Cal Alumni Association
STRATEGIC PLAN FOR 2013-2017

Mission
The mission of the Cal Alumni Association (CAA) is to advance and promote the interests of the University of California, Berkeley by connecting alumni with each other and our alma mater. Together with our campus partners, we play an integral role in informing, engaging, and inspiring alumni to support the University by:

1. Participating and volunteering in University programs and events
2. Acting as ambassadors and advocates on behalf of the University
3. Giving to the University.

Values
Excellence of UC Berkeley
CAA believes in and is committed to the continuation of UC Berkeley as a world-class public, teaching, and research university.

The Home of Cal Spirit
The work of CAA is predicated on a deep love and appreciation for UC Berkeley and all that makes it great.

Welcoming and Inclusive
CAA is welcoming of everyone, gracious and respectful of all who encounter our Association as it exemplifies the highest standards of hospitality and professionalism. CAA believes in providing the very best quality customer service to our alumni, members, and partners.

Vision
Our vision is to be UC Berkeley’s primary campus-wide alumni relations organization responsible for building and engaging a broad alumni community that supports the University. Together, as a globally connected network of Cal alumni, we keep Cal golden!

Dimensions of Our Vision
Vibrant
Ours is a dynamic organization that leverages alumni pride in Cal.

Engaging
We engage, inform, and connect alumni to each other and to Cal.

Innovative
We are recognized as one of the most innovative alumni associations in the country.

Focused
We make tough, smart, and strategically-based decisions.

Professionally Enriching
We are committed to the development and success of our employees.

Success Metrics
Mission and programming effectiveness will be measured by four behavioral metrics:

1. Inspiration
2. Participation, engagement, and volunteerism
3. Advocacy and ambassadorship
4. Giving

Inspiration + Participation + Advocacy + Giving = Overall effectiveness

All of CAA’s programming, investment choices, and measurement of success will be tied to and evaluated based on quantitative and qualitative metrics. CAA’s four global success metrics noted above will be supported by a battery of more detailed organizational and programmatic sub-metrics. Programmatic sub-metrics will be tracked as part of CAA’s annual operating plans throughout the life of this five-year strategic plan. As new programs are created and optimized, program-specific sub-metrics may be added over the course of this five-year plan.

Target Audience Segments
Our objective is to ensure CAA programs and initiatives are designed to attract the diverse range of Cal alumni while driving our four behavioral metrics among these primary audience segments:

1. Recent graduates (first five years out)
2. Working professionals
3. Active retirees

We define these audience segments based on demographics, including class year, psychographics and behavioral characteristics.

Global Strategies
1. Be more proactive and explicit in encouraging alumni support of the University and of CAA
   - Educate alumni why their support is critical
   - Inform alumni how they can support the University
   - Encourage and direct alumni to programs and activities that actually secure their support
   - Encourage alumni action in all program promotion
   - Celebrate and profile alumni who support the University
   - Highlight ways in which the University has been made stronger through alumni support

2. Actively promote CAA- and University- sponsored programs and initiatives that inspire alumni to support the University (even programs CAA doesn’t operate)
   - Actively encourage and drive alumni to participate in CAA and University programs
   - Become a center of information for alumni events and Cal-related engagement opportunities
• Position CAA as the UC Berkeley campus welcome center for all alumni

3. Increase CAA’s reach, visibility, and engagement capacity by leveraging the most current technology (digital, social, mobile, web)
   • Enhance, expand, and better utilize online and mobile communications channels
   • Deliver contextually relevant, behaviorally targeted content
   • Ensure digital platforms enable enhanced cross departmental, cross program promotion
   • Invest in incremental and rapid launch of new tools and channels
   • Leverage and expand reach of existing networks and services wherever possible (e.g., Facebook, LinkedIn, @Cal, etc.)
   • Employ more frequent and timely content updates and enable multiple distribution channels

4. Develop metrics to track CAA’s success
   • Identify and utilize metrics to measure correlation and, where possible, causation between alumni participation and giving
   • Utilize control groups to demonstrate how CAA programs drive positive outcomes (per our desired strategic alumni behaviors)
   • Establish benchmarks in 2013 to track CAA’s efficacy, including membership, giving, participation, and ambassadorship/advocacy activity
   • Develop campus-wide alumni relations metrics in partnership with University Relations and other key campus units focused on alumni relations

5. Cross promote CAA programs, membership, and CAA giving opportunities to CAA members and participants
   • Build and enhance strategies and tactics that ensure greater management and operational efficiencies, enabling more effective cross promotional capacity
   • Employ cross training of and deeper collaboration among CAA staff, so all are capable of promoting any CAA program or offering, including royalty programs and membership benefits
   • Enable cross selling through the creation and enhancement of communications, programming, and staff training

6. Increase CAA net revenues primarily through membership, development, royalty programs, and revenue-generating programs
   • Expand fundraising
   • Grow membership, membership revenue, and net income contribution
   • Grow affinity royalty program

7. Employ an incremental, phased, and prioritized approach to program optimization, creation, and deletion during the five-year period of the plan
   • Articulate parameters, metrics, and timeframe for program improvement and/or deletion
   • Identify program investment strategies and revenue sourcing
   • Implement annual program efficacy review process, possibly a rolling review cycle (a third of CAA programs reviewed annually) to ensure achievability

8. Pursue alternative funding models from campus and third-party partners to support CAA program priorities
   • Enable priority programming and initiatives through an alternative funding pipeline, not reliant upon new revenue generation initiatives
- Identify, build, and strengthen relationships with appropriate and relevant third parties, particularly University Relations, with shared interest in alumni relations at Cal
- Identify program investment strategies and customize third-party funding/underwriting proposals accordingly
- Develop parameters, metrics, and timeframe for third-party funding models