The UNM Foundation, Inc., and the Alumni Association /Alumni Relations Office (AA-ARO) exist to advance the mission of the University of New Mexico by raising private support and building relationships with internal and external constituencies. The Development/Alumni Strategic Task Force was engaged to take a broad look at the current infrastructure and provide recommendations for enhanced strategic collaboration between the two organizations. The Task Force held five meetings and one half day planning session beginning in June 2013. Additionally, four alumni relations officers and one development professional from various universities were invited to present to the Task Force on their organizational structure. Alumni and development organizations typically fit in one of these three categories with respect to their organization and relationship to the university – dependent, interdependent, or independent. These structures are shifting as funding resources become more critical and as organizations are rebranding themselves and reevaluating their mission, vision, and value proposition for the 21st century. The organizational structures at the universities who presented to the Task Force followed one of the three structures mentioned above.

The Task Force developed the following key observations and recommendations to further enhance and embrace a unified strategy between the UNM Foundation, the Alumni Association/Alumni Relations office (AA-ARO) and the University.

**Improved & Expanded Communication** should be established and defined between the AA-ARO, UNM Foundation, Inc., Athletics, Deans, UNM Marketing & Communications and Student Affairs where clear and concise communication methodologies and a formal plan is established that are imperative to the success of fundraising at the University.

**Establish common vision/goals.** A formally documented annual plan between the President’s office, the AA-ARO and the Foundation should be established that serves and promotes mutual interests of the University and its alumni by stewarding life-long relationships, promoting volunteer engagement and outreach activities, fostering pride in the University and other University-wide promotional efforts which lead to
exponential growth of gifts to the University. This plan should reference and align itself with the Institutional *Changing Worlds* 2020 vision plan.

**Robust and enhanced central database.** The University lacks a university-wide data collection and management plan for the central database. Data integrity is imperative to maximize the performance of the operations of the Foundation and AA-ARO in coordination with the University. University leadership should effectively work towards implementation of centralized registration for all activities and events across the University. A comprehensive event registration software system may need to be assessed and purchased to implement this recommendation. Coordinated planning and implementation resulting in contact data capture would maximize the University’s investment in technology.

**Accountability and metrics:** Best practices of successful organizations include accountability for annual initiatives and developing metrics for assessing return on investment. The AA-ARO and the Foundation shall develop a formal plan and implement a return of engagement that measures accomplishment of their goals and vision annual plans. These metrics should include assessments that evaluate return on relationships/investment that benefits the University. The Foundation should periodically review its current metrics plan to ensure its viability and accountability. The AA-ARO should create an accountability and metrics plan and develop mechanisms for communicating the outcome of these metrics to a broad university audience.

**Alumni Representation for Deans/Colleges:** Currently, alumni relations officers employed at various colleges and departments within the University do not directly nor indirectly report to the Alumni Relations Office. Deans should work towards identification of funds for alumni relation efforts within their respective college/department as alumni seem to identify more closely with their respective colleges/unit. Deans and the AA-ARO should collectively participate in the recruitment/hiring process. College/department alumni representatives should have joint reporting to the respective college/department and to the Alumni Relations Office to ensure greater alignment, role definition and continuity of efforts that enhance not only the college and Alumni Relations efforts, but the University overall. This inclusive reporting structure will create interdependence that strengthens collaboration with alumni, leverages value and develops deeper and more sustainable support for the University. A comprehensive plan should be developed by the AA-ARO, Deans and the Foundation to achieve this reporting model.

**Consolidation of Efforts** – There is a shortfall of resources and limited funds to fill vacant and much needed staff positions. It is essential for AA-ARO and the Foundation to seek efficiency, consolidate efforts and mobilize talent wherever possible and jointly engage in fundraising activities. The leaders of the Foundation and AA-ARO should create an annual, joint plan that consolidates, co-sponsors and effectively engages both organizations in all alumni and fundraising activities. Additionally, leadership of the Foundation and the AA-ARO should explore opportunities where key staff from both
organizations can colocate in an effort to create greater synergy in accomplishing common vision and goals.

**Governance** – The current governance structure of both boards should remain the same at this time. The Foundation’s Executive Committee and the Executive Committee of the Alumni Association should meet at least annually to coordinate annual work-plans from their joint annual goal and vision plans that lead to ensure continuity of focused efforts on annual and major gift prospects to further enhance the alumni donor pipeline. Long-term, both organizations should examine the viability of a joint governance board.

Further, the Executive Committee of the Alumni Association should create metrics and an assessment plan that at least annually reviews and assesses the performance of the leadership position at the AA-ARO. The Executive Committee should provide advice and consent to the University President on leadership performance and leadership recruitment. This plan should also review and assess the outcomes of the various programming, activities and initiatives conducted by the AA-ARO.

**Future Alignment** – A succession plan should be created and executed for the chief leadership positions at the Foundation and the AA-ARO. Given what we have learned about best practices at leading universities, we recommend an Advancement model that encompasses the Foundation, Alumni, Athletics, and Marketing & Communications. This model includes an approach where the Foundation and Alumni executives and others will report to an Advancement officer. This strategic restructuring partnership will expand on the continuum of effective integration and enhanced efficiency of overall development and alumni operations.

It is the view of this Task Force that implementation of the identified key observations and recommendations will result in greater mobilization of talent and resources and will enhance strategic collaboration and role definition. The AA-ARO and the Foundation should be viewed as part of the same engagement building spectrum and not as disconnected organizations. These recommendations also provide for the AA-ARO to play an explicit supporting role in fundraising at the University as it is well proven that early engagement is vital to cultivating the major benefactors of the future. As UNM looks increasingly to private philanthropy as a core source of support, UNM must complement this targeted approach with a more comprehensive and sustained program of engagement that reaches out to all alumni, not just the top-tier of donors and prospective donors. Over the long term, the investment of time, personnel and resources necessary to achieve this goal will reap substantial dividends for UNM. By providing a larger community of institutional stakeholders, a broad-based alumni relations program will help to support UNM by encouraging year-to-year giving, volunteer service, and good will.

It is the hope of this Task Force that these recommendations facilitate reaching beyond current engagement and fund-raising initiatives, but also emphasize the importance of creatively and collaboratively nurturing alumni support now and the for the long-term. The Task Force has valued this assignment and looks forward to the continuation of championing
the best interests of the University and hopefully setting the initial path of forming an integrated vision for development and alumni relations.