



## Strategic Planning for an Alumni Relations Organization

The typical components of a strategic plan are relevant for alumni relations organizations, including mission, vision, values, goals, strategies, and tactics, and outcomes metrics, along with associated action and financial plans.

Yet in some ways strategic planning for an alumni organization is different from other contexts. Not all stakeholders have a vested interest in the organization. The strategic planning process can be used to both identify what the strategic priorities and desired outcomes are, and serve as a method to create stronger alumni connections and build a volunteer cohort that will help execute and advocate for the plan. Alumni organizations can also use the strategic plan to identify their resource requirements and budget needs.

There are some unique issues which alumni relations organizations may need to consider during a strategic planning process, such as:

### *Structure*

- What is the formal governance relationship between the university and the alumni association?
- What is the alumni organization's financial and business model (e.g., membership paid or not?)
- What is the relationship between alumni relations and development? Are these activities housed within a single alumni relations organization, or are they separated into two distinct organizations that work cooperatively?
- What are the current volunteer structures (roles/responsibilities) and how might they change because of the plan?

### *Process*

- What are the objectives of the plan, in the context of the mission and structure of the alumni organization?
- What is the input and decision making process to create and approve the plan?
- How can the alumni association engage a broad range of alumni by age, geographic location, and interests?
- What communications messages and vehicles are needed to inform and engage the full alumni population once the plan is completed?

### *Content*

- What is the scope of issues the strategic plan needs to address, from engagement to giving?
- How does the alumni association's mission promote the range of ways alumni engage with the university, and does the structure of the organization enable that?
- How can alumni, through the alumni relations organization, advance university's "institutional" priorities?

The principle stakeholders in an alumni relations strategic plan can include the alumni relations and development volunteer leadership, the broader alumni population, university leadership, and alumni relations and development staff.

**Recommendations:** Use the strategic planning process as a way to engage alumni and make sure they become advocates for the plan. Ask alumni directly how the organization can better meet their needs and the needs of the university. To do this, you need to go where the alumni already are, i.e., the natural connection points. Alumni engagement should take place intensively during the planning process to help shape the plan and once the plan is complete, key directions should be shared broadly with alumni and to reconnect with (potential) alumni leaders.

### **Sample strategic plans**

Association of Yale Alumni,  
Association of Yale Alumni,  
YaleWomen,

[Yale Ambassadors in Action, 2012](#)  
[Ambassadors for Yale, 2008](#)  
[A New Alumnae Network, 2011](#)