



UNIVERSITY OF ILLINOIS ALUMNI ASSOCIATION

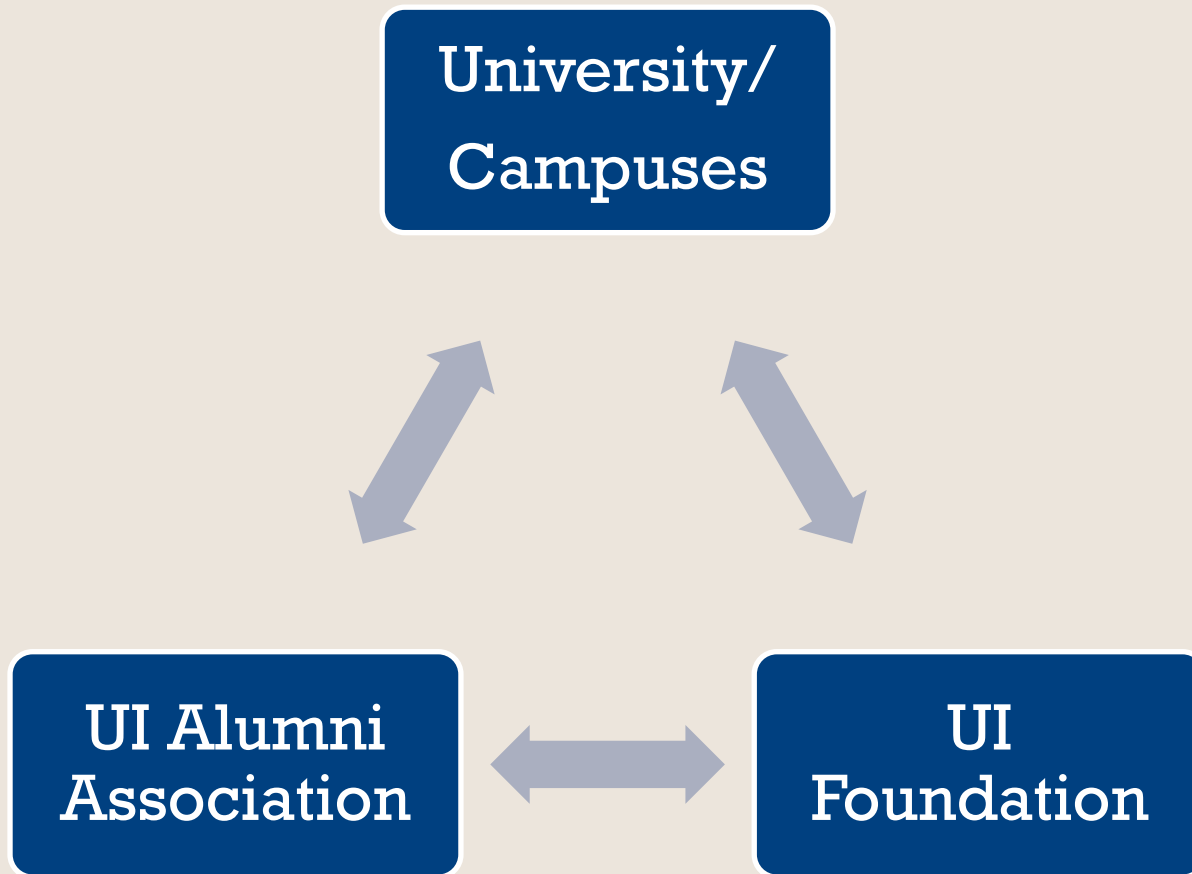
MARK FILIP, CHAIRMAN ~ LOREN R. TAYLOR, PRESIDENT AND CEO

JULY 25, 2013

- 1. Impact on Fundraising**
- 2. Alumni Market Data**
- 3. Benchmarking & Resources**
- 4. Metrics**
- 5. Mission, Strategy & Leadership**

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Comprehensive Advancement Model



Alumni Association Impact on Fundraising

- **Alumni Business Contact Information**
- **New Donor Identification/Acquisition**
- **Mass Stewardship**

Alumni Association Impact on Fundraising

For UI graduates ...

a Life Member is

19 times more likely

**to be a Presidents Council member
than a non-Life Member.**

Engagement Pyramid



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UI Alumni Demographics

TOTAL NUMBER OF LIVING ALUMNI: 678,449

URBANA-CHAMPAIGN - 438,870 (65%)

CHICAGO - 206,605 (30%)

SPRINGFIELD - 32,974 (5%)

GENDER:

MALE 51%

FEMALE 49%

AGE:

Under 40 35%

40 - 60 40%

Over 60 25%

TOP 5 ALUMNI CITIES IN ILLINOIS:

CHICAGO - 69,667

CHAMPAIGN-URBANA - 24,106

SPRINGFIELD - 11,256

NAPERVILLE - 8,808

ARLINGTON HEIGHTS - 4,499

TOP 5 ALUMNI COUNTIES IN ILLINOIS:

COOK - 153,642

DUPAGE - 40,284

CHAMPAIGN - 28,927

LAKE - 26,036

WILL - 14,527

TOP 5 ALUMNI STATES:

ILLINOIS - 393,227

CALIFORNIA - 40,490

TEXAS - 15,966

FLORIDA - 15,854

WISCONSIN - 12,167

TOP 5 ALUMNI COUNTRIES (Outside of U.S.)

CHINA - 2,059

KOREA - 1,922

TAIWAN - 1,879

CANADA - 1,156

INDIA - 954

TOP 5 OCCUPATIONS:

MEDICINE/HEALTH

RETIRED

BUSINESS/MANAGEMENT

EDUCATION

ENGINEERING

TOP 5 EMPLOYERS:

UNIVERSITY OF ILLINOIS

ABBOTT

BOEING

CATERPILLAR

ACCENTURE

Campus Alumni Demographics

	UIUC		UIC		UIS	
Top 5 Cities in State	Chicago	29,848	Chicago	39,306	Springfield	7,623
	Champ-Urb	23,238	Naperville	3,140	Decatur	858
	Naperville	5,593	Oak Park	2,175	Chatham	842
	Springfield	3,260	Skokie	1,935	Peoria	746
	Arlington Hts	2,826	Orland Park	1,781	Chicago	513
Top 5 Counties	Cook	71,853	Cook	80,650	Sangamon	10,392
	Champaign	27,580	DuPage	16,900	Peoria	1,155
	DuPage	23,309	Lake	9,105	Cook	1,139
	Lake	16,931	Will	6,505	Macon	1,115
	Will	8,022	Kane	3,387	Tazewell	907
Top 5 States	Illinois	204,917	Illinois	143,473	Illinois	24,146
	California	26,644	California	9,861	Missouri	849
	Texas	10,925	Florida	4,262	Florida	741
	Florida	9,589	Wisconsin	3,434	California	680
	Wisconsin	7,743	Texas	3,248	Texas	646
Top 5 Countries	Korea	1,775	China	1,174	India	35
	Taiwan	1,421	Taiwan	446	Canada	25
	Canada	906	Italy	235	Thailand	13
	China	879	Canada	225	Taiwan	12
	India	751	India	168	Saudi Arabia	11

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	2002	PAID MEMBERS	ADDRESSABLE GRADS	% PAID MEMBERS	REVENUES	EXPENSES
1	PENN STATE	129,921	429,333	30.3%	\$8,160,501	\$6,658,771
2	OHIO STATE	109,243	326,308	33.5%	\$3,924,856	\$6,904,189
3	MICHIGAN	101,497	420,000	24.2%	\$8,997,000	\$7,862,000
4	U OF I	99,552	445,393	22.4%	\$7,688,440	\$6,678,051
5	INDIANA	85,327	389,419	21.9%	\$7,967,249	\$6,796,362
6	PURDUE	63,685	295,409	21.6%	\$3,163,122	\$3,109,166
7	IOWA	50,114	243,741	20.6%	\$2,633,779	\$3,308,124
8	WISCONSIN	40,465	286,794	14.1%	\$3,633,917	\$3,975,090
9	MICH STATE	35,938	346,508	10.4%	\$4,135,976	\$3,824,000
10	MINNESOTA	27,282	292,578	9.3%	\$4,831,220	\$4,715,575
11	NEBRASKA	24,499	145,100	16.9%	\$3,194,259	\$3,055,006

Sources: IRS 990 and Council of Alumni Association Executives Annual Survey

	2011	PAID MEMBERS	ADDRESSABLE GRADS	% PAID MEMBERS	REVENUES	EXPENSES
1	PENN STATE	127,720	554,787	23.0%	\$9,998,961	\$8,103,465
2	OHIO STATE	108,000	493,890	21.9%	\$7,883,926	\$8,175,568
3	MICHIGAN	94,690	498,000	19.0%	\$15,146,416	\$11,268,612
4	U OF I	92,786	626,400	14.8%	\$7,278,186	\$6,833,366
	<i>ILLINOIS</i>	<i>74,160</i>	<i>418,052</i>	<i>17.7%</i>	--	--
5	INDIANA	57,671	540,200	10.7%	\$8,301,316	\$7,091,224
6	PURDUE	55,072	388,096	14.2%	\$4,414,752	\$4,478,058
7	IOWA	51,179	260,363	19.7%	\$3,639,445	\$3,472,004
8	MINNESOTA	37,305	393,266	9.5%	\$3,001,839	\$4,115,858
9	WISCONSIN	31,524	356,364	8.8%	\$5,111,775	\$5,147,164
10	NEBRASKA	24,082	171,684	14.0%	\$3,083,166	\$2,660,956

Sources: IRS 990; Council of Alumni Association Executives Annual Survey; UIAA Mbr Counts

Sources and Uses of Funds

	FY2002		FY2007		FY2012	
	\$	%	\$	%	\$	%
Sources of Funds:						
Membership Fees	\$ 1,761,409	22.9%	\$ 1,081,700	9.7%	\$ 668,700	8.5%
Cash from Investments	449,817	5.9%	703,000	6.3%	975,000	12.3%
Total Member Support	2,211,226	28.8%	1,784,700	16.0%	1,643,700	20.8%
UI Support - Salaries	2,119,524	27.6%	2,608,100	23.4%	1,987,200	25.2%
UI Support - Other	563,342	7.3%	1,410,500	12.6%	1,579,800	20.0%
UI Support - Benefits	542,283	7.1%	886,700	7.9%	794,600	10.1%
Total UI Support	3,225,149	41.9%	4,905,300	43.9%	4,361,600	55.2%
Affinity Programs	1,434,299	18.7%	3,502,200	31.4%	1,193,000	15.1%
Program Fees and Other	817,766	10.6%	974,500	8.7%	701,500	8.9%
Total Sources of Funds	\$ 7,688,440	100.0%	\$ 11,166,700	100.0%	\$ 7,899,800	100.0%
Uses of Funds:						
Communications	\$ 1,179,110	15.3%	\$ 1,212,100	10.9%	\$ 1,158,600	14.7%
Information Services	949,803	12.4%	1,354,200	12.1%	1,488,700	18.8%
Membership	555,624	7.2%	674,700	6.0%	373,300	4.7%
Alumni Outreach	2,644,022	34.4%	3,101,000	27.8%	2,542,700	32.2%
General & Operating	1,349,492	17.6%	3,348,900	30.0%	2,170,200	27.5%
	6,678,051	86.9%	9,690,900	86.8%	7,733,500	97.9%
Contribution to Reserves	1,010,389	13.1%	1,475,800	13.2%	166,300	2.1%
Total Uses of Funds	\$ 7,688,440	100.0%	\$ 11,166,700	100.0%	\$ 7,899,800	100.0%

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Metrics for Alumni Relations

Connectivity

- Scalable information technologies
- UI Alumni Network

Engagement

- Membership
- Alumni groups
- Events
- Communications and Marketing

Metrics for Alumni Relations

Advocacy

- Advocate recruitment
- Campaign results

Leadership

- Alumni boards
- Trustee selection input
- Awards and recognition

Fiscal Responsibility

- Revenues and Expenses
- Net Assets



UNIVERSITY OF ILLINOIS ALUMNI ASSOCIATION

Long-Term Progress Report

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
STRATEGIC PRIORITY: CONNECTIVITY										
<i>GOAL 1: Develop scalable IT solutions to increase data quantity, quality, access and networking capacity.</i>										
1a: Solicitable alumni										
1b: UI Alumni Network subscriptions	X	X	X							
1c: UI Alumni Network communities	X	X	X							
STRATEGIC PRIORITY: ENGAGEMENT										
<i>GOAL 2: Increase alumni participation that enhances UI loyalty.</i>										
2a: Annual/Life membership										
2b: Mass communications audience reach										
2c: Alumni program participation										
STRATEGIC PRIORITY: ADVOCACY										
<i>GOAL 3: Facilitate legislative advocacy in support of UI mission.</i>										
3a: Advocate recruitment	X	X								
3b: Campaign participation	X	X								
3c: Campaign outcomes	X	X								
STRATEGIC PRIORITY: LEADERSHIP										
<i>GOAL 4: Identify and recruit alumni expertise.</i>										
4a: Role in trustee selection process	X	X								
STRATEGIC PRIORITY: FISCAL RESPONSIBILITY										
<i>GOAL 5: Manage sufficient resources with responsibility and accountability to fulfill mission and achieve goals.</i>										
5a: Operating Revenues										
5b: Operating Expenses										
5c: Net Assets										

Positive	Neutral	Negative

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Mission and Strategy

Mission

- **United Action**
- **Leadership**

Strategy

- **Life cycle approach to alumni relationships**
- **Mass market mentality**
- **Alumni-centric methodologies and messaging**
(Networking, achievement, history & tradition)

Meet Our New Leadership



MARK FILIP
Chairman



BILL STRATTON
Vice Chairman



UNIVERSITY OF ILLINOIS ALUMNI ASSOCIATION
Building Relationships for Life