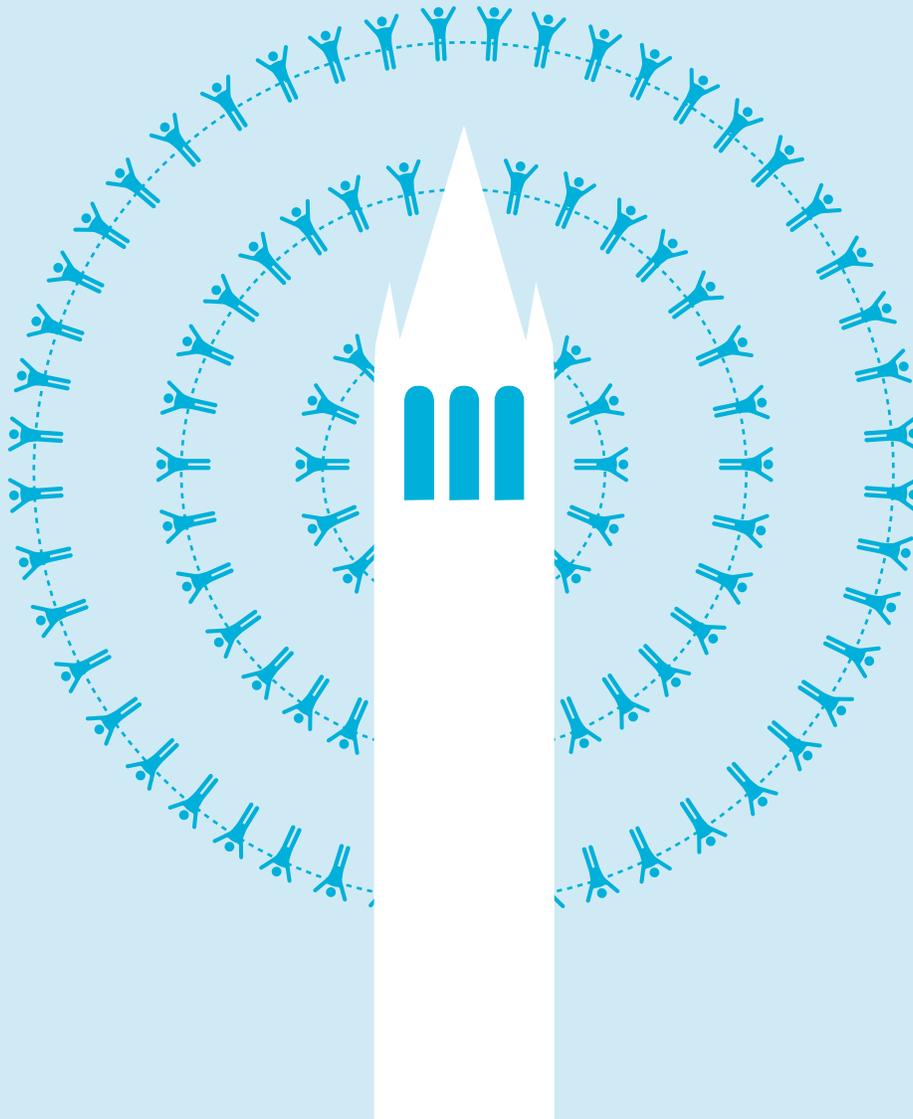


CAL ALUMNI ASSOCIATION 2018–2022 STRATEGIC PLAN



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Since its founding in 1872, the Cal Alumni Association (CAA) has endeavored to connect Cal alumni with each other and our alma mater, UC Berkeley. 145 years later, CAA continues as one of the nation’s preeminent independent alumni associations, with a mission of engaging an alumni community of nearly half a million graduates.

CAA’s 2018–2022 strategic plan was developed through a collaborative effort of the CAA Board of Directors and CAA operational staff. The strategic plan encapsulates the findings of several surveys conducted across CAA’s membership base and the broader alumni community, identifying the needs of today’s alumni base. CAA also interviewed many campus and community leaders to ensure that feedback from these key stakeholders was incorporated into the building of an even more successful alumni engagement program.



The 2018–2022 strategic plan is our best effort to highlight what we consider some of the most important strategic initiatives for the Cal Alumni Association during the next five years. The plan is guided by our updated vision that “all Cal alumni worldwide are connected and actively engaged with UC Berkeley for life.”

At the core of this plan is the belief that CAA serves *all* Cal alumni and that in the years ahead, the economic and political environment impacting UC Berkeley will require CAA to foster even more alumni engagement as the entrée for informed and inspired alumni to support the university. Our focus is on fostering meaningful alumni engagement and chartering timely, relevant initiatives to support our continued growth and enhanced service to our alumni and our alma mater.

Go Bears!

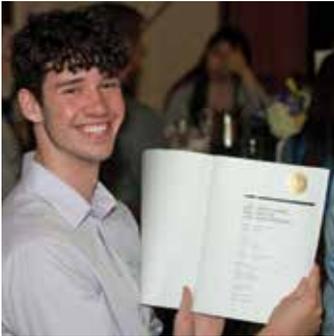


Eric Mart '70
President



Jason Morimoto '02
Past President (2015–2017)

CAL ALUMNI ASSOCIATION 2018–2022 STRATEGIC PLAN



OUR MISSION

Our mission 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:

- Participating and volunteering in university and alumni activities
- Acting as ambassadors and advocates on behalf of the university
- Giving to the university



OUR VISION

All Cal alumni worldwide are connected and actively engaged with UC Berkeley for life.

OUR VALUES

Excellence of UC Berkeley

We are committed to the preservation of UC Berkeley as a world-class public, teaching, and research university.



Home of Cal Spirit

We predicate our work on a deep appreciation for UC Berkeley and all that makes it excellent.

Welcoming and Inclusive

We believe in providing the very best customer service to our alumni, members, and partners.



Commitment to Innovation

We deliver dynamic programming to engage our global alumni community and connect them to each other and the university.



ORGANIZATIONAL HISTORY AND PROFILE

The Cal Alumni Association (CAA) is the campus-wide alumni association for the University of California, Berkeley. Originally named the University Alumni Association, it was formed in July 1872 by the first graduates of the new University of California. The original mission was “the promotion of good fellowship and kindly feeling among its members, and the fostering of liberal and scientific culture on the Pacific Coast.”

At the turn of the century, the Alumni Association began to build a sustaining organization in earnest. The first membership dues were collected in 1904, and the *California Alumni Weekly* (now *CALIFORNIA* magazine) began publication in 1909. By 1912, a permanent alumni office was also responsible for maintaining an address file of alumni, helping alumni secure employment, and assisting in the organization of alumni chapters throughout the state.

In 1917, the organization became the California Alumni Association (CAA) with a new purpose that aligned it more closely with the university—“to advance the interests and to promote the welfare of the University of California.” This mission has remained largely unchanged for 100 years.

Between 1930 and 1950, CAA formed two of its most recognized and enduring programs, the Alumni Scholarship Program (1934) and the Lair of the Golden Bear (1949). Just five years later, in 1954, the California Alumni Association built its own campus home, Alumni House, with the generosity of 18,000 alumni. CAA has served both its alumni and alma mater for more than 60 years from this campus base.



ORGANIZATIONAL HISTORY AND PROFILE (CONTINUED)

In 1973, a former Executive Director of CAA launched the University’s first Development Office, separate from CAA. Over the past 40 years, the Development Office, now called University Development and Alumni Relations (UDAR), has dramatically expanded its engagement of alumni for the purposes of philanthropy. Several academic units have also built their own college, school, and department-based alumni associations to engage their graduates. While CAA remains the only campus-wide alumni association, today it is one member in a constellation of campus organizations aimed at engaging alumni with each other and with UC Berkeley. It has become more critical than ever to work in a concerted and coordinated way with our campus partners in order to engage the greatest number of alumni possible.

CAA Membership continues to be the biggest engagement program in the organization. Nearly 21% of our 474,000 mailable Cal attendees and degree-holders are dues-paying members of CAA. The 2015 industry survey of the Council of Alumni Association Executives (CAAE) found that among 37 alumni associations with dues-paying members, CAA ranked seventh highest in membership participation. Only the top four had more than 25% participation. Further, research has found that Lifetime Members are much more likely than non-members to donate to the university.

This generosity has allowed CAA to grow its scholarship endowment to \$40 million by the end of 2016. In 2016 alone, because of the support of our alumni donors and volunteers, CAA distributed \$2 million in scholarships to nearly 800 students.



ORGANIZATIONAL HISTORY AND PROFILE (CONTINUED)

In 2016, CAA engaged roughly a third of all contactable alumni in eleven different program areas: membership, events, Cal Advocacy, chapter membership and chapter events, The Berkeley Network, Lair of the Golden Bear and Pinecrest Chalet, Cal Discoveries Travel, donor stewardship, and volunteer opportunities through CAA's scholarship, student recruitment, and student engagement programs. CAA engaged additional alumni through digital efforts, including email communications, and its website and social media. While this represents a sizable impact, CAA aims to engage an even greater percentage of our alumni population over the next five years. As a start, CAA launched the Alumni Engagement Expansion Initiative in 2016 to strengthen Alumni Chapters, career programming, volunteer opportunities, and membership outreach.

CAA strongly believes that more engaged alumni will ultimately lead to greater support for the university and a stronger network for the Cal alumni community worldwide.

CAA is a 501(c)(3) nonprofit organization, designated by UC Berkeley and recognized by the UC Office of the President to be the official campus-wide alumni association for UC Berkeley. Its wide-ranging programs and services are supported by a \$13 million operating budget and a staff of approximately 70 full-time employees, and it is led by a governing Board of Directors. Currently, CAA is self-funded through its revenue-generating businesses and philanthropic activities.



STRATEGIC DIRECTION

To be successful in building an even stronger alumni community and providing more support for the university in the future, we need to broaden and deepen our engagement of alumni and future alumni. Over the next five years, we aim to set the stage for the next 150 years of the Cal Alumni Association and our support of the university and the alumni community. To accomplish this, our three major strategic directions for 2018–2022 will be:

- To focus on programmatic and communication efforts that attract, engage, and serve the greatest number of alumni
- To strengthen our partnership and coordination with campus
- To increase our financial resources



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CORE STRATEGIES

STRATEGY 1:

Prioritize high-yield alumni engagement activities that target key alumni market segments, supported by a data-first mindset.

GOAL 1.1

Increase overall engagement of alumni through building the capacities and resources of alumni volunteer-driven chapters and networks.

GOAL 1.2

Support alumni in their early- to mid-career phase of life through the development of robust career and professional networking programs.

GOAL 1.3

Engage alumni who have available time and resources by building a comprehensive portfolio of informal learning opportunities.



2

CORE STRATEGIES

STRATEGY 2:

Serve as the hub that connects alumni to each other and to the multiple facets of our alma mater.

GOAL 2.1

Increase virtual engagement of alumni through new and expanded online tools and programs.

GOAL 2.2

Determine what facilities are required to welcome and serve alumni more effectively on campus and globally in the future.



3

CORE STRATEGIES

STRATEGY 3:

Ensure all Cal alumni are aware that CAA aims to reach, serve, and engage all alumni of UC Berkeley.

GOAL 3.1

Create and implement a communications plan that messages our role as the campus-wide alumni association for all Cal alumni.



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CORE STRATEGIES

STRATEGY 4:

Orient CAA as an indispensable partner with campus in building a coordinated relationship with alumni.

GOAL 4.1

Through joint planning, coordinate communications and engagement of alumni with campus leadership, particularly University Development and Alumni Relations (UDAR) and the Office of the Chancellor.

GOAL 4.2

Support campus efforts to develop a pipeline for alumni philanthropy.



5

CORE STRATEGIES

STRATEGY 5:

Demonstrate to current students, during key milestones in their student life cycle, that CAA and the alumni community are important catalysts and partners in their success.

GOAL 5.1

Provide meaningful services and programs to engage Cal students with CAA and the alumni community, particularly as they explore life after graduation.



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CORE STRATEGIES

STRATEGY 6:

Pivot resources toward current and new revenue businesses that can produce the highest yield in financial ROI while also building alumni engagement.

GOAL 6.1

Determine which current revenue programs should receive additional investment to grow and which ones we should fundamentally alter or divest from partially or completely.

GOAL 6.2

Increase mutually beneficial revenue and cost-sharing opportunities and/or university support for each major alumni communications and engagement program.

GOAL 6.3

Build new net-positive revenue-generating initiatives with a balanced portfolio of risk and return.

GOAL 6.4

Develop a multi-year plan for choices based on resourcing needs, financial requirements, and key deliverables and contingencies.

Photography: Katherine Fjordalis, Kelley L. Cox, Alan Nyiri, Keegan Houser, and Steve McConnell