



2006-2009 Strategic Plan

**Presented to the UIAA Board of Directors
June 2006**

University of Iowa Alumni Association 2006-09 Strategic Plan

VISION

Our vision is to engage all alumni in the life of the University.

MISSION

Our mission is to serve as the gateway for alumni to build strong relationships with one another, with the University and with the Alumni Association.

CORE VALUES

Collaboration

The Association will develop strategic alliances.

Education

The Association supports the University's mission of teaching, research, and service, advancing a culture of lifelong learning among its alumni.

Excellence

The Association's communications, programs, and services will be of high quality, reflecting creative and innovative ways to serve our alumni and the university.

Inclusion

The Association welcomes all members, alumni, students, and friends of the University and will not discriminate on the basis of race, national origin, color, creed, religion, sex, age, disability, veteran status, sexual orientation, gender identity, or associational preference.

Integrity

The Association will manifest the highest standards of honesty, fairness, respect, and professional ethics.

Service

The Association will first and foremost serve alumni and their university.

University of Iowa Alumni Association 2006-09 Strategic Plan

Overall Association Goal:

Increase participation by alumni in the life of the university through UIAA programs and services.

Strategic Goals & Key Objectives:

Strengthen the financial base.

- Strengthen and diversify auxiliary programs to maximize revenue.
- Optimize the efficiency and effectiveness of the Association's human resources.
- Increase membership net revenue to \$840,000.
- Reduce subsidies necessary to support programs and services.
- Contain costs and expenses throughout the organization.

Increase membership.

- Develop an organization-wide marketing plan to promote the value of Association membership.
- Increase membership retention to 85% for annual memberships and to 90% for gift club memberships.
- Acquire 15,000 new memberships for a net effect of 58,000 total memberships.

Engage more students and young alumni.

- Develop an organizational plan to engage more students and young (age 30 and younger) alumni.
- Increase student participation in UIAA programs to 7,500 annually.
- Increase opportunities for young alumni participation.
- Increase young alumni membership to 13%.

Remain an integral part of the university's external relations strategy.

- Enhance channels for involvement and improve access to information about the university for all alumni, with particular focus on non-association-oriented alumni.
- Work with the university to present a consistent message to alumni.
- Embrace the spirit and actively support the "Iowa Promise," the UI's strategic plan.

SWOT Analysis

STRENGTHS: Please list below characteristics of our organization that are strengths. These are generally internal characteristics that help us to do our jobs. Examples might include, but are not limited to, personnel, technology, physical plant, finance, and location.

1. The stature and reputation of the University.
2. Staff.
3. The volunteer leadership.
4. The ability to generate revenue.
5. The ability to respond to changes in its environment.
6. Insights to the needs of alumni based on 2002 research results.
7. Strong and viable on-campus and off-campus partnerships.
8. A strong and effective relationship with the UI Foundation.
9. Recognition for the breadth and quality of communications, programs, and services.
10. Newer office facilities provided by the Levitt Center.

WEAKNESSES: Please list below characteristics of our organization that are weaknesses. These are generally internal characteristics that hinder our ability to do our jobs. Examples might include, but are not limited to, personnel, technology, physical plant, finance, and location.

1. Distance from central campus limits our contact with UI faculty, staff, and students.
2. The challenge of understanding what appeals to our diverse alumni and meeting their needs.
3. Staff size limits what we can do.
4. Alumni confusion over the roles of the Association, the UI Foundation and all other external relations constituencies.
5. Limited office space for expansion.
6. Difficulty engaging young alumni.

OPPORTUNITIES: Please list things that present opportunities for our organization. These can be internal, but are often external to our organization. These might include, but are not limited to, new regulations, changing demographics, technology, market factors, and changes within the university.

1. Credit card revenue.
2. Information from research initiatives.
3. New revenue-generating opportunities.
4. Continued investment in research.
5. Improved on-campus relationships.
6. Evolving electronic communications.
7. Recognition of the UI as one of the best universities in the country and the world.
8. New University and UI Foundation leadership.
9. A growing alumni population.
10. Launch of the Alumni Services brand to expand awareness and engagement of non-association oriented alumni.

THREATS: Please list things that present threats to our organization. These can be internal, but are often external to our organization. These might include, but are not limited to, new regulations, changing demographics, technology, market factors, and changes within the university.

1. Decreasing state appropriations to the University.
2. Constraints on alumni participation such as physical distance, relationship decay, university discontinuity (no perceived clear outlet or process for involvement), and life stage priorities.
3. Increasing competition among non-profit groups for funding.
4. Students' changing attitudes and affinity toward the university.
5. The substantial reliance on credit card revenue for operations.
6. The effect of economic factors upon our investment portfolio.
7. Global, economic, and political volatility.
8. Changing relationships as a result of new University and UI Foundation leadership.

Environmental Scan

DEMOGRAPHICS

Aging population
Increase of nontraditional students
Changing ethnic diversity
Family is being re-defined
Geographical distribution increasing
Growing alumni population

FINANCE AND ECONOMICS

Economic uncertainty
Uncertain investment returns
Reasonably strong UIAA financial base
Declining state support for the university
Increased competition for university support
Decreasing disposable income resulting in conservative spending

GLOBAL PERSPECTIVE

With technology, geography becoming less of an obstacle
Increasing sensitivity to military serving overseas
Global, economic and political volatility leading to uncertainty that creates new challenges
Number of international students/alumni may or may not fluctuate based on the global environment

HUMAN RESOURCES

Traditional employee expectations regarding compensation changing
In reaction to tight budgets, organizations are changing the way they allocate benefits
Greater requirement for technological competence
Recruiting and retaining talented employees in a changing competitive job market
Continually increasing demands on existing staff
All professionals need to seek opportunities to address our rapidly changing environment

LEGISLATIVE AND REGULATORY ISSUES

Possibility of legislation and government regulation affecting our operations
Privacy issues

MARKETING

Implications of evolving technology affecting how we market
Consumer expectations requiring a more targeted approach
Increasing competition from within and outside the university
Difficulty determining saturation levels
Women are playing a greater role in decision making

PHILANTHROPY AND VOLUNTEERISM

Convenient and/or more meaningful ways to participate and volunteer are expected
Greater competition for volunteers and donors
Different attitudes toward charitable giving (paycheck vs. time)

TECHNOLOGY

New technologies offering many opportunities
Constant pressure to keep up with technological change
Cost of hardware is decreasing, but the cost of services is increasing
Expectation of quicker response time and increased electronic services
Increased need for technological support and training
Greater challenge to maintain a personal touch

UNIVERSITY OF IOWA

The impact of academic, cultural and athletic performance on our programs
National recognition an ongoing goal of the University
University considered a great educational value
Continued reduction in state support changing the University
Governing philosophies are evolving
Aggressive public response to university issues

CRITICAL RESOURCES

Budget

- Our reliance on the credit card program as a source of funding must be reduced.
- Revenue from existing auxiliary income programs must be maximized.
- It is imperative that we increase our net operating income, particularly in our core area of membership.
- Membership dues may change during the term of this strategic plan.
- Gifts to the Association will continue to be an important source of funds.
- The level of support from the University of Iowa will be uncertain.
- Non-revenue-generating programs will be required to become increasingly efficient.
- Strategic alliances will be an important way to improve our product without increasing our cost.
- New sources of revenue will need to be identified.

Alumni Body

The University of Iowa Alumni Association serves a population of more than 221,000 alumni and 29,600 students. Approximately 7,800 new graduates are added annually. Although the distribution of our alumni is worldwide, larger groups of alumni are located in the Midwest and in major metropolitan areas. The distribution of our dues-paying membership, which numbers approximately 54,000, features a similar geographic distribution.

Space

There is no room in the Levitt Center for growth in the size of our staff. The Association must begin to consider creative ways to accommodate our employees. In addition, a more inviting and welcoming atmosphere for our constituents is desired. Although some larger alumni events such as reunion dinners will continue to be held at other sites, the building provides ample space for meetings and most social events.

Staffing

It is likely that the UIAA will need to add staff, or at a minimum reorganize existing staff, to meet the goals and expectations of several key initiatives. Limitations in the size of the physical plant will, however, make the placement of additional staff a challenge. We will need to rely on the creativity and versatility of our staff, as well as excellent teamwork and communication skills to accomplish our goals. Continued professional development, competent coaching and management, and the retention of our best employees will remain critical to our success.