifts are quite small. Looking at the giving patterns of alumni who made \$1 million-plus gifts during the 1980s and 1990s, the CORE Group found that these commitments are made after many years of regular giving. In fact, the typical \$1 million donor made gifts 12 times over this 20-year period. This pattern reflects a lifelong relationship with the University.

A study at MIT in 2002 further supports the link between alumni involvement and alumni giving. In 1988, MIT’s Alumni Association was reorganized to merge the alumni relations and annual fund programs, and improvements were made to alumni programs, such as increased support for reunions, new activities such as “MIT on the Road,” renewed emphasis on students and young alumni, and investment in technology resources for connecting with alumni. The 2002 study examined how the resulting increase in alumni involvement translated into alumni support. Looking at the giving patterns of alumni volunteers, reunion attendees, and local club members from 1996 to 2000, the study drew the following conclusions:

- **Participation:** Participation in the alumni fund was significantly higher among involved alumni: for reunions attendees, 30 points higher than all alumni; for volunteers, 20 points higher; and for club members, 13 points higher.
- **Consistency:** Involved alumni were shown to be 1.4 to 2.1 times more likely than all alumni to be consistent donors (those who gave at least four years out of five).
- **Size of gift:** Involved alumni were 2 to 6 times more likely than the general alumni population to make cumulative gifts of \$2,500 or more over 5 years. The strongest ratios were at the level of \$25,000 and greater.

Individual giving is the backbone of the University’s philanthropic support. In the last campaign, alumni provided 45 percent of the dollars raised, and other individuals, such as parents and “grateful patients”, provided 21 percent. Given the importance of individual philanthropy to the University, and given the strong correlation between alumni engagement and alumni loyalty, it is clear that improving alumni relations is of critical importance to the University’s future.

Current Alumni Programs

The Task Force conducted a thorough assessment of the University’s current alumni engagement activities, including those of the Alumni Association and those of the multiple schools, organizations, and foundations that conduct their own advancement programs. For most of the University’s history, the Alumni Association has been one of the primary links between U.Va. and its alumni. Although schools and programs have built their own alumni organizations in recent years, the Alumni Association remains a central organizer and provider of many alumni programs, such as the regional clubs, Reunions, the *University of Virginia Alumni News*, and HoosOnline (an online alumni directory). It was the principal keeper of alumni records before the University adopted the BSR Advance database system in 1995-96. Over the years, the Alumni Association has taken on a number of other key functions (e.g., the UVA Fund, the Jefferson Scholars Program) that complement its alumni relations activities but also, it can be argued, overshadow them. At the same time, schools and University-related foundations have expanded their own alumni programs in parallel with their development operations, which have grown substantially over the past two decades (For a full discussion of the Alumni Association’s role and structure, see Appendix D.).

Observations on the Alumni Association’s Role

The Task Force offers the following observations on the organization and key functions of the Alumni Association and their impact on alumni engagement:

- **Complexity of Mission:** Just within its own sphere, the Alumni Association and its Board of Managers must serve multiple and overlapping constituencies, including the broad alumni body, Alumni Association members, regional Club members (who are not necessarily Alumni Association members), non-alumni parents, young alumni, the network of Jefferson Scholars Program donors and volunteers, UVA Fund clients, and various affinity interest groups. Some of these constituencies have their own governing boards, further complicating the mix.
- **Competitive Relationship:** Because each University school and program sees itself as responsible for generating its own private resources and, therefore, for cultivating its own pool of alumni and friends, relationships among the University’s advancement organizations can be

contentious. As a result, schools and programs often see the Alumni Association as a competitor rather than a partner in alumni engagement. There are insufficient resources in the Alumni Association for coordination and provision of services to schools and units, and more broadly, there is no one with the authority or funding to orchestrate a University-wide and fully integrated alumni engagement effort.

- **The Jefferson Scholars Program:** Though now operating with its own foundation, the Jefferson Scholars Program is still strongly linked to the Alumni Association and is based in Alumni Hall. Since its establishment in 1980, it has been a rallying point for alumni who wish to help the University recruit select students, and it has been successful at building a national network of volunteers and at attracting substantial donor support for its endowed scholarships and fellowships. Many of the schools and units view the Jefferson Scholars Program as a competitor for private resources, which exacerbates their unwillingness to consider the Alumni Association a disinterested partner in alumni engagement.
- **The Parents Program:** The Parents Program has been based in the Alumni Association since its inception and has been successful at engaging non-alumni parents as volunteers and donors. The Parents Program, however, is also seen as a competitor for philanthropic support from this constituency. It is the Task Force's view that the Parents Program should be integrated with an improved alumni engagement effort and that the Parents Program's annual giving efforts should be closely coordinated with the University's major gift appeals to non-alumni parents.
- **Lack of Formal University Connection:** A funding agreement between the Alumni Association and the University is negotiated every five years, but the formal governance ties between the Alumni Association and University remain weak. The University's ex-officio members of the Board of Managers have traditionally played only a limited role. In the absence of more active formal ties, informal ties have developed, such as semi-monthly meetings between the Executive Director of the Alumni Association and the University's Senior Vice President for Development and Public Affairs.
- **Variable Quality:** Due to limited financial flexibility and the issues noted above, the Alumni Association has not been able to create and nurture a "best-in-class" alumni engagement effort. Such an effort requires the active involvement of the President's Office, the Board of Visitors, and the schools and units, as well as consistent leadership and committed financing to support the program through many years before it begins to bear fruit.
- **Limited Authority of the Executive Director:** The Executive Director has no authority except that approved by the President of the Board of Managers, a volunteer position. This limits the Executive Director's official capacity to orchestrate University-wide alumni relations strategies involving the central administration and the schools and units.

Observations Regarding Schools and Units

The Task Force also made the following observations regarding the role of schools and units in alumni engagement:

- School alumni engagement efforts are secondary to and in support of their fund-raising programs. Each school sees itself as accountable for meeting its own fund-raising objectives and has built its own alumni relations operation to under gird its development efforts. This has led to the emergence of multiple and decentralized development and alumni relations organizations, of varying size and scope, which in turn has led to sub-optimal use of resources.
- Schools do see significant value in the University creating a brand among alumni, communicating its key messages, and creating alumni affinity, so long as these help and do not compete with their own development efforts.
- Although the University provides financial support to the Alumni Association, the University itself provides no significant services to help schools and units reach their alumni.
- Existing programs are piecemeal, of varying quality, and lacking economies of scale.

Alumni Engagement Activities by School and Unit

<i>School/Unit</i>	<i>Mag. or Newsletter (NL) freq.</i>	<i>Other Com.</i>	<i>Events</i>	<i>Reunions</i>	<i>On-line Com.</i>	<i>Dev. Staff</i>
Architecture	2 x Web	√	√		√	√
A & S	2 x	√	√		√	√
Commerce	2 x	√	√		√	√
Curry	2 x	√	√	√		√
Darden	2 x	√	√	√	√	√
Engineering	2 x	√	√		√	√
Law	2 x	√	√	√	√	√
Med Alumni	2 x	√	√	√	√	√
Nursing	2 x	√	√		√	√
SCPS		√				
VAF	10 x NL	√	√	√	√	√
Center for Politics	2 x NL	√	√		√	√
Miller Ctr.	4 x	√	√		√	√
Art Museum	2 x NL	√	√		√	√
Library	2 x NL	√	√		√	√
Parents Program (AA)	2 x NL	√	√			√
Alumni Association	4 x	√	√	√	√	√

Engagement Tools and Activities

The Task Force found that there is an abundance of alumni activity at the University, but it is of widely varying quality, poorly coordinated, inefficient, and inadequate for nurturing the bond essential to lifelong alumni engagement and support. At root is an insufficient commitment of resources and personnel to alumni relations in the Alumni Association, which relies largely on the University to fund these activities. As a result, schools and units have launched their own alumni programs, resulting in a confusing patchwork of events, messages, and communications. Broader institutional messages fail to come through clearly, and opportunities to forge meaningful connections between the University and the vast majority of its alumni are lost.

The Task Force looked specifically at alumni activities in seven categories: 1) Regional Engagement; 2) Reunions; 3) Technology; 4) Lifelong Learning; 5) Alumni Magazines/Periodicals; 6) Volunteer Opportunities; and 7) Marketing and Market Research. What follows are summaries of the Task Force's assessments for each of these areas.

1. Regional Engagement

- **Effectiveness measure: poor**
- **Minimal services provided**
- **Poorly resourced**

The Alumni Clubs Program

The ten metropolitan areas with the largest alumni populations are (in order of size) 1) Washington, D.C.; 2) Charlottesville; 3) New York City; 4) Richmond; 5) Atlanta; 6) Baltimore; 7) San Francisco; 8) Los Angeles; 9) Tampa, Fla.; and 10) Boston. The principal vehicle for regional engagement in these and other areas is the Alumni Clubs program, which began soon after the Civil War and now encompasses 130 clubs around the country and around the world.

Each club is financially and operationally independent, and each is responsible for its own event programming and communication tools, such as e-mail, newsletters, and Web sites. The New York club has a paid staff position, but all other clubs rely on volunteers, who typically change with periodic election cycles and who vary in their ability to commit time and energy to club operations. The percentage of alumni participating in these clubs varies from region to region, although the clubs in the 30 highest alumni population areas are required by the Alumni Association to maintain a membership of 10 percent of the region's alumni. Due to insufficient tools for electronic volunteer management, the picture here is incomplete at best. Because each club keeps its own membership records, it is difficult to confirm regional participation rates.

With its limited alumni relations resources, the Alumni Association apportions services to the clubs through a tiered structure that places greater emphasis on large alumni population areas. Services provided from Charlottesville include assistance with event planning, guest speaker coordination, direct mail and e-mail distribution, and newsletter production and dissemination. The Alumni Association's clubs department, which consists of two full-time staff members, also helps the regional groups with a number of specific programs, including schools committees for student recruitment, Cavaliers Care (community service), young alumni programming, book clubs, a monthly luncheon series, game-watching parties, and alumni affinity interest groups (AIGs). Under

the four-tier structure, clubs are categorized by the size of their regional alumni base and the percentage of alumni membership. Clubs in the highest category receive the most services from the Alumni Association, including staff visits.

Regional Development Program

The Office of University Development operates a regional development program in which development officers are assigned to broad national territories. In addition to cultivating and soliciting donors in their territories, the regional officers also perform some alumni affairs duties as needed. When regional development officers assist in organizing regional events, there is usually a fund-raising component to the functions, and the events are usually intended for leadership donors or prospective donors. While such events help to extend the University's presence in the regions, they also may lead to confusion among local clubs regarding who is to be included and who is not.

Regional programming by schools and units

Most schools and units offer some regional alumni programs, but they vary widely in quality and scope. They range from "state of the school" visits by deans to faculty talks (sometimes coordinated with the Alumni Association) to development-related meals and receptions. Several of the professional schools – Darden, Law, Medicine, and Commerce School – provide professional training opportunities to their alumni outside of Charlottesville. For the most part, schools and units schedule their own alumni events with little coordination with the University, the Alumni Association, or each other. Opportunities for partnership certainly exist but are rarely employed, primarily because the University's culture and political climate do not encourage such involvement. As a result, the schools' regional programs reach only their own alumni, even though there may be interest or affinity among alumni of other schools, and rarely are there opportunities for interdisciplinary networking among graduates from different schools.

Regional Program Issues

In light of these findings, the Task Force identified the following weaknesses in the University's regional alumni programs:

- Due to the lack of multi-school programming, the University is missing the opportunity to show its wares and to engage the minds of alumni.
- There is insufficient coordination of University interaction with clubs.
- Club operations, programming, and practices are widely variable.
- Club activities are often limited to members and fail to reach the broader alumni population in a given area.
- Clubs are dependent on individual volunteers, who vary in the time, energy, and leadership they can devote to club operations.
- There is insufficient support for marketing regional events, providing information on local programs, and affording alumni the opportunity to communicate with other alumni in their regions.
- Because clubs keep their own records, it is difficult to track membership.
- It is difficult to convey information learned at the club level to the University, and vice versa.
- There is no regular schedule of alumni surveys to identify alumni needs and interests and to develop regional programs accordingly.

- There are no links between the reunions program and the clubs, which should be a local starting point for publicizing reunions, encouraging volunteer participation, and communicating ideas for content and programming.
- There are no incentives or organizational mechanisms for presenting multi-school programming or for opening school events to all alumni to project a larger University presence in the regions.

2. Reunions

- **Effectiveness measure: needs improvement**
- **Good foundation established**
- **Participation has reached a plateau**
- **Resources needed for additional programming**
- **Affinity group reunions needed in addition to class reunions**

An effective reunions program provides alumni with three key opportunities: 1) to reconnect with fellow alumni, 2) to reinvigorate the mind through academic programming, and 3) to be reintroduced to the University at regular intervals. Several of the professional schools – Law, Darden, and Medicine – have long maintained strong reunions programs, but for alumni of the baccalaureate classes, reunions had been all but eliminated by the 1980s. Recognizing the value of reunions as an engine for alumni involvement and support, the University and the Alumni Association joined forces to revive U.Va.’s reunion tradition. Taking their present form in 1991, today’s baccalaureate reunions provide a solid foundation for establishing a program comparable to those of the leading private institutions. Looking at examples among our private peers, the Alumni Relations Task Force examined the present reunions program with the goal of increasing alumni participation and imagining new ways to strengthen alumni connections with each other, with the University, and with their schools.

Baccalaureate Reunions

The baccalaureate classes are invited to celebrate their reunions every five years. Reunions Weekend, typically the first weekend in June, brings nine classes back to the Grounds for a program of social gatherings, sports and recreation, seminars, children’s activities, and opportunities to learn about the state of the University. Since 1991, Reunions Weekend has steadily grown in scope and participation, with Reunions 2004 attracting 3,600 alumni and guests. Class participation ranges from 9 percent to 12 percent, depending on such variables as the age of the class, the reunion being celebrated (25th, 30th, etc.), and the weather outlook for the weekend.

The Thomas Jefferson Society of Alumni, which comprises alumni who graduated 50 or more years ago, holds its reunion earlier in the year, usually on the Tuesday and Wednesday before Final Exercises in May. The Thomas Jefferson Society brings back about 300 alumni each year; increasing class sizes will undoubtedly yield higher attendance in the future.

Affinity-based Reunions

The current reunions program is based on graduating class. The class trustees program, initiated in the mid-1980s, has sought to cultivate class affiliation among students and has made admirable progress. It has been successful at encouraging class giving, and it has been an effective vehicle for nurturing future alumni leaders, but the growing size and diversity of the University’s graduating

classes makes it increasingly difficult to develop class unity. Without the strong class identification characteristic of the professional schools and smaller private institutions, there is a need to complement class-based reunions with gatherings of alumni in affinity interest groups (AIGs).

Reunions Weekend often includes receptions for a number of AIGs, such as former staff of the *Cavalier Daily* and WUVA, past Lawn residents, Madison House volunteers, and racial and ethnic groups. Successful reunion programs at other institutions have placed greater emphasis on affinity interest groups, either in conjunction with or separate from class reunions. At Stanford, for example, the annual reunions gathering includes events for some 250 AIGs.

At Virginia, a model for AIG reunions can be found in the Ridley Scholarship program, which has been a rallying point for black alumni since 1987. For many black alumni, especially those who graduated in the first decades after desegregation, the University experience was very different from that of their white peers. As a result, African American alumni tend to hold U.Va.'s history and traditions in a different light, which must be taken into account in the University's outreach efforts. The Ridley program's biennial Black Alumni Reunion Weekend, held every other April, has been successful at bringing African American alumni into the University fold, providing opportunities for black graduates to form connections with each other, with the University, and with its students. Many attendees of the Ridley reunion also take part in Reunions Weekend in June, demonstrating that AIG reunions and class reunions can reinforce each other.

Program Development

The Alumni Association, which organizes Reunions Weekend, weaves a limited amount of academic programming into the event. The 2004 schedule, for example, included seminars on such topics as practical ethics, personal finance, Virginia's native Americans, and ways to inculcate leadership and self-esteem in adolescent girls. Some of the University's most respected teachers and scholars lead these seminars, among them James Childress, Larry Sabato, Jeffrey Hantman, James Hunter, Maurie McInnis, and Winx Lawrence. There are limited seminar spots available during the three-day program, however, and schools are eager to find other opportunities to showcase their academic strengths to alumni. Schools do host lunches during the weekend at which they can highlight their needs and messages.

Alumni desire more academic content in Reunions Weekend. The programming available now could be much stronger, especially in comparison with the best private universities, which offer reunion attendees a wider variety of seminars on cutting-edge research and programs that feature distinguished faculty and exceptional student achievers. These universities provide a "pay as you go" system for participants to help finance superb reunion programs. At the University, reunion organizers could do more to build programs around institutional themes and messages. Efforts to use thematic approaches in the past have been hampered by the University's decentralized structure and the need to recover all financial costs for the Reunions weekend. More can be done to use Reunions to achieve general University marketing and communications goals.

Reunions Costs

The costs of attending Reunions vary by class, depending on the social events and entertainment scheduled by class volunteers. Alumni may also choose to take part in some class events and not others, which can reduce out-of-pocket expenses. In many cases, generous alumni on the planning

committees help to pay for special entertainment, which reduces the costs for their fellow alumni. In 2003, costs ranged from \$60 per person for the fifth-year reunion class to \$190 per person for the 30th-, 35th-, and 40th-year reunions. Taking part in a single day's activities can cost from \$45 to \$155. There is no discount for Alumni Association members.

Reunion Giving

Since 1997-98, a Reunion Giving program has been integrated with the Reunions program. Reunion Giving is overseen by the Office of University Development, which assigns development officers to groups of classes. Reunion Giving volunteers from each of the classes solicit their classmates, and participants are recognized on a Web site that is updated regularly throughout the year. Any gift for any purpose made by a member of a returning class between July 1 and June 30 in a reunion year is counted in the class's giving total. In 2004, the 10 reunion classes contributed \$11.9 million to the University. This system could be enhanced to improve coordination, to create greater synergy, and to establish a stronger tradition among alumni of making special gifts in reunion years.

Reunion Staffing

The Alumni Association manages Reunions Weekend with a core staff of four, including three alumni relations officers. Staff from other parts of Alumni Hall is brought in as Reunions Weekend approaches to share the work load. Planning for the weekend's programming is largely driven by volunteer committees for each class, which have taken greater control over the vision and details of Reunions Weekend. While offering valuable opportunities for alumni leadership, the volunteer structure creates variable results due to differences in talent, commitment, and knowledge of the University among volunteers.

Reunion Issues

Issues that need to be addressed to improve reunions include the following:

- Large and diverse graduating classes make it difficult to establish class unity.
- Reunions Weekend offers relatively few opportunities for academic and professional enrichment, when compared with reunion programming at leading private institutions.
- There are missed opportunities to drive home key University themes and messages.
- There are insufficient resources for class-targeted activities.
- There is increasing alumni demand for affinity group reunions in addition to class reunions.

3. Technology – Electronic Tools and Communications

- **Effectiveness measure: poor**
- **A baseline of service has been available but not adequately maintained and updated**
- **Currently, basic tools to serve alumni and the University are missing**
- **The program has become irrelevant for most alumni**
- **Programming available electronically is poor – lack of distance learning opportunities**
- **Opportunities are lost for the University to showcase its strengths and to become part of the daily lives of its graduates**

In the technology arena, the principal vehicle for alumni engagement is HoosOnline. Offering lifetime e-mail forwarding, career connections, and an alumni directory, HoosOnline was considered innovative when it was inaugurated in 1999. Although it has 40,000 subscribers, it is no longer a

state-of-the-art system, and the quality of the data it contains has atrophied over time. Alumni have turned to other resources for networking and communications. More robust solutions have become available for helping alumni maintain connections with the University and with each other, and the University and the Alumni Association should work together to harness the capabilities now available in the technology marketplace. In addition to new technological applications, this will require expanded staffing to acquire and maintain e-mail addresses and to support vigorous efforts to engage alumni online.

The Web Presence for Alumni

Although the University's main Web page is one of the most heavily visited sites in higher education and leads to an abundant array of information resources and services, the University's Web presence for alumni – and the public generally – reflects the decentralized structure of the University. Sites for the University's central administrative areas are overseen by a single Webmaster and are unified in appearance and navigation. This unity rarely carries over into other areas on the University's site. When alumni venture off the main pages, they encounter a confusing array of school and program sites whose look, feel, and navigability vary widely. With their disparate budgets and staff capabilities, schools and units have each developed their own Web resources, resulting in an online presence that is uneven at best. Decision making in this area can be parochial, and the lack of sufficient centralized technology resources, such as Web development and coordinated use of broadcast e-mail, exacerbates the problem. Alumni receive multiple messages through multiple channels of inconsistent quality and character.

Opportunities

This area offers many opportunities for improving the University's relationship with alumni. Among them:

- **Better alumni reach, better alumni engagement:** UVa. alumni already use technology in all aspects of their lives. The University must reach them where their attention is focused. As we use technology to build online alumni relationships and communities, we will cultivate stronger and deeper alumni loyalty.
- **Better knowledge of alumni:** Through technology, the University would be able to capture alumni interests and to tailor information and programming accordingly. It also provides a tool for identifying alumni willing to help the University with their professional expertise and to help students and other alumni through career mentoring and other services.
- **More effective communication:** Technology provides a cost-effective vehicle for coordinated, targeted, and high-impact communication with alumni.
- **More programs and services valued by alumni:** Via technology, the University could provide alumni with services they value greatly, such as news delivery, opportunities to maintain ties with old and new friends, and networking for career and business.
- **Greater awareness of the University's strengths:** Programs delivered via technology provide an effective means to showcase the University's strengths.

- **Better return on investment:** Coordinated planning and implementation would maximize the University's investment in technology.
- **Better donor identification and cultivation:** With a better data trail, the University would be able to identify prospective donors more readily and to cultivate their relationships with the University.
- **Better brand management:** Cohesive planning and implementation of technology would help the University project a coherent brand.

Technology Issues

Largely due to the University's decentralized organization and an online constituent relations program that now lags in sophistication, the technology area raises such issues as:

- **Organizational silos:** Schools and units are making technology investments independently, resulting in uncoordinated and redundant services and inconsistent messages.
- **Gap-plugging:** Improvements and changes are made ad hoc rather than through strategic and forward-looking efforts.
- **Poor marketing:** The marketing of existing technology opportunities at the University is weak. The University and its schools offer a variety of interactive information and services on their Web sites, but they are rarely or inadequately promoted among alumni.
- **Poor alumni tracking:** E-mail forwarding is somewhat useful for tracking e-mail addresses but insulates the University from a direct connection with alumni. By offering permanent University e-mail addresses for all alumni, rather than e-mail forwarding, the University could track alumni more effectively, ensuring that they remain reachable.
- **Insufficient e-mail addresses:** Even with recent efforts to update alumni e-mail addresses, the University has accurate listings for only about 30 percent of its 160,000 former students. Acquiring and maintaining substantially more e-mail addresses will be critical for data mining, surveying, fund-raising, on-line programming, alumni networking, etc.
- **Weak technology tools:** Because of the inadequacies of HoosOnline, alumni are already going elsewhere to fulfill needs for networking and communicating with fellow alumni and other friends.

4. Lifelong Learning

- **Effectiveness measure: poor**
- **Existing opportunities are not well packaged or marketed**
- **Additional opportunities are needed to take advantage of the plentiful academic resources and experiences available at the University**

For U.Va. alumni, the love of learning does not stop when they walk down the Lawn. For their careers and for self-fulfillment, they continue to seek out opportunities to expand their minds. As a tool for improving alumni engagement, the University should do more to provide these opportunities, both for personal enrichment and professional education. Such lifelong learning could be presented by faculty in person, (a class on Grounds or in regions where alumni reside) or virtually (a Web seminar or an on-line book club or chat room). Alumni are especially interested in career-oriented workshops and classes, whether available to individuals or more widely to employers.

Following the executive education model in leading business schools, new professional education programs for alumni could become a significant source of revenue, which could be used to subsidize other types of academic offerings.

Existing Offerings

Lifelong learning opportunities exist in various forms in distinct pockets across the University. They range from continuing professional education courses in architecture, medicine, and law to executive education programs in the McIntire School and the Darden School. At Darden, where executive education has been a core mission since the school's founding, executive programs generate \$11 million in revenue and more than \$3 million in profit each year. They are a major source of funding for Darden, which no longer relies on state support. In addition to providing opportunities for alumni engagement and instruction, executive education programs bring many non-alumni into the University, widening its circle of friends and supporters.

Here is a sampling of various other sources of lifelong learning at the University.

- **The School of Continuing and Professional Studies** offers programs for credit and/or enrichment on Grounds and in regional centers across the Commonwealth, including a Northern Virginia center shared with Virginia Tech. More than 15,000 adult learners a year attend the school's wide-ranging courses, seminars, and conferences. Of particular interest to alumni are foreign and domestic "travel and learn" programs that include faculty from the University and other institutions. Also, the Summer on the Lawn seminars and the annual Jefferson Symposium offer the chance to return to the Grounds for intensive study of a single topic over several days.
- The popular **Engaging the Mind** lecture series, a product of the Virginia 2020 planning process, enables alumni and other members of the public to hear talks by some of the University's leading faculty. The free lectures are held in the state's major population centers, including Northern Virginia, Tidewater, Southwestern Virginia, and Richmond. Created to extend the University's academic reach to the citizens of the Commonwealth, Engaging the Mind provides a model for ways the University can showcase its academic talent.
- **The Mini-Medical School and the Jefferson Institute of Lifelong Learning (JILL)** are popular programs offered to residents of the Charlottesville area. The first is coordinated and taught by Medical School faculty. The second uses University facilities but is taught by members of the wider community, frequently retired faculty. JILL is an example of a national trend in learning opportunities for retirees organized with the help of a college or university. JILL has great potential as a tool for engaging alumni and friends of the University, but it has no endowment or other reliable income stream. Funding JILL should be a priority in the forthcoming campaign, and the University should explore asking JILL to establish an affiliated foundation.
- **The Faculty Senate Speakers Bureau** has the potential to be a valuable public resource. The Speakers Bureau provides a directory of faculty members who are willing to give public lectures about their areas of expertise. While it is not aggressively marketed, it is employed by different University entities and civic organizations to offer educational programming to various publics.

- **The Miller Center of Public Affairs**, which is devoted to study of the American presidency and the workings of the Executive Branch, hosts a wide range of public forums that feature leading figures in government, the media, and academe. These are often recorded for later broadcast.
- **The Alumni Association's travel program** offers 15 to 17 trips each year, attracting some 300 alumni participants. Organized by outside travel companies, these are largely pre-packaged, standard tours that the Alumni Association can brand as its own. On occasion, faculty members are invited to join the alumni and to give lectures related to the travel destinations, and President Casteen has taken part in several tours. Still, this program is nothing like Stanford University's one-of-a-kind travel programs, which are powerful tools for alumni engagement. They focus on a particular academic theme and they link distinguished faculty with alumni intensely interested in the topic at hand.

This listing, which is by no means complete, shows that the University provides a variety of resources for alumni learning, but there is little effort to coordinate these programs and to promote them in a coherent way to the University's graduates. With skillful organization and creative packaging, these disparate offerings could be combined with new courses to establish a more powerful program of learning opportunities for alumni and the general public. While it would be beneficial to achieve such coordination of existing resources, what is needed is new programming with the academic depth and professional accreditation necessary to appeal to a sophisticated alumni body.

Marketing surveys can determine the specific learning needs of alumni, which will vary at different stages in their lives. Business and professional courses are likely to be of intense interest to younger alumni as they establish their careers, as well as to alumni of all ages seeking professional certification or a career change. Training in psychology and child development would be popular with young families. Attractive offerings could be created to engage special interest groups in the alumni population, such as ethnic minorities, young alumni, mothers who work in the home, and retirees, among whom there is increasing demand for intellectual and cultural enrichment. Lacking such coordination and marketing, the University is missing the opportunity to forge a lifelong academic relationship with its alumni.

Lifelong Learning Issues

- Knowledge of the lifelong learning market is poor
- Little coordination and promotion of existing resources
- No consistent or centralized tracking of program participants
- Weak curricular links between the schools and the School of Continuing and Professional Studies, which would be a logical organizational and delivery mechanism for alumni lifelong learning

5. Alumni Magazines/Periodicals

- **Effectiveness measure: needs overall improvement**
- **Communication with individual constituencies is good**
- **Communication with broad alumni population is poor**
- **Little effort to maximize potential or minimize cost**

Every school and many units of the University publish a magazine for alumni and other supporters. All told, there are more than 16 alumni-targeted magazines published in the University community, and many other printed communications (e.g., the President's Report; development periodicals) count alumni as their primary audience. Varying widely in production quality, format, and editorial direction, these periodicals are sent from one to four times a year, and many appear on-line simultaneously. The Architecture School's magazine is now solely an on-line publication, and Arts & Sciences and Commerce also publish on-line periodicals that supplement their printed periodicals. The Alumni Association produces the *University of Virginia Alumni News*, which has been published since 1912. Today it is a quarterly, full-color magazine that is sent to Alumni Association members three times a year and to all alumni once a year. The magazine is the principal benefit of Alumni Association membership.

There are significant differences in style and substance among these magazines, reflecting the distinct cultures and available resources of the schools and programs that generate them. Some focus more on alumni activities and events, while others emphasize academic topics and issues with significance beyond the University. Some are largely news periodicals, while others combine some news with more feature content. Each school and program considers its magazine a critically important vehicle for communicating with alumni and other constituencies.

Magazine/Periodical Issues

As they grow in number and variety, school and unit magazines raise several major issues regarding alumni engagement. Among them:

- There is no coordination of central University messages. Because each magazine tends to emphasize subsidiary rather than key strategic messages, the average alumnus does not know the handful of important themes the University wishes to project.
- Alumni with multiple school and unit affiliations receive a number of different magazines several times per year. The lack of any coordination of schedules further limits the potential impact of the communications.
- There has been no systematic attempt to measure the effectiveness of these disparate communications.
- The aggregate cost of publishing these magazines is substantial. Across Grounds, more than \$1.5 million is spent on staff, production, and mailing for these communications.
- Because communications are segmented so greatly by unit, the smaller schools (such as Architecture and Curry) and the largest schools (such as Arts & Sciences) may be underserved because of limited resources to reach their audiences.

6. Volunteer Opportunities

- **Effectiveness measure: poor**
- **Volunteer opportunities are limited**
- **Except at the top tier, volunteers are insufficiently thanked and rewarded**

Nowhere is the University's limited approach to alumni relations more obvious than in the area of volunteer opportunities. Although alumni clubs rely on the willingness of their members to plan events, track membership, and balance the books, opportunities for meaningful volunteer service to

the University becomes very limited beyond the regional level. Alumni who devote countless hours to organizing club activities often receive little recognition or reward for their labors from the University. Unless they also have substantial giving capacity or exceptional leadership ability, they are rarely accorded seats on the Alumni Association's Board of Managers or on school and foundation boards.

Looking again to Stanford as the gold standard in alumni relations, it becomes clear that the University must provide a richer array of options for volunteer service, including ways alumni can lend the University their professional expertise. Stanford has developed a way to identify alumni who can help the university with such challenges as improving food services or planning construction and development.

Models for broader volunteer engagement do exist in the University community. The Jefferson Scholars Program, for example, has built a nationwide network of alumni and friends who interview Jefferson Scholar candidates at various stages in the selection process. These volunteers are recognized in the program's annual report and have the satisfaction of introducing the University to some of the nation's most promising student leaders.

Volunteer Opportunities Issues

- Few volunteer opportunities are available to alumni beyond local club involvement or school/unit advisory board service
- The University is missing advantages to partner with alumni who may bring significant professional and personal experience to bear on University issues

7. Marketing and Market Research

- **Effectiveness Measure: poor**
- **No University-wide system exists**
- **There are no systematic means to gauge alumni interests and needs on a regular, comprehensive basis**

There are many ways alumni can engage with the University, but there is no central, comprehensive mechanism by which alumni can learn about them. Conversely, no single office is responsible for promoting engagement activities to the broad alumni population. Each unit of the University must mount its own communication and marketing effort, and typically these are targeted at a limited segment of alumni.

Furthermore, the University has no comprehensive method of conducting systematic, recursive surveys of alumni to monitor demographic trends and to gauge evolving needs and perceptions. Surveys of various alumni constituencies are conducted from time to time by the Alumni Association, the University, and schools and units, but they are infrequent, and the results are rarely shared with the wider advancement community. As a result, information on alumni interests and needs may be years old, which hinders the timely development of appropriate programming and services. To truly meet the needs of alumni, and to respond to changing conditions, it will be important to create a system for conducting cost-effective surveys of alumni on a regular basis. Such

a system would make it possible to eliminate programs no longer seen as valuable, and it would support the creation of new programs and services to meet emerging needs.

Marketing and Market Research Issues

- The University does not comprehensively organize and market its programs and services to alumni.
- Without a means to receive consistent feedback from alumni about the University, programs may be uneven or ineffective.

General Observations Regarding Alumni Engagement at the University

In addition to its findings in the specific areas noted above, the Task Force made the following general observations regarding alumni relations at the University:

- I. **There are many touch points at which U.Va. alumni can engage with the University, but they are not well organized or promoted.** The Alumni Association, the schools, various centers and programs, the President's Office, the Office of University Development, and individual faculty and administrators all have regular contact with alumni. However, these programs are disconnected and not well understood by most alumni.*
- II. **There is no coherent, orchestrated strategy for alumni engagement across the University.** The decentralized structure of institutional advancement at the University (alumni affairs, communications, fund raising, etc.) limits the possibilities for improving alumni engagement. Many units operate alumni programs, but they are not directed or even coordinated by any central agency. As a result, the smallest and largest schools are underserved, and the University and its schools fail to take advantage of potential synergies.*
- III. **There is little shared implementation of "best practices" in alumni affairs across schools, programs, and foundations.** Duplication of effort across Grounds generates additional costs to the institution and provides few economies of scale.*
- IV. **Alumni programs are poorly marketed.** Because there is no orchestrated strategy for alumni engagement, there is also no coordinated marketing effort for the variety of programs and activities available.*
- V. **Many worthy programs are under-funded after initially being developed.** A number of programs, especially those in the Alumni Association, have established a good foundation but have been unable to grow with the times. These include the regional clubs, Reunions, and HoosOnline.*
- VI. **Conflicting development objectives undermine collaboration in alumni engagement.** In the schools and in the Alumni Association, alumni relations programs are often intertwined with fund-raising activities. The dual objectives of alumni engagement and fund raising create a level of competition that prevents coordination and partnership among units.*

VII. *The role of the Alumni Association in alumni engagement is unclear. Though its alumni programs receive support from the University, the Alumni Association's structure as a separate, membership-based entity limits its financial and staff capacity for meeting the alumni relations needs of the University and its schools and programs. Also, the alumni relations mission tends to take a back seat to the Alumni Association's extensive foundation responsibilities, such as management of the UVA Fund and stewardship of the Jefferson Scholars Foundation, among other programs.*

Alumni Engagement Costs Grounds-wide

For most schools and programs at the University, the alumni relations operations are intertwined with the development function. Because of this overlap, it can be difficult to determine the true aggregate cost of alumni engagement at the University separate from the overall advancement effort. Schools and selected units were asked to report their alumni relations spending and their development spending, as well as the number of staff devoted to each.

The resulting self-reported information shows that the schools and other units spend no less than \$34.2 million on institutional advancement, including \$19.5 million on development, \$8.7 million on alumni relations and \$6 million on related areas. All told, more than 320 staff members are devoted to advancement, of which 213 are in development, 81 are in alumni relations, and 26 are in other related duties. By comparison, Stanford University, a useful benchmark against which to compare our programs, spends at least \$46 million on advancement, of which \$33 million is for development and \$13 million is for alumni relations. These figures understate Stanford's spending since they encompass only Stanford's central advancement operations and not various school and unit development and alumni relations programs. Put a different way, Stanford spends \$87 per alumnus/alumna on alumni relations, while U.Va. spends \$54. Stanford spends approximately \$307 per alumnus/alumna for its overall advancement program (alumni relations, communications, and development), while U.Va. spends \$214.

“Best in Class”: The Stanford Model

Even with its challenges and idiosyncrasies, the alumni engagement program at the University compares well with those of public institutions in its peer group. As it looked for “best in class” examples of alumni programs, the Task Force focused on the top private institutions, which the University wishes to emulate in both the academic and advancement arenas. It soon became clear to the Task Force that Stanford University has the most to teach us about alumni relations. As the University adopts the advancement practices of its private peers, Stanford provides a useful model for several reasons.

- The two schools have alumni populations of similar size.
- Both have a history of independent, membership-based alumni associations.
- Both have a similar tradition of alumni engagement activities dispersed among the alumni association and schools and units, although Stanford's development program is less decentralized than the University's, which will be a factor in U.Va.'s ability to implement change.
- In recent years, Stanford has gone through a similar self-study process to improve its alumni engagement activities, and the results have been tangible and impressive.

It should be noted that Stanford differs in significant ways. For example,

- Stanford is a private institution.
- Its advancement programs are somewhat more centralized.
- It has a longer tradition of cultivating alumni support as a core funding resource.

Because Stanford provides such a compelling example of how a major university can improve alumni relations, the Task Force engaged William E. Stone, president emeritus of the Stanford Alumni Association, to serve as an adviser. Mr. Stone played a central role in elevating Stanford's alumni engagement program to what is arguably the best of its kind. (A fuller discussion of the Stanford program can be found in Appendix E.).

The Next Era in Alumni Relations: Recommendations

The Task Force has developed the following recommendations with the goal of creating an alumni engagement program for the University that stands among the best in the nation. In several of the recommendations, we use the term “producer” to designate a business manager who, like a theater or film producer, must bring together all the human and financial resources necessary to create a successful program. The producer must be imaginative and organized and must command the authority needed to work across all schools and programs at the University.

Though focusing on seven areas (Regional Engagement, Reunions, Technology, Lifelong Learning, Magazines and Periodicals, Volunteer Opportunities, and Marketing and Market Research), these recommendations are not stand-alone initiatives. They are designed to support one another, and thus should be considered as a whole. Moreover, *how* these changes are implemented is as important as the improvements themselves. For this reason, the Task Force recommends a new organizational structure for alumni engagement at the University.

A key component of this structure is the set of qualifications required of the Executive Director of the University's alumni programs in their new form, which we were asked to develop. As with any advancement officer, good human relations skills will be critical, but this position primarily calls for the ability to attract, hire, and manage a staff of 50 to 100; oversee a multi-million-dollar budget; build consensus across all schools and foundations; develop, test, build, and market new programs; be a credible and forceful voice for alumni in the University community; be technologically proficient; and lead culturally and geographically diverse organizations.

In accordance with our charge from the President of the University, our recommendations also include a financial model for funding the proposed improvements. In this plan, membership dues in a revamped Alumni Association would continue to be a source of revenue, but the services and programs outlined in this report must be available to all alumni, not just those who pay dues. All alumni would be members of the newly structured Alumni Association. Dues payers may receive some premium services, but their support should be regarded as it is now at Stanford: like donors to public television, dues payers make the services possible for everyone.

Recommendation 1. Regional Engagement

- a. Set a “Gold Standard” for regional alumni programs under a new regional engagement producer**
- b. Create a team of regional alumni relations officers**
- c. Enhance programming and communications**
- d. Mount “road shows” rich in academic content and that showcase U.Va.’s strengths and needs across schools**
- e. Enhance opportunities for reaching out to parents and prospective students around the country, expanding the Parents Program on a regional basis**

Desired Outcomes:

- **Centralize delivery of services and improve baseline programming**
- **Provide better coordination of regional alumni engagement and development activities**
- **Improve responsiveness to local needs and affinity interests**

a. Set a “Gold Standard” for regional alumni programs under a new regional engagement producer

As is stands, the Alumni Association’s clubs program provides a basic level of service to alumni around the country and abroad. The quality of club activity is highly variable, depending on the region and those active in it. Moreover, regional programs are often limited to club members and fail to reach the full population of alumni in a given area. A regional engagement “producer” should be put in place to create more compelling programs in areas where there are significant concentrations of U.Va. alumni. With better programming, broader outreach, increased staff support, improved coordination, and greater oversight from Charlottesville, the producer would be able establish a powerful program for reaching out to alumni around the country and around the world. Though local leadership would continue to oversee and promote club activities, increased guidance and resources from the University would help to make club programming less susceptible to the vagaries of volunteer turnover and inconsistent funding.

b. Create a team of regional alumni relations officers

Regional Alumni Relations Officers would be assigned to areas where we have significant concentrations of alumni. Each officer would become expert in the needs and interests of alumni in his or her assigned area and would provide liaison support between Charlottesville and the local clubs. In a sense, the regional officers would be University ambassadors to our alumni communities. The Regional Alumni Relations Officers would work in tandem with the University’s Regional Development Officers, whose primary responsibility is to cultivate current and prospective donors in their assigned territories. This would be especially helpful in cultivating the loyalty of alumni outside Virginia, who provide a disproportionate amount of the University’s philanthropic support.

c. Enhance programming and communications and provide more academic experiences

University programming offered to the clubs should showcase the strengths of multiple schools and programs and should reflect strategic cross-University themes. Furthermore, better tools should be provided to facilitate communication between the clubs and the University and among the clubs themselves. Examples of these tools include e-mail listservs, networking software, a central portal

for club Web sites, centralized online event registration, and Web development services for helping clubs to create and maintain their own Web sites. Technology resources are also needed to track club membership and activities in Charlottesville, which would enhance the ability to coordinate services and to gauge their effectiveness in meeting alumni needs and interests.

d. Mount “road shows” rich in academic content and that showcase U.Va.’s strengths and highlight needs across schools

In keeping with the above-stated goal of providing more multi-school programming, the University, the Alumni Association, and the schools/units should join forces to mount “U.Va. Day” road shows that would be a full day of activities highlighting academic strengths from across the Grounds. These programs would travel from city to city and could be used to promote the University more broadly, reaching beyond just our alumni.

For example, if the day’s activities include a presentation on at-risk children in areas with distressed public schools, that session could draw a larger audience that includes local parents and school officials. Likewise, for a presentation on aging, invitations could be extended to residents of local retirement communities, caregivers, medical professionals, and other service providers.

The road shows would return to each major alumni market annually and could even be scheduled to occur at the same time each year. This would help build alumni participation and also aid in the central coordination of the events.

e. Enhance opportunities for reaching out to parents and prospective students around the country, expanding the Parents Program to include regional outreach

Parents represent a valuable University constituency that is intensely interested in the quality of academic and student life on Grounds. Our regional alumni programs should embrace these institutional stakeholders. Extending club memberships to parents and inviting them to all regional programs would help to secure their connection to the University. At the same time, our regional programs and communications should reach out to prospective students and their parents around the country to ensure that they are aware of the University and the richness of its student experience.

Recommendation 2. Reunions

- a. Appoint a pan-University producer/business manager to coordinate reunions**
- b. Provide more academic and thematic content to Reunions programming**
- c. Explore new organizational models to maximize alumni participation**
- d. Invest more staff and more resources into Reunions**
- e. Enhance efforts to cultivate class affinity before students graduate**

Desired Outcomes:

- Build on existing foundation to achieve greater attendance and participation**
- Provide more opportunities for volunteer involvement**
- Provide better coordination of University messages**
- Showcase strengths and needs to support the reunion giving effort**

a. Appoint a pan-University producer to coordinate Reunions

This new position would have broad authority to orchestrate a stronger Reunions program for baccalaureate alumni. The producer would be responsible for all aspects of the Reunions, including creating the appropriate revenue model, marketing, programming, Grounds-wide organizational systems, and efforts to increase attendance. The producer would, along with the President, Vice Presidents, and Deans, establish central University themes for each Reunion; plan signature events that would be the anchors for the weekend; and create a working template for the event that would guide University and volunteer planning from year to year.

b. Provide more academic and thematic content to Reunions programming

Reunions Weekend provides an ideal forum for presenting key University themes and for showcasing academic strengths. The producer would work with the University's academic and advancement leaders to develop themes that reflect the University's strategic priorities and that also incorporate key messages from schools and centers across the Grounds. This thematic approach could also be integrated with the Reunion Giving program's solicitations and communications.

c. Explore new organizational models to maximize alumni participation in Reunions

New methods of organizing Reunions should be explored to achieve the greatest and most meaningful alumni participation. Among the possibilities are approaches used by many private institutions, such as:

- **Creating new vertical associations:** In the absence of strong class loyalty, alumni may feel more of an affinity with those who took part in the same student activities, such as *The Cavalier Daily*, choral groups, or Madison House. Alumni of smaller schools, such as Architecture and Nursing, may feel a stronger sense of school affinity than class affinity. Reunions could be based on such commonalities as well as on ethnicity or geographic location. Additionally, significant anniversaries of major student organizations could be used strategically to provide an opportunity for gathering, either outside of the regular Reunions schedule, or to strengthen and broaden involvement during Reunions. The current Reunions program includes affinity gatherings, but they tend to be brief receptions with little programming. They are also limited to alumni in the Reunion classes for that year.
- **Broadening horizontal options:** Some private institutions, such as Dartmouth, place participants in three-year cohorts rather than a single class. Rather than returning as the Class of 1994 for a 10-year reunion, alumni would return as the Classes of 1993 to 1995. Reunions would still occur every year, but they would draw on larger pools of alumni.

Such new organizational models would encourage alumni to come back to the Grounds more frequently, not just every five years, and would afford opportunities to meet with friends independent of class affiliation.

d. Invest more staff and more resources into Reunions

The current Reunions program, which dates from 1991, provides a solid foundation for future progress. Additional investment in staff, financial resources, and institution-wide planning would provide a richer array of reunion activities, more opportunities for alumni to connect with friends

and affinity groups, and a more effective forum for communicating key University themes and messages. Such an investment would yield the following results:

- Enhanced programming, with nationally known keynote speakers, panels of high-profile alumni, and improved presentation of food and entertainment. This would broaden the appeal of Reunions and would also attract more alumni in the top tier of donors and prospective donors.
- Greater capacity to supervise volunteer planning and involvement. Giving volunteers a more prominent role in Reunions planning would demand more staff time to manage the process, but it would also provide more ways alumni can become engaged with the institution. This should entail more meetings on Grounds. Reunion volunteers now meet only once in Charlottesville, and at their own expense; other meetings are held by e-mail or conference call.
- Better integration of the alumni clubs program with Reunions to raise awareness and encourage participation. The enhanced regional clubs would be effective vehicles for promoting Reunions and for channeling volunteers into the process.
- Better use of contact reports to record information obtained by the Reunions staff in the volunteer management process. Due to time and access constraints, Reunions planning staff do not currently file contact reports.

Although further analysis is needed, increasing the Reunions staff from four to nine (including three full-time support staff) would make it possible to achieve these goals. But it will take more than human resources to meet these objectives. Better use of communications and technology, including a more robust Web presence for Reunions, would be necessary to capture more volunteers and participants. This should include better use of “class books” for each returning cohort.

e. Enhance efforts to cultivate class affinity before students graduate

Stronger class loyalty would provide a greater incentive for alumni to take part in Reunions and Reunion Giving. Building on the Class Trustees program, which was launched in the 1980s to encourage class affinity and class giving, more effort should be made to promote a spirit of healthy competition among classes.

Recommendation 3. Technology

- a. Create a new center of competence in technology to serve the University, alumni, and the schools/foundations**
- b. Improve existing functionality and connectivity through basic tools such as volunteer management software, broadcast email, networking capabilities**
- c. Create a robust and coordinated electronic communications program**
- d. Capture and maintain all e-mail addresses, starting with students by offering lifetime @virginia.edu e-mail addresses**
- e. Provide a single access point for alumni interaction with the University and with each other**
- f. Create programming that takes advantage of electronic media**

Desired Outcomes:

- **New opportunities for alumni interaction with the University and with each other**

- **Increased capability for capturing alumni information**
- **Better ability to market the University strategically**
- **Greater support for other areas of alumni engagement, such as regional programs, lifelong learning, communications, and market research**

a. Create a new center of competence in technology to serve the University, alumni, and the schools/foundations

As with other program recommendations, it will be important to create a position that will have responsibility for orchestrating Grounds-wide technology and electronic communications tools for alumni engagement. The Technology producer must be responsive to the needs of schools and units, must have the authority to negotiate competing demands, and must be creative and strategic in developing ways to connect with alumni through technology. The Technology producer must work closely with the public affairs and marketing arm of the University (University Relations) to communicate key University messages.

b. Improve existing electronic functionality and connectivity through basic tools such as volunteer management software, broadcast email, networking capabilities

The University should move immediately to improve its capabilities for using technology to communicate with alumni. Step one, the University should launch a marketing program aimed at acquiring substantially more e-mail addresses from alumni. Next, the University should begin assigning lifetime e-mail addresses to students to maintain their connection to U.Va., and if possible, it should begin offering lifetime e-mail addresses to current alumni. Thirdly, the University should enhance the functionality of alumni networking services for social and business interaction and for e-commerce and marketing. As alumni increasingly use electronic networking for socializing, business development, and other interests, the University should provide alumni the best tools available for finding and communicating with each other, for making business contacts, for social networking, and for sharing volunteer information. Furthermore, the University should enhance its electronic “store-front” to make quality UVa.-branded merchandise easy to find and easy to purchase.

c. Create a robust and coordinated electronic communications program

Reflecting the University’s decentralized advancement structure, electronic communications with alumni are uneven and insubstantial, varying widely among schools and programs. Alumni are increasingly tech-savvy and are accustomed to reading quality content online, but opportunities to engage alumni in meaningful ways through this medium are being missed. The University should mount a coordinated and consistent system of electronic communications that serves all schools and programs, that provides well-developed and substantive content, and that maintains best practices in terms of functionality and frequency.

Through institution-wide coordination of broadcast e-mail, alumni would receive carefully scheduled and well-crafted communications. This program would provide an effective means to:

- Deliver University news and strategic messages
- Meet communications needs of schools and programs
- Avoid “spamming” alumni with multiple and haphazardly scheduled communications from various University entities.

This program of e-communications should be integrated with the editorial direction of the pan-University magazine (see Recommendation 5). The magazine's editorial board, with representatives from all schools and selected programs, would also guide the development of e-content, including a pan-University e-magazine, to ensure that electronic and print communications complement and support each other. Indeed, this group should facilitate the migration of most University communications from hard-copy to online formats, utilizing features such as e-mail cards and links to documents and other relevant material.

All e-mail broadcasts should be executed through a single service provider and coordinated with the alumni records division of University Development to capture address updates and opt-outs. In parallel with the e-communications program, the same level of coordination, planning, and scheduling should be implemented in regard to e-mail solicitations. Haphazard solicitations from multiple University entities will be perceived as an irritant by alumni and will be counter-productive to our efforts to generate increased alumni support.

Specific features of the e-communications effort would evolve as new innovations emerge, but for now one can imagine a program that includes a daily U.Va. news summary with links to the *Cavalier Daily* and other information sources (i.e., Headlines@U.Va.); pan-University event and regional event schedules with links to online registration; updates for Reunion classes and volunteers; and private news groups for alumni with specific interests. Alumni would be able to opt in to these communications by checking off boxes in their profile in the online alumni directory and would be able to create their own affinity groups by networking with U.Va. graduates with shared interests.

d. Capture and maintain all e-mail addresses, starting with students by offering lifetime @virginia.edu e-mail addresses

Currently, the University offers alumni e-mail forwarding, which links a UVa. e-mail address to an individual's permanent e-mail address. However, this system relies on alumni regularly updating the links to their UVa. address if they change their permanent e-mail address. By offering permanent University e-mail addresses for all alumni, rather than e-mail forwarding, the University could track alumni more effectively, ensuring that they remain reachable. To ease this process, students could essentially keep their student e-mail address (although most likely with an additional extension) when they graduate.

e. Provide a single access point for alumni interaction with the University and with each other

Although the University's main Web page is one of the most heavily visited sites in higher education and leads to an abundant array of information resources and services, the University's Web presence for alumni – and the public generally – reflects the decentralized structure of the University. Sites for the University's central administrative areas are overseen by a single Webmaster and are unified in appearance and navigation. This unity rarely carries over into other areas on the University's site. When alumni venture off the main pages, they encounter a confusing array of school and program sites whose look, feel, and navigability vary widely. With their disparate budgets and staff capabilities, schools and units have each developed their own Web resources, resulting in an online presence that is uneven at best. Decision making in this area tends to be parochial, and the lack of sufficient centralized technology resources, such as Web development and coordinated use of broadcast e-mail, exacerbates the problem. Alumni receive multiple messages through multiple

channels of inconsistent quality and character. As a result, alumni visiting the University's Web site can be baffled by what they find there.

For this reason, the University should create a central port of entry through which alumni can search for programs and services relevant to them. In addition, content provided by schools and units for secondary pages would be organized and presented in a consistent, easy-to-use format. By presenting alumni content in a unified way, it would be possible to communicate school and unit information, as well as vital University messages, much more powerfully.

f. Create programming that takes advantage of electronic media

With better organization and management of its alumni programs, the University would be well positioned to use advanced technology to meet "digital alumni" at their point of interest. Such new programs could include the following:

- Distance learning programs
- Online events
- Expanded bulletin boards
- Surveys and polls

Recommendation 4. Lifelong Learning

- a. Appoint a producer to coordinate existing and expanded offerings**
- b. Consider various delivery/organizational options**
- c. Create and market new programs**
- d. Use technology for virtual offerings**
- e. Explore lifelong learning as a revenue generator**
- f. Develop tailored travel programs rich in content and showcasing academic leaders**

Desired Outcomes:

- **Alumni, who are lifelong learners by nature, would look to the University for these services**
- **Alumni would turn to U.Va. for professional training and certification in their disciplines**
- **Alumni would gain a clear sense of the University's present academic strengths**

a. Appoint a producer to coordinate existing and expanded offerings

The lifelong learning producer would match the University's academic capabilities with alumni needs and interests. This must be a creative individual who has a thorough understanding of the University's curricular strengths and who can craft programs that appeal to alumni, that have an appropriate level of academic rigor, and that showcase the University's commitment to great teaching. In the area of professional development and certification, the producer must work with the University's schools and with professional organizations to ensure that U.Va. offers programs that not only meet basic requirements but are also among the best in the field.

b. Consider various delivery/organizational options

The lifelong learning function must have the respect of the University’s academic community to ensure that the best teachers and scholars participate in the program. Though clearly a part of alumni engagement, it must have strong links to the provost and other academic leaders. It must also build on and complement existing delivery mechanisms, such as the School of Continuing and Professional Studies, JILL, and executive education programs at the Darden School and the McIntire School.

c. Create and market new programs

In addition to offering variations of existing courses and programs to alumni, the University should develop new lifelong learning opportunities for this audience. These could include interdisciplinary classes modeled on the “common courses” team-taught by leading faculty in recent years. Similarly, Princeton offered alumni a course on the nature of time taught by outstanding faculty in physics, philosophy, psychology, history, and several other disciplines. It was extremely well received.

Alumni courses that involve travel and field work should also be developed. These would be customized courses with top faculty, rather than pre-packaged tours. Building on faculty work already under way, classes could focus on climate change in southern Africa, archaeological investigations in Sicily, decorative arts and architecture in Charleston, or ancient Native American cultures in the Southwest. Programs should also be fashioned to match the interests of specific affinity groups.

d. Use technology for virtual offerings

All lifelong learning programs should have a virtual component to reach alumni who can’t travel to Charlottesville, but some programs would be entirely online. Some possibilities include online networks, in which faculty help guide peer-to-peer discussions on such topics as careers, business trends, politics, world affairs, science, medicine, history, literature, and the arts. Virtual book clubs also offer a way to engage alumni intellectually and to connect them to faculty and students and each other.

e. Explore lifelong learning as a revenue generator

Using Executive Education at the Darden School as a model, it may be possible to structure at least a portion of the lifelong learning program so that it is revenue-generating. These are likely to be professional development or certification programs, which alumni would view as a worthwhile investment and for which an employer may be willing to cover all or part of the costs. The revenue generated by these programs could help to sustain the other lifelong learning programs, which are not expected to be profitable.

f. Develop tailored travel programs rich in content and showcasing academic leaders

The alumni travel program should be enhanced substantially, going beyond prepackaged tour programs to offer tailored travel experiences built around the University’s academic stars. Marketing efforts should be launched to determine alumni interest and to design programs accordingly.

(See Appendix F. for a discussion of lifelong learning opportunities at peer institutions).

Recommendation 5. Alumni Magazines/Periodicals

- a. Develop University-wide themes and messages, which should be incorporated into editorial planning and content for an improved University-wide magazine and other vehicles, including online communications**
- b. Create an upgraded, centralized magazine for communicating with all alumni**
 - i. Provide a more academic editorial focus for magazine, guided by a multi-school editorial board**
 - ii. Ensure that key school/unit messages are integrated into the pan-University magazine**
 - iii. Mail every issue to all alumni and other constituencies**
- c. Over time, reduce the need for separate mailings of school and unit magazines; encourage deans to communicate with their alumni with twice-yearly communiqués**

Desired Outcomes:

- **Key University themes and messages reach all alumni**
- **School and unit messages are integrated with broader institutional messages**
- **More intellectual content and greater impact of University magazine**
- **Greater coordination of University mailings for enhanced effectiveness**
- **Potential cost savings**

a. Develop University-wide themes and messages, which should be incorporated into editorial planning and content for an improved University-wide magazine and other vehicles, including online communications

The Task Force senses a strong interest among alumni in clear and definitive University-wide messages. In the University's decentralized advancement environment, alumni receive multiple and sometimes conflicting messages. University Relations, in coordination with the new alumni engagement organization and with schools and units, should develop coherent institutional messages that can be incorporated into alumni communications in all forms, including an improved University-wide alumni magazine.

b. Create an upgraded, centralized magazine for communicating with all alumni

The *University of Virginia Alumni News* magazine should be elevated to a high-caliber, pan-University magazine sent to all alumni six times a year. Wider audiences should be added to the distribution, including non-alumni donors, faculty, students, parents, and staff. The magazine should be modeled on elite university alumni periodicals such as those of Stanford, Dartmouth, Brown, and Duke, which are consistently recognized for the high quality of their editorial content, graphic presentation, and the ways they capture the essential characters of their schools. On a par with such distinguished magazines as *Harper's* and *Atlantic*, it should appeal to any reader, regardless of their connection to the University.

The editorial calendar would cycle through news stories and features that present the institution's priorities and accomplishments. From issue to issue, it would turn its focus on every part of the

U.Va. community. Coverage would range from broad University trends and initiatives to faculty work, student achievements, alumni profiles, and University history. Commentary from expert faculty and alumni on current events would further broaden the magazine's appeal. The writing would be crisp and compelling (in a personal rather than institutional voice), the photos and graphics lively and welcoming (offering the reader multiple points of entry on every spread), and the story selection imaginative and engaging (reaching for new angles and unexpected insights). In overall character, the magazine must have integrity and credibility, while portraying U.Va. as a confident institution with a distinctive community of alumni, faculty, and students, and an unwavering commitment to superb teaching, scholarship, and public service.

Producing a magazine of this quality would require a staff of seven to ten. A pan-University editorial board, with representatives from schools and units across Grounds, would guide content planning and story selection to ensure that the key messages of the University and its units come through clearly. Academic deans must feel they have a stake in this publication and that it is vital to meeting their communication needs. This would decrease the pressure to launch or expand unit magazines and periodicals, and it would enable schools and programs to shift their communication resources to more personal means of reaching out to alumni and friends. Among other issues, the editorial board would need to consider the appropriate proportions of the magazine devoted to editorial content, class notes, and advertising.

c. Over time, reduce the need for separate mailings of school and unit magazines

Schools and units could reduce costs and decrease the volume of mailings to alumni by coordinating the distribution of their publications with the enhanced *Alumni News*. The following options would require careful coordination of mailing lists and production schedules, but the benefits are well worth the effort:

- Placing school and unit magazines in a poly-bag with the *Alumni News* for joint mailing. Alumni households would receive the magazines for which they have corresponding affiliations. For example, a couple with degrees from the College and the Darden School would receive their two school magazines and the *Alumni News* in a single package.
- Gluing or stapling school and unit magazines as an insert in the *Alumni News*. School magazines could be produced independently and inserted into the *Alumni News* at the bindery stage. Mailing would be segmented accordingly: Curry alumni would receive the *Alumni News* with the Curry insert; Nursing School alumni would receive the Nursing insert; and so on.
- Gluing or stapling the pan-University magazine as an insert in the school and unit magazines.
- Devoting a section of the *Alumni News* to each baccalaureate school. Content for these sections could be developed by the schools or by the *Alumni News* staff in coordination with the schools. Replacing the separate school publications, this expanded pan-University magazine would be mailed to all alumni and would give each school the opportunity to reach a wider audience.

If deans feel they can discontinue their school magazines, they would be encouraged to distribute twice-yearly communiqués to alumni and other constituents, perhaps in the form of letters or reports.

Recommendation 6. Volunteer Opportunities

- a. Offer more numerous and more varied ways alumni can provide volunteer service**
- b. Improve communication on volunteer opportunities**
- c. Establish a search function to allow the University to tap into alumni skills and expertise**

Desired outcomes:

- **Increased involvement of alumni in the life of the University**
- **Alumni feel their non-financial contributions are valued by the University**

a. Offer more numerous and more varied ways alumni can provide volunteer service

Looking to Stanford and other models of alumni engagement, the University should develop volunteer opportunities beyond board and committee appointments. This could include offering career counseling to students and young alumni; helping faculty and students gain access to real-world environments for their research; and providing consulting services to advance the University and to help its students and faculty.

b. Improve communication on volunteer opportunities

Improved alumni communications, including the pan-University magazine and enhanced technological tools, would provide new ways to promote volunteer opportunities and encourage alumni to offer their time and expertise in service to the University.

c. Establish a search function to allow the University to tap into alumni skills and expertise

The University must create tools to help match University needs with alumni willing to help. Stanford has developed a way to identify alumni who can assist the university with such challenges as improving food services or planning construction and development. The University should develop a database that is sufficiently detailed that it can identify alumni with special skills and expertise on an as-needed basis.

Recommendation 7. Marketing and Market Research

- a. Mount a coordinated effort to market alumni programs and services**
- b. Integrate the marketing function with expanded capabilities in communications and technology**
- c. Create a system for conducting recursive, agnostic surveys to determine objectively what alumni want and need and to evaluate the effectiveness of alumni programs**
- d. Improve coordination and communication among schools and units in this area**

Desired Outcomes:

- **Increased awareness among alumni of engagement activities**
- **A clear picture of current alumni interests, needs, and perceptions**
- **Timely development of programs to meet emerging demands**

a. Mount a coordinated effort to market alumni programs and services

A marketing function, headed by a qualified business manager with appropriate authority and resources, should be established to raise awareness of alumni engagement activities. This would be critically important for promoting regional programs, volunteer opportunities, lifelong learning options, and Reunions. Furthermore, the improvements outlined in this report must be accompanied by a comprehensive communication and marketing plan.

b. Integrate the marketing function with expanded capabilities in communications and technology

To ensure that it reaches the full breadth of the alumni population, the marketing team must work in coordination with the pan-University magazine and its editorial board, and it must have ready access to enhanced technological tools for gathering and disseminating information.

c. Create a system for conducting recursive, agnostic surveys to determine objectively what alumni want and need and to evaluate the effectiveness of alumni programs

To sustain a superb engagement program, a system must be established for conducting surveys of alumni on a regular basis and at a reasonable cost. This system would be vital to taking the pulse of the University's alumni community and to crafting programs and services accordingly. Regular surveys provide a way to measure the effectiveness of alumni programs, and they are also a useful tool for gauging alumni perceptions on University issues, which would help in the development of appropriate responses when needed. Survey results should be shared broadly for greatest effectiveness.

d. Improve coordination and communication among schools and units in this area

Typically, schools and units market their activities only to their own constituencies, even though these programs are likely to be of interest to a wider alumni audience. The new central marketing team must work with schools and programs to promote these activities to the broader alumni population.

The Next Era in Alumni Relations: Structure, Financing, and Implementation

In addition to being charged with providing recommendations for elevating the University's alumni engagement programs, the Task Force was asked to propose an organizational structure, a financing model, and an implementation plan for realizing its goals. These are described as follows:

A Financial Analysis

To estimate the resources necessary to implement its recommendations, the Alumni Relations Task Force conducted an analysis of institution-wide spending on alumni engagement activities and the additional funding required to finance new and expanded programs. While documenting the need for a substantial new commitment of resources to alumni programs, the analysis shows that the University can recoup its investment with a modest increase in alumni giving, which can be expected due to improved alumni engagement and good will.

In sum, the financial analysis shows the following:

Current Spending

- University-wide spending on alumni relations totaled \$8.7 million in fiscal year 2003 and involved the equivalent of 81 full-time personnel (FTEs).
- Spending was widely dispersed across at least 19 different schools, foundations, and other organizations.
- Of the \$8.7 million total, \$2.5 million was spent on the Alumni Association's alumni relations staff and programming. The remainder supported alumni activities in the various schools and units.

Projected Needs

- New programs and the expansion of existing programs would cost an estimated \$6.3 to \$6.9 million per annum (current dollars) on a fully employed, steady-state basis. This estimate is incremental to all current expenditures.
- The recommended programs would require 43 additional FTEs.

Return on Investment

The University would recoup its investment if, for existing donors, the average gift size (now \$3,600) increases by \$200; or if an additional 7 percent of the alumni population gives at the current median gift size (now \$150) *and* if existing donors increase their gifts on average by \$150.

Current Spending

To determine how much the University spends today on alumni engagement, the Task Force gathered self-reported figures for fiscal year 2003 from 19 organizations across Grounds: the Alumni Association (excluding the Jefferson Scholars Foundation), the Office of University Development, nine schools, and eight other foundations and organizations that maintain ties with alumni. In total,

these schools and units dedicate 81 FTEs to alumni programming and spend \$8.7 million annually on alumni activities. This figure represents approximately one quarter of University-wide spending on alumni relations and development.

Table 1. Current FTEs and Spending Devoted to Alumni Relations and Development

	<i>FTEs</i>	<i>\$ millions</i>	<i>% of dollars</i>
Alumni Relations	81	8.7	25
Development	213	19.5	57
Other	27	6.0	18
Total	321	34.2	100

Table 2. How Alumni Relations Dollars Are Spent

	<i>FTEs</i>	<i>\$ millions</i>	<i>% of dollars</i>
Communications	25	3.3	38%
Programming	31	3.4	39%
Technology	8	0.6	7%
Other	17	1.4	16%
Total	81	8.7	100%

Table 3. Distribution of Alumni Relations and Development Spending (in \$ millions) and Distribution of FTEs

	<i>Alumni Association</i>	<i>University Devt.</i>	<i>Average Undergrad. School*</i>	<i>Average Grad./Prof. School**</i>	<i>Average Other Unit</i>
Alumni Relations	2.5	0	0.3	0.8	0.2
Development	0.1	6.9	0.7	1.0	0.7
Other	1.3	0.9	0.1	0.8	0.1
Total	3.9	7.8	1.1	2.6	1.0
<i>Alumni Rel. FTEs</i>	<i>23</i>	<i>0</i>	<i>3</i>	<i>7</i>	<i>2</i>

*The 6 schools that grant baccalaureate degrees as well as graduate degrees

** The 3 schools that grant only graduate and professional degrees

Conclusions on Expenditures

Current expenditures on alumni relations at the University (\$8.7 million per annum) fall far short of the amount that best-in-class institutions are spending on alumni programs. Stanford, for example, spends at least \$13 million annually exclusively on alumni relations and is expected to increase its budget by 12 percent each year. Indeed, it can be argued that the \$8.7 million figure overstates the University's spending, since many of the staff members working in school and unit alumni relations also have development duties.

The Task Force’s recommendations would produce some efficiencies, such as coordinated distribution of alumni periodicals, but it will be difficult to harvest cost savings immediately from a reorganization of alumni programs. If schools and units reduce their spending on alumni relations due to a more robust institution-wide alumni engagement effort, it is likely that these dollars would be reallocated to development functions.

Estimated Cost of Recommended Programs

The Task Force’s recommendations encompass new and expanded programs in such areas as an upgraded pan-University magazine, the development and marketing of core messages, market research, regional engagement, University road shows, reunions, lifelong learning, travel, and technology. After estimating staffing needs, salary requirements, and program costs, the Task Force calculates that fulfilling the recommendations in this report would require 43 additional FTEs and approximately \$6.3 to \$6.9 million in additional funding per year. The projected new costs are in addition to current expenses for existing programs (magazine, regional programs, reunions, etc.).

The purpose of this cost analysis is to form the basis and justification for recommended funding for the alumni engagement initiative. It should not be considered a budget for new programs, although an estimated allocation is helpful in illustrating funding needs. Of the estimated new costs, about half are human resource expenses, and about half are program expenses. Table 4 shows how the new FTEs and expenses would be distributed. Of the nearly \$6.9 million in new expenses, almost two-thirds would be devoted to three areas: Technology, 28 percent; Reunions, 18 percent; and Regional Engagement, 17 percent.

Table 4. Additional FTEs and Funding Needed to Fulfill Task Force Recommendations (in \$ thousands)

	FTEs	Total (in '000s)	%
Pan-U. Magazine	5	625-675	9
Message Development	2	275-325	5
Market Research	1	150-200	3
Regional Engagement	10	1,050-1,150	17
Road Shows	2	525-575	8
Reunions	6	1,150-1,250	18
Lifelong Learning	3	425-475	7
Travel	4	325-375	5
Technology	10	1,750-1,850	28
Total	43	6,275-6,875	100

A Phased Approach

The funding of the new initiatives would be phased in over several years as new staff members are hired and new programs are developed and launched. For example, it is likely in the first year that new expenditures would be limited to the funding necessary to hire a new Executive Director and to fill key “producer” positions. In the second year, additional funding would be needed for more staff and new programs. It would take at least three years (and possibly longer) to reach full implementation.

Funding Sources for Alumni Engagement

Sources for Existing Alumni Relations Functions

The estimate of \$6.3 million to \$6.9 million in new and expanded program expenses is an estimate of the incremental expense over and above the level of current spending on these programs. The estimate was based on an assumption that current spending would continue to be funded by current sources dedicated to those programs. However, the precise functions of the enhanced alumni engagement operation, and therefore the amount of current sources which would be available to cover funding of those functions, is yet to be negotiated, and therefore, currently unknown. For information purposes, the following list, which totals approximately \$4.5 million per annum, identifies all current sources of revenue to the Alumni Association. The extent to which these resources will be available to fund the improved alumni engagement operation will be determined through negotiations with the Alumni Association's leadership. These sources include the following (figures are approximate):

- **Alumni Association Endowment: \$1.5 million.** The Alumni Association's \$32 million endowment, created with life membership fees, gifts to the Sullivan Fund, and other resources, is the largest single source of support for the organization. Other important financial assets of the Alumni Association include Alumni Hall and three reserve funds: the reserve for capital replacement of \$729,000; a "rainy day" fund of \$385,000; and a contingency reserve of \$50,000. These reserves were created by the Board of Managers to continue to meet expenses in times of uneven cash flows.
- **University Support: \$1.1 million.** The second largest source of revenue is the University, which provides approximately \$1.1 million per year to support alumni engagement activities, such as reunions, regional clubs, and distribution of the *Alumni News* magazine to non-members.
- **Affinity Credit Card Program: \$475,000.**
- **Other Affinity Programs: \$200,000.**
- **Reunion Participant Fees: \$500,000.**
- **Advertising (*Alumni News* magazine): \$400,000.** (Note that recommended content changes to the magazine may reduce the advertising space available, and therefore the existing revenues.)
- **Annual Giving: \$400,000.** This total includes annual gifts from members of the Board of Managers and other donors.
- **Dues From Annual Members: \$160,000.**
- **Various Other Sources: \$73,000.**

Sources for New Alumni Engagement Functions

There are a number of possible sources of funding for the new program recommendations, but the highest likelihood, and the case assumed for purposes of the organizational recommendation (see below), is that the University would bear the great majority of these costs. Following is a list of possible sources of funding:

- **University support: up to \$6.5 million.** Depending on implementation and available current alumni engagement revenues (to be negotiated), the University would be the greatest investor in a new alumni engagement program.
- **Additional Reunions Fees: \$500,000.** Given the recommended enhancements to Reunions, it is projected that Reunions would bring in additional attendance fees.

- **Lifelong Learning Fees: \$100,000.** Some lifelong learning programs likely would require individual registration charges to participants.
- **Alumni Travel: \$50,000.** As with Reunions, expanded alumni travel options are projected to attract greater participation.
- **Possible Funding Sources (totals undetermined):** Additional revenue sources might be available, depending on how the program recommendations are implemented. These could include premium membership dues, local club registrations, and additional reunion, lifelong learning, and alumni travel revenues.

Recouping the Costs of Alumni Engagement

The University would recoup the additional costs outlined in this report if improved alumni relations lead to increased alumni giving. Stanford's experience showed that alumni engagement, both in terms of volunteer involvement, level of gift, and percentage of participation, increased significantly only five years after its reorganization and additional investment in alumni programming (see Appendix E.).

In the 2002-2003 fiscal year, 33,612 of the 159,733 reachable alumni made gifts to the University, a participation rate of 21 percent. The average gift level was \$3,600, and the median gift level was \$150. If existing donors increase their gifts to the University on average by \$200, their contributions would exceed the new funding spent on improved alumni activities. Alternatively, the University would also recover its costs if an additional 11,181 alumni (7 percent of the alumni body) became new donors at the median gift level of \$150 *and* existing donors increased their gifts to the University on average by \$150.

A New Organizational Model for Alumni Engagement

Structural Principles

In developing a new organizational model for alumni engagement, the Task Force sought to adhere to the following structural principles:

- School and unit foundation structures would remain unchanged.
- The organizational structure should provide service and support to the President, the deans, and their foundations.
- Economies of scale should be achieved where feasible.
- Establish appropriate self-perpetuating governance with the following characteristics:
 - Extensive participation
 - Improved coordination with the Board of Visitors
 - Independence
- Define clear accountabilities to the University and its schools and programs and to the alumni being served.
- Match funding with University goals.

Structural Options

The Task Force considered a wide range of structural options, including the following:

- I. Status Quo: Alumni Association As-Is; Schools Continue to Build Own Alumni Engagement Efforts

- II. Centralized Support Service; Building on Alumni Association Resources
 - a. Integrated Alumni Association
 - b. Alumni Association removes links to Jefferson Scholars Program
 - c. Alumni Association relinquishes alumni engagement

- III. Centralized Support Services: Building a New Alumni Engagement Function
 - a. Integrated with other external affairs functions
 - b. New, stand-alone University function

- IV. New Alumni Engagement Partnership; Centralized Support Services: Independent alumni engagement function operated as a “joint venture” between the Alumni Association and the University; dual report to the President and the Alumni Engagement Board

Recommended Structure for Alumni Engagement

The Task Force considered a wide range of options, which are referred to above and detailed in Appendix G. These range from adjustments to the status quo, to full separation of the alumni engagement functions from the Alumni Association, to full University oversight of alumni programs. The option recommended by the Task Force (Option IV) follows a recommendation by the Alumni Association’s Board of Managers. It calls for creating a new alumni engagement subsidiary of the Alumni Association that would be a separate 501(c)(3) organization. It would be overseen by an Alumni Engagement Board that includes members of the Alumni Association’s Board of Managers as well as representatives of schools and foundations, the President’s Office, and the Board of Visitors. Though it would have representatives on the Alumni Engagement Board, the Board of Managers would not have controlling interest. To ensure that alumni engagement policies, programming, and services meet the needs of the schools and foundations, consideration would be given to weighting board representation so as to reflect the proportional alumni populations of the various schools.

The Executive Director would report jointly to the Alumni Engagement Board and the President of the University. The Executive Director would be a member of the President’s cabinet, and depending on the President’s wishes, should be afforded the title of Vice President for Alumni Affairs. The President and the Board would have equal authority over selection, compensation, and performance evaluation of the Executive Director. Larger policy decisions would be handled through joint reporting to the Board and the President, but day-to-day oversight of the Executive Director would be handled by the President. (For the Executive Director’s job description and qualifications, see Appendix H.)

Under this structure, funding sources would include Alumni Association revenues (to be negotiated) and increased subsidies from the University. The Task Force felt it is important to preserve Alumni Hall’s role as the face of alumni engagement at the University, particularly for functions such as Reunions and other events that bring alumni to the Grounds. Back-office functions, which would be largely handled by the University, could be placed elsewhere.

Alumni Association functions that focus on constituent relations would be transferred to the new alumni engagement operation. These include:

- Reunions
- Regional clubs
- The *Alumni News* magazine
- Affinity Marketing
- HoosOnline and Other Technology Outreach
- Alumni Travel Programs
- The Parents Program
- Career Services
- Legacy Admissions Counseling
- Alumni Association Memberships

Alternative Structures

If the organizational structure above (Option IV) is not adopted, lacking financial or governmental agreement, the Task Force recommends Options IIb or IIIb as alternatives.

Under Option IIb (see Appendix G. for organizational model), the Alumni Association would be dedicated entirely to alumni engagement and support services for the University and its schools and foundations. The Jefferson Scholars Foundation would become entirely independent of the Alumni Association. The Executive Director of the Alumni Association would report both to the President of the University and to the Board of Managers, which would be reconstituted to include representatives from the schools and foundations.

Under Option IIIb (see Appendix G. for organizational model), the University would establish a new alumni engagement office. Alumni programs now operated by the Alumni Association would become the responsibility of this division. It would be led by a new Vice President for Alumni Affairs who is part of the President’s cabinet. The Alumni Association and its Board of Managers would become a new organization devoted to foundation activities, such as management of the UVA Fund and the Jefferson Scholars Foundation.

Implementation

The following steps must be taken to implement the new alumni engagement structure and the recommended improvements:

a. Appoint an implementation leader and team

The University should create an implementation team comprising key administrators and alumni leaders who have the authority, credibility, and the respect in the University community needed to effect these changes.

b. Set an implementation timeline

The University should adopt a timeline for achieving the following:

- Appointment of the implementation team
- Agreement on a new organizational structure
- Keeping the Board of Visitors apprised of ongoing progress
- Negotiation of financial solutions
- Endorsements from schools and programs with a stake in alumni engagement

- Searches for key personnel, including the Executive Director
- Implementation of new programs and improvements as the needed personnel and structures come into place

c. Establish a board structure for the new organization

As part of the process of setting the mission and goals of the new alumni engagement organization, the University should establish a board structure with bylaws and a mechanism for appointing this body.

d. Develop a sustainable funding mechanism

(See financial analysis above.)

e. Launch a communication effort to make alumni and other members of the University community fully aware of the new alumni engagement program

Using every vehicle at its disposal (the Web, e-mail, direct mail, publications, and external media), a well-coordinated communication effort must be mounted to announce to alumni and others in the University community that a new era has begun in alumni engagement. Emphasis should be placed on plans for expanded alumni programs. This would build expectation and demand for these services, which in turn would place beneficial pressure on the University and the new alumni engagement organization to redouble their commitment to provide them.

The process outlined above would create a structure for effecting and sustaining the recommended improvements, ensuring an orderly and timely transition to the new structure, identifying sustainable funding of the alumni engagement initiatives, and increasing awareness of the University’s commitment to improving alumni services.

Conclusion: Realizing the Vision

If it is to uphold its stature and fulfill its aspirations, the University of Virginia has no choice but to make fundamental improvements to its alumni relations program. The University has long recognized that it cannot rely on state funding as its only core resource. As it adopts a funding model that mirrors its private peers more than its public counterparts, the University must maintain lifelong ties to its alumni and inspire them to translate their natural affection for the institution into ongoing philanthropic support.

This report provides a blueprint for establishing one of the best alumni relations programs in the nation. Its recommendations form an integrated vision. They must be viewed as a whole, and they must be implemented together through an organizational structure fully devoted to nurturing the University’s bond with its alumni. By making the University an abiding presence in the lives of its former students, and by ensuring that they share the institution’s core values, hear its key messages, and understand its goals and priorities, the program outlined here would open a new era in alumni engagement. As the founders of our first alumni organization intended, it would yield “the happiest effects” and would serve, in substantial and lasting ways, the best interests of an institution that continues to shape our lives and the world around us.

Appendix A. Task Force Process and Timeline

University President John T. Casteen III convened the Alumni Relations Task Force in autumn 2003, with the following original purpose and charge:

Purpose of the Alumni Relations Task Force

The Alumni Relations Task Force will study current University alumni relations efforts and recommend specific approaches to enhance the University's ability to consistently engage a broad and diverse body of alumni in meaningful ways.

A successful alumni involvement program will be positioned to communicate key institutional messages to the broad alumni constituency through a variety of means. Such engagement will allow the University not only to communicate these messages but to create institutional advocates.

In such a program, a variety of vehicles may be employed to engage alumni, including educational offerings on Grounds, regionally, and through virtual means; volunteer opportunities, at the University level and with specific schools, programs, departments and centers; advocacy opportunities, for example regarding recruitment of students, financial support for the University, and especially in building the University's relationship with the Commonwealth of Virginia; social, networking and public service activities with various affinity groups; alumni travel programs; and more passive communications through publications.

It will be important for the Task Force to address the challenges of the University's de-centralized structure.

Recommendations will address approach, programs, resource allocations, and reporting structure.

Charge

- Specifically, the Task Force will:
 - reach consensus on the elements of "alumni relations" so as to guide the work of the Task Force;
 - catalog alumni relations programs, activities and alumni communications currently in place, as well as outreach efforts University-wide that could be harnessed as resources to expand the University's programs;
 - benchmark against an aspiration group of alumni relations programs at the finest public and private institutions;
 - brainstorm needs and opportunities for broadening alumni engagement;
 - recommend ways to organize, fund and staff the effort.
- The Task Force will recommend a timeline for implementing possible changes in alumni relations approaches, and may establish a "pilot program" to test new approaches.

- The scope of the Task Force’s work will not include the existence or independent nature of the University of Virginia Alumni Association, nor will the operational relationship between the Alumni Association and the Jefferson Scholars Foundation be addressed. However, the ways in which alumni programming and involvement are approached through the Alumni Association, as well as through other areas of the University, will be covered.
- Once the Task Force’s report is drafted, school and unit advisory/foundation boards will have the opportunity to provide comment before the report is finalized.
- The Task Force will be appointed by, and report to, President Casteen. Although not officially reporting to the Board of Visitors, the Task Force will include as an ex-officio member the Chair of the External Affairs Committee of the Board of Visitors.

Timeline

The first meeting was held in October 2003. The primary tasks for the fall were to evaluate the University’s current programs, benchmark them against peer schools, and identify key needs of the University and of alumni. Throughout the fall, Task Force members met with leaders and staff in each of the schools, as did the Senior Vice President for Development & Public Affairs, to update them on the course of the Task Force’s work and to collect their comments related to the process.

During the late winter and spring, the Task Force more specifically defined its recommendations on best practices and met individually with the deans of bachelor degree-granting schools and individual members of the Board of Visitors. In February 2004, the Chair of the Task Force appeared before the Board of Visitors’ External Affairs Committee to report on progress to date. The Task Force Chair gave another brief report at the board’s April meeting and also met with the President, the Rector, and the Executive Vice President to update them.

A draft report was completed in April and preliminary conclusions shared with school deans and other academic and administrative leaders for comment. The Task Force met several times in the spring to discuss the organizational and financing options for delivering the recommendations. The Chair of the Task Force reported again to the Board of Visitors in June, and the final report was submitted to the President and the Board of Visitors later that month.

Alumni Relations Task Force members

Chair: H. Eugene Lockhart, Jr. (*'72 Engineering, '74 Darden*)

Lucien L. Bass III (*'63 Engineering, '65 Darden*)

Gordon C. Burris (*'67 Education*)

James J. Chaffin, Jr. (*'66 Arts & Sciences*)

Thomas Connally, Jr., M.D. (*'58 Arts & Sciences, '62 Medicine*)

Douglas D. Garson (*'78 Engineering*)

Elizabeth J. Heider (*79 Architecture*)

Elisa Holquist (*'85 Arts & Sciences*)

Rebecca J. Horner (*'92 Arts & Sciences, '95 Education*)

Valerie Smith Kirkman (*'75 Nursing*)

Jeffrey D. Nuechterlein (*'79 Arts & Sciences, '86 Law*)

John C. Peoples ('88 *Arts & Sciences*)
Philip B. Pool, Jr. ('76 *Commerce*)
Robert W. Riordan ('73 *Law*)
Charles H. Turner IV ('79 *Commerce*)

Ex-Officio

Thomas A. Saunders III ('67 *Darden*)
(Former Chair, External Affairs Committee of the Board of Visitors)

Staff Liaisons

Bob Sweeney, *Senior Vice President for Development & Public Affairs*
Jack Syer, *Executive Director, UVa. Alumni Association*
Wayne Cozart, *Director of Alumni Activities, Alumni Association*
Ken Kipps, *Director of Communications, College of Arts & Sciences*
Megan Raymond, *University Outreach Officer and Director, Engaging the Mind Series*
Andy Selfridge, *Director of Regional Programs, Office of University Development*
Bill Sublette, *Director of University Publications and Development Communications*
Jenny Wyss-Jones, *Special Assistant to the Senior Vice President for Development & Public Affairs*

Note: Scott H. Jones, *Senior Manager for Business Analysis in the Office of the Vice President for Finance*, also provided valuable assistance regarding financial modeling for this report.

Appendix B. Who Are Our Alumni? A Statistical Analysis

- **Number of Living Alumni:** 160,000
- **By Gender:** Male 59%, Female 41%
- **By Age:** 35% under 34; 58% younger than 45
 - < 34 yrs = 35%
 - 34-44 = 23%
 - 45-54 yrs = 26%
 - 55-64 yrs = 8%
 - Over 65 yrs = 8%

Alumni Concentration: Top 10 States (not in priority order)

- Virginia
- Maryland
- New York
- California
- North Carolina
- Pennsylvania
- Florida
- Georgia
- New Jersey
- Texas

Alumni Concentration: Top 10 Cities (not in priority order)

- Washington, DC
- Charlottesville, VA
- New York, NY
- Richmond, VA
- Atlanta, GA
- Baltimore, MD
- San Francisco, CA
- Los Angeles, CA
- Tampa, FL
- Boston, MA

Alumni by Minority (University and U.S. as a whole)

- African American 5% (US: 12%)
- Asian-American 4% (US: 4%)
- Hispanic-American 1% (US: 13%)

Note: The percentage of minorities in the student population has increased greatly over the last 30 years, from 1% in 1970 to 22% in 2003. By comparison, the presence of non-whites in the U.S. population is less than 25%. Because the size of graduating classes has grown steadily since full co-education in 1970, the percentage of minority alumni will increase significantly over time.

Education

- Graduated from the College of Arts & Sciences (undergraduate and graduate): Almost 50%
 - School of Engineering: 11%
 - School of Education: 11%
 - School of Law: 7%
 - McIntire School of Commerce: 6%
 - Darden Graduate School of Business Administration: 4%
 - School of Nursing: 4%
 - School of Medicine: 4%
 - School of Architecture: 3%
- With Multiple U.Va. Degrees: 10%

Annual Household Income (self-reported from an Alumni Association special programming survey, 1999)

- >\$50,000: Over 80%
- >\$150,000: 25%

Occupational Information (self-reported from an Alumni Association special programming survey, 1999)

- 17% employed in business/management fields
- 16% homemakers
- 11% employed in engineering/technical fields
- 11% employed in the educational field
- 9% employed in the medical field
- 8% employed in the legal field

Internet Access

Alumni with self-reported Internet access: >81%

Appendix C. The Link Between Alumni Engagement and Alumni Giving

The CORE Group Study

The CORE Group is a private research organization that has been engaged by a consortium of 55 universities, colleges, and independent schools to collect data on development and alumni relations, to analyze relationships between actions and outcomes, and to draw conclusions about recommended approaches. The consortium includes such private universities as Brown, Columbia, Cornell, Dartmouth, Georgetown, Harvard, Johns Hopkins, Princeton, Stanford, Yale, and Penn, as well as such public universities as U.Va., Michigan, the University of California-Berkeley, UCLA, the University of Washington, Penn State, and University of Texas.

The CORE Group's study shows that individual giving is becoming the growth engine for U.Va.'s financial support and that alumni are driving this growth. The CORE Group study also indicates that large gifts to an institution are much more likely to come after many years of engagement with the University, even if initial gifts are quite small. In addition, the most likely donors to the University will be its alumni. Therefore, there is a strong correlation between alumni engagement and giving, especially significant giving.

The CORE Group analyzed all of U.Va.'s gift transactions from 1981 to 2000 to draw conclusions about motivations for giving and to identify trends that might be duplicated over time. Preliminary analysis from the CORE Group suggests the following related to alumni engagement and giving:

- Over the last 20 years, U.Va.'s growth in individual giving has outpaced the growth in gifts from other sources. Alumni gifts drove that growth.
- In any single fiscal year, alumni are the largest source of gifts of \$1 million or more, as opposed to foundations, corporations, and other individuals.
- Million-dollar donors are frequent contributors to U.Va. The million-dollar gift is given after many years of giving and is a reflection of a life-long relationship and affinity with the institution.
- Over the last 20 years, million-dollar alumni donors gave 89% more frequently than all alumni.
- Over the 20 years studied, the million-dollar donor made gifts in 12 of the 20 years. In the 12 years in which gifts were made, the million-dollar gift came in year 11.
- Over the 20 years, gifts from million-dollar donors start at very modest levels and grow consistently and at a high rate over time. The average first gift is \$255; the average 12th gift is \$162,700.

The CORE Group study also shows that donors of smaller gifts give more generously to the University when gifts are made regularly over time.

- Gift size grows over time with years of giving. In fact, U.Va.'s alumni donors increase their gift size by nearly 17% in the first 6 years of giving, by more than 12% to year 12, and by 10% thereafter.
- This high growth over time means that U.Va.'s 20-year alumni donor gives in twice as many years but contributes 8.9 times more than a 10-year donor.

The MIT Study

To understand the relationship between alumni engagement and alumni support, it is useful to refer to the MIT Giving/Engagement Study conducted in spring 2002. The study was undertaken to confirm the results of a 1989 MIT Alumni Association study that demonstrated a strong connection between giving to the Alumni Fund and engaged and involved alumni. In 1988, MIT's Alumni Association was reorganized to merge the alumni relations and the annual fund staffs under the leadership of a managing director, under the assumption that involvement leads to greater philanthropic support. In addition, changes were made to strengthen the alumni relations programs, including adding support to reunions volunteers, instituting giving campaigns at each five-year reunion, creating new activities such as "MIT on the Road," renewing emphasis on students and young alumni, and investing in technology resources for alumni relations.

The MIT study examined involvement related to alumni volunteers, reunion attendees, and local club members from 1996 to 2000. The following conclusions were made from the study:

- **Participation:** Rates of participation in the Alumni Fund were significantly higher among involved alumni: reunions attendees (30 points higher than all alumni), volunteers (20 points higher), and club members (13 points higher).
- **Consistency:** Involved alumni were shown to be 1.4 to 2.1 times more likely than all alumni to be consistent donors (those who gave four or more years out of five).
- **Size of gift:** Involved alumni were 2 to 6 times more likely than the general alumni population to make cumulative gifts of \$2,500 or more over 5 years. The strongest ratios were at the \$25,000 and greater level.

Appendix D. The Alumni Association: Current Role and Structure

For most of the University's history, the Alumni Association has been U.Va.'s primary driver of alumni engagement. It remains the central organizer and provider of many alumni programs, such as the clubs, Reunions, the *Alumni News*, and HoosOnline. It was the principal keeper of alumni records before the University adopted the BSR Advance database system in 1995-96. To envision an improved University-wide program of alumni engagement, the task force examined the Alumni Association's present structure and the place of alumni activities within that structure.

Key Functions

The Alumni Association manages a wide range of programs, but three stand out:

- **The Alumni Relations program**
- **The Jefferson Scholars Program** (the Alumni Association also administers other scholarships, including the Ridley Scholarships)
- **The UVA Fund**

In addition, a Parents Program seeks to involve non-alumni parents with the University, primarily as donors to a fund for student activities and other purposes.

The Alumni Association is an independent, fee-based organization with 57,029 dues-paying members, or about 33 percent of the University's 160,000 alumni. It has an annual operating budget of approximately \$5 million, and among its principal funding sources is a \$32 million endowment built over the years with gifts and life membership fees. Its target endowment spend rate ranges from 4.25 percent to 6.25 percent.

Other key revenue sources include:

- **General University Support:** \$1.12 million is being provided in the 2003-2004 fiscal year as a fee for services to fund clubs, Reunions, the online community, and communications, including once-a-year distribution of the *Alumni News*. Pursuant to a contract last signed in 2001, the University agreed to provide these funds annually, with incremental increases each year.
- **Endowment Income:** \$1.5 million is projected as income from the Alumni Association's endowment (described above) and for managing and administering several entity accounts, primarily the Jefferson Scholars Program. This service distinguishes Virginia's Alumni Association among its peers as a unique, hybrid organization.
- **Credit Card Royalties:** Approximately \$475,000 is being generated annually, with equivalent amounts provided to Athletics and the University on a contract that extends through the 2009 fiscal year.
- **Reunion Support and Registration Fees:** Based on attendance, this is projected to be more than \$500,000 annually.

Alumni News Support and Advertising, Career Services, and Computer Service Fees: These amount to more than \$400,000 in the current budget. The magazine is distributed to all alumni once per year and to members only three times per year

- **Annual Giving:** Gifts for the use of the Alumni Association generally total \$300,000 annually.
- **Annual Membership Dues:** The Alumni Association attracts annual membership dues of approximately \$165,000 each year.
- **Board of Managers Support:** Every year, a special appeal goes out to Board of Managers' members and generates \$100,000.
- **Alumni Board of Trustees:** The Alumni Board of Trustees of the University of Virginia Endowment Fund makes an annual grant of \$58,000 to the Alumni Association.
- **Affinity Promotion Income:** Approximately \$210,000 comes from marketing of commercial products at special rates to Association members, such as insurance.

The Alumni Relations Program

The objective of the Alumni Relations program is to serve alumni and to involve them in the life of the University. Programs are designed to appeal to alumni at each stage of their lives, beginning with their student years.

The Alumni Association's Alumni Relations services include:

- The Class Trustees program
- Alumni clubs
- Affinity Interest Groups
- Reunions
- HoosOnline, an online directory of U.Va. alumni
- Lifetime forwarding e-mail addresses
- Online and onsite career advising and services
- The Honor Endowment fund
- Legacy admissions advising
- *Alumni News* magazine

Membership Model

The Alumni Association is a membership organization, and some of the Alumni Association's alumni relations services, such as receipt of all issues of the *Alumni News*, are available to members only. Annual members pay yearly dues, currently \$35 per year. Life members make a one-time payment, currently \$400, which can be spread over several years. Under the membership-based model, the Alumni Relations services and activities are required to be financially self-sustaining. They are available only if they can support themselves or are subsidized by the University. This limits the investment that can be made in these programs, and it limits how the Alumni Association can work with the schools to market these programs.

Membership in an Alumni Club is entirely separate from membership in the Alumni Association. An alumnus might be a member of the Alumni Association and not a member of his or her local club, or vice versa. Each club sets its own membership criteria and dues, and club activities are designed to benefit and appeal to club members. These layers of membership complicate efforts by the University and the Alumni Association to deliver messages and services to all alumni.

Scholarship Programs

To enhance the University's capacity to recruit outstanding students, the Alumni Association's Board of Managers established the Jefferson Scholars Program in 1980. The program seeks to attract to the University the most promising student leaders in the nation and to give them sufficient financial support so that they are free to develop their talents and to use them for the good of the University community. Now operated by the Jefferson Scholars Foundation, an independent foundation affiliated with the Alumni Association, the Jefferson Scholars Program awards full four-year scholarships to approximately 36 undergraduates in each entering class. The Jefferson Scholars Program also has begun to offer graduate fellowships, awarding seven each year. Made possible by gifts from alumni and friends, the scholarships and fellowships are fully endowed. The Jefferson Scholars Foundation's endowment now totals \$125 million. The endowment also supports the operations of the program, which has a staff of 11. The Jefferson Scholars Program pays rent to the Alumni Association for its offices in Alumni Hall.

Established in 1987 through the leadership and support of African American alumni, the **Ridley Scholar Program** has helped to foster a tradition of giving and involvement among the University's black alumni. Named for the University's first African American graduate, Walter Ridley (Curry '53), the program awards 15 to 20 scholarships to black undergraduates each year and has one staff member. Annual expenses are paid by the Ridley program, with a contribution from the Alumni Association.

The UVA Fund

Through the UVA Fund, the Alumni Association manages approximately \$220 million in endowment assets, which include its own endowment, the Jefferson Scholars Foundation endowment, and approximately \$65 million in other University-related endowment accounts. The objectives of the UVA Fund are to preserve principal, to earn a return each year at least equal to the annual distribution rate of 6 percent, and to the extent consistent with the first two objectives, to maximize return.

In addition, the UVA Fund manages approximately \$20 million in checking account assets for University departments, programs, student groups, and other University-related organizations. The checking account service, which includes bookkeeping and gift accounting, gives these programs immediate access to their private funds.

The UVA Fund operates with six to seven FTE staff. The fund's total annual expenses of \$700,000 include a fee paid to Tremont Capital as adviser to the fund. These expenses are approximately offset by an administrative service fee charged to investors and earnings from the checking account. As a result, the net budget impact of the UVA Fund on the Alumni Association is approximately zero.

The Parents Program

The Parents Program was established in 1980 with the mission of enhancing the student experience at U.Va. through fundraising and involvement in the University community. The program is directed by a Parents Committee that comprises non-alumni parents from around the world. Each year, the Parents Committee allocates funds to academic and student life programs and to a variety of University and student organizations. The Committee also provides information resources to incoming parents and works to develop new initiatives and programs that enhance the student experience at the University. One staff member is dedicated to the Parents Program.

Key Management and Governance Functions

Governance – Board of Managers: The Alumni Association is an independent 501(c)(3) organization governed by an independent, self-perpetuating Board of Managers comprising 36 members. The board meets twice a year, and its Executive Committee meets separately a third time each year. Members are elected to 3-year terms and may serve two consecutive terms. The University has two representatives on the Board of Managers, one designated by the President of the University and the other designated by the Board of Visitors. Both University representatives act as ex-officio voting members of the board, and one serves on the Executive Committee. The president and the vice president of the Young Alumni Council serve as non-voting ex officio members of the Board of Managers.

The President of the Board of Managers is nominated from among the Board members by the Nominating Committee and is elected by the Board. The President exercises a general executive control of the affairs of the Association. To provide consistency in leadership, the President generally serves as Vice President for one year, then as President for one year, and then as a member of the Executive Committee and head of the Nominating Committee for one year.

Executive Director: The Executive Director is also the Secretary of the Board of Managers and is elected by the Board, subject to the President of the University's right to consultation. Overseeing the day-to-day operations of the Alumni Association, the Executive Director is responsible for managing the staff and for fixing compensation. He or she can sign contracts with the approval of the President of the Board of Managers.

Appendix E. Stanford's Experience with Improving Alumni Engagement

In the mid-1990s, Stanford and its alumni association conducted a similar self-study to determine how best to strengthen and maintain Stanford's relations with its graduates. The university itself had not been significantly invested in alumni relations, deferring to the association and school alumni programs to perform this function. Like the U.Va. Task Force, the Stanford group was charged to think broadly and boldly, unconstrained by history, by cost, or by structures. Under the resulting blueprint, the Stanford Alumni Association (SAA) was reorganized and enhanced in a number of ways.

Like the U.Va. Alumni Association, the Stanford Alumni Association was an independent 501(c)(3) dues-based membership organization. It was overseen by a governing board representing its members; the association's president and CEO reported to the board and served at its pleasure. In 1998, in accordance with the blueprint emerging from the self-study, the association merged its separate non-profit organization into the university. The board became an agency of the University's board of trustees, still named by the membership but ultimately also approved by the trustees. The SAA president became a university officer with the rank of vice president, alongside the senior business, development, legal, and public affairs officers.

Along with this structural reorganization came a number of other significant changes and improvements. These included:

- A substantial increase in university funding for alumni programming
- New ways to use and engage volunteers across the institution
- Closer coordination among the various units that interact with alumni
- A new alumni center facility
- The merging of alumni records in a single upgraded database.

According to William E. Stone, the President Emeritus of the Stanford Alumni Association, this restructuring yielded a number of key advantages. Three stand out:

- **Gaining “a seat at the head table”:** The restructuring brought an alumni perspective to institutional decision making at the highest level, placing alumni affairs and alumni engagement high on the university's agenda.
- **A more direct connection with alumni:** Alumni see the institution itself, not just a separate association, embracing their interests, needs and reenergized alumni programming.
- **Greater Synergy:** Merging the SAA into the university has provided a way to bring all of the campus teams that work with alumni to one coordinating table. This makes it easier to take advantage of possible synergies and joint programming opportunities.

The Results at Stanford

Just since 1998, there have been distinct improvements in alumni engagement measures over the years since the Stanford/SAA merger and additional investments.

- **Volunteers in regional programs:** Growth from 300 per year in 1998 to 1,600 per year in 2003.
- **Volunteers in reunions:** Growth from about 200 per year in 1993 to 1,500 per year in 2003 (note: this is a ten-year increment)
- **Overall active volunteers (based on self-reported surveys):** Growth from about 11,000 in the 1990s to 21,000 in 2002.
- **Reunion attendance:** Growth from 21% of class in 1998 to 35% in 2003.
- **Reunion giving:** Growth from 35 percent of class members in 1998 to 48 percent in 2003. (Four of the ten classes set best-ever giving records in 2003, and three set donor participation records. The total raised was also a record: \$79.4 million from 7,393 donors.)
- **Membership:** Maintained at about 67 percent of baccalaureate alumni despite de-emphasis on dues. Additional services were made available to non-members and special priority/pricing options were offered to dues payers.
- **Approval rating:** Alumni rating service as excellent or good increased from 59 percent in 1998 to 72 percent in 2002. Alumni grading Stanford as good to excellent in providing attractive ways to volunteer increased from 37 percent in 1998 to 55 percent in 2002.

Communications

Circulation of the SAA's bi-monthly magazine was expanded to reach nearly all alumni, including donors who are not SAA members. Although the magazine was no longer strictly a member benefit, there was no negative impact on membership percentages. The magazine also built stronger collaborative ties with the Stanford University News Service for reporting institutional news and developing editorial content. Members of the News Service staff occasionally serve as contributing writers to the magazine. The News Service and the magazine jointly publish a monthly e-report, for which more than 60 percent of alumni have opted in. The SAA Web site was redesigned to provide a more useful port of entry for alumni seeking information on the university and on alumni services and activities.

Regional Programs

Stanford has reduced its dependence on clubs as regional presence and has adopted a "sales territory" model that aligns its regional alumni relations officers (RAROs) with corresponding major gift officers. The RARO in each area is responsible for supporting and working with all clubs in the territory, identifying and cultivating strong volunteer leadership, and assisting with coordination of school and development events in the field.

Classes and Reunions

Class alumni relations officers work with Stanford Fund counterparts to maintain relations with baccalaureate reunion classes, with activities and modest campaigns in the years between five-year reunions. In addition to alumni from the baccalaureate programs, each reunion weekend includes a professional school reunion and a "featured" school or program that does not hold a regular reunion for its graduate alumni. The result is an exceptionally full menu of offerings that showcase distinguished alumni and faculty and that appeal to a broad range of interests.

Technology

In addition to improving the SAA Web site as mentioned above, the Stanford Alumni Association and the Stanford development office have collaborated to produce a single, fully integrated alumni database. This permits more sophisticated relational analysis that incorporates giving, event participation, volunteer activity, product purchases, call reports, honors, and alumni interests.

Lifelong Learning

Some three-quarters of the SAA's programs involve ongoing education in some form. As many as 400 faculty (25 percent of the university's professoriate) participate in alumni relations activities in a typical year. A number of them take on multiple assignments. A particular focus has been interdisciplinary presentations that allow the faculty to work with colleagues from other schools and programs across the institution.

Alumni Recognition

SAA was given the responsibility of broadening alumni recognition opportunities beyond donor recognition. Nominations for alumni honors are gathered campus wide. One particularly attractive recognition activity is a periodic "insider information" conference for select alumni. Nominations for alumni participants are submitted by schools and departments, as well as the SAA and development staffs.

Students

Stanford regards alumni relations as a continuum that begins with the student experience, which can be a predictor of later alumni engagement. To build this connection, the SAA works with underclass and senior class officers and gives Stanford's senior student affairs officer a seat on its board. The SAA holds a "zero" reunion at graduation and assembles a core of graduating students who show promise for volunteer leadership in the future.

Membership

Though no longer an independent organization, SAA still relies on membership as a significant revenue source. Although programs and services were expanded to reach non-members, some priority and pricing advantages are given to dues payers. No longer defined by benefits, SAA's membership dues are now akin to support for public television—members make the services possible for everyone.

Volunteer Deployment

The SAA is working to develop volunteer opportunities beyond the usual alumni assignments, such as fund-raising, club leadership, and service on boards and committees. This includes a volunteer clearing house for harnessing the abilities and professional expertise of alumni for the benefit of the entire institution.

Benefits Still to Come

Stanford now spends 33 percent more on alumni relations and 30 percent more on development and alumni relations combined than the University of Virginia. Although the organizational changes and increased investment in alumni affairs have already borne fruit at Stanford, the full impact of these improvements are yet to be seen. Nevertheless, significant trends are clearly evident, which makes Stanford an example well worth following.

Appendix F. Lifelong Learning Models

To aid in the evaluation of a proposed lifelong learning program, the Task Force gathered information about lifelong learning approaches at various peer institutions. Following is a short description of several programs at primarily private colleges or universities:

Cornell: “CyberTower” offers “study rooms,” which are actually lecture series, along with readings and Quicktime clips of Cornell professors delivering 6-8 lectures on the topic, including slides. New “rooms” come online every month, with ten offered each year. Recent topics included “Rembrandt’s Etchings: A Portrait in Black and White,” “Protecting Adolescents from Bullying,” “Engines and the Atmosphere,” “The Bible and History,” “A Brief History of English Garden Design,” and “Wine Appreciation.” The CyberTower also offers Forums, in which a University dean interviews faculty members, administrators and student leaders about their areas of expertise, and Views and Reviews, which provides a “bully pulpit” for Cornell faculty to share opinions and observations. The CyberTower is free and open to everyone, regardless of their affiliation with Cornell.

AllLearn, a collaboration between Stanford University, Yale University and University of Oxford: Formed in September 2000, AllLearn offers non-credit distance learning programs. Classes repeat year-round, and range from 90-minute faculty forums to 10-week course. Costs range from \$50 for a week-long seminar to \$300+ for more extensive courses. Recent courses included “The U.S. Constitution,” “Understanding Beethoven,” “The Intelligent Emotions,” and others. A free online library of Academic Directories and Learning Guides are also available. Offerings are developed by faculty from Stanford, Oxford and Yale, and are taught by professors from these, and occasionally, from affiliate, institutions. Other universities are invited to participate (without financial commitment) as affiliates. AllLearn focuses its marketing on graduates from the three universities and selective partnerships with other universities. According to AllLearn, a recent program on Iraq attracted 4600 learners, and AllLearn participants have given its offerings “excellent” or “high” ratings 80% of the time.

Alumni College at Washington & Lee University: Started in 1982, the Alumni College offers 5-day, on-campus, continuing learning programs in an upscale “summer camp” setting (most programs are held in the summer), as well as alumni travel. There is no on-line component. This year’s programs include “The Historical Jesus,” “Brain and Mind,” “Law and Literature: Tom Wolfe’s *Bonfire of the Vanities*,” and “Understanding the Middle East.” Alumni Travel opportunities include trips such as a river cruise on an exclusive W&L charter through Belgium and Holland, “Lewis & Clark’s Montana,” trips to Australia, France, Italy, the Baltics and others.

MIT: MIT offers “MIT On The Road”, Club Seminars, and the MIT Enterprise Forum. Other educational resources include access to the MIT Libraries, OpenCourseWare, and streaming Webcasts of campus talks and events. OpenCourseWare is an MIT innovation that is “a free and open educational resource for faculty, students, and self-learners around the world.” It publishes MIT course materials and does not require any registration, but is not a degree-granting or certificate-granting activity and does not provide access to MIT faculty. MIT offers a variety of Alumni Travel excursions.

Harvard: Harvard's lifelong learning resources are limited and accessible only to alumni through a log-on page. Harvard@Home offers on-line programs of edited video and multimedia ranging from 45 minutes to 3 hours in length. They are marketed to alumni monthly through Harvard's e-mail newsletter. New programs are available each month, and include discussions of academic subjects (such as professor Diana Eck's discussion on "Manifestations of Shiva") and Harvard events (such as Commencement and Harvard's new curriculum review process). Harvard also offers Alumni Travel (nearly 50 trips each year), often in partnership with other Ivy schools.

George Mason: George Mason (GMU) has its main campus in Fairfax and a smaller one, for its law school and public policy school, in Arlington. It is involved in lifelong learning through both campuses. The Arlington campus is a cosponsor of Arlington Learning in Retirement, which offers courses to retirees. Most of the courses are taught by volunteers who have little, if any, association with GMU. They make some of their classrooms available for lectures, but most are given in facilities supplied by the Arlington County School System. A series of fall lectures will be given by Peter Stearns, the provost at GMU and a respected historian. The larger Fairfax campus is the home of Fairfax Learning in Retirement. Though most lecturers are volunteers from the community at large, an increasing number of GMU faculty are teaching courses there. There is a nominal charge (\$35) for the courses. The faculty, including those from George Mason, is unpaid. Learning in Retirement program students are given a GMU student ID card which can be used for parking, book store purchases, etc. The campus in Fairfax has excellent theater and production facilities and makes these available for community events; for example, a recent televised program on bio-terrorism preparedness, with a speech by John Kerry and discussion afterward, was held there.

Appendix G. Structural Options

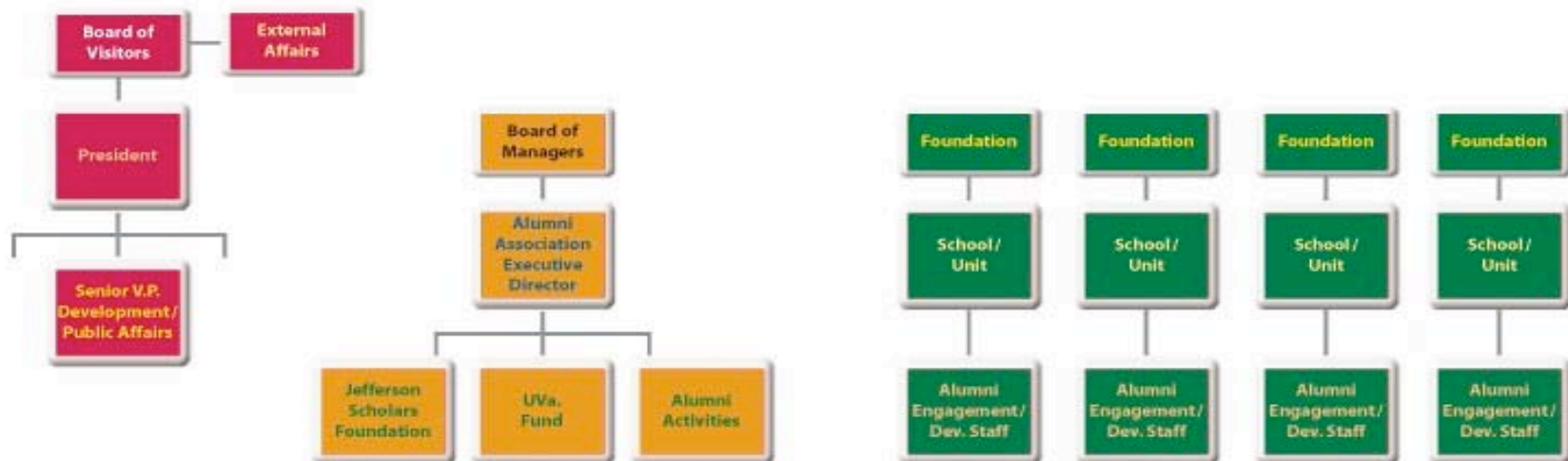
The Task Force considered a wide range of structural options for delivering enhanced alumni engagement programs and services, including the following seven:

- I. Status Quo: Alumni Association As-Is; Schools Continue to Build Own Alumni Engagement Efforts
- II. Centralized Support Service; Building on Alumni Association Resources
 - a. Integrated Alumni Association
 - b. Alumni Association removes links to Jefferson Scholars Program
 - c. Alumni Association relinquishes alumni engagement
- III. Centralized Support Services: Building a New Alumni Engagement Function
 - a. Integrated with other external affairs functions
 - b. New, stand-alone University function
- IV. New Alumni Engagement Partnership; Centralized Support Services: Independent alumni engagement function operated as a “joint venture” between the Alumni Association and the University; dual report to the President and the Alumni Engagement Board

Following are the organizational charts associated with the above options.

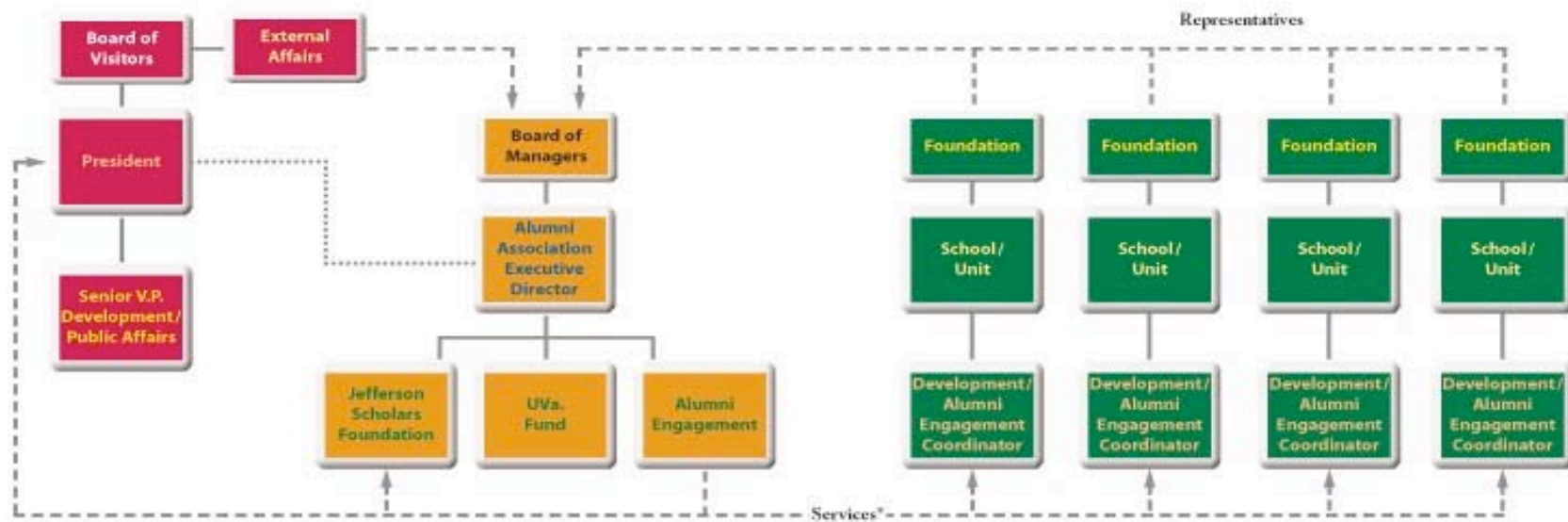
I. Status Quo: Alumni Association As-Is; Schools Continue to Build Own Alumni Engagement Efforts

- **Description:** Builds on existing resources across Grounds in schools and foundations. Alumni Engagement resources are in the hands of deans and unit directors; University investment in the Alumni Association continues.
- **Governance:** Fully decentralized; individual schools and foundations are responsible for direction and management of their alumni engagement functions.
- **Executive Management:** Fully decentralized.
- **Source of Funding:** Fully decentralized; school- and foundation-based.
- **Linkage to President:** None (except through existing dean/provost/vice-president connections).
- **Linkage to BOV:** None directly (except through BOV representatives on foundation boards).
- **501(c)(3):** Decentralized (individual charitable foundations).
- **Location:** Dispersed.



IIa. Centralized Support Services: Building On Alumni Association Resources Integrated Alumni Association

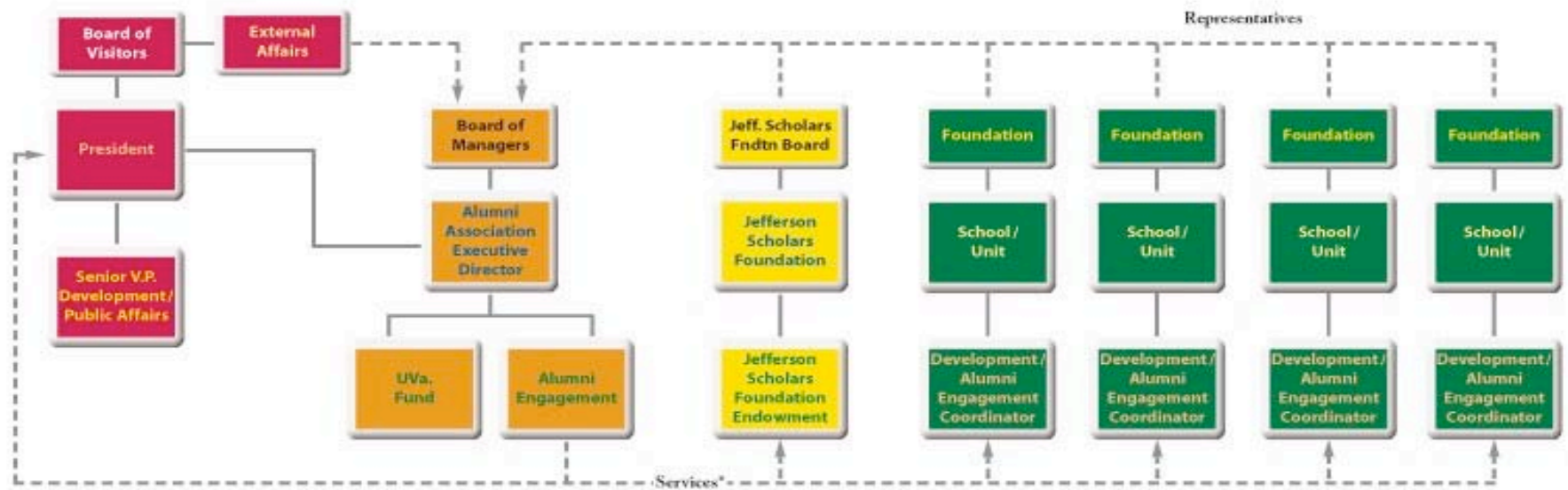
- **Description:** New charter for the Alumni Association– to expand on its role of providing services to both alumni and the schools, foundations and University. New programs provided to schools/foundations and existing support services expanded. Jefferson Scholars Foundation remains with the Alumni Association as-is. The AA Board of Managers (BOM) transitioned to include representatives from schools and foundations. Alumni Association Executive Director becomes a dual report to the Board of Managers and the President.
- **Governance:** Self-perpetuating; schools/foundations have representation on BOM of Alumni Association.
- **Executive Management:** Decentralized, but Executive Director managed by BOM.
- **Source of Funding:** Modified Alumni Association economic model; membership revenue changes, increased University contribution, access to Alumni Association unrestricted alumni endowment.
- **Linkage to President:** Executive Director reports to BOM.
- **Linkage to BOV:** Through External Affairs Committee of BOV
- **501(c)(3):** Decentralized; Alumni Association remains independent charitable foundation.
- **Location:** Space for Alumni Engagement functions to be based on business plan for Alumni Engagement activities.



* Services: Programming/Producing for Regional Engagement, Reunions, Electronic Tools and Communications, Lifelong Learning, Pan-University Magazine; Market Research; Alumni Engagement Marketing

IIIb. Centralized Support Services: Building On Alumni Association Resources Alumni Association spins out Jefferson Scholars

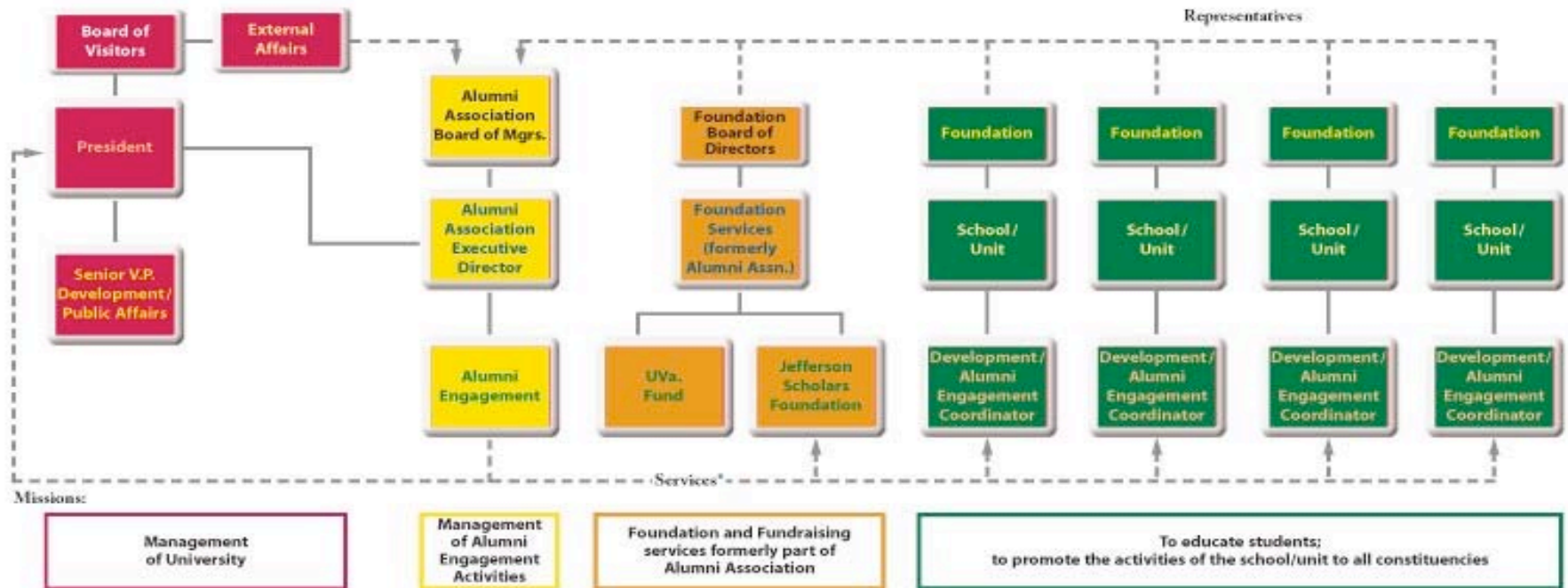
- **Description:** Alumni Association becomes dedicated solely to Alumni Engagement and support services to the schools/foundations and University. Jefferson Scholars Foundation becomes independent of the Alumni Association. The AA Board of Managers (BOM) transitioned to include representatives from schools and foundations. Alumni Association Executive Director becomes a dual report to the Board of Managers and the President.
- **Governance:** Self-perpetuating; schools/foundations have representation on BOM of Alumni Association.
- **Executive Management:** Executive Director managed jointly by the President and the Board of Managers.
- **Source of Funding:** Modified Alumni Association economic model; membership revenue changes, increased University contribution, access to Alumni Association unrestricted alumni endowment.
- **Linkage to President:** Executive Director has dual report to President and BOM. Executive Director included on President's Cabinet. President has equal authority with Alumni Association Board on hiring and firing.
- **Linkage to BOV:** Through External Affairs Committee of BOV
- **501(c)(3):** Decentralized; Alumni Association remains independent charitable foundation.
- **Location:** Space for Alumni Engagement functions to be based on business plan for Alumni Engagement activities.



* Services: Programming/Producing for Regional Engagement, Reunions, Electronic Tools and Communications, Lifelong Learning, Pan-University Magazine; Market Research; Alumni Engagement Marketing

III. Centralized Support Services: Building On Alumni Association Resources Alumni Association spins out Alumni Engagement

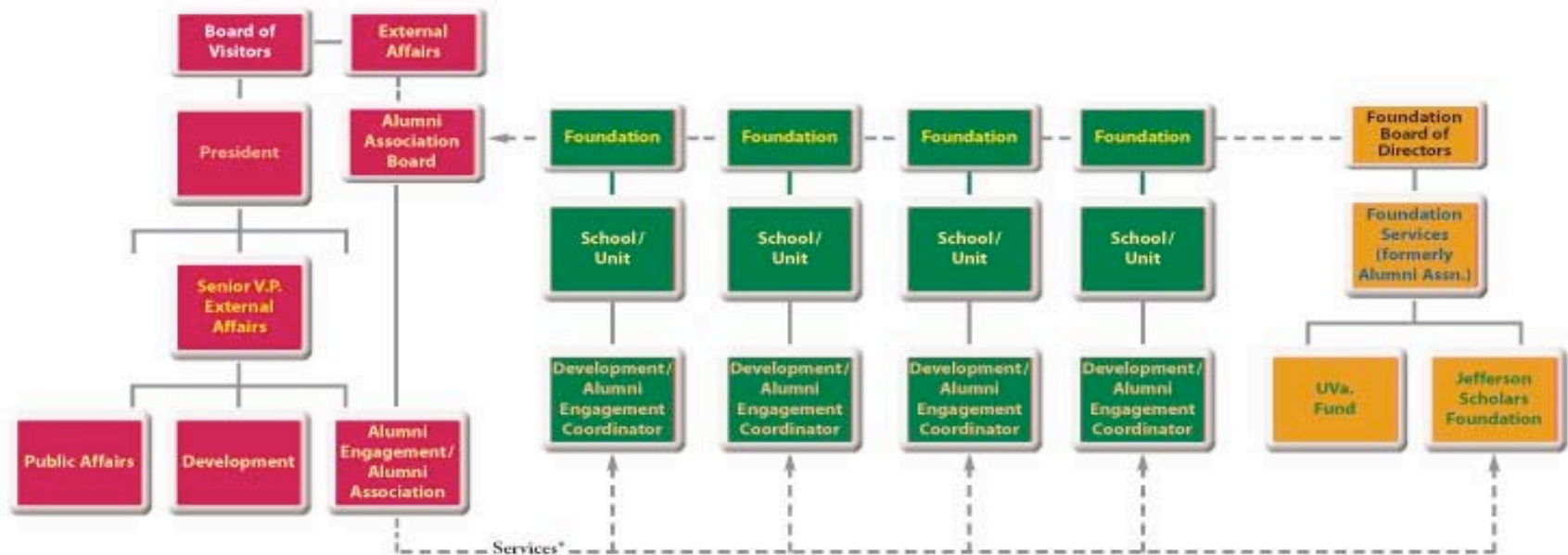
- **Description:** Alumni Engagement functions would spin out from the Alumni Association to become a new entity providing Alumni Engagement and support services to the schools/foundations and University. The new entity (likely called the Alumni Association) would include representatives from schools and foundations, and would have a linkage to the Board of Visitors. The existing Alumni Association would continue to support the Jefferson Scholars Foundation, the UVa. Fund, and its other services, but would likely be renamed to reflect its new focus.
- **Governance:** Self-perpetuating; schools/foundations have representation on BOM of new Alumni Engagement entity; BOV also nominates X independent directors.
- **Executive Management:** Executive Director managed by BOM of new Alumni Engagement entity.
- **Source of Funding:** Modified Alumni Association economic model; membership revenue changes, as does management of card and affinity marketing programs, increased University contribution, access to current Alumni Association unrestricted alumni endowment.
- **Linkage to President:** Executive Director has dual report to President and BOM of new Alumni Engagement entity. Executive Director included on President's Cabinet. President to have equal authority with Alumni Association Board on hiring and firing.
- **Linkage to BOV:** Through External Affairs Committee of BOV
- **501(c)(3):** Decentralized; the new Alumni Engagement entity remains independent charitable organization.
- **Location:** Space for Alumni Engagement functions to be based on business plan for Alumni Engagement activities.



* Services: Programming/Producing for Regional Engagement, Reunions, Electronic Tools and Communications, Lifelong Learning, Pan-University Magazine; Market Research; Alumni Engagement Marketing

IIIa. Centralized Support Services: : Building A New Alumni Engagement Function Integrated With Other External Affairs Functions

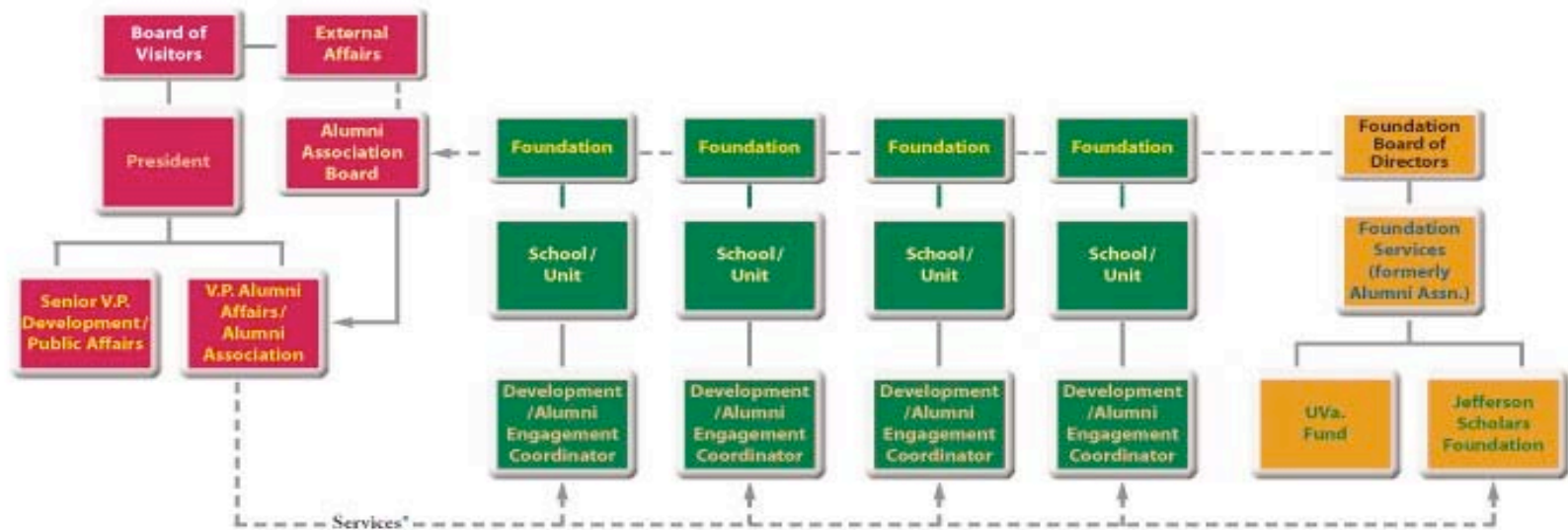
- **Description:** New University Alumni Engagement and support services function is created within the University, to serve and support the schools/foundations and the University. This new division would report to the current Senior Vice President for Development and Public Affairs (whose title would perhaps be changed to SVP for External Relations). The Alumni Association's alumni relations functions would be subsumed into the new division.
- **Governance:** The Alumni Association becomes a department of the University, and would be run and managed as a University entity. In addition, has a volunteer board. Incoming school/unit Presidents to serve on the board. The residual organization (formerly the Alumni Association) would retain non-Alumni Engagement functions and would be renamed.
- **Executive Management:** Associate Vice President to manage the division, reporting to the Senior Vice President.
- **Source of Funding:** University would fund new division; current University financial contribution to the Alumni Association for alumni relations services would be transferred to new division.
- **Linkage to President:** Through the SVP.
- **Linkage to BOV:** Through the President and the External Affairs Committee.
- **501(c)(3):** The Alumni Association becomes a department of the University, though with a volunteer Board of Directors.
- **Location:** To be determined.



* Services: Programming/Producing for Regional Engagement, Reunions, Electronic Tools and Communications, Lifelong Learning, Pan-University Magazine; Market Research; Alumni Engagement Marketing

IIIb. Centralized Support Services: : Building A New Alumni Engagement Function New, Stand-Alone University Function

- **Description:** New University Alumni Engagement and support services function is created within the University, to serve and support the schools/foundations and the University. This new division would report to a newly created Vice President, who would be part of the President's cabinet. The Alumni Association's alumni relations functions would be subsumed into the new division.
- **Governance:** The Alumni Association becomes a department of the University, and would be run and managed as a University entity. In addition, has a volunteer board. Incoming school/unit Presidents to serve on the board. The residual organization (formerly the Alumni Association) would retain non-Alumni Engagement functions and would be renamed.
- **Executive Management:** Newly-created University Vice President.
- **Source of Funding:** University would fund new division; current University financial contribution to the Alumni Association for alumni relations services would be transferred to new division.
- **Linkage to President:** Direct report.
- **Linkage to BOV:** Through the President and the External Affairs Committee.
- **501(c)(3):** The Alumni Association becomes a department of the University, though with a volunteer Board of Directors.
- **Location:** To be determined.

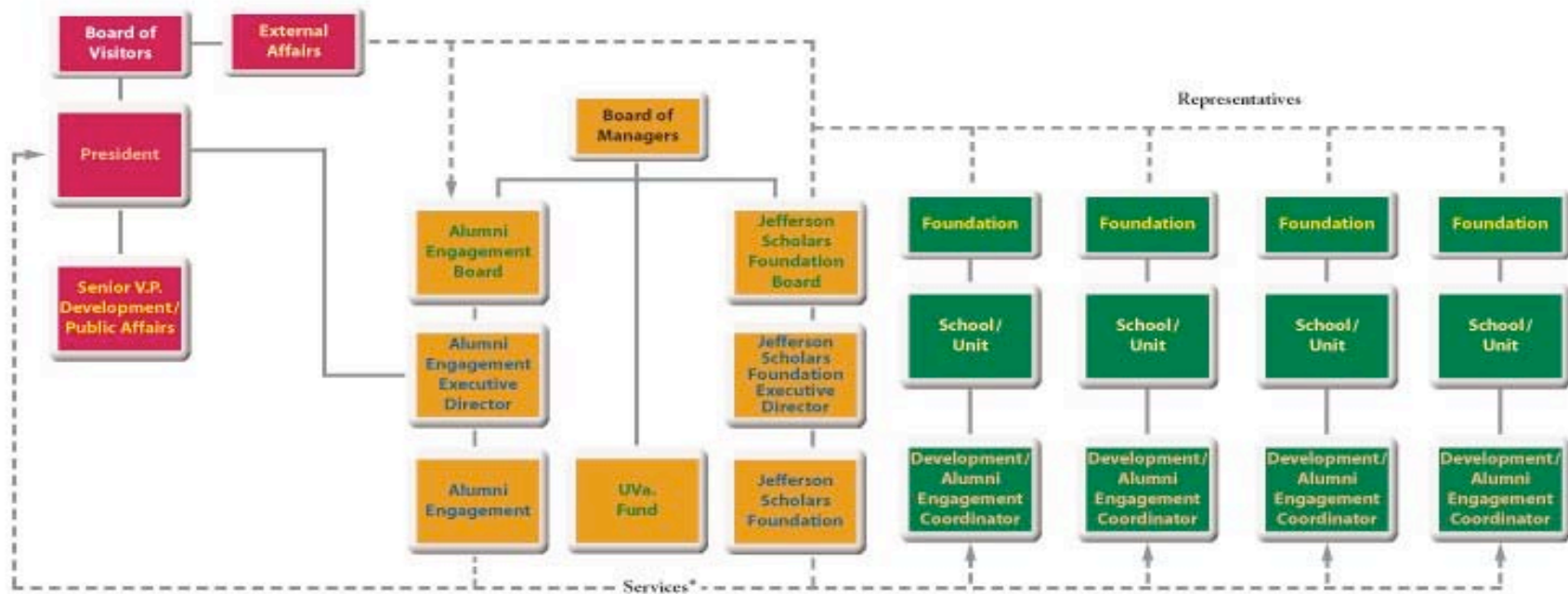


* Services: Programming/Producing for Regional Engagement, Reunions, Electronic Tools and Communications, Lifelong Learning, Pan-University Magazine; Market Research; Alumni Engagement Marketing

IV. New Alumni Engagement Partnership; Centralized Support Services:

Independent Alumni Engagement Function, operating as a joint venture between Alumni Association and University; Dual Report to President

- **Description:** A new Alumni Engagement Board would be created, similar to the Jefferson Scholars Foundation Board, which would be a subsidiary organization of the Alumni Association. Alumni Engagement functions would be managed by this board. The new board would include representatives nominated by schools and foundations, the Board of Visitors, and the President.
- **Governance:** Representative and self-perpetuating; schools/foundations have representation on new Alumni Engagement board; BOM representation modified to reflect engagement role; as a joint venture, voting control goes to Alumni Engagement Board.*
- **Executive Management:** Executive Director managed jointly by Alumni Engagement board and by the President.
- **Source of Funding:** Contribution from the Alumni Association unrestricted alumni endowment; increased University contribution; membership and program revenue.
- **Linkage to President:** Executive Director has dual report to President and Alumni Engagement board. Policy decisions would be handled through joint reporting, but day-to-day management would be by the President.
- **Linkage to BOV:** Through External Affairs Committee of BOV
- **501(c)(3):** Decentralized; the Alumni Engagement organization is an independent organization under the umbrella of the Alumni Association.
- **Location:** Space for Alumni Engagement functions to be based on business plan for Alumni Engagement activities.



* Services: Programming/Producing for Regional Engagement, Reunions, Electronic Tools and Communications, Lifelong Learning, Pan-University Magazine; Market Research; Alumni Engagement Marketing
 * Consideration should be given to Alumni Engagement Board representation being based on weighted average of alumni population for schools

Appendix H. The Executive Director's Position

Achieving a best-in-class alumni engagement program will require exceptional leadership. As with any advancement officer, good human relations skills will be critical, but the Executive Director's position primarily calls for the ability to attract, hire, and manage a staff of 50 to 100; oversee a multi-million-dollar budget; build consensus across all schools and foundations; develop, test, build, and market new programs; be a credible and forceful voice for alumni in the University community; be technologically proficient; and lead culturally and geographically diverse organizations. Specific qualifications should include the following:

- **Proven managerial leadership**
- **A service mentality**
- **Facility with technology**
- **Proven marketing skills, including database marketing experience**
- **Exceptional interpersonal skills**
- **Proven experience in managing geographically diverse organizations**
- **Cultural sensitivity and the ability to work with diverse communities**
- **Credibility with the University's leadership, including deans and program directors with a stake in alumni relations**
- **Significant understanding of the importance of education in society and a demonstrated interest in his or her own ongoing education**
- **Record of increasingly responsible volunteer service, including to the candidate's alma mater**
- **Understanding of the collaborative, multiple-constituency nature of decision-making in a university setting**
- **Clarity and persuasiveness in oral and written presentations**
- **Unusual stamina and the potential for significant tenure in the position**