alumniusc alumr

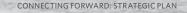
Connecting Forward

STRATEGIC PLAN

APRIL 2017 - MARCH 2022

alumniubc

SELF-GOVERNED AND REFLECTING AN ALUMNI VOICE FOR 100 YEARS



On May 4th, 1917, the University of British Columbia Alumni Association was established as the self-governing, independent voice of UBC's alumni – just one year after the convocation of UBC's first graduating class. In fact it was that very class of 1916 that founded the UBC Alumni Association, now known as *alumni UBC*.

100 years on, *alumni UBC* more than ever magnifies the combined commitment of UBC alumni to their alma mater. It reflects an energetic, growing global community of more than 320,000 graduates as of 2016 - with well over half living across the Province of British Columbia. Collectively and individually, UBC alumni are making their mark on our society, economy, and culture. They share a vision of a better world and a greater UBC, thus expanding UBC's mission. WHILE THE ALUMNI ASSOCIATION'S HISTORY SPANNED OVER 100 YEARS AS OF 2017, IN THE PRIOR FEW YEARS BOTH THE ALUMNI ASSOCIATION AND ALUMNI ENGAGEMENT ITSELF AT UBC HAVE GONE THROUGH A MAJOR METAMORPHOSIS. THE LIST OF DEVELOPMENTS IS SUBSTANTIAL:

- 1. The memorandum of agreement between the UBCAA and UBC to collaborate on alumni engagement was first penned in 2004 and renewed in 2009 and again in 2014. This agreement has stood the test of time and established a solid platform for the strong working partnership between the University and the alumni association.
- The first joint executive (AVP Alumni/ED AA) was hired in 2004 with accountability to both the alumni association and university.
- 3. In 2008, alumni relations and development was combined into a single portfolio under a Vice-President for Development and Alumni Engagement to ensure closer alignment and a strong, efficient infrastructure support for both.
- 4. In 2009, alumni engagement was embedded for the first time into the University's strategic plan "Place and Promise" as a key university priority.
- 5. Faculty-based alumni engagement programs were introduced in 2008 and all Vancouver faculties now have alumni officers, as does athletics.
- 6. In 2011, the University launched and successfully executed a dual-goal campaign, *start an evolution*, to raise \$1.5 billion for student learning, research, and community engagement, and to double annual alumni engagement. By the campaign's conclusion in 2015, more than \$1.6 billion was raised during the campaign, and more than 130,000 alumni were engaged, establishing a new culture of engagement for the University.

- The first university-wide strategic plan for alumni UBC and for alumni engagement

 Alumni, Forever UBC - was adopted in
 This plan provided a strong, focused road map for engagement efforts during its five-year lifespan and its key goals have largely been achieved.
- The governance of the UBC Alumni Association was reviewed to align with best practices and new bylaws were adopted in June 2012 to establish a board that is laserfocused on strategy, policy, and oversight. A larger, more broadly representative alumni advisory council was also created.
- 9. The Association and University alumni affairs brand was more clearly defined in 2013 to position the overall programs, services, and organization in a more alumni-centric, unified, and forward thinking manner. The *alumni UBC* brand was successfully launched and adopted, including the tagline "it's yours."
- 10. Market research was combined with strong data collection and data analytics to better understand how alumni want to engage and what is of value. This has led to the definition of a stronger value proposition lifelong enrichment.
- 11. The Robert H. Lee Alumni Centre was opened in 2015, providing a home on the Vancouver campus for alumni for life - a place to network, socialize and connect to the university's cultural and intellectual riches, and support and promote UBC. It is an iconic representation of the important role alumni play in the life of the University and in the wider world.

- 12. Finally, in 2016 the international consulting firm of Grenzebach, Glier and Associates (GG&A) conducted a comprehensive review of alumni engagement efforts at UBC over the last 5 years:
 - a. Their overall assessment indicated alumni UBC and the University were modeling and even setting best practices relating to alumni strategies, programs and services.
 - b. GG&A also identified areas of future focus including sustaining elevated levels of broad engagement while giving more attention to deeper engagement especially in the areas of volunteerism, advocacy, and alumni giving.
 - c. They further recommended evolving the sophistication of our data analytics to better understand correlations between types of engagement; more focus on career-oriented programs; expansion of digital programming, and strategies to reach out to students and recent graduates.



SHIFTING THE CULTURE AND CHANGING THE CURVE

The most critical and enduring of all achievements is the sea change to a true culture of alumni engagement at UBC; the University proactively advocates for alumni engagement, and alumni are demonstrating a desire to take advantage of opportunities to participate in the life of the University and to see the value of their global alumni community. Alumni, now, are always included along with students, faculty, and staff in any references to the core UBC community.

Today UBC serves more than 60,000 undergraduate and graduate students on two campuses - Vancouver and Kelowna plus other distributed learning sites across the province. As it stands, as of 2016, a full 37% of UBC alumni graduated within the past ten years, and this percentage will continue to grow. By 2025, 50% will have graduated within the past 20 years. Additionally, 24% of UBC's student population on both campuses today currently hail from countries other than Canada.

All of these developments will have a substantial impact on how *alumni UBC* and alumni engagement efforts across the entire University evolve to meet our changing alumni community. As our President and Vice-Chancellor Professor Santa Ono has articulated, as UBC moves from "excellence to eminence," the expectations of our alumni will grow, as will their expectations of *alumni UBC* and how UBC engages them.



LOOKING TO THE FUTURE – A ROADMAP

- 1. The vision of *alumni UBC* articulates an ambition that UBC alumni share aspirations for a better world and that they also want to participate in the University's rise. After all, the value of their degrees is dependent on it.
- 2. *alumni UBC* has a distinctive mission focused on delivering lifelong enrichment centered on personal and professional growth, nourishing alumni pride in UBC and one another, and facilitating opportunities for contribution in myriad ways.
- 3. We need to seize opportunities to further broaden the reach of our alumni programs, services, and communications by continuing to increase the effective use of technology and digital platforms.
- 4. We need to shape our programs to better meet the needs of a growing community of recent graduates and help to introduce more students to the opportunities for and value of lifelong enrichment.
- 5. At the same time, given the progress that has been made in establishing a culture of growing alumni engagement, the time is right to also turn our attention to deepening the engagement among those who want to make a difference for UBC through their advocacy, volunteerism, mentoring, leadership, and, of course, giving.

- 6. To achieve our goals of broadening AND deepening alumni engagement, we will need to continue to be innovative and set a global standard for how modern alumni organizations operate. This will include growing our abilities to utilize sophisticated data analytics to understand the correlations between different forms of alumni engagement in order to better target our programs, services, and communications.
- 7. We will also need to identify new, reliable revenue streams along with strong University support to strategically expand our efforts and abilities while always seeking efficiencies.
- 8. It will be critical to ensure alumni engagement and *alumni UBC* are collaborative and effective partners with and for Development and that there is alignment across the University especially with the Deans, the faculties and the UBC Executive.

STEERING COMMITTEE:

CHAIR: Gregg Saretsky Vice-Chair, *alumni UBC* Board of Directors

Barbara Anderson Treasurer, *alumni UBC* Board of Directors

Natalie Cook Zywicki Associate Executive Director, *alumni UBC*

Robert Helsley

Dean, Sauder School of Business & Grosvenor Professor of Cities, Business Economics & Public Policy

Barbara Miles Vice-President, Development & Alumni Engagement

> Rahim Moloo Co-Chair, *alumni UBC* Advisory Council

Jeff Todd

Executive Director, *alumni UBC* & Associate Vice-President, Alumni

Faye Wightman Chair, *alumni UBC* Board of Directors

LEADERSHIP TEAM:

Jennifer Bendl Senior Director, Stewardship & Events, Development & Alumni Engagement

> Natalie Cook Zywicki Associate Executive Director

Dianna DeBlaere Director, Operations & Planning

Richard Fisher Chief Communications Officer, Development & Alumni Engagement

Ana-Maria Hobrough Managing Director, DAE Services, Development & Alumni Engagement

Steve Kennedy Director, Marketing & Communications

> **Fred Lee** Director, Alumni Engagement

Jeff Todd Executive Director, *alumni UBC* & Associate Vice-President, Alumni

Tanya Walker Director, Alumni Engagement

CONSULTANT:

RJ Valentino President & Co-Founder, The Napa Group

VISION

A global alumni community for an exceptional UBC and a better world.

MISSION

To reach, inspire and engage alumni through lifelong enrichment by:



Nourishing pride



Empowering personal growth



Supporting professional development



Enabling contribution

STRATEGIC IMPERATIVE

By 2022, we have advanced UBC's goals by:



Broadening engagement to 50% of all alumni



Doubling the number of alumni more deeply involved by taking action in support of their alma mater

GOAL 1

Broader Engagement

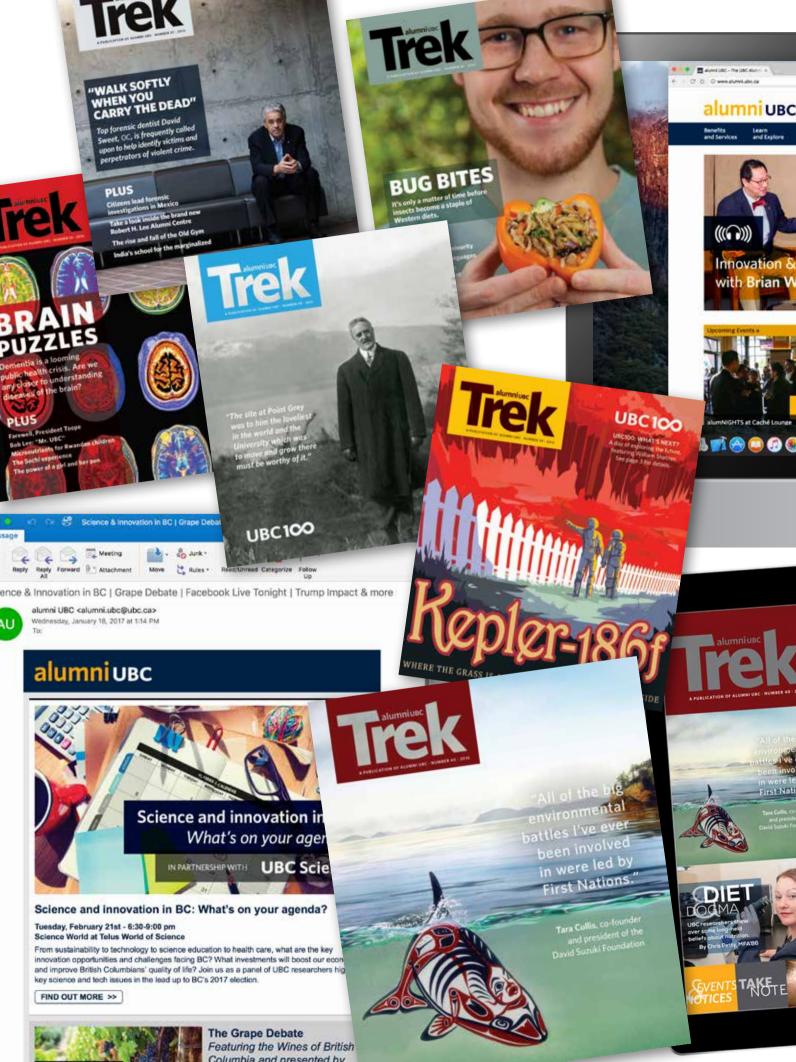
JBC

CONNECTING FORWARD: STRATEGIC PLAN

Ensure more alumni benefit from the collective resources of UBC and the global alumni network, and more students become familiar with *alumni UBC*.

DEFINITION OF SUCCESS (KPIs)

- The number of engaged alumni increases to 50%, by 2022.
- 85% of graduating students are aware of *alumni UBC* and 50% are aware of opportunities for alumni engagement.
- 80% of students and 80% of contactable alumni perceive *alumni UBC* programs and services as somewhat or very valuable.



CONNECTING FORWARD: STRATEGIC PLAN

Columbia and presented by Odlum Brown Ltd.

Thursday, January 26th, 6:00-9:30 pm Robert H. Lee Alumni Centre Tickets: Grape Debate & Wine Tasting - \$84



) 🖉 🔁 🔂 🐨 🖾 🖏 🕲 🕅 🔜

CONNECTED

furning

Point



2.

fy Da-

Sustain and expand reach to alumni through innovative, targeted communications that include broadening awareness of UBC research initiatives and further evolving two-way communications on issues of importance to UBC and/or alumni.

Support professional development by identifying and delivering career programs that can be made available to the broadest audience to meet alumni needs (in collaboration with UBC programming and research when possible).

 Engage students across Vancouver and Okanagan campuses. Align and integrate with faculty-based and UBC-wide student engagement strategies and activities. In Vancouver, capitalize on the Robert H. Lee Alumni Centre on campus to help build the connection between students and alumni.

 Meaningfully connect with new alumni and build a culture of lifelong engagement.

5. Continue with programming to nourish pride, empower personal growth and enhance programs for alumni engagement – locally, regionally and globally, that includes the opportunity for alumni to connect with the Vancouver and Okanagan campuses and to directly connect with each other.

GOAL 2

Deeper Engagement

Deepen connection with key alumni, so UBC benefits from their voice, influence, skills, and capacity.

DEFINITION OF SUCCESS (KPIs)

- Alumni engagement will continue to be an institutional priority in the University's strategic plan.
- The number of alumni actively engaged in volunteering and philanthropy doubles.
- 85% of alumni volunteers believe their volunteer experience enhanced their connection to UBC.



STRATEGIES

- 1. Implement a system that links alumni behaviour, interests and expertise to create leadership, enthusiast, philanthropy and advocacy segments for deeper engagement.
- 2. Increase participation in the leadership segment through university-wide opportunities on boards, councils and committees.
- 3. Build programs for enthusiast sub-segments encompassing social media influencing, student and alumni interaction and other meaningful volunteer opportunities.
- 4. Actively support and contribute to the development, cultivation, and growth of a philanthropy pipeline.
- 5. Develop an alumni advocacy program to harness alumni support and influence for the University.

GOAL 3

Operational Best Practice

Drive innovation across UBC that broadens and deepens alumni engagement.

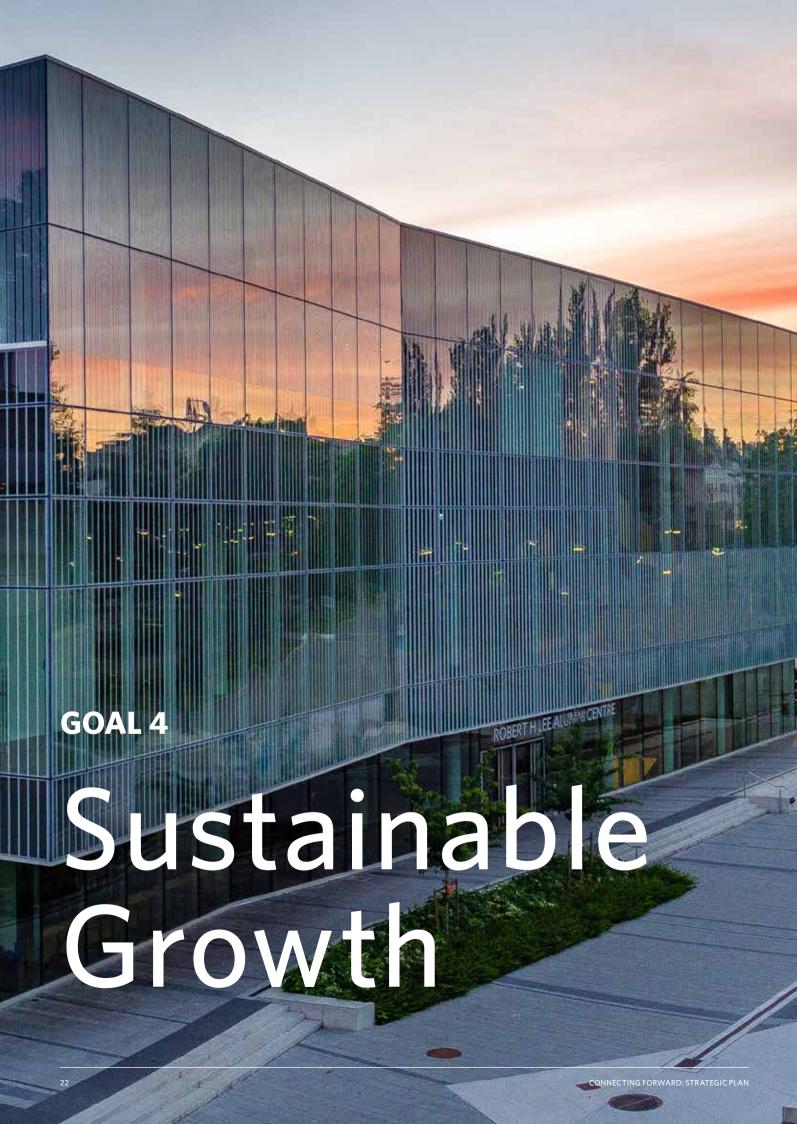
DEFINITION OF SUCCESS (KPIs)

- Become a benchmark institution for alumni organizations seeking innovation and best practices.
- Achieve a score of 85% in Employee engagement and 85% in job satisfaction scores, as measured by the third party Work Place Engagement Survey (WES).



STRATEGIES

- 1. Grow *alumni UBC's* industry leadership in data collection and market analytics and segmentation and use this information to guide programming and provide alumni with a customized experience.
- 2. Leverage available technology and develop a plan to continue technology enhancements and innovations.
- 3. Expand the definition of alumni to include a broader group of past UBC students consistent with best practices among peer institutions.
- 4. Share best practices and thought leadership with selected top-tier organizations (e.g. CASE, CCAE, CAAE, peer institutions and alumni associations).
- 5. Strengthen our high performance culture.



Create a sustainable finance and business model that grows *alumni UBC's* resources, its capacity to serve, and effectively stewards finances.

DEFINITION OF SUCCESS (KPIs)

- Successfully execute a multi-year business plan with efficient cost management and diversified revenue streams attained through targeted business development and robust alumni financial contributions.
- Increase revenue by 22% per year, so that by 2022, total revenue will exceed UBC's annual grant and the Robert H. Lee Alumni Centre will operate with a net-zero budget.

nte locarditector Giusia della 46 el Castella

.

STRATEGIES

- Increase awareness of and demand for Robert H. Lee Centre and Cecil Green Park House bookings through strategic, purposeful marketing and communication to key market sectors.
- 2. Maximize affinity programs, sponsorship and ad sales (including in-kind).
- 3. Work with UBC Development to create a culture of ongoing philanthropic support.
- 4. Build new sources of revenue via high-value programs and benefits for alumni.



alumni.ubc.ca