

**RUTGERS UNIVERSITY
ALUMNI FEDERATION**

LONG RANGE PLAN

2005 - 2009



PRESENTED BY:

Dianne Clarke-Kudless (GSAPP), Chair
Tom Calamia (RC)
Julie Eisdorfer (DC)
Nancy Madacsi (SCILS)
William Norville (UCNB, GMLR)
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Randall Solomon (GSNB)
Michael Toto (CC, NLAW)
Robert Uhrik (LC)

June 2005

**RUTGERS UNIVERSITY ALUMNI FEDERATION
MESSAGE FROM THE PRESIDENT**

I am pleased to submit to the members of the Rutgers University Alumni Federation the Long Range Plan for our organization for the years 2005 through 2009.

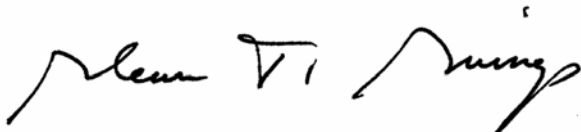
This Long Range Plan builds on the past successes of the RUAF and its member associations and foresees a future in which the alumni constituency continues to grow in size, strength and influence within the larger University community.

In the pages which follow, you will find a “road map” for achieving our Plan’s goals. Just like any road map, the experience of the journey can neither be completely imagined nor understood until we actually begin our trip. While our destination will remain constant, the exact path we travel; the unknown factors and ever-changing environment which we will encounter; the friends – old and new – whom we will meet along the way; will all be factors in the ultimate success of our Plan.

The broad goals of our Long Range Plan reflect the ambition of the RUAF to seek synergies among the member Associations which will benefit all alumni. In addition, our Long Range Plan demonstrates the desire of the RUAF to ensure that the alumni community plays a vital role in helping Rutgers University achieve and be recognized as one of the premier educational institutions in the world. The potential to accomplish our vision is tremendous.

Our Long Range Plan is the culmination of nearly two years of hard work of volunteers supported by staff and administration. This document expresses the dedication, and vision of alumni and University leaders, the continued cooperation of which is necessary to achieve the Plan’s goals. Particular thanks go to the Long Range Planning Committee, the members of which are specified elsewhere in this document.

It is my hope and desire that by 2009 we will be able to look back and, after self evaluation, know that we have achieved our goals and built a stronger foundation upon which to build a bright future on behalf of Rutgers Alumni and Federation members.

A handwritten signature in black ink, appearing to read "Glenn T. Gnrirrep". The signature is fluid and cursive, with a prominent loop at the end.

Glenn T. Gnrirrep
President (2003-2005)
Rutgers University Alumni Federation

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**RUTGERS UNIVERSITY ALUMNI FEDERATION MESSAGE
FROM THE FOUNDATION VICE PRESIDENT FOR EXTERNAL PROGRAMS**

Dear Alumni,

I am so pleased to be presented with the RUAF 2005 Long Range Plan which I see as a very effective working plan between the Long Range Planning Committee and the University. It is my hope that you, as our leadership alumni volunteers, will use this document as a tool to move forward in the goals of the individual alumni associations and the RUAF in the coming years.

The most striking feature of this plan is that it embraces what the alumni said were the most important attributes in your relationship with Rutgers. These comments were formed into goals, which will now be adopted by the Federation members in reaching out to more volunteers. In this way, the department of Alumni Relations can more effectively reach out to alumni realizing that we're all striving for the same achievements.

As I meet with the leadership of the University, I will use this plan to emphasize the alumni commitment in giving back their time and talent to Rutgers. And I look forward to seeing the volunteer experience grow for the many alumni involved now, and for those we encourage to become involved in the future.



Brian Crockett
Vice President
External Programs, Rutgers University Foundation

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**RUTGERS UNIVERSITY ALUMNI FEDERATION
MESSAGE FROM THE LONG RANGE PLANNING COMMITTEE CHAIR**

Since 2003 the mission of this Committee has been to create a document that represents value to all our members and is visible in the work of the Federation and in our relationship to the University. Assisted by Tom O'Connor our Federation officer liaison and President Gnirrep, we present this work for your review.

This work has been accomplished through many contributions made during the past two years. The RUAF members include:

Tom Calamia (RC), Dianne Clarke-Kudless (GSAPP), Ann Marie Contorno (UNCB), Julie Eisdorfer (DC), Nancy Madacsi (SCILS), William Norville (UCNB, GMLR), Tom O'Connor (NCAS), Randall Solomon (GSNB), Michael Toto (CC, NLAW), Robert Uhrig (LC), Arleen Urban (GSE) and member-at-large Robert Stevenson (RC)

This Committee's work was further assisted by the exceptional support provided by incredible staff liaisons (Lisa English and Chuck Mannella). During the early months of this Committee's work, Cal Maradonna (Associate VP of Alumni Relations) provided enthusiasm and support, followed by Brian Crockett (VP for External Programs) who has become a champion of the Federation Plan. We are grateful to these special individuals.

Additional help was provided by volunteer consultant Steve Ryden (RC) who helped our Committee incorporate more members' views in plan development. Steve, together with colleague Uneeda Brewer from Johnson & Johnson and Poyee Chui, a Rutgers GSAPP graduate student, donated their professional services to help with the planning and execution of the Vision Conference. This special event held on a beautiful day in June is a critical part of this Plan. Thanks to staff organizer Carey Loch, staff participants and all the Federation members and alumni stakeholders who attended this event. This was an incredible contribution of devotion and talent to the Federation. Well done.

Another critical planning activity is the Alumni survey. A special note of thanks goes to LRP member Nancy Madacsi (SCILS). Nancy single-handedly sponsored, created, distributed and analyzed the survey. Along the way, we learned about the Rutgers marketing research and she helped us understand that too. Nancy is a can-do volunteer and her individual contribution was felt in every part of the project.

It is with great pleasure that this document is presented to you for your approval. It is my hope that this work has strengthened our organization and brightened its future as a Federation and as an advocate for all Rutgers Alumni.



Dianne Clarke-Kudless, PsyD. (GSAPP)
Chair, Long Range Planning Committee (2003-2005)
Rutgers University Alumni Federation

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SECTION ONE
PLAN INTRODUCTION

RUTGERS UNIVERSITY ALUMNI FEDERATION LONG RANGE PLAN DESIGN

The design of the Long Range Plan (LRP) is such that it should facilitate the achievement of the goals and provoke thought and action towards their achievement.

The first section (Introduction) provides the background of activities that lead to the Plan creation. It also includes specific recommendations and explains the essential components of those recommendations and subsequent implementation.

The second section (Plan Goals) includes four broad Federation **Goals** that are the core of the Plan and represent the focus for key Rutgers University Alumni Federation (RUAF) initiatives for the next five years. Each Goal contains the following information.

Background information and some relevant **Facts** accompany each goal. These are included to provide perspective on the environment, data, and beliefs which influenced the creation and development of the goal.

Each goal also includes specific **Objectives** which, if achieved can help the RUAF accomplish the goal. In implementing the Long Range Plan, future Board of Representatives should not feel limited to these objectives, and in fact it is expected that the specific objectives for each goal will be reviewed and augmented on a regular basis.

Suggested **Strategies** and **Actions** follow and, when taken, will help to achieve the objectives. These are very specific concrete actions which the Federation and its Committees can take which should lead to accomplishment of the respective objective. Committee(s) suggestions have been made regarding areas of leadership for each action. In some cases, more than one Committee may be assigned to a strategy. The Federation Executive Board and its respective Committees have the latitude to choose whatever strategies and actions are appropriate to achieve the objectives and ultimately the goal.

In that we seek to monitor our progress so we can modify as necessary the activities of the Board of Representatives, each Goal section finishes with a description of what **Success** will look like. These statements are the vision of the end product. It is the responsibility of the Executive Committee of the RUAF to annually determine the measurement to be used to track progress toward Federation goals.

While the Plan Design is important, of greater significance is the **Plan Implementation**. In Section Three, the Implementation Plan for this work is described and a Plan **Roadmap** is included that presents the critical elements of the Plan. This is followed by Appendix materials and important website references.

RUTGERS UNIVERSITY ALUMNI FEDERATION PLAN DEVELOPMENT PROCESS

The Rutgers University Alumni Federation Long Range Planning Committee is chartered through the Federation By-laws to approve annual special project budgets, to review the Rutgers Alumni Federation plan and to “promote and predict the growth and development of the Federation”. Since the summer of 2003, the Long Range Planning Committee has been actively reviewing the current plan and preparing to issue the 2005-2009 Long Range Plan.

The Committee is composed of varied representation that has remained relatively stable throughout this period and includes staff representation and volunteer consultant assistance. The Committee created a process to collect members’ views, discussed aspects of Federation activity critical to its growth and determined the content and reviewed relevant Federation and Rutgers documents. The following represents a summary of the primary activities undertaken by this committee over two years. The Committee has created a Federation host site that contains the following documents that were produced or used by the Committee in conjunction with this work.

- 2001-2005 RUAF Long Range Plan (approved)
- 2005-2009 RUAF Long Range Plan (draft)
- 2004-2005 RUAF Long Range Planning Committee minutes
- 2003 RUAF Leadership Summit final report
- 2004 RUAF Vision 2009 final report and conference data
- 2004 e-survey document
- 2004 e-survey analysis report
- 2004 Rutgers marketing survey

RUAF Leadership Summit (Fall 2003)

From this event, the leader participants discussed five topics:

- Merger & Restructuring
- Budget
- Membership
- Association Programming
- Community Relations/Image

Each group addressed the topic by answering several questions.

- Why is this an issue?
- How can we address it?
- What is going to get in our way?
- How can the Alumni Federation address this issue?

The event report is being included as part of the planning research. A report from this RUAF activity can be found in Appendix A (2003 Alumni Summit Report).

RUAF Executive Committee participation, review and endorsement

During the past two years, Vice President and Executive Committee member Tom O'Connor has been an active participant in this Committee's work. In addition, we have benefited from the regular attendance and significant involvement of President Glenn Gnirrep. The Executive Committee, staff members, administration and selected stakeholders have been represented at all the major Plan events and we have appreciated their participation.

As we composed the draft plan, the Executive Committee (October 2004) was presented with the four goals in advance of introducing these goals to the membership. In February, the RUAF Executive Committee reviewed the Plan draft in advance of Plan distribution to the member organizations. It is with this confidence that the draft Plan was released to the member associations for their review and to the members and officers of the Federation for their approval at the June 2005 membership meeting.

Vision Conference (Spring 2004)

The Long Range Planning Committee and Federation Executive Committee sent invitations to Federation representatives, university staff and university leaders to attend a Vision Conference. Over 50 representatives of various interests connected to the Rutgers Alumni Associations attended a "Vision 2009" conference on Saturday, June 12, 2004. During the full day workshop, trained facilitators lead the participants through a series of exercises that helped to identify the issues and goals that were most highly valued by the group. The program concluded with discussion of five themes that had emerged from the day's activities:

- Increase in funding/revenue
- Increase of alumni office staff
- Increased and effective use of technology
- Increase in Membership
- Federation/university/event image and participation

Diversity, alumni image and influence within the university were considered extremely important to the success of the Federation's mission and are included in this list also. The event report is being included as part of the planning research. A report from this RUAF activity can be found in Appendix B (Vision Meeting Summary Report).

Federation member e-survey (Fall 2004)

Using Vision 2009 experience, the Planning Committee constructed a RUAF Membership Survey (Appendix C) to help direct member participation and help the Planning Committee increase understanding of member's needs and to build upon the work of the Vision

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Conference. The survey was distributed and discussed at the 2004 Leadership Forum, the October 2004 Membership meeting, 2004 Homecoming and 2004 Regional Club meeting.

The event report is being included as part of the planning research. A full report from this RUAF activity can be found in Appendix D (2004 Membership Survey Report).

The survey results yielded the following overall observations.

Areas of Concurrence

- The mission statement is viewed as appropriate
- All groups agree upon the importance of two items: increased participation and improving Rutgers' image
- Expanding student involvement is a low priority
- The use of technology is not an important value to most respondents in both the federation survey and the Rutgers' survey
- Easier access to Rutgers' programs and services is desired by all groups
- All groups want more alumni input into Rutgers' governing structures
- Most view member incentives as important
- Networking events are highly valued on both surveys

Areas of Disagreement

- The homecoming group didn't value increased alumni membership as much as the other groups
- Diversity is important to some groups but didn't score highly in the overall ranking; it is specifically mentioned in the comments as important
- Most groups wanted to see alumni facilities expanded, this is not as important to the regional clubs

Federation Alumni Leaders Forum sponsored by the RUAF Leadership and Recognition Committee (Fall 2004)

By participating in the Federation event, the Planning Committee shared information about the current planning activity and helped leaders understand how to utilize this planning progress in their own association to build membership interest and enthusiasm for the future. The results of this activity are included as part of the survey research.

Long Range Plan issuance, review and adoption (Winter 2005)

The Long Range Planning Committee started this difficult task over two years ago. Through various Federation activities, the LRP has come to know and reflect upon the varied needs of our Federation members. The Plan reflects this work, our recommendations and the important references that were used. The document contains background information; proposes goals and ways in which the federation business can achieve them. The document also includes comments regarding Federation constitution and by-Laws changes.

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Following the issuance of the Plan (Winter 2005), member associations are expected to conduct review sessions prior to a Federation membership adoption vote (June 2005). The LRP Committee has provided the document and related references materials electronically to RUAF members and Association leadership.

Collaboration with the RUAF Constitution and By-Laws Committee (Winter 2005)

The LRP Committee provided this Committee with initial review comments of the existing documents and a preview of the proposed plan goals for 2005-2009. The LRP Committee anticipates that the outcome of this Committee's work will be incorporated where appropriate into the Plan document.

RUAF Alumni Leaders Forum sponsored by the RUAF Constituent Concerns Committee (Spring 2005)

At this event, the LRP Committee will present the newly released 2005-2009 proposed plan. The program is also expected to include reports from the Constitution and By-Laws Committee and presentation of the Constituency Research project results (See Appendix E – Website References).

**RUTGERS UNIVERSITY ALUMNI FEDERATION
LONG TERM PLANNING COMMITTEE RECOMMENDATIONS**

As a result of two years of research by the LRP Committee, guidance provided by the RUAF Executive Committee and the participation of the Federation membership in the planning activities, the RUAF Long Range Planning Committee presents the following recommendations for 2005-2009 supported and described by this Plan document.

- Do not change the existing Mission as it continues to represent the RUAF members interest and direction
- Align all Federation activity around distinct goals
- Establish clear metrics and reporting to determine Federation progress toward these goals
- Provide a mechanism for continuous learning and improvement related to Plan implementation
- Include and appreciate the contributions of critical stakeholders in the fulfillment of RUAF goals including Alumni staff, Foundation leadership, and University Administration.
- Unify Rutgers alumni resources for the benefit of the alumni and the Federation.
- Be a proactive and visible partner in University planning
- Update the By-laws and Constitution to reflect the principles embraced by this Plan
- Promote the recruitment of Federation leaders who will provide the skill and inspiration for the achievement of these goals

In order that the work of this Plan is fulfilled, it is expected that the LRP Committee will continue to function in its role to promote thoughtful dialogue regarding the growth and development of the Federation. It is also hoped that the processes and purposes represented by this Plan are considered by each Association for their own individual planning. As each Association responds to the changing needs of their membership, it is the intention of this Plan to invite these experiences to be reviewed and reflected in Federation Plan implementation.

NOTE: Additional items may be added as a result of the work of the RUAF Constitution and By-Laws Taskforce appointed by the RUAF Executive Committee that is expected to complete its work in advance of Plan adoption.

Also, where stated facts are used within this document, their source is acknowledged as coming from several documents and direct experiences collected by the Rutgers University staff assisting the Federation in the creation of the document.

SECTION TWO
PLAN GOALS

GOAL: MEMBERSHIP

To Increase Membership and Engagement in Alumni Organizations

Membership in Alumni Organizations is a key goal by which the Federation helps to fulfill its purpose to promote “the welfare of the alumni/alumnae of Rutgers University, their alumni/alumnae associations, and Rutgers, The State University of New Jersey.”

Alumni Organizations primarily consist of the constituent Alumni Associations, the Regional Clubs and Special Interest Alumni Organizations.

Points of Interest:

- Rutgers University currently has 336,400 living alumni
- The RUAF constituent Alumni Associations have 26,454 dues paying members. This is the equivalent of 10.5 % of the alumni population which is eligible for a dues paying membership (249,605). (Douglass College does not have a Dues Program)
- Peer Institutions have an average of 10-30 % of their alumni population as dues paying members
- The Regional Clubs have 850 (in 2002) dues paying members
- In the recent Rutgers University Foundation campaign, dues paying members of a recognized alumni association was a strong predictor (54%) of whether someone would be a donor to the Foundation
- In the recent Constituency Study, more than 64% of the alumni interviewed reported being a member of their Alumni Association
- Remove organizational obstacles and develop incentives to make volunteering easy, flexible and attractive to alumni

Specific Objectives Related To This Goal:

- Enhance Current Membership Benefits & Incentives
- Increase Membership & Programming for Culturally Diverse Groups
- Increase Alumni Participation in Programs
- Develop Alternative Memberships
- Develop Methods for Retaining Members

GOAL: MEMBERSHIP

Suggested Strategies/Actions Which Can Help Achieve The Objectives:

Strategy/Action	Committee(s) Responsible
Do Analysis/Evaluation of Current Benefits Offered to Members	Member Services Committee
Consider Other Benefits to Offer Members – Survey Other Institutions	Members Services Committee
Proactively reach out to African American Alumni, Latino Alumni, and Asian Alumni	Constituent Concerns
Implement Special Project Designed to Identify, Survey and Re-attract “Dues Defectors”	Ad-Hoc Dues Defectors Committee
Develop consistent tool to measure and track participation at alumni events	Executive Committee
Develop follow up process with alumni who participate in events	
Consider and implement alternative membership categories including: Seniors, Married, Dual Degrees, Lifetime Dues, Member at Large, etc.	Member Services Committee
Proactively reach out to Alumni “Special Interest Groups” (i.e. occupation, undergraduate activity (Greek, Athletic Team, etc.)	Constituent Concerns
Develop and implement “Education” campaign for differences between Association Members, Donors, Touchdown Club, Scarlet R, etc.	
Consider alternative strategies for attracting and retaining members (phone-a-thon, automatic renewal, rolling dues year, tables at events, etc.)	Member Services Committee
Develop a Student Alumni Association to begin to instill a lifetime bond to Rutgers while future alumni are still undergraduates /graduate students	Student Recruitment/Alumni Committee

GOAL: MEMBERSHIP

What Success Will Look Like:

By 2009, if we are successful in achieving this goal we will have the following measurable and tangible accomplishments:

- Increased number of alumni who are members of their Alumni Associations
- Greater number and variety of benefits for Alumni Association members
- Greater diversity in members of Alumni Associations and increased participation by alumni from culturally diverse backgrounds
- Increased alumni participation in events, programs, activities
- Greater variety of types of Alumni Association memberships
- Increased percentage of members who regularly renew their membership

Each year, the Federation Board of Representatives should develop/update specific goals for each of these areas which are measurable and which drive the actions of the Federation and its respective Committees towards these ends.

GOAL: UNIVERSITY IMAGE

To develop the influence and image of Rutgers University both within New Jersey and on a national basis

The impact which Rutgers has on the NJ state economy is tremendous. It is also generally under appreciated by politicians, educators and citizens.

The contribution which Rutgers alumni and its schools make to the nation is significant. It is also under recognized and often unnoticed.

Image and influence play an important role from many perspectives including:

- State & Federal support which is provided to the University
- Size and scope of grants which are provided to the University faculty
- Business and industry support for the University community
- Attractiveness as the “college of first choice” to the best and brightest students
- Willingness of NJ citizens to embrace Rutgers as a pre-eminent state university
- Inclination for alumni to support the University with time and financing

The Rutgers University Alumni Federation and the alumni community play an important role in helping to create and sustain the influence and the image of Rutgers University at many levels.

Points of Interest:

- In Fiscal Year 2001, Rutgers received \$337.6 million in direct appropriations and salary support from the state of New Jersey. In the current fiscal year (FY 2005), the university is scheduled to receive approximately \$326.0 million, a modest increase above the prior year’s (FY 2004) figure. The FY 2005 total remains \$11.6 million (3.4%) below the university’s FY 2001 level of state support. During that same period (FY 2001-05), the overall state budget increased by over 28%
- Last year (FY 2004), state government spent over \$34,000 on every prisoner in New Jersey. In contrast, the state spent on average just over \$8,000 per full-time equivalent (FTE) student attending a public two-year or four-year college or university. (Note that this latter figure includes state-paid fringe benefits for campus employees as well as state-funded student financial aid programs)
- Rutgers received approximately \$350 million in federal support in the fiscal year that ended June 30, 2004. The combination of state support and student tuition and fees covers less than two-thirds of the university’s annual budget
- During the recent capital campaign approximately 50,000 individual alumni contributed to the Foundation. This is approximately 15% of living alumni

GOAL: UNIVERSITY IMAGE

Specific Objectives Which Can Help Achieve This Goal:

- Recruit more alumni to serve as advocates through the Friends of Rutgers Advocacy Initiative
- Provide leadership development, training and support to alumni who are acting as advocates
- Partner and Sponsor events with other organizations who also seek to improve the University’s influence and image
- Expand community service and outreach by the Alumni Community
- Work to make Rutgers University and its campuses more attractive to potential incoming students

Suggested Strategies/Actions Which Can Help Achieve The Objectives:

Strategy/Action	Committee(s) Responsible
Have Friends of Rutgers (FOR) brochures and membership information available at all alumni events	Government Relations Committee
Include appeal for in all membership mailings	Member Service Committee
Work with University staff to ensure FOR advocates are trained and effective	Government Relations Committee
Present Student Legacy Scholarships at High School Awards ceremonies	Student Recruitment/Alumni Committee
Have educated alumni participate in “Speakers Bureau” which is available to civic groups, professional organizations, high schools, etc.	
Partner with University in developing a vision and implementation plans to make Rutgers campuses more attractive to incoming students	

GOAL: UNIVERSITY IMAGE

What Success Will Look Like:

By 2009, if we are successful in achieving this goal we will have the following measurable and tangible accomplishments:

- Increased number of alumni who are actively participating as Friends of Rutgers advocates
- Increased state aid, both in dollars and in percentage of state budget
- Increased federal grants for University research and studies
- Increased enrollment and increased acceptance and attendance of NJ's best and brightest high school seniors
- Increased visibility and outreach to the community by Rutgers alumni

Each year, the Federation Board of Representatives should develop/update specific goals for each of these areas which are measurable and which drive the actions of the Federation and its respective Committees towards these ends.

GOAL: RESOURCES

To Build the Capacity and Resources of the Rutgers University Alumni Federation and the constituent Alumni organizations

The increasing number of alumni, the desire to get more alumni actively “engaged” with the University in some manner, the goal to increase membership in the Alumni Associations, and the ambitious goals for the alumni community which are part of this Long Range Plan will all place increasing demands on the organizational infrastructure which supports the alumni community.

Rutgers University is amongst the largest universities with respect to the number of living alumni. It needs an infrastructure which provides adequate support. The infrastructure should include staff resources, operating resources, adequate facilities and meeting space. While the demand for resources will be greater in the future, so too will the demand that the resources are used efficiently and effectively.

The RUAF and the alumni community play an important role in helping to create and sustain the influence and the image of Rutgers University at many levels.

Points of Interest:

- Rutgers University currently has 30 (plus 14 at Douglass) paid professional staff (including administrative support personnel) to support the 336,400 living alumni
- The operational budget for the Alumni Relations Departments is \$123,333 excluding all salaries and wages
- The Alumni Relations staff supports the RUAF and its 14 committees, plus 19 unique Alumni Associations, and 34 domestic and 8 international Regional Clubs
- Each Alumni Association and Regional Club has a unique Tax ID number; conducts a separate audit; maintains separate financial accounts; and completes separate 990 Federal Income Tax Forms and respective State Charities Registration Forms
- Winants Hall was converted from a dormitory to departmental and classroom use in 1947, however it was closed in 1986. In 1988 Rutgers began a two-year, \$9.4M restoration project. The building reopened as office space in 1990. Winants Hall houses Alumni Relations, Government Relations, Rutgers University Foundation and Office of University Development, Secretary of the Boards of Governors and Trustees, and University Counsel

GOAL: RESOURCES

Specific Objectives Which Can Help Achieve This Goal:

- Ensure adequate University funding to Alumni Relations
- Ensure adequate revenue available for Federation and constituent organizations to effectively implement goals and plans
- Ensure adequate staff support available to Alumni community in general, and RUAF in particular
- Improve availability of facilities for alumni meetings, activities, and programs
- Utilize economies of scale when dealing with constituent organizations which will make better use of resources
- Improve organizational structure to facilitate decision making and implementation
- Increase use of technology to support alumni organizations

Suggested Strategies/Actions Which Can Help Achieve The Objectives:

Strategy/Action	Committee(s) Responsible
Conduct a benchmark study of peer institutions to determine funding, staffing, revenue, facility and other organizational issues	
Increased use of conference call meetings	All
Web based meetings	
Develop revenue generating programs for Federation and Associations	

GOAL: RESOURCES

What Success Will Look Like:

By 2009, if we are successful in achieving this goal we will have the following measurable and tangible accomplishments:

- Adequate funding by University for Alumni Relations (personnel and operations budgets)
- Adequate staff to support Alumni Relations
- Appropriate office space for Alumni Relations and adequate facility space for alumni organizations
- Cooperation by alumni organizations which take advantage of sharing resources where appropriate
- Technology is utilized as a regular tool for implementing actions and plans
- Decisions are made more quickly and are made which benefit the overall good of the alumni community

Each year, the Federation Board of Representatives should develop/update specific goals for each of these areas which are measurable and which drive the actions of the Federation and its respective Committees towards these ends.
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GOAL: UNIVERSITY GOVERNANCE

To Strengthen Alumni Involvement and Influence within the University Governance Structure

Alumni represent perhaps the largest constituency of Rutgers University and the fastest growing one as well. Too often, however, individual alumni and their representing organizations are not visibly included or represented when decisions are made which will affect the future of the University or may require alumni support or funding.

Rutgers alumni are known to be involved in the Board of Trustees, the Board of Governors, the Senate and the Board of Overseers. The direct connection of many of these alumni to RUAF either as members or advocates is not an active part of the university governance process and the RUAF membership communication.

Points of Interest:

- The most senior Alumni Relation position (Associate Vice President) is organizationally three levels down from the University President; this position represents nearly 350,000 alumni
- The most senior Student Affairs position (Vice President) is organizationally a direct report to the President; this position represents 50,000 students

Specific Objectives Which Can Help Achieve This Goal:

- Consistently and persistently represent to the University President the need for equity of alumni status in the University as compared to other constituencies and other universities when our nearly 350,000 alumni are considered
- Educate and mobilize the RUAF member organizations regarding this goal
- Engage the University President discussion to include an Alumni Relations staff as a direct reporting position at the cabinet level, and to appoint an Alumni Ombudsman within the University President's Office
- Proactively request the University President to include a Federation representative (or designee) in university executive search efforts in general, and specifically for significant vacancies in areas of direct service to the alumni
- Proactively request the University President to include a Federation representative (or designee) on all primary University tasks forces, both generally and specifically for significant vacancies in areas of direct service to the alumni
- Establish RUAF procedures for creating positions on critical University issues and delivering them to the University Administration and governing bodies

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Suggested Strategies/Actions Which Can Help Achieve The Objectives:

Strategy/Action	Committee(s) Responsible
<p>Convey to the University President and our members the inequity of alumni status in the University as compared to other constituencies and other universities when our nearly 350,000 alumni are considered. This will alert the University President and mobilize the membership.</p>	<p style="text-align: center;">Executive Committee Constituent Concerns Committee Communications Committee</p>
<p>Proactively notify the University President of our willingness and need to participate in executive searches each and every time a significant vacancy occurs.</p>	<p style="text-align: center;">Executive Committee</p>
<p>Proactively notify the University President of our willingness and need to be represented on all pertinent University tasks forces, both generally and as they are announced.</p>	<p style="text-align: center;">Executive Committee</p>
<p>Establish procedures for developing RUAF positions on critical University issues and delivering them to the University Administration and governing bodies.</p>	<p style="text-align: center;">Constituent Concerns</p>
<p>Present RUAF positions on critical University issues to the University Administration and governing bodies.</p>	<p style="text-align: center;">Executive Committee</p>

GOAL: UNIVERSITY GOVERNANCE

What Success Will Look Like:

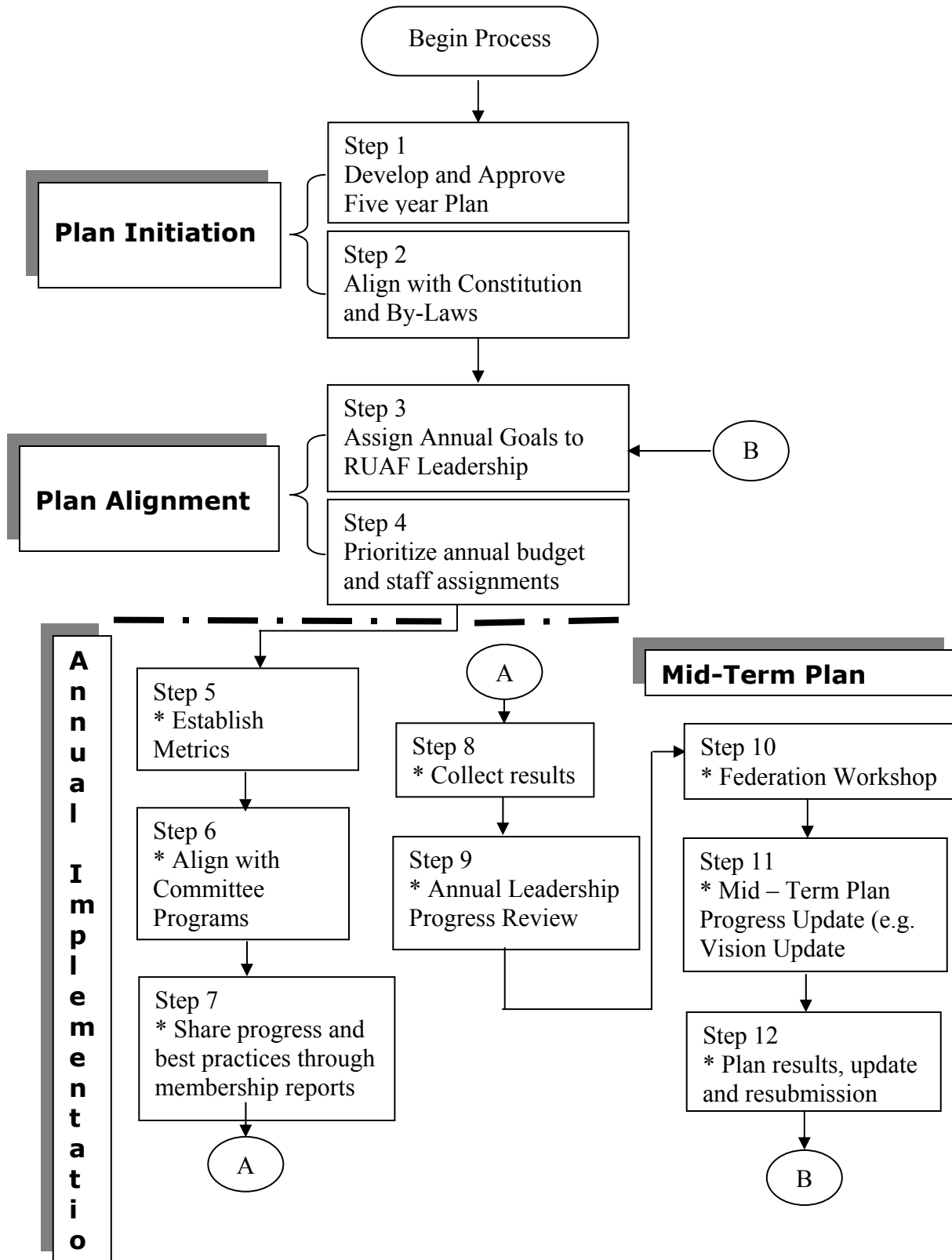
By 2009, if we are successful in achieving this goal we will have the following measurable and tangible accomplishments:

- Responsible involvement and visibility of a senior Alumni Relations staff position as part of the University President's Cabinet activities and decisions
- Responsible involvement and visibility of an Alumni Ombudsman within the Office of the University President in key university activities
- Increased Alumni voice in University decision making will be evident from automatic and increased participation of RUAF members on all pertinent search committees and task forces
- Inclusion of established RUAF positions on critical University issues in the determination of University administration and other governing bodies decisions
- Successful RUAF representation and critical actions established by the University and enacted by the University committees

<p>Each year, the Federation Board of Representatives should develop/update specific goals for each of these areas which are measurable and which drive the actions of the Federation and its respective Committees towards these ends.</p>

SECTION THREE
PLAN IMPLEMENTATION

IMPLEMENTATION ROAD MAP



IMPLEMENTATION PLAN

The Federation Long Range Planning Committee has generated a set of four goals to guide all Federation activities over the next five years as outlined in Section II of this report. Each of the four goals must be translated into specific quantitative targets where possible, and Federation committee programs, activities, and events must be implemented in order to achieve the desired results.

The LRP Committee recommends that the Federation Executive Committee be charged with the preparation of a Federation Annual Plan designed to be developed from the Long Range Plan. The LRP Committee envisions the Federation Annual Plan process as follows:

1. The Federation Executive Committee will meet once a year before the start of the academic year to establish specific quantitative and measurable targets for each of the four goals in the Long Range Plan. The Executive Committee will then examine the goals, and articulate the relevance of each goal to specific Federation Committees for the upcoming year. Some goals may not be relevant to a particular committee.
2. Two Executive Committee members will be assigned as sponsors of a particular goal. These sponsors will act in the role of officer oversight to monitor progress of the Federation Committees.
3. The Executive Committee will conduct an annual Planning activity to be attended by all Federation Committees and Federation Reps. This conference is designed to convey the Annual Plan goals to the conferees, and to answer any questions about the targets that have been established. The Planning activity will include linking committee activities for the upcoming year with the assigned goals. These plans will be reviewed with the Executive Committee for release to Federation Alumni Associations.
4. A Federation Leaders Forum will be convened each year at mid year to examine the Annual Plan, and to update the Long Range Plan as needed. The results of this Leaders Forum will become planning information for the Annual Plans for the following year as described in Step I above.
5. The Road Map which incorporates all steps in the new Annual Planning process for 2005 through 2009 is included in the Introduction Section of this report for reference purposes.
6. The Executive Committee and Federation Representatives will encourage the individual Alumni Associations to consider alignment of Association goals where possible. Federation Committees will regularly report progress on goal attainment, and the Executive Committee will prepare an annual report consolidating all committee accomplishments versus the stated goals.
7. The Department of Alumni Relations staff will play a key role in the alignment of Federation and Alumni Association goals. The staff will support individual alumni associations in the planning and implementation of activities and programs to achieve the stated Federation goals.

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8. The Long Range Planning Committee will monitor the committee progress reports, and it will issue a report each year to the Executive Committee which outlines conformance to the stated major goals.

A key component of the Implementation Plan will be the need for progress reporting. Each Federation Committee will report goal progress as an included section of every Federation committee meeting report. In this manner, no new reports from the committees will be required.

Each academic year, the Executive Committee will issue a new Annual Plan based on the process outlined above. The five year Long Range Plan will continue to be the source document for annual planning.

APPENDICES

- Appendix A: 2003 Alumni Summit Report
- Appendix B: Vision Meeting Summary Report
- Appendix C: 2004 RUAF Membership Survey
- Appendix D: 2004 Membership Survey Report
- Appendix E: Additional Website References

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APPENDICES



- A: 2003 Alumni Summit Report
- B: Vision Meeting Summary Report
- C: 2004 RUAF Membership Survey
- D: 2004 Membership Survey Report
- E: Additional Website References

APPENDIX A -- 2003 ALUMNI SUMMIT REPORT

CURRENT ISSUES FOR RUTGERS ALUMNI

Community Relations/Image		
Why is this an issue?	How can we address it?	What is going to get in our way?
<p>Affects all constituencies – New Brunswick, Newark, Camden and outside of NJ</p> <p>The image is different inside NJ vs. outside NJ (equiv to “IVY League”)</p> <p>Reality is that for NJ HS students, RU is a “safe” for IVY League caliber, is 2nd Tier to many students and Counselors</p>	<p>Focus on technology, website, and providing information</p> <p>Academic Challenge</p> <p>RU = Academic Excellence (i.e. Philosophy Dept.)</p> <p>RU = Academic Top Choice</p> <p>Positive Press & Radio</p> <p>Reach out to admitted students</p> <p>Alumni Families</p> <p>“Engaged” students/alums/faculty</p>	<p>Access vs. Excellence</p> <p>Public Relations</p> <p>Branding/Seal/Logo</p>

How can the Alumni Federation address this issue?

- **Assign the Student Recruitment Committee to develop programs and initiatives to help with image in the high schools**
- **Enlist Regional Clubs to continue to “sell” Rutgers in their local areas**
- **Have Long Range Planning Committee consider these programs as part of development of Long Range Plan**
- **Work with RU Administration in development of Speakers Bureau to help get Rutgers name out**

APPENDIX A -- 2003 ALUMNI SUMMIT REPORT (CONTINUED)

CURRENT ISSUES FOR RUTGERS ALUMNI

Membership		
Why is this an issue?	How can we address it?	What is going to get in our way?
Membership is declining for Associations	Promote Associations outside the University community	Continued confusion
Not enough retention of dues payers	Pride in Rutgers Alumni involvement in Career activities	Duplicate and numerous mailings from all of Rutgers entities (need to have “one face to customer”)
Membership choices are confusing and not consistent amongst associations	Market to alumni via “identities” beyond class year Build off “free” memberships	Limited number of volunteers within the Associations Need to work together
Not all members identify themselves primarily by class year	Make renewing easier – “rolling renewal”	
Alumni are confused by Association and Foundation	Promote benefits with personal touch (phone calls, ride to meetings, events) Common dues structure	
Confusing structure	Educate about differences between the Foundation and Associations	
Difficult economy		

How can the Alumni Federation address this issue?

- **Consider a single dues structure to minimize confusion - solicit high level support from Associations**
- **Have Constituent Concerns Committee consider ways to reach out to alumni via “alternative” identities**
- **Assign Members Services Committee to review dues mailing process and renewal process**
 - **Have Long Range Planning Committee consider marketing and membership initiatives as part of development of Long Range Plan**
 - **Work with RU Foundation to consider ways to minimize confusion between Associations and Foundation**

APPENDIX A -- 2003 ALUMNI SUMMIT REPORT (CONTINUED)

CURRENT ISSUES FOR RUTGERS ALUMNI

Budget		
Why is this an issue?	How can we address it?	What is going to get in our way?
State Funding continues to be cut	Grassroots campaign – tell the “RU Story”	Low voter participation amongst students
Most residents of NJ don’t understand or appreciate the impact RU has on them	Grasstops campaign – tell the Legislators the “RU Story”	“University culture” needs to change
Most legislators don’t understand or appreciate the impact RU has on the State	Facts & Figures and Unified Message	“Balkanized” University
	Alumni at their High Schools (i.e. College Night, Financial Night, Career Night)	State Colleges/County Colleges
	Advocacy Programs – Letters to Editors, Talk Radio, Sponsor Radio Programs	No State Dept of Higher Education
		Weak Alumni Loyalty
		Lack of Industry “Buy In”
		University “Image” Problem

How can the Alumni Federation address this issue?

- **Have Government Relations Committee continue to develop programs to reach out to legislators**
- **Work with RU Government Advocacy Program to develop a strong and active Advocacy Program**
- **Have Long Range Planning Committee consider on-going advocacy initiatives as part of development of Long Range Plan**

APPENDIX A -- 2003 ALUMNI SUMMIT REPORT (CONTINUED)

CURRENT ISSUES FOR RUTGERS ALUMNI

Merger & Restructuring		
What about this is an issue?	How can we address it?	What is going to get in our way?
<u>Governance</u> Keep Chancellor on campus or not at all Maintain current structure	Look at how others have been successful with similar models Work with Administration and Boards of Trustees	Politics and politicians and their own agendas
<u>Structure</u> Keep "Rutgers" Central administration while keeping campus autonomy	Ensure we do what is best for Rutgers	
<u>Budget</u> Lack of consistent funding	Reach out to Associations at UMDNJ and NJIT	
Model failed with SUNY	Advocacy Program	
Too many compromises		
Too expensive		
Lose AAU?		

How can the Alumni Federation address this issue?

- **Work to keep Associations informed and advised of status and progress**
- **Consider alternatives to deal with possible outcomes of process**
- **Create ad-hoc Committees to look at issues which may affect alumni, Alumni Associations, Alumni Federation and Alumni Relations**

APPENDIX A -- 2003 ALUMNI SUMMIT REPORT (CONTINUED)

CURRENT ISSUES FOR RUTGERS ALUMNI

Associations Programming		
Why is this an issue?	How can we address it?	What is going to get in our way?
<p>Challenge of identifying key topics for events</p> <p>Inter-association communications is not always as strong as it should be</p> <p>Personal agenda vs. Association agendas</p> <p>Duplicate costs in terms of dollars, time, effort is not efficient and practical</p>	<p>Pay attention to RU offerings – intellectual vs. social</p> <p>Co-sponsor with student groups</p> <p>Solicit opinions on web site</p> <p>Interfunctional groups and Formal surveys for assistance</p> <p>Mimic successes</p> <p>Mix generations</p> <p>Joint events with other Associations</p> <p>Share Newsletters</p> <p>Compare calendars</p> <p>Participate in University events</p> <p>Have designated point of contact in each Association</p>	<p>Not linked everywhere</p> <p>Snail mail vs. E-mail</p> <p>Resistance to reaching out to school</p> <p>Communication pieces/ professional resources</p> <p>Dollars for promotion/attendance</p> <p>Timing/competition of other events</p> <p>Lack of University wide calendar in advance</p> <p>Island vision</p>

How can the Alumni Federation address this issue?

- **Have Communications Committee serve as repository to share newsletters/publications with each Association**
- **Have Constituent Concerns Committee create opportunities to facilitate discussion and planning of cooperative events/activities amongst Associations**
- **Have Long Range Planning Committee consider collective initiatives as part of development of Long Range Plan**
- **Continually solicit input and support from Alumni Association Presidents**

APPENDIX B -- VISION MEETING SUMMARY REPORT

VISION FOR THE FUTURE (2005-2009)

To establish a research base for the next Long Term Plan, the Executive Committee and Federation's Long Range Planning Committee of the Rutgers Alumni Federation sponsored a workshop on Saturday, June 12, 2004. Invitations were sent to 220 Federation representatives, university staff and university leaders. Over 50 representatives of various interests connected to the Rutgers Alumni Associations attended a "Vision 2009" conference. During the full day workshop, trained facilitators lead the participants through a series of exercises that helped to identify the issues and goals that were most highly valued by the group.

Upon arrival, participants were organized into mixed interest and stakeholder groups encouraging individuals to "open up" and brainstorm. Through all the exercises, the groups worked to identify common themes and future trends of alumni and the alumni association and then envision how these could be improved or changed through Federation action by 2009. The most notable outcome of these activities was the creation of the Mind Map which was a visual summary of the participant discussions and the priorities that each participant had assigned to each element. The Mind Map became a visual reminder of the day's activities and represents the source of common understanding that was developed.

The day started with an exercise to create a personal and world events time-line that was presented in relation to important Rutgers events. This formed the basis for further discussion about prominent themes, future actions, regrets and proudful events, intentions and desires. This work culminated with skits that depicted how the Federation might be in 2009. These skits were helpful for the participants to reflect upon the difficulty in acting upon all our areas of desired change. Skits included: Jeopardy game, radio show; virtual meeting; imaginary walk-through a future Alumni Center building; and TV show.

During the day, discussion groups changed from mixed to stakeholder and back again. Potential actions were developed for themes of athletic programs, diversity, economics, demographics, and technology and volunteer issues. Actions related to alumni status within the university, staffing and public image were also developed.

During the past five years as a Federation group, we were most proud of social activities, use of traditional and electronic communication methods, philanthropic and volunteer activities, advocacy achievements. The regret list included a lack of collaboration between alumni groups, the need to improve communication via traditional and electronic methods, the need for more diversity and inclusion, the need to increase membership and improve participation, the need for more advocacy activities, the need for more and better social activities, better coordination and utilization of volunteers, diversity and continuing education opportunities, the need for more funding and the need for more effective marketing of the association.

APPENDIX B -- VISION MEETING SUMMARY REPORT (CONTINUED)

The full day program concluded with a discussion of five dominant themes that had emerged from the day's activities. Diversity, alumni image and influence within the university were considered extremely important to the success of the Federation's mission and should be considered as well.

- Increase in funding/revenue
- Increase of alumni office staff
- Increased and effective use of technology
- Increase in Membership
- Federation/university/event image and participation

The participants left the workshop engaged and reunited with their fellow alumni representatives from other associations, the university and the student population. Attached are some of the additional details that were obtained from the various discussions. This information is not conclusive but suggests that the participants realize that Federation success depends upon recognition that these trends require action by its members.

Submitted by the attending members of the Federation Long-Range Planning Committee
Tom Calamia
Dianne Clarke-Kudless, PsyD.
Nancy Madacsi
William Norville
Julie Eisdorfer
Chuck Mannella

Vision for the Future
Flipchart records of conference discussions

Task 1A -- Time Line

Pre-1970

WORLD EVENTS	RUTGERS EVENTS
End of World War II	Mason Gross President
Baby Boomers (end of World War II)	RAA 1861
60's questioning authority	AADC 1927
Kennedy and Martin Luther King assassinations	SSW 1954
1964 civil rights bill – change in composition of student body	UCNB 1934
60's riots	RU family relatively young
Vietnam War – Draft Lottery-ROTC protects takeover of Administration Bldg.	3 campus (late 40's)
Invention of the TV	Newark University merged 1946
1956 NJ State University	College of SJ joined 1950
Cuban missile crisis	1947 Federation Incorporated
Space program	1956 Reorganization of University
Landing on the moon	
Arms race	

1970-1980

WORLD EVENTS	RUTGERS EVENTS
Change of role of women	1976 RU Basketball undefeated
College admits women	BO Overseers created 1973
Nixon impeachment	RU Foundation created 1973
Gas crisis	RC allows women 1974
Iran hostages	Pharmacy moves from Newark to
Kent State	NB 1972
Oil shortage	1975-1980 LC developed
End of Vietnam/draft	1971 Bloustein president
Carter elected	Meritorious Service award
Recession/inflation	Credit card program
3 mile Island	As world expanded/diversified the university had to structure itself/unify

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

1980-1990

WORLD EVENTS	RUTGERS EVENTS
Reagan years	Bloustein died 1985
Challenger exploded	85-90 Mary Ruth Snyder
Air Traffic firing	FAS-NB established 1981
End of New Deal	HDA begins homecoming festival
End of Cold War	1987 HAD established
End of apartheid	Dick Lloyd – Director of Alumni Relations
Fall of Berlin Wall	Link Alumni Relation to Federation
Changing of traditional family	Distinguished Alumni Hall created
Chernobyl	
Billion dollar fundraising at universities	
Hand gun band	
Attempted assassination	

1990-2000

WORLD EVENTS	RUTGERS EVENTS
Millennium crisis	1990-95 MBNA huge revenue increase
Widespread use of web	Dick Lloyd
Wireless	1995-00 RUAF begins revenue sharing
Collapse of Soviet Union	Regional clubs expand
World Trade Center attacks '93 and 9-11	Meritorious Service Awards
OJ Simpson trial	
Columbine	
Oklahoma City	
Launching of Americore	
Rwanda, Bosnia	
Gulf War	
Republican congress	
Thiamin Square China	
Bill Clinton “Contract w/America”	
Health Care reform	
Branch Divians	
Balanced Federal Budget	

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

2000 – Present

WORLD EVENTS	RUTGERS EVENTS
9-11	RL McCormick president
Cell Phones – common use	Cal Maradonna Asst VP
Iraq	Merge issues (threat)
First billion dollar public university campaign	Unified dues plan
Afghanistan	
Economy	
Gas prices	
Y2K	
Euro	
China joins WRO	
CHADS	
Mega bank mergers	
Low interest rates	

PERSONAL EVENTS PRE 1970	PERSONAL EVENTS 1970-1980
Began Career -6	Born 1
Bought a motorcycle	Live abroad 4
Social and political awareness/involvement 7	Divorce 1
Started elementary school 10	College grads 6
Got married 4	First job 3
Born 11	Elementary school 2
High School grads 10	Marriage 6
Attended college 7	Children 4
College grads 4	Bought a home 2
Birth of a child 3	Death of family/friends 8
Military Services 3	Travel 7 Alumni involvement 3
Bought a home 3	
Alumni involvement 2	

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

Current Trends or Concerns

- 1) Funding Sources
 - a) Federal Government
 - b) State Government
 - c) Alumni Association dues have not increased
 - d) Federation program i.e. MBNA generates extra income
- 2) Growing Alumni Diversity
- 3) Rutgers Image
 - i) Lack of recognition from RU administration
 - ii) Lack of recognition from NJ residents – students look out of state to go to college
- 4) Volunteers
 - i) Not enough time
 - ii) Costly to travel
- 5) Alumni Relations Office Structure
 - i) Understaffed
 - ii) Growing alumni and programs to accommodate alumni
 - iii) Part-timers/work study assistants – less efficient productivity working on events
 - iv) Feel disconnected with other associations, Federation, Foundation and RU President

Solutions for the Future 2009

- 1) Funding
 - a) Federal Government – lobby for more grants
 - b) State Government – lobby and elect Rutgers alumni into office
 - c) Alumni Association/Offices
 - i) fundraising events such as concerts, golf outings and book fairs
 - ii) co-sponsor events with other alumni associations
 - iii) offer associate membership for non-graduates
 - iv) initiate dues levels such as gold and silver
 - v) offer automatic membership renewal on-line or by credit card
 - vi) reach out to out of state alumni i.e. Affinity groups
 - vii) establish student alumni association group with automatic enrollment after graduation with no charge
- 2) Federation will provide new services and incentives for membership
 - a) dental, healthcare or prescription plans
 - b) discounts to athletic events or theatre, airport parking, and special alumni gala events
 - c) continuing education

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

- 3) Growing Alumni Diversity
 - a) Representation on Federation Board
 - b) Programs geared to ethnic or special interest groups
- 4) Rutgers Image
 - a) Have a mentoring program
 - b) Design and implement a marketing program targeting friends of RU as well as NJ politicians and residents
 - c) Enhance image by outreach to high schools
 - d) Improve public relations for university research programs
 - e) RU president needs to recognize the expertise of alumni and use it as a resource.
- 5) Volunteers
 - a) Cut back number of meetings
 - b) Use teleconferencing
 - c) Offer services such as networking opportunity helping alumni find jobs
 - d) Offer incentives such as health care insurance/prescription plans
 - e) On-line documents i.e. board members by-laws
- 6) Association Structure
 - a) Alleviate understaffed stressors
 - b) re-focus staff skills and tasks utilizing a staff person's strongest skills
 - c) use technology for video conferencing, on-line document references
 - d) piggy-back meetings
 - e) Co-sponsor events with other associations
 - f) Correct productivity loss with work studies / pt workers
 - i) have proper orientation for work studies
 - ii) use student interns for credit i.e. Graphic arts
 - iii) implement flex time with incentives for pt workers
- 7) Enhance relationships between federation, alumni and president with better communication
 - a) university president needs to know about alumni staffing problems

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

WHAT ARE WE DOING NOW AND WHAT DO WE WANT TO DO

ATHLETIC PROGRAM

Doing Now
<ul style="list-style-type: none">➤ No relationship between athletic department and Alumni Relations➤ Homecoming➤ Programs on each campus
Want To Do
<ul style="list-style-type: none">➤ Create relationship between Athletic dept. and Alumni➤ Reunions/Outreach➤ Local Athletic programs

INCREASING DIVERSITY

Doing Now
<ul style="list-style-type: none">➤ Run events to appeal to diverse groups➤ Fractionalizing by naming these groups➤ Increasing diversity on executive board
Want To Do
<ul style="list-style-type: none">➤ Hold federation meeting in Newark and Camden➤ Priority for constituent concerns committee➤ Increase programs to address diversity

ECONOMIC ISSUES

Doing Now
<ul style="list-style-type: none">➤ Credit Card➤ Dues program➤ Reactionary-Fed/State budget
Want To Do
<ul style="list-style-type: none">➤ Proactive – get ahead of the curve➤ Use money from capital➤ Campaign more effectively➤ Alumni advertise itself➤ Ask university for greater access

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

DEMOGRAPHICS

Doing Now	
<ul style="list-style-type: none"> ➤ Recognize issue ➤ Try to find activities that appeal to all different 	
Want To Do	
<ul style="list-style-type: none"> ➤ Appeal ➤ Collaboration ➤ Accessibility 	} More & Better

TECHNOLOGY

Doing Now	
<ul style="list-style-type: none"> ➤ Websites ➤ List serves ➤ On-line directory ➤ Join on-line ➤ Email ➤ Gather info ➤ Classes online 	
Want To Do	
<ul style="list-style-type: none"> ➤ Alumni access to database ➤ Better communication and marketing ➤ Reach out to non-NJ alumni ➤ More distance learning – multi media ➤ Continuing education 	

VOLUNTEER TIME

Doing Now	
<ul style="list-style-type: none"> ➤ Combine meetings ➤ Multi-tasking ➤ E-mail meetings ➤ Conference calls 	
Want To Do	
<ul style="list-style-type: none"> ➤ Provide regional meetings ➤ Video conferencing ➤ Taping ➤ Make time ➤ Productive- better- more targeted ➤ RU TV & other facilities ➤ Staff support administration work ➤ Recognition & support ➤ Keep it fun 	

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

UNIVERSITY LACK OF RECOGNITION/UNDER UTILIZATION OF
ALUMNI...NOT USING ALUMNI FOR PR

Doing Now

- Friends of Rutgers advocacy program
- Positive press releases to media
- DART Douglass Alumni Recruitment Team
- New Volunteer Orientation
- Legacy Reception/ Scholarships for children of Alums
- Complaining about staff reductions
- Programs to bring alums in

Want To Do

- Coordinate PR campaigns...training for alumni PR
- Focused involvement ... don't overwhelm volunteers
- Expanded leadership training...including prospective future leaders
- Promote "fun" activities for volunteers
- Target alumni in school (particularly H.S./Junior High) to "talk up" Rutgers.
- Expand "Doing Now" items to Federation level and be more encompassing
- Focus appeal to administration (formalize)
- Combine association events...don't complete
- Brainstorming coffee sessions informal/get-together
- Communicate to administration that we can improve on bringing alums in

UNIVERSITY STAFF

Doing Now

- 1) Dwindling economic resources
- Friends of Rutgers network
- Outreach to gov. and leg./dinners
- Increased communications to citizens policy leaders
- Increased research support
- Increased federal \$
- Capital campaign

Want To Do

- Billion \$ capital campaign
- Comprehensive marketing and advertising campaign
- Grants and gifts
- Integrate alumni in advocacy and recruitment efforts
- Grow dept of Alumni Relations staff

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

DECREASED STAFF/INCREASED WORKLOADS

Doing Now

- Doing more with less
- Utilize students and volunteers and P/T staff
- Implemented flex time/more creative policies
- Technological solutions

Want To Do

- Economic resources
- Encourage cooperation and collaboration within university
- Refocus staff as resources become available

NEGATIVE VIEW OF RU

Doing Now

- Constituency Research Project
- Increased communication with Leg., public
- Recruiting
- Faculty tour
- RU Day in Trenton
- Increased Alumni events

Want To Do

- Integrated marketing and campaign
- Connecting university with NJ citizens

IMPACTS ON TRENDS OF DIVERSITY AND FUNDING

Doing Now

- Cultural and academic associations minimum effort awards given with diversity in mind
- Rutgers advocacy group
- Legislative reception

Want To Do

- Concern for constituencies by marketing to ethnic and minority groups
- Elect more RU Alums to political office (Rept. + Pem.)

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

What are we proud of?

- Increased Alumni Participation
- Success of Alumni Programs (HAD, etc.)
- Friends of RU network
- RU Day in Trenton
- Alumni activity collaboration
- New RU website (Alumni (ae) web site(s))
- Better use of Technology
- Mentoring programs (Link students with Alumni)
- E-Newsletter (Link Campuses)
- Dinner for new Grads (GSE) outreach
- Free magazine with application
- Impact on state budget (letter writing campaign)
- HDA & meritorious service awards diverse
- Camden Reunion and reunions in general
- UCNB – Homecoming
- Attendance is up at alumnia events
- HDA-Douglass Society
- Legacy Dinner/Scholarships
- Student scholarships
- Homecoming
- DART
- University Regional Clubs
- Volunteer Orientation
- Cordiality between associations (improvement over past)
- Website/email/Alumni directory
- Volunteers are involved
- Meeting attendance
- Lots of activities
- Network activity successes
- Volunteer learning opportunities
- Current group of dedicated and involved volunteers (Good core group)
- Effective email
- List serv outreach
- On-line courses
- Combining networking and prof-e-credits
- Homecoming
- 1st Diversity (Newark campus)
- Student funding for prof. Activities
- Beginning, making progress
- Diversity is recognized
- Federation lobbying in Trenton for years – “Friends of Rutgers”
- Proud of participation in enabling budget cuts to be decreased
- Substantial influence of alums on governing boards

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

What are we sorry about?

- Lack of Economic resources
- Under utilization of Alumni body to achieve university goals
- The perception that the administration doesn't care about alumni
- Not having an internal and external marketing plan which should grow from constituency research project
- Encourage cooperation within university divisions. Today we have several staff members from outside AR.
- Lack of Relations between associations and Regional Clubs
- Alumni allegiance misplaced
- Lack of knowledge concerning Federation
- Confusion between Federation vs. Foundation
- Not enough cooperation
- Law members numbers too low
- Douglass Regional Clubs (Lack of support)
- Competition between campuses/colleges/associations
- Lack of informed get-togethers to exchange ideas
- Failure of University to coordinate flow of information
- Failure to pull members in from special interest groups
- Failure to grow membership
- Lack of coordination of events/sharing information
- Special interest groups
- Not enough volunteers
- Lack of Diversity
- Under utilized resources-older volunteers
- Not enough celebration
- Lack of student involvement
- More recognition of volunteers
- More incentives for active volunteers
- Website not up-to-date
- Not reaching out
- Not able to access info
- No online newsletter
- Involving students
- Distance learning
- Lack of outreach activity
- Don't communicate with older alumni
- Include full lifespan issues
- Mentoring
- Parking/Transportation
- Seattered services/classes
- Results aren't showing
- Slow pace of advancement of diversity progress
- Lack of coordination of lobbying by RU and Alumni Federation in past
- Small percent of encouraged alums relative to similar universities
- Lack of a single organized alumni group

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

Consensus Themes/Desirable Futures

Alumni Community in 2009

- 1) associations – how many, what structure
- 2) growth in membership – 400,000
- 3) more students involved
- 4) relationship with administration
- 5) lobbying
- 6) networking / helping
- 7) preparing workforce
- 8) funding – alumni relations and associations
- 9) fundraising

RUAF Scenarios for 2009

- 1) everybody can join one organization then choose affiliation
- 2) allow associate membership for spouses (Rutgers family), foundation donors, students
- 3) Rutgers Federation Plaza
- 4) distinct locations for alumni (visible and useful) i.e. Newark, Trenton, NB, Atlantic City
- 5) fully engages with other Rutgers group such as Rutgers Club, Foundation, Athletics, Career Services
- 6) experience of community, personal development and intimacy through Rutgers education throughout the life cycle
- 7) addressed the issues of RU image and turned it positive
- 8) programs that relate to all membership groups relating to their personal interests
- 9) membership enrollment greater than our competitive benchmark focusing on recent graduates, diversity goals, overall and utilizing automatic enrollment with one year free and contact info including pin #
- 10) enhanced Federation effort
- 11) strengthen unique group outreach efforts to enrolled individuals
- 12) fee based (annual fee) with incentive of first year free, include a pre-printed membership card with diploma with reply card to update address and choose affiliations with promise of gift (renew – recent alumni reduced rate)
- 13) communications to include magazines, newsletters, email, other and can choose preferred methods
- 14) Rework our views of programs (federation?)
- 15) staff engaged

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

Potential Futures

- 1) active integration of students in alumni culture
 - (1) join automatically at graduation (hand out in graduation bag -
 - (2) website to activate and get gift)
- 2) diversity
- 3) collaboration among associations
- 4) athletics
- 5) continuing education
- 6) interest in attending RU
- 7) advocacy
- 8) associate membership in alumni associations for spouse, faculty/staff, business, for anyone who took any class
- 9) Cal's giveaways increase
- 10) improved facilities for volunteer office space, "business center", more staff requires more space

Desirable Future

- 1) involvement of students
- 2) Rutgers and Federation reputation is better
- 3) better usage of university facilities i.e. The stadium for concerts and Winants Hall for Federations
- 4) Marketing of Federation
- 5) Improved Government structure
- 6) Develop a measurement system i.e. Establish benchmarks
- 7) future "Vision for the Future" conference

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

Common Themes Vision

1. Increase Funding

Funding/Revenue

- Funding
 - Federal sponsored events
 - Revenue from credit card

Funding

- Association Membership dues
- Private industry grants/sponsor

Increase Revenue

- Additional affinity groups
- Funding
 - State Funding
 - More alumni donors
 - More ambitious capital campaign

Funding

↑ UNIU Funding

↑ Membership dues

- Grants? – Related to special projects
- Benchmark Study
- Contributions
- Different dues level
 - Gold
 - Silver

Revenue Sources

- Online store
- Events-concerts, book fair, golf outing
- Expansion together
 - Insurance
 - Mass mailing
- Investing companies
- Co-branding
- C Edu unit day
- Rutgers Day at entertainment venues

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

STAFFING

1. More Staff

- Benchmarking with other comparable schools
- More efficient use of staff
- Student interns
- Volunteers
- Volunteer participation
 - Conference meeting

2. Staffing

- Funding

How can the Federation help address the staffing issue?

- Better utilize current resources
- Create independent work-study/ interns with proper orientation
- Dedicate staff to training interns/volunteers
- Federation president should meet with university president to discuss staffing needs immediately
- Review of salary, benefits, and promotion structure immediately

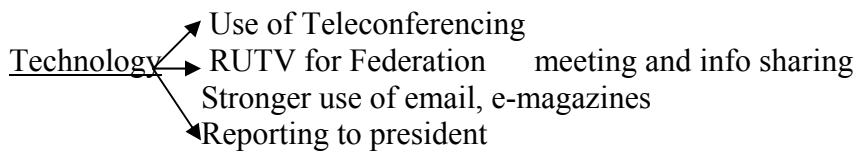
VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

Use of Technology

Video Conference

Online Documents

1. By-laws
2. Training
3. Orientation



Use of technology: email, videoconferencing, website, message boards

MORE!

Utilization of Technology

- Video conferencing
- Expanded RU network
 - More sign-ups

Definition

Application of RU existing technology for existing and extended membership information sharing and program activities

VISION FOR THE FUTURE -- FLIPCHART RECORDS (CONTINUED)

Membership

- Increase membership
- Membership growth
- Increase Membership
 - Retention, expanded programming
 - Value for \$ new enhanced benefits

Membership

- Unique benefits
- Student alum
- Seminars, concerts, continuing education

Membership

- Enhanced incentives (home insurance, real estates, dental, disability)
- Automatic enrollment at graduation

Overall General Improvements

- Diversity
- Improve facilities
- Image enhancement
- Enhance role umbrella organization/ active with president foundation leadership
- More programs services
- Networking, Health insurance, prescription drugs, included with student activities
- Programming improvement- continuing education
- Stronger athletic connection
- RU magazine
- Combined events
- Associate members
- Winning football team
- Recruiting / outreach
- Improved image
- Involve undergraduates
- Image - RU vs. RUAF
- Increase respect for alumni and experts as a resource
- Recognition by RU President of importance alumni
- Improve Benefits
- Diversity-provide good representation on fed. Board

APPENDIX C -- 2004 RUA F MEMBERSHIP SURVEY

Long Range Planning Committee Survey

Please take a few minutes to complete this survey and add your thoughts to this important Federation activity. The results of this survey, along with the information gathered from the vision conference and the Executive planning session, will be incorporated into the long-range planning document to be released by the Committee to Federation membership for review in early 2005.

Your individual survey response will strengthen the Federation ability to represent your needs and help us grow the Federation as the collective voice of Rutgers Alumni.

**Glenn Gnrrep, President
Rutgers Alumni Federation**

**Dianne Clarke-Kudless, Psy.D., Chair
Federation Long Range Planning**

Please rank the following goals in the order that they are most important to you or your association. **Use "1" to indicate the goal that is most important.**

GOALS

- _____ 1. Enhanced membership benefits
- _____ 2. Increase alumni membership of culturally diverse groups
- _____ 3. Increase association membership
- _____ 4. Acknowledgment of the alumni's value by the University
- _____ 5. Utilize alumni as University advocates
- _____ 6. Apply technology to enhance communication
- _____ 7. Increase funding and revenue
- _____ 8. Increase participation
- _____ 9. Expand student involvement
- _____ 10. Improve Rutgers image in New Jersey
- _____ 11. Strengthen alumni relations support

WAYS TO ACCOMPLISH THE GOALS

Please indicate your level of interest in using the following:

	Frequently use	Might Use	Never Use
Establish an online store			
Networking events (hold)			
Partnering/Sponsoring with other organizations and businesses			
Continuing Education			
Members incentives program			
Alternative memberships			
Alternative meeting opportunities (virtual meetings, teleconferencing, video conference)			
Expanded alumni facilities			
Diversity focused programming			
Rutgers community outreach and promotion			
Easier access to Rutgers programs and services			
More alumni representation within University governing structures			
Improving government affairs			

Rutgers University Alumni Federation
2005 Long Range Plan

MISSION STATEMENT

The Federation's 1990-2004 Mission Statement is stated as follows:

To promote the welfare of Rutgers, the State University of New Jersey,
encourage recognition of its activities and support the interests of alumni,
their constituent associations, and related alumni organizations.

Considering the goals and activities that you have selected above, is the statement still a valid
statement of the Federation's mission for 2005-2009?

Yes ____

No ____

DEMOGRAPHIC INFORMATION (Please check all that apply)

Decade of graduation

- _____ 1930's or earlier
- _____ 1940's
- _____ 1950's
- _____ 1960's
- _____ 1970's
- _____ 1980's
- _____ 1990's
- _____ 2000

Age: Please check your current age group

- _____ 20-30
- _____ 31-40
- _____ 41-50
- _____ 51-60
- _____ 60+

School: Please indicate the school(s) where you received your education
(Please insert list of schools)

Comments:

APPENDIX D -- SURVEY ANALYSIS

Areas of Concurrence

- The mission statement is viewed as appropriate
- All groups agree upon the importance of two items: increased participation and improving Rutgers' image
- Expanding student involvement is a low priority
- The use of technology is not an important value to most respondents in both the federation survey and the Rutgers' survey
- Easier access to Rutgers' programs and services is desired by all groups
- All groups want more alumni input into Rutgers' governing structures
- Most view member incentives as important
- Networking events are highly valued on both surveys

Areas of Disagreement

- The homecoming group didn't value increased alumni membership as much as the other groups
- Diversity is important to some groups but doesn't score highly in the overall ranking; it is specifically mentioned in the comments as important
- Most groups wanted to see alumni facilities expanded, this is not as important to the regional group

Rutgers Survey

- The most valued service to Rutgers' alumni is computer labs and the library, followed by career service and counseling, mailed alumni newsletters and professional networking opportunities. Comments on the planning committee survey indicated that career services and networking needed to be improved
- The survey seems to indicate that Rutgers can do better with alumni communication.
- Alumni value print media.
- 63% of the alumni reported that they had talked to a Rutgers' student in the past year and 60% had visited the campus in the past year. Only 22% attended sports events and only 25% attended cultural events.
- The two main sources of information about Rutgers are the Rutgers' Alumni newsletters (34%) and newspapers (30%). Areas least mentioned included, the Internet (6%), TV (5%), Rutgers' Faculty/Staff (6%) and Rutgers' Website (2%)
- Alumni are generally positive about Rutgers' image and view Rutgers as providing high quality education (72%), having a faculty that conducts research (64%).
- 60% of the alumni view Rutgers sports as having no impact on the perception of RU. The message that resonates least with the alumni is "RU is the only NJ public higher ed institution competing in 30 sports at NCAA Div 1-A"
- The services most desired by alumni include: research into causes and treatments for illness, continuing education, environment and natural resource planning. The long range planning survey didn't rank continuing education highly
- 77% of the alumni strongly support state funding for Rutgers
- 59% of the Rutgers' upperclassmen plan to stay involved after graduation but only 34% belong to the association and only 19% report contributing time and help.

APPENDIX E – ADDITIONAL WEBSITE REFERENCES

Federation Information

<http://www.alumni.rutgers.edu/about/federation.shtml>

Association Information

<http://www.alumni.rutgers.edu/join/assocs.shtml>

Rutgers Constituency Project

http://president.rutgers.edu/constituency_research.pdf