Office of Alumni Relations

2016-17 Annual Report

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I. Executive Summary

The Office of Alumni Relations moved from the Chancellor's Unit to Student Life in February 2016. With the move came a new focus on strategic planning, reporting, and assessment. The following document is the first-ever annual report conducted by the Office of Alumni Relations. The annual report reflects on the goals and objectives established in the department's 2016-17 strategic plan, and provides insight into the structure and resources of the department.

A number of significant changes to the work of Alumni Relations occurred in 2016-17:

- UMD Commencement, previously the responsibility of Alumni Relations staff, was moved to Academic Affairs.
- The annual Twin Cities alumni social gathering was discontinued in favor of a new model of small affinity-based events (detailed on pages 6-7).
- The Alumni Board of Directors disbanded in fall 2016 (detailed on pages 8-9).
- Director of Alumni Relations gained responsibility for chairing the Homecoming Committee and coordinating the Homecoming Parade.
- Young Alumni Board was reintroduced and rebranded as Bulldogs of the Last Decade (detailed on page 9).
- Numerous staff changes and one position reclassification (detailed on pages 12-13).

Collaboration with other departments and units was a strong point of emphasis for the department in 2016-17. This approach will yield significant short and long-term benefits for campus departments and, most importantly, alumni. The move to Student Life, in particular, encouraged the Alumni Relations team to explore new opportunities to partner with departments closely associated with the student experience. Greater understanding of the student experience will help Alumni Relations staff and volunteers identify what it means to forever be a Bulldog.

II. Mission and Vision

Mission: The Office of Alumni Relations creates opportunities for alumni to learn, reconnect, influence the student experience, and contribute to the direction of UMD.

Vision: The Office of Alumni Relations will identify where the needs and priorities of alumni overlap with those of students and the university. We will work with alumni to create programs that address these interests. These efforts will give alumni a greater voice in the present and future of UMD

III. Goals

Goal Areas:

1. Affinity Groups
2. Service
3. Students
4. Learning

Goal Area 1: Affinity Groups

Partner with affinity groups to strengthen alumni ties to the programs, departments, and activities at UMD that individuals find most compelling.

Focus on providing support to diverse selection of affinity groups.

Goal Area 2: Service

Build culture of alumni giving back through programs both on campus and off.

Develop leaders in the alumni community to take advantage of the energy and ideas of UMD's most dedicated alumni.

Goal Area 3: Students

Connect alumni to students so that alumni experience the value of giving back to UMD, and students benefit from the skills and knowledge of alumni.

Create alumni culture within current student body; help students understand the value of and their place in the alumni community.

Goal Area 4: Learning

Utilize university resources to create learning experiences for alumni.

Create methods of outreach that bring learning opportunities to alumni in places where they live and work.

IV. Objectives and Assessment

Objectives:

1. Seek out new and diverse affinity groups (e.g. Alumni of Color, Journalism alumni, RSOP) for collaboration on reunions and/or other desired events and programs.

2. Use volunteers to drive event and program development. Involve alumni (and students) in planning and execution to secure greater buy-in from campus partners, better attendance from alumni, and a wider range of options.

3. Strengthen the mission, objectives, and participation of the Alumni Board.

4. Reconstitute the Young Alumni Board and launch programming.

5. Develop and implement a mentor program to connect alumni and community members with students.

6. Explore feasibility of guest lecture series in downtown Duluth.

7. Build new website to inform and engage alumni more effectively. Highlight learning opportunities, volunteer roles, and affinity reunion/chapter program. Reflect changing Alumni Relations mission in newsletter and social media.

Objective 1: Seek out new and diverse affinity groups for collaboration on reunions and/or other desired events and programs.

Assessment Strategy: Expanded set of partnerships; more affinity-focused events, projects, and programs.

Action Steps:

2016-17 alumni event programming was a departure from past years. No single event attracted the attendance of the prior Twin Cities all-class reunions, but more events were offered to attract the attention of a larger group of alumni. Department partnerships were critical to the staff's ability to manage the increased number of events.

Event	Partner	Attendees	Date	Location
MEHS Reunion	MEHS Dept.	104	7/29/2016	Campus
Class of 1951 Reunion	n/a	16	8/18/2016	Campus
State Fair	n/a	n/a	8/27/2016	St. Paul, MN
Farm Fest	UMD Farm	500+	9/18/2016	Duluth, MN
Homecoming Parade	Homecoming Committee	n/a	10/15/2016	Campus
Homecoming Family Carnival	Duluth YMCA	300	10/15/2016	Campus

Event	Partner	Attendees	Date	Location
BOLD Homecoming Happy Hour	BOLD	20	10/15/16	Duluth, MN
Networking Night	Career & Internship Services	149	11/17/2016	Duluth, MN
Game Night	Student Alumni Board	98	12/1/2016	Campus
Northstar Cup Watch Parties	n/a	69	1/27/2017	St. Paul, MN; Duluth, MN
Timberwolves Alumni Night	n/a	35	3/30/2017	Minneapolis, MN
Frozen Four Watch Parties	n/a	n/a	4/4/2017	Nationwide
Grad Party	n/a	477	4/27/2017	Duluth, MN
Rochester Alumni Social	LSBE	30	6/1/2017	Rochester, MN
KUMD 60th Anniversary	KUMD	121	6/10/2017	Campus

Outcome: The focus on partnerships proved effective on different levels: 1) partners were leveraged to draw in additional guests who may not identify with Alumni Relations, but see value the partner, and 2) use of partners relieved some of the burden on staff, allowing the team to stretch their time further. The strategy of more frequent small affinity events drew in greater overall alumni event participation compared to the model of 3-4 large events each year.

What We Learned: Partnerships will allow the department to accomplish outreach to a wider audience. The effort should be continued and expanded as a critical component of Alumni Relations growth. Some partnerships in 2016-17 were more effective than others. Clear understanding of program/event leadership is critical to project success. Alumni Relations staff must have a voice in all elements of project planning or the partnership is unlikely to be successful.

Focus on affinity-based programming was successful in 20176-17 and should continue. Effective affinity programming has the potential to deepen engagement with all alumni, and thus forms the backbone of the work Alumni Relations will conduct in future years. For this reason, it is likely that affinity groups will no longer be a department goal area and objective; instead the concept will be woven into an updated mission and vision. Future objectives should address work with more specific affinity groups.

Objective 2: Use volunteers to drive event and program development. Involve alumni (and students) in planning and execution to secure greater buy-in from campus partners, better attendance from alumni, and a wider range of options.

Assessment Strategy: Measure volunteer participation in UMD activities; are our initiatives volunteer driven?

Action Steps: Staff attempted to use volunteers in all events hosted by the department. Volunteer leaders were solicited for new event ideas to ensure the programming was what alumni wanted.

Event	Volunteers
MEHS Reunion	11
Class of 1951 Reunion	1
State Fair	37
Homecoming Parade	3
Homecoming Family Carnival	15
BOLD Homecoming Happy Hour	6
Networking Night	17
Game Night	22
Timberwolves Alumni Night	2
Frozen Four Watch Parties	18
Grad Party	17

Outcome: Effort to involve more volunteers in alumni event programming was successful. In addition to the events, volunteers also contributed to the Alumni Lunch Series, BOLD, and MEA Campus Preview. Use of volunteers to shape programming decisions was more challenging because volunteers require time to understand the needs of their audience and the scope of event/program development (esp. cost).

What We Learned: There are individuals who would like to take active roles in alumni programming. Roles are in abundance; identifying the potential volunteers is a bigger challenge because of the limited history of volunteerism with Alumni Relations. Alumni have not yet come to expect that they are needed by UMD for this purpose. In order to grow volunteer participation the department will need to clarify and simplify this aspect of our mission and communication. Greater volunteer-driven programming will follow the incorporation of more volunteers.

Objective 3: Strengthen the mission, objectives, and participation of the Alumni Board.

Assessment Strategy: Active participation by all board members; develop objectives tied to outcomes.

Action Steps: Worked with the Chair of the Strategic Planning Committee and members of the Executive Committee to compile results from the 2015-16 strategic planning process, formulate recommendations, and present to the Alumni Board for approval. Primary recommendations included:

- Overhaul of the committee system, bringing the total number of committees from eight to four.
- Defined objectives for each of the committees.
- Instituting term limits to enhance diversity of views on the board.
- Redefining the role of Directors Emeritus (existing rule provided lifetime board voting rights).

Outcome: Recommendations to the board by the Strategic Planning Committee were voted down and ultimately tabled for future consideration in June 2016 meeting. Following careful

consideration and discussion with campus and alumni leaders (including members of the Alumni Board), the Office of Alumni Relations disbanded the Alumni Board in fall 2016.
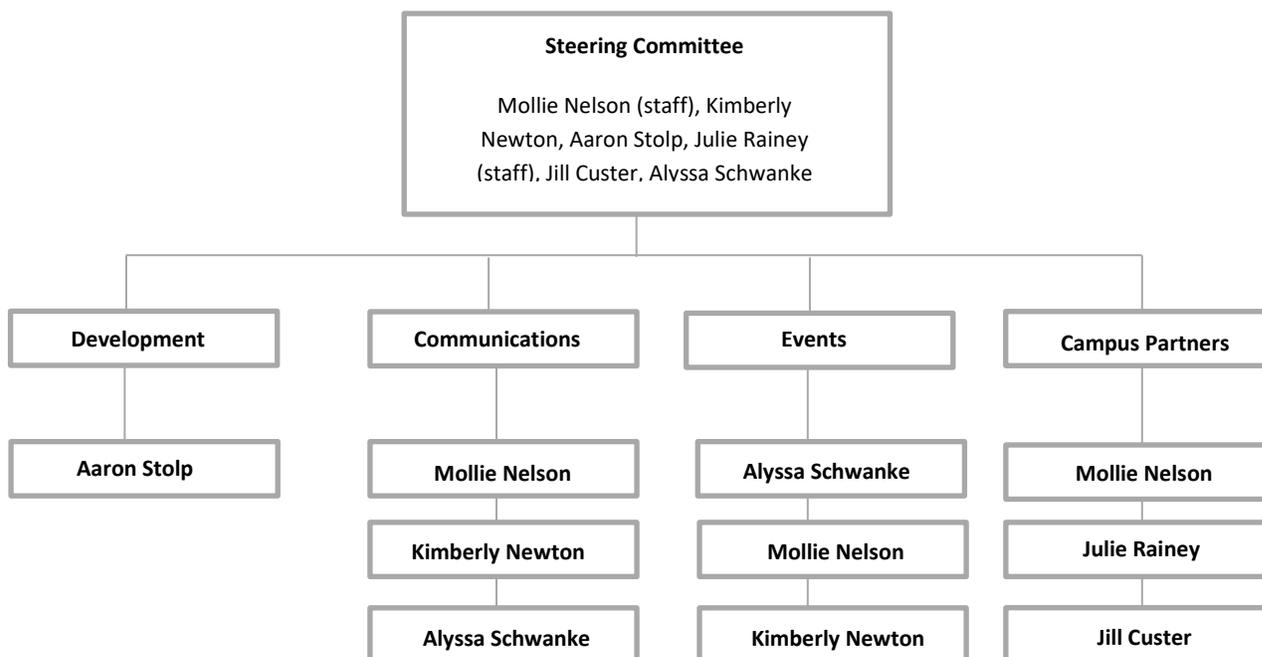
What We Learned: The alumni board model is not well suited to meet the needs of UMD alumni in 2016-17. Alumni volunteer leadership remain critical to overall alumni engagement, however leaders should be developed through more nimble and flexible volunteer models (e.g. affinity group designs like reunions and BOLD).

Objective 4: Reconstitute the Young Alumni Board and launch programming.

Assessment Strategy: New young alumni group with at least one program executed and bolstered digital presence.

Action Steps: Young alumni affinity group launched in fall 2016. Group rebranded as Bulldogs of the Last Decade (BOLD).

Bulldogs of the Last Decade Accountability Chart

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                          Steering Committee

                    Mollie Nelson (staff), Kimberly
                    Newton, Aaron Stolp, Julie Rainey
                    (staff), Jill Custer, Alyssa Schwanke

   Development        Communications        Events        Campus Partners

   Aaron Stolp        Mollie Nelson      Alyssa Schwanke    Mollie Nelson

                      Kimberly Newton     Mollie Nelson      Julie Rainey

                      Alyssa Schwanke    Kimberly Newton     Jill Custer
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BOLD hosted one event exclusively for young alumni (Homecoming Happy Hour). The group held one in-person board meeting and monthly conference calls. Members of the Communication Committee are managing an active BOLD Facebook page.

Outcome: BOLD exceeded staff expectations in 2016-17. The group finished the year with five members of the steering committee, but had as many as seven members at one point during the year. While only one event was planned and executed by BOLD, individual members made volunteer contributions to numerous other Alumni Relations events.

What We Learned: Young alumni have strong ties to UMD, and thus are more easily engaged in programming. The resulting pipeline of prospective young alumni volunteers is strong. Staff

will need to work with BOLD leaders in 2017-18 to ensure the structure of BOLD allows for growth beyond the members of the Steering Committee. BOLD should remain a department priority in 2017-18.

Objective 5: Develop and implement a mentor program to connect alumni and community members with students.

Assessment Strategy: Launch pilot program; determine if/how program can be implemented campus-wide.

Action Steps: Conducted research on mentor programs at other colleges and universities. Staff held informal discussions with different academic units on viability of partnering to pilot a program.

Outcome: Mentor program did not launch in 2016-17 due to lack of adequate staff time, financial resources, and inability to identify partner department willing to share ownership of the program.

What We Learned: A healthy partnership is critical to the success of a mentor program at UMD. Staff will work to identify this partner in 2017-18, develop a plan, and secure buy-in from campus leaders including college deans. A university-wide mentor program will more nuanced than other Alumni Relations initiatives, and thus requires a careful approach to program development.

Objective 6: Explore feasibility of guest lecture series in downtown Duluth.

Assessment Strategy: Build program with campus partner; conduct trail run.

Action Steps: Hosted two Alumni Lunch Series in fall 2016.

> Alumni Lunch Series: Shakespeare's First Folio
> Tweed Museum of Art
> Thursday, October 6, 2016
> Presenter: Dr. Krista Sue-Lo Twu
>
> Alumni Lunch Series: Brand Alliances
> Center for Economic Development
> Tuesday, November 15, 2016
> Presenter: Dr. Rajiv Vaidyanathan

Outcome: Lunch series for alumni and community members had a successful launch. Planning the events required more staff time than expected. Changes to staff mid-year caused the program to be placed on hold until fall 2017.

What We Learned: To successful reach alumni and community members the department will need to move the lunch series off campus. The first lunch, Shakespeare's First Folio, was attended exclusively by staff and faculty alumni. Partnering with the Center for Economic Development provides free space for the events and a desirable downtown location for guests.

Staff will consider the CED and other locations around Duluth for future lunches. Faculty were eager to present and share their research.

Objective 7: Build new website to inform and engage alumni more effectively. Highlight learning opportunities, volunteer roles, and affinity reunion/chapter program. Reflect changing Alumni Relations mission in newsletter and social media.

Assessment Strategy: Website migration to Drupal completed. Learning, volunteer, and affinity info available.

Action Steps: Communications overhaul in 2016-17 included several components.

- Website migration completed in fall 2016.
- Alumni learning, volunteer, and event information is present on the website.
- Created department communications calendar/schedule.
- Revised e-newsletter to streamline production and enhance value of content.
- Trained and empowered student worker to manage social media accounts.
- Developed new social media posting protocols to enhance messaging.

Outcome: The website migration to Drupal greatly enhanced staff's ability to develop new web content and publish in a timely fashion. Coupled with a more active presence on social media, the team was able to generate support for department campaigns using technology for the first time (the Frozen Four Watch Parties would not have been possible without the use of the website, Twitter, and Facebook). Overall, greater intentionality with communications helped the team align messaging with department strategy.
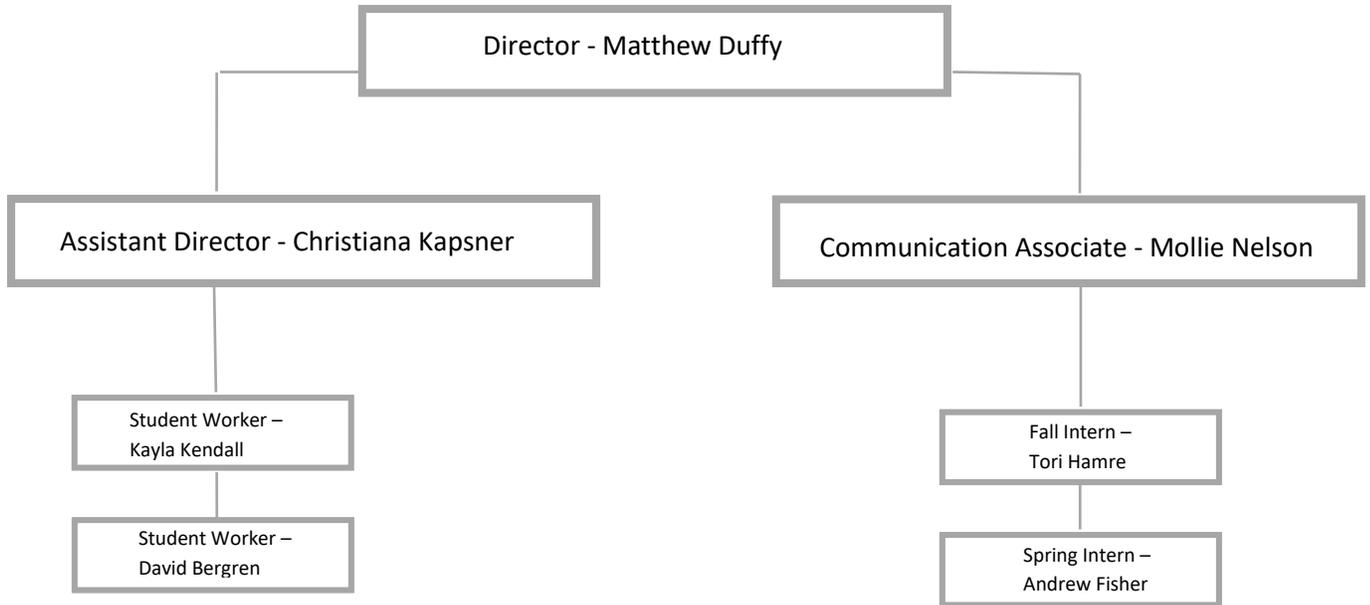
What We Learned: More time and familiarity with the workings of the website and social media will result in stronger messaging and more interaction with alumni. This is a relatively straight-forward deduction, but the department was not at this level of functionality with communication tools prior to 2016-17, and so there was uncertainty about the team's potential for success in this area.

V. Resources

Staff

Alumni Relations experienced numerous staffing changing during 2016-17.

Organization Chart (Effective July 1, 2016)

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                        ┌─────────────────────────────────┐
                        │   Director - Matthew Duffy       │
                        └─────────────────────────────────┘
                 │                                          │
    ┌────────────────────────────────────┐   ┌────────────────────────────────────────┐
    │ Assistant Director - Christiana     │   │ Communication Associate - Mollie Nelson │
    │ Kapsner                             │   │                                          │
    └────────────────────────────────────┘   └────────────────────────────────────────┘
                 │                                          │
         ┌──────────────────────┐              ┌──────────────────────┐
         │ Student Worker –      │              │ Fall Intern –        │
         │ Kayla Kendall         │              │ Tori Hamre           │
         └──────────────────────┘              └──────────────────────┘
                 │                                          │
         ┌──────────────────────┐              ┌──────────────────────┐
         │ Student Worker –      │              │ Spring Intern –      │
         │ David Bergren         │              │ Andrew Fisher        │
         └──────────────────────┘              └──────────────────────┘
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Analysis of the needs of the department yielded a reclassification of the Communication Associate to Alumni Relations Associate in October 2016. In December 2016, Christiana Kapsner departed for a new position elsewhere in the university system. Mollie Nelson was promoted to Assistant Director in February 2017, opening up her prior position as Alumni Relations Associate. Julie Rainey was hired in June 2017 to fill that role.

Organization Chart (Effective June 30, 2017)

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                        ┌─────────────────────────────┐
                        │  Director - Matthew Duffy    │
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│ Assistant Director – Mollie Nelson    │   │ Alumni Relations Associate – Julie Rainey     │
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        │
   ┌────────────────────────┐
   │ Student Worker –       │
   │ Kayla Kendall          │
   └────────────────────────┘
        │
   ┌────────────────────────┐
   │ Student Worker –       │
   │ David Bergren          │
   └────────────────────────┘
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   ┌────────────────────────┐
   │ Fall Intern –          │
   │ Tori Hamre             │
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   │ Spring Intern –        │
   │ Andrew Fisher          │
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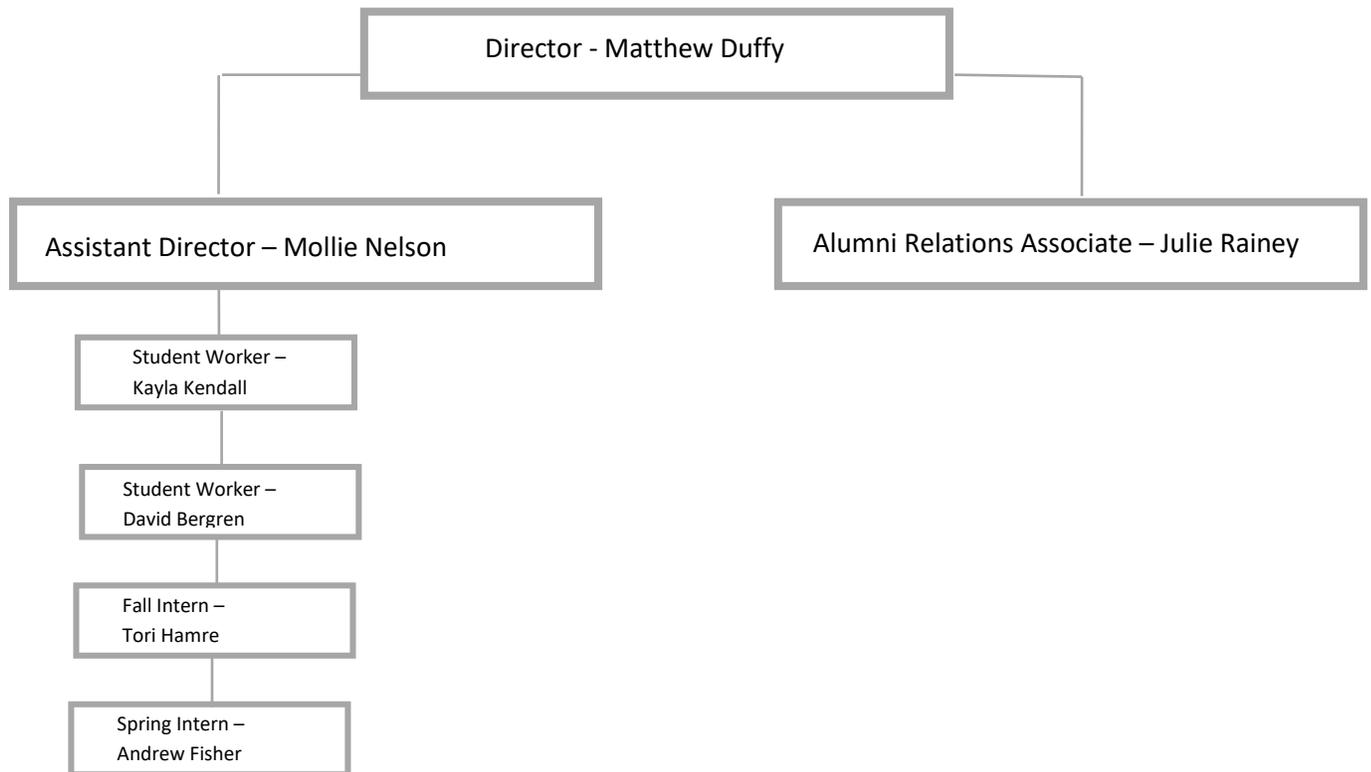
Responsibility for supervision of one or more interns and student workers is expected to shift back to the Alumni Relations Associate as experience in the new structure grows. Department will add a new intern role in 2017-18 focused on graphic design.

The department is unlikely to experience significant growth in staffing in the near future. Instead, Alumni Relations will need to focus on developing and retaining talent in order to continue program growth.

With successful training and leadership, the department is able to rely on talented students to accomplish meaningful work. To help develop the student worker and intern program, all student workers and interns will be asked to complete self-assessments beginning in 2017-18. Additionally, performance appraisals of students will be conducted by all department staff whereas previously the appraisals were completed by only the supervisor.

Budget

Alumni Relations relied on six budgets and funds to accomplish the goals and tasks of the department in 2016-17:

- Personnel budget for staff salary and benefits
- SE&E budget for operational expenses
- Revenue budget for events and sponsorships
- Apter Endowed Fund for costs associated with Grad Party
- UMD Alumni Scholarship Fund for awarding three student scholarships

Summary of expenses and revenue:

Fiscal Year	2016-2017	
Prior Year Carry Forward		
Fiscal Year End Carry Forward	35,573	
Total Carry Forward	**35,573**	
Revenue		
State O&M Appr Redistribution	232,550	
External Sales	19,708	
Gifts/Bequests	8,228	
Total Carry Forward + Revenue	**296,058**	
Expenses		
Payroll	150,619	
Fringe	45,558	
27th PD Accrual PR & Fringe	194	
General Oper Supplies and Services	15,374	
Telecommunications	121	
Travel	1,104	
Federal Non-Reimbursable	9,444	
Consulting and Professional Services	5,800	
Non-Capital Equipment	0	
Short Term Rents & Leases/Bldg/Fac	2,870	
Repairs and Maintenance	85	
Student Assistance	6,000	
Enterprise Assessment	2,610	
Total Expenses	**239,779**	
Transfers		
Transfers In	7,996	
Transfers Out	(23,439)	

Total Transfers		(15,443)	
Ending Balance		40,837	