RUTGERS UNIVERSITY ALUMNI RELATIONS

THE IMPERATIVE FOR CHANGE

Report of the Task Force on Alumni Relations
August 2007
August 28, 2007

Dr. Richard L. McCormick, President
Rutgers-The State University of New Jersey

Dear President McCormick:

Thank you for the opportunity to serve as members of the President’s Task Force on Alumni Relations and to serve Rutgers University on the important topic of the University’s relationship with its alumni body. In your letter of September 8, 2006 to us, you charged us with reviewing and analyzing Rutgers’ alumni relations and recommending a structure and program that would enable us to build a national model of excellence in alumni relations.

We have prepared the attached observations and recommendations for your consideration. We believe that our proposals are broad, comprehensive and ambitious, and will significantly advance not only the relationship between Rutgers alumni and their alma mater, but also the mission and standing of the University itself. Our report reflects a vital and shared goal: that Rutgers and its alumni be mutually supportive, and that the alumni community strengthen its allegiance to the University, share pride in the University’s accomplishments, and expand its critical role in helping Rutgers achieve its ambitions.

We are grateful for your commitment to this endeavor and your support of our work, and thank you in advance for your careful consideration of our recommendations.

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I. INTRODUCTION

In recent years, the senior officers of Rutgers -- The State University of New Jersey, the Rutgers University Foundation (the Foundation), the Rutgers University Alumni Federation (RUAF), and the leaders of the 19 alumni associations currently affiliated with the RUAF (and also referred to here as the legacy associations) have felt a growing sense of urgency to raise the level of alumni engagement in the life of the institution and to unify the University and the alumni body to advance Rutgers University. In September 2006, the President of the University, Richard L. McCormick, appointed a Task Force of University and alumni representatives to develop recommendations that would achieve this objective.

The Task Force was led by Gene O’Hara, Chair, and Gerald Harvey, Vice-Chair, and included 24 other members representing a widely diverse range of alumni involvement in the institution. As it began its work to fulfill President McCormick’s charge, the Task Force retained eAdvancement, consultants in alumni relations, to assess the potential to achieve higher and sustainable levels of alumni engagement. As part of its work for the Task Force, eAdvancement conducted a comprehensive audit and survey of undergraduate alumni. The RUAF also conducted a benchmarking study that was helpful to our work.

The eAdvancement survey confirmed that Rutgers University alumni, while ranked impressively in their pride of degree compared with alumni of “best practice” U.S. schools, were not participating in the life of the University at a level commensurate with their strong positive feelings for Rutgers. Nor were they stepping up to meet the University’s ever-increasing need for the kind of support that alumni elsewhere provide their alma maters. While 73 percent of Rutgers University alumni indicate they take great pride in their degree and 56 percent express very positive feelings about the University today, only 22 percent of the alumni body attended a non-athletic University event on campus in the past year, this despite the close proximity of the majority of the graduates. Fewer than ten percent are current annual fund donors and an equally small cohort pays membership dues to the various alumni organizations. The disparity between the exceptional loyalty and affection that former students express for the University and their actual support for the institution as participants, advocates, donors and dues payers is as striking as it is unacceptable for an institution with the hopes and aspirations that Rutgers has for the future.
We point out with deep gratitude the fact that Rutgers University alumni volunteers work tirelessly for the University in a variety of valuable ways. Their generous efforts have helped to make the University the institution it is today and it is important to pay tribute to those efforts. Now the challenge is to build alumni participation and support to the much higher level necessary if Rutgers is to meet the ever-increasing responsibilities of the new century.

eAdvancement briefed the Task Force about best practices and the concepts integral to effective institutional advancement. In evaluating best practices at other institutions, the Task Force found that there is no “one size fits all” approach. Each institution has some elements that we found would be useful to Rutgers. We also found that existing Rutgers University alumni have traditions and values within their respective affiliations that should be touted as examples of best practices at Rutgers and are comparable to some of the finest initiatives at other institutions. We conclude that the structure of alumni relations at Rutgers, as it is currently configured, prohibits the Rutgers alumni body from uniting for Rutgers. We further conclude that if we combine the best elements of what we do now with the best elements of what we have found at other institutions, we will, indeed, build an alumni relations program that will generate the level of participation and support that Rutgers must have to achieve its goals.

The premise of the Task Force’s work was the certainty that the institution would change much about the way it conducts its alumni relations, and that such change would require increased investment by the University. The Task Force expects that all the parts of the University will work together to effect stronger alumni engagement and unity and that a stronger and restructured central Department of Alumni Relations (DAR) will be necessary to drive these efforts. The active involvement in alumni relations of faculty, deans, provosts, the Undergraduate Admissions Office, Career Services, and many others, will produce mutual benefits. A key component to this unified University effort will be the involvement of students with alumni relations. Students entering the University must be seen to be starting a lifelong affiliation with Rutgers, and this relationship needs sustenance and reinforcement on an ongoing basis.

Some will suspect that these new initiatives are motivated by fund-raising concerns. Increasing gift totals is not the inspiration for this work, even though it is well documented that increased alumni giving is a natural result of increased engagement, just as fund-raising success is always the first casualty of poor engagement. The main goal of this plan is to engage alumni, both professionally and personally, in the many ways that alumni elsewhere stay involved in their
universities and colleges, whether as trustees, donors, program participants, mentors for students, recruitment volunteers, advocates or simply as proud, informed citizen ambassadors of their alma mater.

Our recommendations address an immediate challenge to Rutgers University’s future, and provide the basis for a plan of action to be developed by the DAR in consultation with alumni leaders. Some of the recommended outcomes may prove difficult at first to achieve, but they promise excellence for Rutgers University. “Excellence” and “imperative” are the key points—for it was clear to us from the start that, if Rutgers University is to be successful in the realization of its aspirations, it must also be pre-eminent in building, sustaining and celebrating a mutually-supportive partnership with the alumni branch of its family, and it must be prepared to embark on this change without delay.
II. OVERVIEW OF THE PROJECT

Rutgers University President Richard L. McCormick appointed the Task Force in September 2006, charging it to provide its recommendations no later than the end of August 2007. (A copy of the charge to the panel is included in the Appendix.)

The full Task Force met on a monthly basis starting in September 2006, adding additional sessions as needed in the course of the year. Staffed by Foundation Vice President Brian Crockett and University Associate Vice President for Alumni Relations Donna Thornton, it also worked closely with Foundation President Carol Herring, and consultants Bill Stone and Dan White, principals of the eAdvancement consortium retained by the Task Force to support the project. Over the course of the process, the Task Force met collectively and as individuals with a diverse array of stakeholders.

In addition to the full panel, two formal subcommittees were named to report on areas where Rutgers could better serve its graduates (chaired by Bob Stevenson) and on areas where alumni could better serve Rutgers (chaired by Bernice Venable). A third subcommittee was assigned the task of drafting this report on behalf of the Task Force, and was also chaired by Bob Stevenson. (The reports from the first two subcommittees are included in the Appendix.)

In the course of several campus visits, including meetings at Camden, New Brunswick/Piscataway and Newark, the eAdvancement consultants interviewed approximately 75 University officers, deans, advancement staff members, volunteer leaders and students, and conducted a stratified random sample telephone survey of the undergraduate alumni body as part of their work in preparing recommendations to the Task Force about its charge. (The survey and the consultants’ written findings and recommendations are available from the Department of Alumni Relations.) Following the transmittal of the recommendations, the consultants then held briefings for alumni relations and advancement staffs and representatives of the RUAF and the 19 alumni associations, seeking feedback and questions.

The Task Force also held a forum with alumni associations and RUAF leadership in June 2007 at which those representatives were invited to provide feedback on the data gathered by the Task Force. Written summaries were also received from representative geographic clubs and several other parties. Following the June
forum, the Task Force considered all input and then turned to the preparation and assembly of its findings and the completion of this report.

We acknowledge with gratitude the full support of the Foundation and Alumni Relations staffs, particularly Mary Hutchinson, Angela Green and Brian Perillo.
III. PRINCIPLES OF EFFECTIVE ALUMNI RELATIONS
AND ENGAGEMENT

In preparing for the completion of this report, the Task Force allocated time on its agenda to reinforce its own understanding of the context of best practice alumni efforts and the principles that underlie them.

Several of these general principles guided the development of our specific recommendations, and we include them here for the record:

- Alumni should be viewed as a core asset at Rutgers.
- Ownership of the institution is broadly shared and alumni should be viewed as vital stakeholders. The Rutgers family includes its alumni.
- Alumni Relations should be seated at the head table at Rutgers.
- Strong professional staff and talented committed volunteers must understand and respect each other’s roles as partners in leading alumni relations.
- A shared goal is to reach, serve and engage ALL alumni.
- Alumni have rights, privileges and responsibilities as degree holders.
- Alumni Relations should be considered a long term investment—a significant, adequately funded, and permanent University priority.
- Volunteer leadership is a responsibility and volunteer service must benefit all alumni and the University. Volunteer time and resources should focus on engaging the broadest alumni population in the life of the University.
- While an end in itself, Alumni Relations is also critical to the success of University fund-raising and communications, the other two disciplines of advancement, as captured in a diagram and discussion of the Rutgers University Advancement Cycle (included in the Appendix.)
IV. CHALLENGES AND OPPORTUNITIES IN ALUMNI RELATIONS

We cannot begin the discussion about institutional alumni relations at Rutgers University without acknowledging the many strengths of the current program. At the core are the positive feelings that an overwhelming majority of 350,000 Rutgers graduates expresses for the institution, and the cadre of talented and dedicated alumni volunteers who devote untold time and energy to their alumni organizations and to the University. Active throughout the 19 alumni associations and a myriad of institutional activities, they regularly carry on a diverse portfolio of initiatives intended to promote and support the University they love and cherish. These constitute not only remarkable service to the institution, but suggest the potential for an even stronger partnership in the future.

Among the associations, both the Rutgers Alumni Association (RAA) and the Associate Alumnae of Douglass College (AADC) present noteworthy examples of effective programming (such as student engagement at Douglass) and the ways in which they have involved alumni in their organizations (such as the volunteer development program for the RAA’s constituencies). Pride in affiliation with their campus is strongly evident in both the Camden and Newark alumni populations. The caliber of the University’s professional Department of Alumni Relations Staff and its service ethos are equally noteworthy, as are the dedicated efforts and perspective of the President of the Foundation who has brought a new vision to the significance of alumni relations in an effective advancement operation. We are fortunate as well to have a University President who understands and actively defines the University community as inclusive of the alumni body. His fellow University officers, along with Governors, Trustees, and Overseers, support his determination to raise Rutgers to new heights in all categories of achievement.

Collectively, these ambitions are of incomparable value in moving forward in our resolve to improve alumni engagement at Rutgers, starting with the precept that alumni are an institutional asset and must be embraced as such.

At the same time, we do conclude that this unique institutional asset is underperforming relative to its vast potential, and the system of engaging alumni requires overhaul and renewal, especially if we are to realize Rutgers University’s aspiration to be regarded as among the very best public research universities in the country. An effective alumni relations program must help to
advance the interests of the University by engaging its alumni uncommonly well in its on-going life.

Structure and Organization

There are 19 (if we count the RUAF, there are 20) separate alumni groups all attempting to function independently. With the exception of the AADC, all are dependent on the DAR for staffing, office space, and administrative services and support. Further, the associations have huge disparities in activities, number of volunteers, resources and skill sets.

Under this set of circumstances, Rutgers lacks the ability to plan strategically and effect a strong, coherent alumni relations program that maximizes the programming initiatives to be expected by an alumni body as large and diverse as ours is. To cite one example, any two associations can undertake parallel strategic planning projects, each uninformed by the other, both drawing time and energy from the staff. That these separate initiatives might end up with worthy goals should not surprise, but that such goals might also be competitive or inconsistent with one another, and unrelated to the priorities of the Department of Alumni Relations, should also not surprise. This is a formula for dysfunction, lost energy, and frustration that works against any overarching strategic plan to build sustainable alumni engagement.

Notwithstanding the many good things that accrue in the current system, competitive and uncoordinated programming, redundancies, ineffective use of staff time and expertise, multiple layers of clearances and processes, pigeon-holing individual alumni interests today based on school affiliations when they were students, ambiguity about who speaks for whom and how an alumni voice may be heard institutionally are all indicators of the challenges that interfere with functionality and effectiveness.

Prior efforts to unify the alumni body and provide a sense that they all were members of one institution, have been far reaching and persistent, but have achieved a level of success far below what we believe is needed for the future. Despite the valiant efforts of a long succession of talented leaders over the many decades, the Task Force believes that the RUAF and its 19 constituent alumni associations are not positioned to represent the Rutgers alumni community as a unified group in support of Rutgers. We believe that the RUAF and its constituent alumni associations have played a valuable role in efforts to link alumni and the University, thereby attempting to fill a gap that was never filled
by the University. In that light, RUAF is viewed as having served an important coordinating role in alumni relations for Rutgers and could play a role in transitioning alumni relations to the model and structure presented in this report.

Leadership of Alumni Relations

Because of the current structure and historic mission of the existing alumni organizations, none of the existing alumni organizations are positioned to provide leadership for the entire alumni body, nor are they positioned to drive institutional alumni relations for the whole of Rutgers University. The current structure and those organizations within it are overwhelmed by multiple and contradictory bureaucratic needs of the individual groups, leaving little opportunity to address the larger needs of the institution’s alumni body.

Funding

The funding system for alumni relations compounds current structural challenges. A large component of available revenue for programs and events ($450,000) derives from membership dues paid by a small minority of alumni, a single digit participation rate that has been flat for some years. Fees for individual programs and services defer some costs, but do not begin to cover the overhead associated with the various alumni associations, including staffing. There is a piecemeal system for staff billets, each position the subject of individual negotiations rather than part of a “top down” operating budget allocation that would allow the Vice President for Alumni Relations (VP-AR) to prioritize based on most compelling needs. There are a handful of third-party or royalty contract revenues that involve complex formulas for allocation to associations, but do not flow directly to the Department of Alumni Relations. There are also various reserve funds that may or may not be invested for maximum performance and utility.

The dues program is deserving of special comment, since the nature of a dues program works against the principles we espouse for alumni relations at Rutgers. Chief among those precepts we advocate is inclusion, not the exclusivity, that a dues system automatically breeds, which is counterproductive to comprehensive alumni engagement. In the present system, the fewer than ten percent who are
dues payers “belong” and the other 90 percent of alumni do not. We feel strongly that all Rutgers alumni should automatically belong to its alumni body, enjoy the same rights and privileges, and share the same responsibilities for the institution.

We conclude as well that there are definite limits on any upside potential that membership dues offer as a source of revenue to fund expanding opportunities. The best membership dues programs in the country seldom attain more than 25 – 30 percent membership. They take advantage of student experiences that significantly reinforce a culture of participating. At Rutgers today, the investment in terms of staff and budget required to administer a more productive dues program would also mean diverting resources away from the basic mission of alumni relations, and additionally has the potential to undermine a much needed rethinking of annual giving programs.

The DAR does not currently receive any share of vendor-generated revenues. The University must rely on the RUAF to provide funding to support key programs and events. This is backwards. In effect, the professionals with the knowledge and experience in overseeing alumni relations have little direction over expenditures, except for a relatively modest amount ($175,000) for operations after salaries and benefits costs are paid from the University’s annual allocation.

Add to this the sobering reality that the revenues from vendors fluctuate according to the market: revenues from the credit card contract, for example, will begin diminishing considerably this next year, creating a potential tsunami effect throughout the beneficiary organizations.

Equally significant, there is no substantial institutional statement (in space allocation, or dollars and cents programming and service terms) that would demonstrate that the University views alumni as a vital constituency, to be invested in, preserved, and nurtured as a resource.

Staff and Volunteer Relations

While there are many instances of excellent staff – volunteer relations and joint projects, there are also many examples of breakdown. We attribute that mainly to the inefficiencies built into the system, the odd nature of the financial arrangements in place, an overburdened and poorly utilized staff, silo mentalities among volunteers, the absence of shared confidence and the
suspicion that the University wants to take over alumni relations. The best that can be said is that we see a malnourished understanding of the role of a partnership, one which prospers due to shared goals and a sensible division of talents. This issue is aggravated by the fact that several associations depend mightily on individual staff who in some cases become divided in their loyalty and sense of responsibility between the University for which they work as employees, and the individual association volunteers whom they staff. This dichotomy is another contributor to frustration and lost opportunity.

This problem surfaces in frequent reference by volunteer leaders to their institutional colleagues as “support staff” and in such practices, for example, as not acknowledging the staff representatives who serve on various alumni committees. Among volunteers, it surfaces in the form of purposeful exclusion of staff from any meaningful official role that takes full advantage of their professional talents. Among staff, it presents itself in a tendency to want to minimize information sharing and alumni volunteer involvement. Present arrangements also deny the institution and the graduates an important asset: a chief alumni relations officer respected by both partners and equipped to address alumni objectives and University goals in a mutually supportive climate of respect.

Alumni Programming

Focus on process necessitated by the dysfunctional nature of the current structure has limited the variety and development of breakthrough communications/engagement opportunities—designed to appeal to the diverse interests of alumni. General content of programs and services does little to nourish interest and involvement, especially of the 90 percent who are not dues payers. The programs—large and small—appear almost exclusively social and are mostly attended by a relatively small core of faithful followers.

A rigorous portfolio of educational programming is noteworthy by its absence—the Rutgers faculty and the deans are vastly under-utilized as a key component of alumni engagement. Homecoming is described as lightweight and poorly attended. Reunions are generally inconsistent and lack the kind of impact and momentum that such programs elsewhere accomplish. There is no overarching plan to grow or consolidate reunions, another casualty of the structural impossibility of finding easy planning mechanisms to engage in common cause pursuits.
Regional Clubs and Shared Interest Groups

Rutgers University currently has 35 regional clubs, none overseas, only 16 of which are considered active. There are no clubs in New Jersey supported by the Department of Alumni Relations, despite the fact that more than two-thirds of its alumni live in state. While both the Camden and Newark campuses have alumni associations that provide support to the campuses, these associations also lack adequate resources as they depend on too-lean staffs as a result of the general funding problem. To the extent that Rutgers aspires to national and world prominence, it requires an extended regional network across New Jersey, around the country and overseas, that supports its aspirations.

The potential of shared interest groups to capture and sustain the same kind of alumni support as the more traditional cohorts is huge indeed. African-American alumni have formed a group at Rutgers, as have Caribbean alumni. Other special interest groups include Alumni Band, the Alumni Glee Club, the Alumni Intra-fraternity Council, the Cook Young Alumni Club, and the Camden Garden Club, to name a few. Such groups have only tenuous links to the RUAF.

In effect, alumni structure and programming do not really provide enough content to connect meaningfully with a majority of alumni who would welcome such connections. Nor are there adequate efforts in place to grow a fully informed corps of talented volunteers with the perspective and breadth to assist the entire institution with its key challenges.

Rutgers Magazine and the E-newsletter

A startling forty-four percent of alumni cite public sources such as local newspapers as their chief source of information about the University, more than twice the percentage who responded that they read Rutgers Magazine and/or E-newsletter. This fact alone points to a glaring missed opportunity in our ability to inform and involve our alumni. Rutgers Magazine is sent only to donors, dues payers and special friends of the University. It is clear to us that tens of thousands of Rutgers alumni may not receive any direct information or contact from the University for many years—a huge challenge for the University to overcome in developing a top-of-mind presence.
Student-Alumni Relations

In alumni surveys done throughout higher education, there is a consistently high correlation between alumni who have positive memories of their student years and their subsequent engagement with the university. The student experience is thus a critical determinant of effective alumni relations.

During a student’s time at Rutgers, regardless of which campus or program, there appears to be little active effort to inculcate an awareness of alumni or the larger Rutgers family and to begin consciously to prepare students for lifelong engagement. From orientation on, there is little or no ceremonial connection with alumni organizations except in an isolated instance or two (and particularly at Douglass.) As a result, ten thousand students graduate each year from the three campuses with little awareness of, and no structure for, transitioning to life as alumni. If they do not pay membership dues or participate in the annual fund, they may not hear from the University for some time, perhaps ever. Without something like a magazine or useful young alumni services and communication, their incentive to notify the University of address changes as they move about the world is diminished. The risk is that the young alumnus or alumna drifts out of the advancement cycle and it takes years before he or she reappears again, if ever.

Alumni Center

As the RUAF recognized in its 2005-2009 Long Range Plan, the campus lacks appropriate office and facility space for alumni relations and the attendant organizations. While Winants Hall is centrally located on the Old Queens campus, the Department of Alumni Relations is a warren of small, overcrowded workspaces. Attempts at making alumni feel welcome through displays and exhibits of mementos are few and undistinguished: for example, photos of alumni award winners—members of the prestigious Hall of Distinguished Alumni, are scattered throughout hallways and meeting rooms. Access to the building is complicated by a paucity of convenient parking for visitors. The space does not, in sum, bid alumni a warm welcome back to campus, and is not a campus “home for alumni.” The same has to be said for the visibility and iconic value of the alumni offices on the Camden and Newark campuses. In short, only the Douglass campus can now boast of a welcome facility, but it is limited by its designation as an on campus home for a small segment of Rutgers graduates.
Conclusion

Our historic inattention as an institution to alumni, and the growth of a complex and confusing organization and structure with a multitude of alumni interest groups, has led to a system characterized by huge inefficiencies, dysfunction, and lost opportunities, resulting in stagnation in participation and support.

We believe, however that the corps of talented and dedicated leaders and their loyal alumni cohorts, along with the renewed interest and support of the University, together form a dynamic for change that can move us into the vanguard of public institutions.

Our ambition as an institution is to be at the forefront in all respects. In the face of such a commitment, we think the University has no choice but to move forward in implementing our proposed recommendations which will result at last in the realization of the great potential of our alumni body.
V. MAJOR RECOMMENDATIONS: AN INTRODUCTION

The Task Force initially identified the following ten key topics on which it would focus its study of alumni relations:

1. Communication, especially outreach beyond campus
2. Funding for alumni relations – scope and sources
3. Membership dues, which falls under the category of funding as well, but also plays a different role in alumni relations
4. Current organizational structure described as a “staff versus volunteer-driven” alumni relations
5. Lack of connections between alumni and the University
6. Priority of alumni within University leadership ranks
7. Absence of students in alumni relations
8. Strengths of existing operation
9. Need for an alumni center
10. Absence of a seat at the head table

By consolidating and ranking according to priority and feasibility, we established the following five categories for our main assessment and recommendations:

**Partnership**

The Task Force believes that the University and the alumni body share responsibility for alumni relations. Therefore, both must partner in the management and goal setting required of a first-rate program, with the overarching objective of doing what is best for Rutgers University, and thereby doing what is best for the alumni constituency. Partnership roles must be clearly defined and respected, and planning, programming priorities and funding policies all agreed to by the alumni relations staff and volunteer leadership.

**Structure - Volunteer**

The Task Force concludes that a new volunteer structure is necessary to lead an enhanced program to a higher level of engagement.
Structure - Staff

A new structure for the Department of Alumni Relations will be required to focus more attention and professional skill on the core functions of alumni relations, and to work more effectively with its volunteer partners, and with all institutional colleagues that can contribute to effective University-wide engagement.

Funding Alumni Relations

The University should be responsible for adequately funding alumni relations as a line item in its central budget. The principal volunteer-led organization should in addition retain a small measure of financial independence. Eliminating the membership dues program and the encouragement of donations with a concomitant institutional commitment to funding alumni relations will send a message of inclusiveness to all Rutgers graduates.

Programming and Communication

Overall alumni relations content must be both expanded and upgraded to increase effective outreach, especially key areas like alumni education. In communications, for example, the alumni magazine should be sent to all alumni rather than just donors and dues-payers. The goal is to develop, design and implement a broad engagement portfolio that brings a more significant percentage of Rutgers graduates into the life of the University on a sustained basis.
VI. A NEW PARTNERSHIP BETWEEN RUTGERS AND ITS ALUMNI

Partnership

As noted, the University and its alumni body must both contribute to the management and goal-setting required of a first-rate program, with the overarching objective of doing what is best for Rutgers University and its alumni constituency. This partnership must be clearly defined; staff and volunteer leadership must agree to all planning, programming, priorities, and funding policies. The joint venture must be structured to provide regular contact and communication between the partners, beginning at the highest levels of the institution: the President of the University, and the Boards of Governors, Trustees and Overseers, and the leaders of the alumni body, and building on the very best volunteer traditions and leadership throughout the alumni body.

When partners understand each other and work hard to keep the relationship in good repair, they build trust and can move to predictably successful outcomes: the flow of communication between volunteer leaders of the alumni association and the University leaders becomes seamless, the flow of energy and good will across the partnership is constant and rich, and the results glow with energy, positive activity and ongoing success.

The Task Force concludes that a new volunteer structure must be created to achieve higher levels of alumni engagement. To be called the Rutgers University Alumni Association (RUAA), it will have a Board of Directors, and the Chair of the Board will be the leader of the alumni body, working in partnership with a Vice President for Alumni Relations (VP-AR) of the University and other senior leaders to effect a strong alumni relations operation.

The Rutgers University Alumni Association

As noted, the Task Force believes that a new, single, all-encompassing volunteer structure is mandatory if we are to accomplish an improved alumni relations program that supports a considerably higher level of engagement in the life of the University. In our deliberations, we paid careful attention to alternative options that might build on existing structural platforms such as the RAA’s, or the repurposing of the RUAF, among others. We concluded, however, that trying
to rebuild on any existing agency was sub-optimal, and that the opportunity to start fresh held the greatest assurance of success for the long term.

As the recognized University alumni organization, the RUAA will include all Rutgers graduates, encompass all three campuses, and include the legacy associations and all chartered alumni affinity groups. These constituent agencies would continue as chartered groups with a degree of “constitutional” autonomy, but also bound by the overarching mission of the University and the RUAA.

In anticipation of a multitude of questions about the RUAA as a Rutgers-wide alumni association, what follows here is a fairly detailed description of how the RUAA could work. These are intended as general precepts that embrace the principles of alumni relations identified in Section III of this report, and which must guide the formation of the successor structure that will prove critical to the goal of increasing and sustaining considerably higher alumni participation in the life of the University.

**RUAA Board of Directors**

The RUAA will be governed by a Board of Directors which functions in close partnership with University advancement leaders and President McCormick. The Board will have executive responsibility for the affairs of the RUAA, and for reporting to the new Rutgers University Alumni Council (described below) at its annual meeting.

The RUAA Board will be a group of leaders chosen by the Board’s Nominating Committee, the chair of which will be appointed to a two-year term by the Chair of the RUAA Board. Nominating Committee members will include the Vice President for Alumni Relations (VP-AR) as a voting member, members of the existing Board and an equal number of representatives selected from the Rutgers University Alumni Council’s current membership who are not and have not been members of the Board. We think these provisions will facilitate the regular turnover of fresh talent into positions of leadership within the alumni body—a principle of healthy behavior for volunteer organizations, which we strongly endorse. The makeup of the Board’s nominating panel shall seek to be reflective of the demographic makeup of the RUAA membership, to the extent possible given the importance of keeping the committee relatively small.
The Board itself will be made up of fewer than twenty voting members, including the VP-AR, who will also be chief operating officer of the RUAA. Again, this number is consistent with the dictates of organizational behavior concerning governing boards: 14 – 17 is regarded as large enough to ensure diversity of opinion and discussion, and small enough to ensure efficiency and productivity in carrying out its business in a timely fashion.

Board members represent all Rutgers graduates – both graduate and undergraduate – and do not serve as representatives of a particular affinity, school, unit, etc. Neither the Board nor the Council will be a parliament of chartered interest group delegates within the alumni family, but will strive always to be reflective of the diversity of the alumni body. We believe this concept is a major change in the way we have historically conducted alumni relations, but is fundamental to our success in advancing our goals for the future. Rutgers must have ever increasing numbers of alumni leaders skilled in the basic functions of alumni relations and intent upon leading the alumni body to new and improved success.

All three campuses will be represented, although, as noted, no members of the Board will serve as “instructed” representatives of, or be accountable to, any specific constituency, campus, college or other affinity group.

The Board will have standing committees representing the core functions of alumni relations (e.g. publications, regional activities, campus programs, alumni services, etc.,) each chaired by a Board member chosen by the Nominating Committee for proven ability and experience in that particular activity, as well as capacity to serve the entire alumni constituency. Board assignments will be made based on experience and expertise.

Board members will be the volunteer partners of the staff. The Board will focus its attention on goals and policies for effective engagement, confirming priorities for the Department of Alumni Relations, advising the institution’s governing boards about alumni interests and issues, managing volunteer leaders in all of the groups that make up the Council, and hosting the annual meeting of the Council to be held, for example, on the New Brunswick campus two of every three years, alternating every third year between the Camden and Newark campuses.

Members of the Board will be elected to serve a single three-year term. The Board will elect its own officers who will serve a two-year term. These terms will
allow Board leaders to take real responsibility for their actions and for the University’s engagement agenda. Upon completion of their terms, volunteer leaders will retire from the Board so as to encourage new talent, the lifeblood of any such organization. All Board officers, including the Chair and Vice-Chair, will be limited to one term to remove the temptation to hold on to excellent officers. Past chairs will be retired off the Board and may be utilized in other leadership posts, including ex-officio membership on the Council.

In this new era for Rutgers University, alumni leaders will share with University officers the responsibility for effective alumni relations. The Board Chair will be a public voice for the entire Rutgers University alumni body. The Chair will play a major public role traveling periodically with staff to meet with club leaders, and presiding over regional events sponsored by the RUAA. The Board leadership will have regular access to the President of the University and to the Boards of Governors, Trustees and Overseers.

The Board must have a strong sense of purpose and the best talent from the entire alumni body from which to draw its leadership. Alumni will take more responsibility and more ownership of the RUAA if they realize they have a genuine role in directing it. Their efforts are redoubled if they see that there is much responsibility and honor to be gained from their involvement. Peer to peer accountability is in the end much more influential than staff-driven directives, thus the advantage of advancing alumni relations toward increased self-reliance within a carefully prescribed system. Peer pressure, whether it is focused on raising reunion attendance, or improving communication among alumni, or increasing giving to the Annual Fund, is the secret weapon used by the most effective leaders in advancement, those who have made possible significant gains for their institutions.

*Rutgers University Alumni Council (RUAC)*

A new Council of volunteer leaders will be formed to allow for the considerable expansion of the number of talented and dedicated alumni meaningfully involved in the Association. As is the case with the Board, the Council will not and must not serve as a representative parliament of chartered interest groups within the alumni body, but will strive ever to represent the whole of the University including its alumni, and accordingly, to be reflective of the diversity of the alumni body. The Council will, however, consist of senior leaders from all chartered groups including the three campuses, classes, clubs, official affinity
groups (including the 19 legacy associations), and other shared interest groups. In addition to these leaders, the Council will include representatives from graduate and professional schools, and at-large members, elected/selected faculty, staff, and student leaders.

The Council’s size will be determined by the number of organizations active in the RUAA and could number several hundred when fully developed. Since responsibility for management of alumni interests will be vested in the Board of Directors, the ultimate purpose of the Council is to provide a periodic assembly to bring together alumni, University leaders, and representatives of the institution and Foundation governing boards to discuss matters of mutual import.

These convocations will update the leadership corps on the activities of the RUAA and its Board, brief alumni leaders on University agendas, and vice versa, and engage them with University officers, staff, and faculty on a variety of the key intellectual and educational issues of the day.

We envision that the annual assembly of the Council will feature training workshops and programs where volunteers share best practices and mentor their successors. The Council will also provide a regular occasion for the institution to recognize, reward and thank alumni for their ongoing support, and to honor them as the devoted workers playing their critical role in the success of a great institution. These summits will reinforce the University’s commitment to its alumni body and reaffirm its value and role in a way that is highly visible to the entire University community.

The annual Council assembly will expand considerably the number of talented alumni visible to University leadership. It will increase regular contact with the University officers and provide an invaluable opportunity for alumni leaders to meet and network with each other.

This face-to-face interaction with rising stars in the alumni body will provide a pipeline for the selection of leaders for key posts institution-wide. RUAA Board leaders may be drawn from volunteers tested through their experience in affiliated activities. Expanding the leadership corps in this manner and bringing it into contact with institutional officers will produce positive engagement that will ripple across the entire alumni community.
It is important to say at this juncture what is NOT being recommended. It is not recommended that alumni associations—with the exception of the RUAF—be disbanded in any official or legal sense. The affinities they reflect are natural, strong and beneficial to alumni relations at the University, and each legacy association brings important history, effective practices and collegiality to the new RUAA. (It may be that separate legal standing only remains useful in overseeing reserves or other resources, so flexibility here is important. In time, the legal status of these legacy groups may come to be seen as irrelevant.)

Concerning the issue of legal independence of the new RUAA, the new Association must continue to seek always to preserve the independent voice of alumni. But that goal is not to be confused with the issue of structural and/or corporate independence. The current structure features 20 organizations legally independent of the University, which are so heavily reliant on University resources and staffing that they should be more aptly defined as interdependent. Separate incorporation may still be useful to some in the new era, but those entities will bear the full burden of dealing with charters, regulatory compliance and annual IRS filings, since Department of Alumni Relations staff will be focused on engaging the entire alumni body in the life of the University.

A well-structured partnership must ensure as a core value that the objective views of alumni will be represented to the University in a timely and full manner. But it must be understood that, as the designated representatives of the alumni constituency, alumni leaders operate inside the framework of the institution, not outside, at the table, and not away from the table—they work for the good of the institution and not simply in the narrower interests of a segment of the institution that they purportedly represent. When the focus is on serving the University’s needs, the false issue of structural independence becomes irrelevant.

There are certain policies that the member groups would adhere to within the RUAA. For instance, the use of the data base and mailing lists, the collection of any fees, the use of the Rutgers University and the RUAA logo and name, the scheduling of the President for his alumni relations responsibilities, and the like would be governed by policies established by the partnership of the RUAA and Department of Alumni Relations.

Otherwise, it is not recommended that any rules or policies of the new Association be imposed on previously autonomous groups so as to homogenize the alumni body, as some have feared a single association could. The Rutgers
alumni council will be the place where existing legacy associations and the multitude of new shared interest groups will provide engagement opportunities, each a unique and significant element of the larger whole, and all bound by certain common needs and a shared goal of engaging all alumni in the life of the institution.

Chair of the RUAA Board of Directors

The Chair of the Board of Directors will be the elected leader of the alumni body, and thus will be its official voice during his or her two-year term in office. The Chair will preside over all official meetings of a newly structured Alumni Association and its Board. The Chair and/or the Chair’s designees will represent the Association at all events where it is important to have a presence and where there is an opportunity to build partnerships. The Chair of the Board plays a critical evaluative role with regard to the Vice President for Alumni Relations of the University, but does not supervise that person. He or she also has a supervisory or mentoring responsibility over the volunteers who serve the University.

What needs to be stated here clearly is that the Task Force believes that no alumni board should run alumni relations for its university, which must employ the same high level of professional management in this vital area as it does in development and communications. By the same token, staff must never make the mistake of trying to “do” alumni relations programs for alumni, rather than with the input and support of key volunteers.

Vice President for Alumni Relations (VP-AR)

The status of the Vice President for Alumni Relations (and the staff) must be redefined to reflect the key institutional role that alumni will occupy at Rutgers in the future. Rutgers graduates and the University itself must come to see the VP-AR as symbolic of the institution’s high regard for alumni. All alumni must understand that in this office they enjoy a pipeline to and from the institution’s leadership in the effective deployment of alumni talents and loyalty. To achieve this, the VP-AR (or whatever title deemed both reflective of the new role and appropriate within the University) should be closely aligned with the President of the University, either as a direct report or in a dotted-line relationship (see President of the University and President of the Foundation below.) The VP-AR
should also serve as a member of whatever group constitutes the President’s forum of advancement leaders for the University, thereby assuring regular and frequent access not only to the President but also to other University officers, deans and leaders.

The responsibility for the selection of the VP-AR of course rests with the University—the Vice President for Alumni Relations is ultimately accountable to the University President, not to an alumni board. The process of recruiting and evaluating candidates must include the active involvement of the senior leadership of the RUAA.

The VP-AR, in partnership with the Alumni Association, must lead Rutgers University alumni relations, working to achieve the broad goal of increased engagement and multi-faceted institutional support that forms the core of our recommendations. She or he will define and convey a strong engagement vision (developed in consultation with peers on the advancement team and with senior volunteer leaders) to professional staff colleagues and volunteers alike. The VP-AR will advance the many partnership opportunities (including student affairs, faculty relations, athletics, admissions, government relations and so on) that will multiply the University’s ability to move greater numbers of alumni through the steps of meaningful engagement.

Functionally, as a member of the University’s leadership team, the VP-AR will be charged with communicating in and communicating out: representing alumni views to the institution, and representing University values, ambitions and challenges to alumni, maintaining vital two-way dialogue so essential to any successful partnership.

The VP-AR must build a strong staff, training professionals to help lead the office into a new leadership/management role in which they perform as a corps of respected experts advancing and managing the key functions of alumni relations for the University.

Role of the VP-AR in the Alumni Association

The VP-AR serves as the point person in the partnership between the institution and the Alumni Association. As VP-AR of the University and chief operating officer of the Association itself, the incumbent shall sit on the Alumni Association
Board with full voting privileges. This relationship is integral to maintaining a healthy volunteer/University partnership.

**Department of Alumni Relations Staff**

The Department of Alumni Relations should be reconfigured as the central administrative home within the University for the planning and implementation of alumni relations for the entire institution. This would include oversight responsibility for the three campuses, all legacy associations and interest groups, regional clubs, plus any other officially sponsored alumni groups and activities, or those desiring to establish new initiatives.

Given the large size and diversity of the University and the alumni body, a certain amount of decentralization of programming and services is desirable and natural—witness the large number of enterprises and shared interest groups at Rutgers. Ultimately, however, there must be a strong central agency to coordinate direction and resources, and to offset natural disparities that arise among affinity groups in size, resources, and skill sets available for planning programs and activities. A strong center is thus a prerequisite for strong constituencies. By having a strong core administrative agency, Rutgers University will strengthen its connections with all alumni. The staffs on the Camden and Newark campuses will continue as senior level members of the DAR with the same access that all alumni cohorts enjoy, plus the autonomy that geographical separation requires for operating efficiency.

In the case of the professional and graduate schools, the deans and their chief advancement officers responsible for alumni engagement will be encouraged to forge strong ties with the DAR. But it is to be expected they will also need to act with some autonomy, especially where their local constituency interests and needs are unique. At the same time, the faculty and officers (and graduates) of these schools have much to offer to undergraduate alumni (and graduate alumni of other Rutgers schools and departments), and graduate alumni interests at Rutgers most certainly do extend well beyond their immediate school loyalties. It would be ludicrous to suggest, to cite but two examples of this observation, that no law graduates are interested in athletics, or that no humanities majors are interested in health care policy issues, so active liaisons and partnerships among these communities and staffs and the Department of Alumni Relations will benefit all, and must occur.
The Department of Alumni Relations will likely continue many of its current activities, but in a more comprehensive, visible and powerful fashion. Building upon existing programs such as existing alumni association volunteer and alumni recognitions programs, alumni engagement events and traditions such as Reunion and Homecoming, the Department of Alumni Relations will work with the RUAA and the RUAC to bring those valued traditions to the entire alumni community. It will aggressively represent the entire institution, utilizing an integrated organizational structure. Staff will focus on managing the core functions of alumni relations that support all alumni and their affinities, rather than administrative support of the legacy associations or groups: communications via print and online, student-alumni relations, core events and activities including leadership convocations and workshops that help attract attendance throughout the system, volunteer leadership training, awards, etc. Staff will oversee the database, marketing and pricing of events and services, the development of a larger, more vibrant national and international network of clubs, and the design of strategies and tactics for deploying central institutional resources including the President, the faculty, and other senior leaders.

Staff professionals will provide valuable guidance to chartered alumni groups as part of the mission of the Department of Alumni Relations to nurture and support all alumni, including new affinity initiatives that are in the best interests of the University. A dedicated reunions team would define objectives for annual reunions, determine scheduling and key components, enlist presidential and faculty participation, and be responsible for marketing. Staff will partner with volunteers representing constituencies such as classes, schools and interest groups to assure that participation increases, highest quality activities are offered, and resources are used to maximum effectiveness.

In the next few years, the Department of Alumni Relations will need to supplement its skill set, which is currently focused largely on event-planning and committee support, with training in motivational and entrepreneurial skills—training staff members to engage alumni. More staff may be required, but re-organizing existing staff as specialists in functional areas such as reunions, class and shared interest groups, regional programming, students and young alumni organization and activity, University outreach to alumni, etc. should produce greater efficiencies and professionalism.
President of Rutgers University

The President of the institution is the leader of the University community, which includes, of course, its alumni body. In the same sense, he is also the chief manager of its assets, of which the alumni constituency is one. As such, he must regularly articulate and reaffirm the role of alumni in the institution and invest in the health of the alumni body to preserve and enhance its value as a significant asset to Rutgers. He and senior officers of the University play a unique role in helping all members of the Rutgers community understand and value the important role of alumni in the life of Rutgers, and in assuring that alumni feel valued and useful.

Engagement begins when alumni enroll as students. The President leads the effort to help Rutgers students develop institutional awareness and loyalty, a sense of place and time, and an ethos of lifelong caring about and service to the institution—virtues of citizenship that will benefit alumni relations.

The President regularly presents his vision to alumni and solicits their views as well as their support. His time is focused not just on the few who will make a difference to the fund-raising totals. By spending time with all alumni, the President acknowledges that they matter to the University and gives shape and purpose to their participation and support. His attention to them, his reaffirmation of their role, and his effectiveness in gathering alumni together—these are things no one except the President can do as credibly and well. His role is as singularly critical as it must be tireless, driving the change in attitude that will help to raise participation and support.

By his action in creating the Task Force on Alumni Relations, President McCormick has already signaled that he understands the imperative for change in the way Rutgers embraces its alumni, and we are confident that he will continue to provide strong leadership for the improvements we propose. From speeches, correspondence, magazine essays, including an annual letter to the entire alumni body, and all other possible communication options, all alumni need to understand that they now are seated at the table, with all the rights, privileges and responsibilities that their Rutgers degrees encompass.

As noted, one tangible expression of the new era of alumni involvement at Rutgers, the President should establish a close relationship with the VP-AR either as a direct report, or at a minimum, via a dotted line, but which brings him regularly into close contact with the VP-AR of the University to symbolize his
direct responsibility for and interest in enhancing the alumni constituency’s effective participation. (See, President of Foundation below.)

Board of Governors, Board of Trustees, and Board of Overseers

The Board of Governors and the Board of Trustees of Rutgers University occupy the peak of the volunteer pyramid. As the principal governing boards, these agencies must include the oversight and support of alumni relations as a significant element of their responsibilities for every core activity of the institution. Governors and Trustees play a key role in propelling the entire advancement enterprise toward success, and have a special leadership responsibility for assuring the achievement of the changes we propose. Similarly, the Foundation’s leadership group, the Board of Overseers, must also actively be engaged with alumni relations as it is with all aspects of fund-raising.

We specifically recommend that a joint committee on Alumni Relations of the Boards of Governors, Trustees and Overseers be appointed. Its members should include the Vice President for Alumni Relations, the Chair of the RUAA, as well as the Chairs of each respective board. In this way the University and the Foundation serve notice that alumni play a critical role in the life of the institution as well as in fund-raising success.

We propose additionally that one or more sitting members of the Governors, Trustees and Overseers serve also as active ex-officio members on the Board of Directors of the RUAA.

President of the Foundation

As the University’s principal advancement officer, the President of the Foundation must build and manage an organization that will demonstrate its regard for alumni and the critical importance of an integrated approach to all three disciplines in advancement: Alumni Relations, Development and Communications.

We recognize the natural and relentless pressure caused by the University’s ever-increasing need for resources. This pressure energizes advancement and should produce on-going success. But, if fund-raising is allowed to drive all decisions regarding advancement, insufficient time is taken to build the infrastructure of
long-term relationships that will promote sustainable giving. Fund-raising becomes transactional rather than relationship-based. Ultimately, it seduces a university into focusing exclusively on short-term goals and solutions. The comparable dynamic in industry is a preoccupation with present quarter earnings per share at the expense of long term planning and investing. Allocating time and resources to alumni relations also has an educational institutional analog called basic research.

The Foundation President must demonstrate that a strong alumni relations program is not only of value in and of itself, but critical to successful fund-raising. The existence of this Task Force and the participation of the Foundation President both testify to the fact that the incumbent understands that role. The Foundation President must join the President of the University in reinforcing support for alumni relations as one of the integral elements of advancement. Organizationally, the Presidents must elevate this key division to its proper visibility across the University. Actions by Foundation leadership must continually reaffirm the University’s regard for all alumni, beginning with an advancement team that is organized to make more effective alumni relations an achievable goal. We recommend as a vital step in proclaiming the importance of alumni relations that the VP-AR have an official reporting relationship to the Foundation President that complements his or her relationship with the President of the University—as noted earlier. In their roles as the two ranking advancement officers for the institution, both Presidents must work very closely with the VP-AR. Practical considerations will need to be factored into these critical reporting relationships, but the point remains: alumni relations must be raised to its proper role in the organizational hierarchy of the institution.
VII. REALIGNING STAFFING FOR EFFECTIVE ALUMNI RELATIONS AT RUTGERS

We strongly endorse the concept that the principal focus of alumni relations at an institution is and must be on its core functions (see below). By working to strengthen the basic components of alumni relations, a University achieves optimal effect in its advancement program: staff and their volunteer partners develop expertise, planning can be done system-wide and with significantly greater consistency, best practices are more easily shared, and there is an important degree of accountability coupled with the necessary resources to accomplish a broadly enriched level of engagement institution-wide.

A function-driven Department is one of our most significant recommendations, and stands in sharp contrast to what has been the practice historically at Rutgers where staff have been required to focus on the various legacy associations and the RUAF and their separate (and often conflicting) priorities. The results as we have discussed throughout the report, speak for themselves.

Going forward, the lion’s share of organizational design, priority-setting and program implementation revolving around core functions will properly be, in close consultation with the new RUAA Board, the responsibility of the VP-AR and staff).

The “core functions” include: student and young alumni relations, class and other alumni shared interest groups, programs and events on campus for all alumni, off campus (outreach) organization and activity, advice to legacy and special interest cohorts and customer service to alumni cohorts and individual alumni, communications and the application of technology, etc. Of course, priorities will change as the new enterprise evolves, and new initiatives will be added to the mix, as less effective activities are retired. This is the nature of dynamic and opportunistic alumni relations at its best.
VIII. FINANCING A SUCCESSFUL ALUMNI RELATIONS PROGRAM

The University has under-invested in alumni relations for most of its modern history. The single most important step the University must take to reinvigorate its alumni constituency and to redefine the relationship between the institution and the graduates is to provide necessary resources for a robust program. The Department of Alumni Relations must be able to depend on stable funding, and to control the allocation of its budget with input from the Alumni Board, remembering that ultimate discretion for all University budgets rests with the Board of Governors.

In addition to the principle of committing permanent funding for the DAR and its portfolio, we endorse the concept of earmarking independent funding for the new RUAA Board to use for one time needs, to support innovative engagement ideas, and to respond to partnership proposals generated by the legacy, regional and special interest groups. The funding would come from outside sources, such as a modest percentage of royalty fees from affinity cards and the like, which we discuss below.

The Task Force further recommends that the University, as an act of good faith and increased commitment to alumni, budget an especially significant investment during the start-up period—the next three to five years, to demonstrate its new commitment to alumni, encourage the development of strong mutual trust and good will, and assure the expansion of much-needed programming.

University Budget

As a fundamental institutional activity, the Department of Alumni Relations will continue to be funded as a line item in the University’s operating budget. We are guided by the reality that an alumni relations program will never be stable if it must depend on independent funding from sources outside the university to make its budget, and that in such an instance, it will have to devote some of its resources to the business of making budget, rather than engaging alumni. We believe the history of alumni relations at Rutgers bears this out.

While we would normally defer to the University’s leadership on internal budgeting matters, we feel obligated to state that incremental and continuing
investments must be significant enough to accomplish the Department’s programming, service and engagement missions (and requisite staffing), and to allow the University convincingly to proclaim a new level of commitment to alumni relations, and with it, the start of a new era of trust and cooperation.

Consistent funding will enable the staff to do significantly better forward planning and will provide a measure of stability to alumni relations that it does not now have. The alumni constituency needs to be reached, served and effectively engaged on an ongoing basis, and the institution needs to provide the financial wherewithal to accomplish this vital goal.

**Annual Fund**

Henceforth, solicitations by the Annual Fund of Rutgers should include all former dues-payers who will be provided the option to designate their tax-deductible gifts for the expressed purpose of supporting alumni programs and services. We cannot predict at this point how much money will accrue to the budget as a result, but we know that over the long term, annual fund gifts have far greater upside potential than a dues program, and will lead to increasing revenue for alumni relations. This is so because dues can only be increased periodically (by small increments) whereas the pattern of a successful annual fund is to encourage more generous giving over an equivalent time period.

The difference in psychology here is profound when compared to any other funding model: alumni are being asked to support a vital University function rather than an independent, narrowly focused alumni association. And should they choose not to donate to the Annual Fund, they are not barred from holding a stake in the University.

Also, gifts that replace dues would obviously be counted as Annual Fund participation, thereby improving the percentage of those who give to Rutgers. The money would all flow into the University budget and there would no longer be any formula distribution to legacy groups. The University would of course be bound to use donations targeted for alumni relations as part of its budget support for that office, just as it honors other gift covenants.
Credit Card and Related Partnership Revenues

A second source of funding for alumni relations—to flow into the University’s budget—is income from credit card and other third-party partnership revenues. While the bulk of this revenue will be assigned to the Department of Alumni Relations programming budget, a modest portion of these funds should be earmarked for the RUAA, both for the entrepreneurial opportunities that may arise apart from regular budgeting cycles and to allow a degree of flexibility that may not pertain to elements of the central institutional budget. While the mechanics need further definition, the guiding principle will be that monies collected from any source be expended on the goals of building engagement rather than stockpiling reserves.

Using the University’s name on the credit card and other third-party activity provides the real value for alumni who sign up for these offerings. Any agreement regarding revenue disbursement has to recognize this fact.

Legacy Endowments and Reserves

We note that certain associations now have accumulated resources of varying amounts. In the new era of alumni relations, the legacy associations would continue to oversee accumulated resources through careful stewardship to increase their constituency engagement, and accomplish specific goals such as scholarships.

The sizeable reserve of the RUAF is a different matter because of the large amount of its invested funds—approaching $4 million—contributed by alumni largely through vendor partnerships over the years. Since the RUAF is required to pay out its reserves to the 19 alumni associations in the event of its dissolution, those reserves represent a special and unique opportunity that would benefit all alumni. As we will note below, we urge the RUAF and the 19 alumni associations to reassign the funds to the University either as endowment for the Department of Alumni Relations, or to fund the construction of a dedicated Alumni Center. The case for such a Center is addressed in the next section of this Report.

The associations of Camden and Newark campuses would follow the same financial procedures as other affinity groups. They could collect activities fees,
but not offer memberships or limit programs to donors, and would still receive the majority of their funding from the University’s general budget support.

While there are undoubtedly some wrinkles not accounted for in these recommendations about funding, we restate the key principle: the University must provide and control the allocation of resources that fund alumni relations staff, programs and services for all alumni. The RUAA, freed of the burden of funding programs and services, would no longer collect or manage dues. It would focus entirely on raising the level and quality of alumni engagement to a world-class status.

Membership Dues

The Task Force recommends that the practice of charging membership dues to join any association be ended permanently and immediately. The premise of our recommendation is that alumni of the University should automatically be members of the RUAA upon graduation, entitled to all the rights and privileges of such status, and responsible for the duties and obligations that come with their new status in the institution.

The loss of dues revenue will result in a sizeable shortfall, at least for the near term. We believe that this income can be replaced and subsequently increased by the following means:

- increased investment by the University in alumni relations as a line item in its budget;
- increased vendor revenues (although the upside potential here is not automatic);
- Annual Fund solicitation for designated gifts;
- changes in programming and staff assignments that lead to greater efficiency and more attractive and expansive content, much of which can be provided on a break-even basis; and
- reasonable charges for alumni events and services that will enable the majority of programs to become largely self-supporting.

To reiterate: gifts that replace dues would obviously be counted as annual fund support, thereby improving the percentage of those who give to Rutgers. The money would all flow into the University budget and there would no longer be any formula distribution to legacy associations, or affinity groups. The
University would commit to use donations targeted for alumni relations as part of its budget support for that office, similar to restrictions on other designated donations. The University must also avoid the temptation to reduce its base budget allocation for alumni relations in years when annual fund donations and other revenues may exceed expectations. The Task Force recommends that budget support provided by the University, while an internal prerogative, be reviewed annually by a joint committee of the partnership to include the VP-AR and the Treasurer of the RUAA.

Alumni groups like the legacy associations and regional clubs would, of course, be allowed to charge nominal program and event fees to support their separate activities, as many do now.
IX. NEW ERA PROGRAMMING AND COMMUNICATIONS

The partnership between the Department of Alumni Relations and the RUAA must guarantee more broad based engagement of Rutgers alumni—to the University and to each other—for Rutgers to be able to raise the energies and commitment of this key stakeholder group. It was outside the scope of this Task Force to conduct a comprehensive audit of current offerings of programs and activities. We believe, however, that the potential for vastly increased engagement opportunities and benefits that accrue from a truly diverse set of programs is now compromised by the complications imposed by the flawed structure. The Task Force believes that it is properly the work of the DAR and the RUAA to assess carefully the existing programs as well as activities in regional clubs, and shared interest groups including associations, classes, and other affinities.

Listed here are some general precepts the Task Force concludes will achieve the goal of providing multiple programs for engagement.

General Programming

There are vital areas of opportunity which include the addition of alumni education programs; expanded, more structured student-alumni opportunities including activities from first year orientation on through the course of their undergraduate experience; a larger, richer core reunion program built around a veritable festival of University life; a vastly expanded agenda of outreach programs both bringing alumni back to campus and traveling to alumni across the world; and an agile volunteer engagement unit to match alumni skills with institutional needs. Three programs in particular offer unusual return on investment: student-alumni events and activities, alumni admission work, and an expansive reunions festival of University life.

Student Alumni Relations

It has become standard wisdom in the profession that alumni engagement begins with students. We are aware that alumni surveys show a high correlation between those alumni who have positive memories of their student years and their later involvement with their university. Commuter campuses offer special
challenges, but, as noted, student “neighborhoods” form wherever there are students, and the nature of these experiences is critical to the successful student experience that becomes the basis for active alumni. In other words we must attend to our students with an eye toward their future as alumni, ensuring that by the time they graduate, they have been inculcated with the right values, a sense of service to the institution, and a feeling, no matter how vaguely defined, that they will be connected to the institution for the rest of their lives.

We salute the University’s latest efforts to improve the quality of the student experience, witness the monumental decision to transform undergraduate education. President McCormick has also begun a plan that seeks to enhance the environment of each campus as a special place to be proud of and enjoy. He periodically sends out e-mail blasts to the student body across the three campuses to inform them of issues, and to solicit their views, a practice that many students are aware of and commend.

These are all to the good, but considerably more needs to be and can be done. For example, the planned consolidation of orientation offers an opportunity for ceremonial connection of entering students with alumni organizations, something that already occurs in isolated instances like Douglass College. Best practice places have multiple ways of accomplishing this task of “locating” current students in the long line of alumni stretching back in time.

To explore opportunities, we suggest that a special committee of the RUAA should be formed to study possible programs in student-alumni relations and report back within a six-month period with a set of recommendations and a timetable.

*Alumni Admission Network*

The Department of Alumni Relations and the RUAA, in conjunction with the University’s Admission Office should expand its alumni admission network, a basic activity that provides both increased student talent as well as a natural seedbed for young alumni involvement in the University. The current undersized Rutgers Admission Volunteer Information Network (RAVIN) as exemplified by its operation in South Carolina, offers at least one instance worthy of expansion and emulation.
A vastly expanded system would benefit from being managed jointly by the Undergraduate Admission Office and an RUAA committee on alumni admission volunteers. We recognize and endorse the fact that the Undergraduate Admission Office on behalf of the University must retain full responsibility for admission decisions and all pertinent policies and practices, including the training of alumni volunteers.

The RUAA also has a role to play in the recruiting, training and monitoring of the alumni “labor force.” Alumni, especially recent graduates, can be excellent representatives of the University in the fiercely competitive process of trying to identify and persuade top students to consider Rutgers University.

**Reunions**

The RAA, AADC and Camden campus each host reunion programs that could well serve as models for the entire University. All such Reunions should be consolidated into a single University Reunion Weekend on each campus, when all constituencies schedule individual reunion activities around a core program developed by the Department of Alumni Relations and the RUAA Committee on Reunions. Reunions should be one of a handful of key institution-wide events each year, calling on the entire Rutgers community to welcome the alumni back to the campuses. The powerful effect that successful reunions can have on engaging the entire University family in alumni relations, and in inspiring alumni connectedness is magical as evidenced elsewhere.

**Individual Alumni Affinity Programs**

It would be wrong to assume as some have that the creation of a single alumni association will mean the end of individual legacy association programs and activity. The ultimate strength of alumni relations will depend on all alumni affinity groups sponsoring individual programs and events as well as supporting the general alumni programs of the University.

The major programs described above will make the whole University available to alumni and thus enhance the attraction for many alumni of individual programs without interfering or competing with such programs. For example, rather than individual associations having to organize separate reunions, they will be able to supplement their offerings with a core University program planned by the
Department of Alumni Relations and the Board’s Committee on Reunions. In short, every alumnus/a can select from a comprehensive menu of affinity and institution-wide offerings. This will result in a division of labor that takes advantage of staff and volunteer skills that optimizes use of time and resources.

**Regional Clubs**

Every alumnus/a of the University ought to be served by at least one official Rutgers University alumni club or regional representative. We should expand the club network by adopting the proposition that wherever Rutgers alumni want to organize, they should be encouraged to do so. The goal should be to have clubs (or regional ambassadors where the number of alumni is smaller) throughout the world, all linked together through effective communications (especially electronic) and through periodic contact with staff and University leaders.

A strong club organization provides the means to capture the momentum and spirit created by a visit from the President or other University dignitaries. In large cities where there are significant numbers of alumni, no year should pass without a regular visit from the President and/or a senior leader of the administration or faculty. Indeed, the President’s travel schedule should regularly feature six to eight such visits a year, revisiting vital areas, but always adding to the mix of cities to reinforce the fact that Rutgers University is a world-class institution.

Periodic regional conferences—even within state—should be scheduled—at least one per year—to feature the President, senior leadership and outstanding faculty in a variety of presentations combined with a short social event—a compact, but comprehensive, fast-moving one-day program that periodically puts Rutgers front and square in the faces of alumni around the state and world.

Consistent with the principle that alumni volunteers seek real decision-making roles in their organizations, and are the most effective recruiters of their peers, it follows that legacy organizations must become more self-reliant as a strategy for increasing engagement, regional clubs must support themselves, govern themselves, elect their own officers, continue to fund their own programs by charging fees for alumni activities and services, and so on. Staff will provide a template for organization and operation, and the necessary basic training,
guidance and limited resources for special needs and opportunities, such as supporting the formation of a fledgling club.

A greatly expanded, newly vigorous faculty speakers program should be instituted to enrich the offering of alumni programs both on and off campus, and show off the extraordinary range of faculty talent.

Classes and Shared Interest Groups

The “neighborhoods” that students formed on campus are often the precursor of shared interest groups that in some cases, like Rutgers College, are bound by the shared experience of going through the University at the same time—as a class or cohort that distinguishes it from other shared interest groups. Every undergraduate alumnus has a broad, uniform class numerals reference point on which to peg his or her Rutgers University experience. Much more needs be made of the potential of these cohorts as units of organization for alumni, especially as the University implements the new undergraduate education plan.

A team of staff responsible for class-based activities should provide expertise and support for classes and shared interest groups, working with them to help them become active organizations.

Another form of alumni organization at best practice universities is “shared interest groups:” an alliance of African-American alumni, of Gay-Lesbian alumni, of Wall Street alumni, of business women alumni, of alumni lawyers, Caribbean alumni, etc. are examples of such groups at Rutgers. There are countless opportunities to expand this catalog and this should be encouraged on the principle that an alumnus or alumna who feels some kinship with a particular cohort that is viewed as a part of the whole, is more likely to embrace the whole.

Programs that involve alumni in the activities of Athletics, Admissions, and Career Services, not to mention Student Affairs, offer increased engagement opportunities and thereby leverage positive alumni energy and feeling for the University.
‘Rutgers Magazine’

The Task Force believes that a fundamental requirement for increased success across the broad front of University advancement depends on communicating in some form with all alumni no less than once a year. We see the Rutgers Magazine as the linchpin in that effort and recommend that the magazine be paid for by the University and published four times a year, especially during the upcoming campaign, and that it be sent to the entire alumni body. While it would be ideal to send all issues to all graduates, it may be necessary to think in terms of sending one or two issues a year to all alumni. Employing some of the fees gained from credit card and other vendor sources would seem like a logical step to explore in making this happen.

Oversight of the magazine should move to the Department of Alumni Relations as long as the Department can provide the professional expertise and experience required to produce a first class periodical. Whether housed within the Department of Alumni Relations or elsewhere, the VP-AR should have ultimate discretion over the design and content of the magazine as the main vehicle of alumni communication. The volunteer editorial advisory committee needs to include alumni professionals in journalism, communications and marketing.

Regarding magazine content, the alumni notes sections should be changed in accordance with the new era of alumni relations: the pages devoted to RAA class notes should be integrated with those devoted to other legacy alumni association notes and organized by year of graduation so that alumni hereafter are seen as members of the University family rather than only individual colleges or schools.

President’s Column

We strongly recommend that the President of the University write a column in each issue of the Magazine. Each column could address a particular key issue, or provide a unique opportunity to spotlight an eminent scholar, exceptional student or student activity, or an acclaimed alumnus. The column should be directed at alumni readers and seek to open up a line of communication between the President and them.
**President’s Annual Letter**

We strongly recommend that the President also write an annual letter reporting on events of the past year and previewing the coming year. The letter along with the magazine columns should encourage communication with the President by listing his email and postal addresses. The effect of this gesture would reinforce the University’s new regard for alumni as partners in the life of the institution.

**Web-Based Communications**

Transformational developments are occurring every day in the creation and use of online communications in alumni relations. As a powerful tool for reaching alumni, e-mailing is now widely used—witness Rutgers’ monthly Alumni E-newsletter—and has proved effective in connecting with alumni of all ages, particularly more recent graduates.

One finding from the alumni survey commissioned for our work indicates that a quarter of those alumni who receive the Alumni E-newsletter are not aware that they do so, an astounding fact that speaks to the need to re-examine both the design and content of the product. E-mail proliferation and junk mail filters make it imperative to keep this significant pipeline in the forefront of relevant design and content.

We are pleased to report that Rutgers’ online community is already receiving a fresh look from the perspective of alumni users, in particular how to link all alumni affinity groups to a single site, as a way to promote the whole of the University and simultaneously reflect its diversity. Again, it is beyond the scope of this report to do more than recommend increased attention and investment in this area. Involving younger alumni who work in the field of electronic communication, on a committee of the RUAA would provide an example of effective engagement of volunteers based on expertise.

The campaign for alumni e-mail addresses must continue relentlessly, and in perpetuity. The Department should consider various incentives for generating e-mail responses—small Rutgers mementos, for example.

While we have stressed the need to increase the effectiveness and coverage of electronic communications, certain alumni still prefer that their contact from the University come to them on paper—through the mail. It is likely, for instance,
that a majority of alumni will prefer to read the *Rutgers Magazine* in hard copy format for some time to come.

**Alumni Center**

No single visible act by the University would move alumni relations forward faster than for the institution to declare now its intention to establish a well-located alumni center, whether a new and separate building to be constructed on land that the University might set aside now, or a newly created significant space in an existing building. It should be a place that proclaims the University’s esteem for its former students—that symbolizes the critical place of alumni in the life of the institution and lends itself to visits by former students seeking some sense that their time at Rutgers is part of the University’s cherished history. An alumni center should also provide a natural link to students or perhaps admissions. It would be advantageous to be centrally located as part of campus life, a place that draws in all of the diverse elements of the University with meeting rooms not only for alumni, but also for student groups, and faculty and staff receptions and events. In other words, ideally, an alumni center would be integrated into campus life although it would still retain its primary role of serving alumni.

Such a facility is not a substitute for sustained investment in alumni relations programming, staffing and governance redesign. But best practice places do employ alumni centers as a way of reinforcing and augmenting their investment in alumni relations, and we urge University leaders and the new RUAA board to set in motion a study team to explore site and funding opportunities for centers in New Brunswick/Piscataway, Camden and Newark open not only to Rutgers graduates of the respective campuses, but to all alumni. As noted, the Federation and those legacy associations with reserve funding might take significant satisfaction from investing in a potential launch fund for this ambitious undertaking.
X. IMPLEMENTATION OF TASK FORCE RECOMMENDATIONS

In looking ahead to next steps, we note that this report is a set of recommendations to the President of the University, and that he will consider our advice from the perspective of what is best for the whole University. We interpret our mission, however, to permit us to offer some suggestions about how Dr. McCormick might proceed from here.

Vetting the Report

We strongly recommend that the President circulate this report to a representative array of University stakeholders including alumni, for the purpose of eliciting further input and ideas that will almost certainly inform our findings. At the outset, we believe it will be advantageous for the President to refrain from declaring any particular bias toward the report so as to elicit the fullest possible benefit of the report’s circulation.

We further suggest that responses be encouraged promptly, and within a designated response period. The primary goal should be to learn the issues and concerns that will affect the strategies and tactics to be employed in implementing those recommendations the President finds appropriate.

Oversight of Implementation and Monitoring of Issues and Progress

Once the vetting process is completed, the President should move forward with those recommendations he supports, again in a prompt and demonstrative manner that reinforces the University’s long-term commitment to alumni relations.

Specifically, he should first designate and empower a smaller implementation team of the Task Force, perhaps numbering between five and seven people to include the VP-AR, to implement recommendations to be put in place.

During the next two academic years, the entire Task Force should be reconvened at six-month intervals to hear progress reports from the implementation team and discuss any open issues. The Task Force should be disbanded no later than August 2009.
Timetable for Implementation

The first order of business for the implementation team should be to announce a timetable for its work. We strongly recommend that the changeover to a new system occur as soon as possible and in any event, within a year of its being chartered. We see no virtue to be gained from any extended transition period; postponement could diminish the achievement of much-needed improvements for Rutgers and its graduates.

Funding Recommendations

The dues campaign for the coming year 2008-2009 should be cancelled with appropriate fanfare; this will require the University to step forward immediately to cover the shortfall. The credit card revenue and other vendor revenue flow should begin to flow immediately to the University in the determined formula, e.g. 90 percent to the Department of Alumni Relations budget and ten percent to the RUAA.

We suggest that an appropriate act of magnanimity from the RUAF and its 19 member associations could be delivered by assigning their reserves to the University to be designated for the Department of Alumni Relations budget, or a new alumni center. Such a vote of confidence going forward would generate a clear message to the alumni body and help ensure the successful launch of the new Rutgers University Alumni Association. This action should be completed by the start of 2008.

Structural Recommendations

The implementation team would draft operating by-laws for the new RUAA, which would include the VP-AR and a small group of alumni leaders to create an interim RUAA Board, including a designated chair who would agree to serve as a founding statesperson for a specified transition term, at the end of which the normal process for electing officers (as specified in the new by-laws) would begin. The goal is to have the transition complete within 12 months or sooner, to be followed by the first meeting of the RUAC.

In recognition of their talent and experience, all current and past alumni leaders of the RUAF and the 19 alumni associations as well as alumni of other affinity
groups who so desire will be considered for membership in the new RUAA Board, Council, and its committees.

The RUAA Board will need to develop a mechanism to charter legacy associations, regional groups and other affinity interests. We suggest that President McCormick make available the services of University counsel to advise any incorporated organizations about options for maintaining reserves or endowment, and related compliance issues.

Internal Organizational Changes

The President and the Foundation should complete internal organizational changes that will ensure the success of this whole venture in a timely manner. The VP-AR should be charged with preparing a business plan (and staffing needs) for prompt consideration by appropriate institutional officers.

Informing the Alumni Body of Changes

By January 2008, the Task Force recommendations and a report on progress to date should be announced in the Rutgers Magazine and online, with follow-up reports as pertinent in subsequent issues. We recommend also that the President mark the occasion by delivering a major address or paper announcing the new era of alumni relations.

Following this timely schedule, the changes advocated here should begin producing increasing engagement for Rutgers almost immediately.
XI. APPENDIX

President McCormick’s Charge to the Task Force

Sub-committee Reports
- What Rutgers Should Do for Alumni
- What Alumni Will Do For Rutgers

Advancement Cycle

Resource List
(The documents listed below are available from the Department of Alumni Relations upon request. Please contact Angela Green at agreen@winants.rutgers.edu with your request.)

- eAdvancement Alumni Relations and Alumni Engagement Survey Reports
- RUAF Alumni Benchmarking Study
- RUAF Ad Hoc Alumni Associations Study Committee Findings
- Remarks from the June 11 meeting with the Alumni Task Force, RUAF and Alumni Association Presidents
- Rutgers Alumni Association Presentation to the University Task Force on Alumni Relations with Research and Data
- Proposal from Task Force Member Gregory Bender

Dear Alumni Task Force Member:

Thank you for agreeing to serve on the Alumni Task Force, a group whose recommendations will help Rutgers’ earn its place in the top tier of American comprehensive research universities. Just as we have been working to improve the student experience at Rutgers, the University must also review its alumni relationships to ensure that the alumni experience is a model of excellence. The University must understand and serve the needs of its alumni just as the alumni should help to advance the University.

The overall goal is for Rutgers to have an alumni program that is a national model for alumni loyalty, involvement and advancement of the university. To achieve this high standard, Rutgers alumni programs should:

- Offer activities and events that will meet the needs of a diverse alumni base. For example:
  - Provide and market outreach programming for specific groups.
  - Communicate with all alumni by using all forms of media and tailoring messages to specific groups.
  - Develop career and social networking opportunities for Rutgers’ graduates to demonstrate the value-added worth of being an active and supportive alumna/us, especially among Rutgers’ most recent graduates.
  - Cultivate employers to hire Rutgers graduates and use this network to provide on-site employer alumni engagement.
  - Develop student, particularly undergraduate, appreciation of the benefits of being Rutgers alumni.

- Deliver a unified message that inspires loyalty and affection for Rutgers and pride in its academic and athletic accomplishments.

- Engage the alumni body so that it is poised to provide the financial and advocacy leadership and support necessary to advance the institution's mission.

- Seize every opportunity to elevate the University's image and instill pride within the greater university community of students, faculty, staff, alumni and parents, as well as among the citizens of the state.
Over the years, Rutgers University alumni relations programming has evolved to reflect the structure of its undergraduate and graduate colleges and schools. The resulting alumni experience, while playing an important role in cultivating alumni loyalty and affinity to their respective schools and colleges, has not been conducive to building broad-based institutional support. Loyalty and affinity for Rutgers are critical to the University's future success in garnering support and recognition from the citizens and state of New Jersey.

Alumni play a key role in connecting the University’s expertise, programs and research with the communities and organizations with which they are involved and connected. An alumni body can provide the leadership needed to present a compelling case that Rutgers adds value to the lives of New Jerseyans and is an important partner in their state’s future.

I ask that the task force have a broad vision of Rutgers that will bring the changes we seek. In making its recommendations, the task force should consider the following:

- On the New Brunswick campus, a major reorganization of undergraduate education will soon transform the student experience. The current University alumni structure does not reflect the new Rutgers structure.
- There are 18 individual alumni associations and the Rutgers University Alumni Federation staffed by the RU alumni relations department. The 19th association, the Douglass Alumnae Association, while part of the RUAF, has its own alumnae relations staff.
- There are currently 23 alumni relations department staff persons on three campuses supporting Rutgers’ 353,000 alumni.
- The Rutgers Alumni Relations Department receives its operations and salary funding from the University.
- The Rutgers Alumni Relations Department receives its program funding from the Rutgers University Alumni Federation.
- Several studies over the years have recommended that the University and its alumni come together in support of common goals for Rutgers. Most recently, in 2005, the consulting firm Marts & Lundy noted that the number of independent alumni associations leads to confusion, inefficiencies and ineffectiveness in the delivery of alumni programming and services.
- The University intends to launch a capital campaign with a goal of $1 billion or more. The key to a successful campaign is an alumni body that is engaged, enthusiastic and ready to support its alma mater.
- New leadership in the Foundation and the Department of Alumni Relations and the creation of the External Programs Department at the Foundation provide an opportunity to develop a common vision of support for Rutgers through its alumni.

In consideration of these facts, I charge the Alumni Task Force with achieving the following objectives:

1. Using institutions with renowned alumni programs (e.g., UNC, UT-Austin, UC Berkley, Penn State, Michigan) as benchmarks, determine best practices and how they can be implemented to help Rutgers achieve its goal of being a national leader in alumni relations. The review should include the following:
a. What are the key elements of a mutually beneficial relationship between the alumni organization and the University?
b. How are alumni programs funded?
   ▪ What is the role of a membership dues program?
   ▪ How can membership dues programs be made most effective?
   ▪ What affinity programs are available to alumni organizations and what levels of funding can be expected from them?
   ▪ What other sources of revenue are available to support alumni programming?
c. What do alumni expect from the university and from its alumni relations programs?
d. What do alumni expect to give (in time, money, support, etc.) to the university and its alumni relations programs?
e. What does the university expect from its alumni?
f. What are the best ways for the university to serve its alumni and for the alumni to serve the university?

2. Develop recommendations with clearly defined outcomes for alumni engagement with the University.
3. Develop recommendations with clearly defined outcomes for how the Rutgers University Alumni Relations program should best serve its alumni.
4. Recommend an organizational and funding structure that will provide Rutgers with the tools to become a leader in alumni relations outreach, engagement, programming and support.

Eugene O’Hara UCN ’62 has agreed to chair the task force and Gerald Harvey RC ’72 will serve as its vice chair. The task force will be staffed by Brian Crockett, Vice President for External Programs of the Rutgers Foundation, and Donna Thornton, Associate Vice President for Rutgers University Alumni Relations. An independent consultant will assist the task force in gathering data and helping to guide the discussion. I will announce the creation of the task force during my annual address to the university community on September 15, 2006 and ask that the final report of findings and recommendations be submitted to me by August 31, 2007. The first meeting of the task force will be held on September 20, 2006 at 5:00 p.m. in the Assembly Room of Winants Hall.

The Alumni Task Force will play a valuable role in advising me, the University’s boards and my administration in all matters relating to alumni relations and how we, as a community, may create the best future for Rutgers University. Thank you for your service to Rutgers and for your continued support of our commitment to the goals of a great university.

Sincerely yours,

Richard L. McCormick

Richard L. McCormick

c: Carol Herring, President, Rutgers University Foundation
   Brian Crockett, Vice President for External Programs
   Donna Thornton, Associate Vice President for Alumni Relations
What Rutgers Should Do for Rutgers Alumni

This subcommittee of the Alumni Task Force was chaired by Robert Stevenson, and charged to recommend ways in which the University can honor and support alumni as critical players in its mission as a major teaching and research institution serving the state, the nation and the world.

It is our conviction that the University’s investment in and respect for its alumni constituency will be repaid many times over, and will help to advance Rutgers to the first tier of educational institutions anywhere.

We elected to focus on the following key areas where Rutgers can serve its former students, and here provide a brief commentary on each.

1. RUTGERS SHOULD ASPIRE TO EXCELLENCE IN ALL FACETS OF THE STUDENT EXPERIENCE.

The University should strive for excellence in all aspects of its mission to educate students, including the quality and character of their non-academic including advising, residential living and dining and so forth. Each area of student life, no matter how seemingly small or tangential, represents an important opportunity for the institution to conduct itself in a professional and caring manner. Surveys across the country conclude that alumni who feel positively about their student experience are much more likely to engage with the University throughout their lifetime.

2. RUTGERS SHOULD VALUE ITS ALUMNI FOR AT LEAST THREE MAJOR REASONS:

A. Alumni remind the University of core principles upon which the University was founded. The voice of alumni is often important to achieving a future that is true to the basic values of the institution.

B. Alumni help institution leaders realize their hopes and aspirations for the University. They can provide multi-faceted support to ensure the ongoing success of the University.
C. Alumni validate the mission of the University. They are Rutgers University. In their roles throughout the world, they are the living embodiment of what a university produces as an educational “product.

3. THE UNIVERSITY MUST AFFIRM THE IMPORTANCE OF ALUMNI RELATIONS AS A CRITICAL AND INTEGRAL ELEMENT IN ADVANCING THE UNIVERSITY’S MISSION

The Advancement Cycle (See Appendix) demonstrates the vital interrelatedness of alumni relations and success in fund-raising and communications. The three major forces of advancement—alumni relations, fund-raising and communications/marketing—seek the same general goal, namely, to engage alumni and friends in the life of the institution. Alumni relations bears the responsibility for providing multiple broad-based engagement opportunities integral to stake holding and support.

4. THE UNIVERSITY SHOULD INCREASE INSTITUTIONAL RESOURCES FOR ALUMNI RELATIONS IF IT IS TO ACHIEVE A MUCH GREATER LEVEL OF ALUMNI ENGAGEMENT

Rutgers must fund alumni relations as a line item in its budget to ensure stability and success over the long term and to minimize short term fluctuations in the intensity of its engagement efforts.

Alumni relations also must enjoy the same high quality of professionalism in its staff, as any other major department of advancement.

5. THE PRESIDENT, THE GOVERNING BOARDS, SENIOR UNIVERSITY OFFICERS, FACULTY, STAFF, AND STUDENTS MUST RECOGNIZE THEIR RESPONSIBILITIES FOR ADVANCING ALUMNI RELATIONS.

Alumni relations is the responsibility of the entire institution and every Rutgers constituency can have a positive or negative lifelong effect on students. The President and governing boards and other senior leaders must set the appropriate tone by their actions in acknowledging the important role of former students within the institution and conducting themselves with students accordingly. The President is de facto the head of the alumni body; the governing boards of the institution have oversight of the alumni body and are
ultimately responsibility for advancing alumni relations and the rest of the advancement program.

6. RUTGERS SHOULD MANAGE ALUMNI RELATIONS IN PARTNERSHIP WITH ALUMNI

Successful alumni relations requires a mutually respectful partnership between Rutgers and her graduates. A professional staff employed by the University oversees alumni programs and services and drives alumni relations for the institution. An Alumni Board as the representative agency of the alumni, manages the corps of alumni volunteers, advises the institution about priorities, and articulates and communicates alumni interests to institutional decision-makers.

7. RUTGERS MUST PROVIDE PROGRAMS, SERVICES AND EFFECTIVE COMMUNICATIONS THAT ENHANCE ALUMNI ACCESS TO THE INTELLECTUAL, EDUCATIONAL AND CULTURAL RICHNESS OF THE UNIVERSITY

This principle is self-evident; less so, perhaps, is the non-restrictive nature of institution-wide alumni programming: open to any alumnus/a and underscoring the breadth and diversity of the whole university.

8. RUTGERS SHOULD DEVELOP A PLAN TO ENGAGE STUDENTS AS LIFELONG MEMBERS OF THE UNIVERSITY COMMUNITY

Students are the lifeblood of an alumni relations program and must be educated and cultivated from their first days at the University throughout their on campus education so that the idea of maintaining a lifelong relationship with Rutgers will seem a natural way of thinking as they approach graduation.

9. RUTGERS MUST HAVE A DEDICATED ALUMNI FACILITY AS THE CENTERPIECE OF ALUMNI RELATIONS ON CAMPUS AND AS A SYMBOL OF THE UNIVERSITY’S HIGH ESTEEM FOR ITS FORMER STUDENTS
The existence of an alumni center with special alumni identity and feel to it would provide a powerful symbol of the University’s esteem for its former students and the role they play today in helping Rutgers move forward.

10. **ALL ALUMNI MUST RECEIVE MAJOR COMMUNICATIONS REGULARLY**

Every single alumnus of the University should receive at least one official communication from the University in any given year, starting with the Rutgers Magazine, an Alumni E-Newsletter, etc. This “touching” of alumni is a critical prelude to developing presence among its army of 350,000 alumni.

11. **RUTGERS SHOULD ENHANCE THE EXISTING NASCENT NETWORK OF ALUMNI VOLUNTEERS TO RECRUIT STUDENTS FOR RUTGERS**

There are many virtues in having such a network of alumni volunteers recruiting students for Rutgers. The two most important are: recruiting students appeals especially to young alumni who are often the most skilled at this task, the most enthusiastic about the University, and enjoy doing something other than “raising money.” Young alumni who do schools work often become involved in other basic functions and organizations of alumni relations so that schools work is a great nursery bed for growing talented and dedicated alumni volunteers. Second, alumni expand the breadth and depth of the student body by adding a dimension to staff coverage not otherwise available.
PREAMBLE

Our subcommittee of the Alumni Task Force, chaired by Bernice P. Venable, was charged to recommend ways in which alumni of Rutgers University may support and assist the University in accomplishing its objectives and realizing its ambitions as a highly significant major research University in service to the state, the nation and the world.

We wish to observe at the outset that alumni service to Rutgers is based on a reciprocal understanding that alumni matter to the institution, every bit as much as the institution matters to alumni. This suggests that Rutgers itself must also put a high premium on:

- assuring a context where both students and alumni feel well served (and appreciated) by the University;
- informing, serving, and engaging alumni in the life of the institution, to the fullest extent possible;
- identifying institutional priorities that benefit from alumni assistance and support, and facilitating effective interaction; and
- providing both resources and a climate that welcomes Rutgers graduates to their rightful place as University stakeholders.

It is our conviction that the University’s investment in and respect for its alumni constituency will be repaid many times over, and will help to advance Rutgers to the first tier of educational institutions anywhere in the world.

We elected to focus on the following key areas where alumni can serve Rutgers, and here provide a brief commentary on each:

- The University’s Reputation
- Student Recruiting and A Great Student Experience
- Serving Fellow Alumni
- Strengthening University Resources
- Strengthening the Academy
- Professional Support and Standards
I. The University’s Reputation

We suggest that the graduates of Rutgers can effectively serve as institutional ambassadors, advocates, event hosts, cheerleaders, celebrants and promoters of the University. As with many other focus areas, this requires the University to inform alumni of key opportunities and issues at stake. Whether it be in working with New Jersey state officials, community and municipal leaders in the cities where Rutgers has campuses, media and opinion leaders, corporate connections, secondary educators, friends, neighbors and other appropriate audiences, or local civic groups that can host faculty or alumni speakers, informed and enthusiastic initiatives across the board should be extremely useful to Rutgers.

Alumni can also assist the institution by calling attention to alumni achievements that will both recognize important accomplishments and reflect well on the institution.

Our goal should be to enhance statewide and national understanding of the value Rutgers brings to the well being of New Jersey and beyond. Telephone and e-mail networks, letters to the editor, spreading the Rutgers story and relating one’s personal Rutgers experiences to others will all be useful, as will a recognition program and editorial coverage that pays attention to people in a position to be helpful to Rutgers.

An effort to update University records to have all pertinent contact information will be essential to the institution’s ability to “tap” appropriate volunteers and communicate efficiently with interested networks, such as a statehouse legislative alert corps. Likewise, targeted periodic briefings and updates will complement more general commentary in electronic and print vehicles. And a mechanism is needed to allow alumni to raise their hands as well as being recruited and to offer ideas about how they can be useful. The institution needs to encourage database updates and to invite regular feedback from alumni.

A number of University offices and officers will play important roles here: admission and financial aid, student affairs, federal and state relations, university relations, community relations, corporate and foundation development, as well as the President and other spokespeople. Staff and officer time to educate and work with the advocacy groups and to keep them informed will also have to be set aside.

II. Student Recruiting and A Great Student Experience

Again, the alumni body can make a significant difference in helping to enhance the quality and breadth of the student body, and in assuring
that every Rutgers student leaves Rutgers with a sense of pride, satisfaction and gratitude. Such assignments as working with local secondary school placement people or instructors, assisting the admissions office in identifying promising individuals in one’s community, representing Rutgers at college nights, enriching the “buzz” about Rutgers among young people generally, and meeting with admitted students to move Rutgers to the top of their choices will be valuable at the time potential students are working through college options.

Simply showing the Rutgers flag and talking about how Rutgers has enhanced one’s life also adds value to the institution’s perception among prospective enrollees.

Once the students have joined the Rutgers family, the alumni can play an equally important role in adding value to the student experience and in reinforcing the lifetime connection Rutgers and its alumni share. This can take the form of serving as mentors (including mentoring of first-generation and minority students), as informal undergraduate or major advisors, by participating in career and majors panels on campus, providing internships, summer employment or part-time jobs for current students or an occasional home-away-from-home meal or social occasion for those whose own families do not live nearby (or for students studying overseas or doing internships away from campus).

Alumni can also be informal advisors or presenters to student organizations and publications, serve on arts and cultural advisory boards, provide folklore and historical perspectives on the institution and its values, show the flag to build school spirit, and provide resources for student undertakings.

In the regions, alumni can be an important resource in welcoming recent graduates to the community—or in helping in connecting new alumni with career and social networks locally and professionally.

An additional channel, particularly for young alumni, might be recreational activities such as white-water rafting or hikes where students could interact on a very informal basis with graduates. Student vs. alumni sports tournaments are a related possibility, as, importantly, is providing unified enthusiastic support for Rutgers teams at home and on the road.

Although it technically falls under section IV (below), funding for enhanced student financial aid—all things from scholarships to emergency loan funds—is not to be overlooked in this discussion.
III. Serving Fellow Alumni

As we mentioned, alumni satisfaction with Rutgers is critical to a motivated sense of giving back. But the alumni can also play an important role in building alumni satisfaction through service to fellow graduates. As suggested under the prior heading, alumni are natural providers of welcome wagons for alumni new to regions. Career advice and employment networks, as well as professional services (legal, medical, real estate, investments—the whole range of valuable needs) are also a logical way for alumni to assist each other and implicitly raise the Rutgers banner throughout their lives.

Alumni also serve fellow alumni by stepping forward to volunteer: for regional events, class, college and affinity reunions, board service, news and class notes for publications and on-line communication, in activating inactive alumni, celebrating RU’s accomplishments and working as RU’s ambassador corps as mentioned in earlier comments about enhancing Rutgers’ reputation.

If a new alumni/visitor center ever moves from the concept stage to reality, alumni will have played an important role in masterminding the facility and making it possible, and the facility will serve alumni in uncountable ways in the years to come.

IV. Strengthening University Resources

To state the obvious, annual financial support by a growing percentage of alumni is critical to Rutgers’ aspirations and current challenges.

Alumni can host development activities, solicit fellow graduates, encourage friends and acquaintances to support the University by their own example, and assist with valuable contacts and support that can lead to important gifts from corporations, foundations and philanthropists.

They can personalize the value of investing in Rutgers by talking about their own experiences and what Rutgers has meant to their lives.

Those with the capacity to be more generous can make and leverage significant and transformational support for Rutgers, including challenge grants and facilitating investments, equity in corporate start-ups or other avenues to high return ventures, and can also set an important example among others who may be in a position to invest in the University.

Alumni who volunteer for board and committee service can also commit to 100% annual giving participation by their members.
V. Strengthening the Academy

Alumni came to Rutgers to become educated citizens. Their academic experience ought to continue beyond graduation, both as occasional returning “students” and in partnership with faculty and other educators. As the institution finds ways to invite alumni back to campus or in the regions for lectures, talks, panel discussions, tours of labs or conversations with student scholars, it can also benefit from inviting alumni as guest speakers or presenters in appropriate disciplines, as members of departmental visiting committees or advisory boards, as mentors, as hosts of faculty on the road or prospective faculty recruits visiting Rutgers, and in celebrating faculty excellence and scholarly achievements. Just as pride in a Rutgers degree can be lifted by extraordinary athletic achievement, pride in Rutgers can also be raised by uncommon academic accomplishments.

There is also a role here for personal narratives and salutes—recognizing an influential teacher, testifying to the value of classroom experiences and majors, and spreading the word about how good teaching and scholarly research add to the quality of life of every citizen.

And there may be a critical role for alumni in advancing the cause for the newly redesigned undergraduate education program, of course celebrating the legacy institutions and their colorful histories, but at the same time supporting the new era in Rutgers life in ways that raise understanding, confidence and support.

VI. Professional Support and Standards

Alumni involvement as volunteers can also take less typical forms—alumni can step forward when needed to provide their personal expertise and professional advice to Rutgers officers and managers on a pro bono basis—both working as individuals and on task groups assembled to augment staff talent and perspectives. This calls for the effective development of sophisticated databases that can help the University locate particular skill players: an expert in zoning or patent law, for example, an appraiser who could assess donated property, a group of journalists to advise a University editor, a translator to work with a faculty member on an important manuscript, web designers, marketing experts, investment professionals, to name but a few possibilities. The value of this kind of alumni-Rutgers relationship cannot be understated. The institution expresses regard for its graduates’ skills, and uses them to leverage University resources. Those who volunteer get the satisfaction of assisting Rutgers in useful ways and in being appreciated.
Two other comments that fall appropriately here: alumni volunteers can have an important value-added role in treating their staff counterparts with the respect due to fellow professionals, adding to the satisfactions of working at Rutgers. And great care should also be exercised by all alumni who step up for Rutgers to avoid the pitfall of becoming a burden on already-taxied staff resources and energies, not to mention the University’s financial resources.

CONCLUSION

A new era in alumni relations at Rutgers is not simply a unilateral declaration that alumni matter to Rutgers. That is surely one part of the equation, but it is an equation or partnership rather than an institutional pronouncement. Our subcommittee interviews with a broad range of University officers and leaders uncovered numerous ideas about ways in which alumni may return the favor of a Rutgers education and Rutgers’ continuing service to alumni and imagination in keeping alumni informed and engaged. We were also persuaded in instance after instance that University leaders would genuinely welcome our help. The testimony we obtained is on file as part of the Task Force’s findings, and members of the subcommittee would be pleased to elaborate on any of the suggestions contained here and to work energetically with staff to build a substantial ethos of alumni support for Rutgers.

Respectfully submitted,

Bernice P. Venable, Ed.D.
While an effective alumni relations and engagement program is an end in itself, strong mutual relations with an institution’s graduates are also critical to the success of fund-raising and communications, the other two disciplines of advancement, as represented in this diagram:

The arrow on the graph shows the inflow of alumni into the advancement cycle: through identification by University staff and other alumni volunteers, or not infrequently, by themselves, new alumni volunteers are identified and recruited to work on behalf of the University. The cycle is also refreshed annually by the inflow of brand new alumni—the graduating class of students who head out from the University each year, thus into the cycle. They represent a potentially vast pool of volunteer service if the University can successfully engage them in the various stages of the advancement cycle, as described below.

The second segment of the cycle is labeled Information. Ideally, all alumni experience this phase of the cycle as the University constantly tells its story, using a variety of methods, including face-to-face visits.
between alumni and University representatives, including officers, faculty and students; mailings and electronic communication; and other forms of interaction or contact.

Many alumni will respond to the information flow by entering the next phase of the cycle, the Engagement phase. As the term implies, here the alumnus/a engages more proactively in one or more ways with the institution. In addition to the options listed in the diagram, others may include sending news to the Rutgers Magazine, or having lunch periodically with a former teacher, or a current staff member at the University—some activity that requires an effort on his or her part to participate in the institution. In other words, information flow can be one-way, lacking an engagement result. A positive response by the alumnus is an important indicator of interest and feeling for the institution.

Involvement is a higher form of engagement and takes many forms as shown: volunteering to help with alumni activities, leading an alumni cohort or interest group, writing a check to the University’s Annual Fund, and the like.

Once the alumnus/a is engaged and involved, he or she is much more likely to contribute in the three basic ways that constitute productive alumni relations: the giving of time, talents and financial support.

Each segment of this cycle (identifying, informing, engaging, involving and investing) represents a pivotal activity in advancement. If one or more is not functioning appropriately, then the entire cycle is compromised.

Each follows its own strategy, but all are linked to a common goal: to build lasting relationships with alumni (and other key constituents such as parents, friends, and the like) and engage them in the life of the institution.

Institutional leadership must seek to maximize the smooth, continuous action of the cycle, assuring effective teamwork among the three disciplines (and across the University) through integrated and coordinated operations and consistent behavior that reinforces and builds on the value added by the other units. This critical task of organizational integration is the responsibility of advancement leadership and the institution’s chief executives and volunteers. It must be the coordinating principle of any effective advancement team.