Office of Alumni Relations

2018-19 Annual Report
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I. Executive Summary

During the past year the Office of Alumni Relations continued its focus on goals established in 2017. Volunteerism, bringing alumni back to campus, connecting with alumni where they are, and collaborating with internal and external partners remained core components of the team’s work. The continued emphasis on these goals helped shape the decision-making process in Alumni Relations: staff were more effectively able to determine the best events, programs, and communications that fit the mission of the department. Additionally, the presence of established goals made staff transitions less disruptive to the overall productivity of the department in 2018-19. Below are highlights from the past year:

- Moved into a new work space in the Darland Administration Building in June 2018. The shared space with the Development Office created a new opportunity for UMD to physically welcome guests and visitors to campus.
- Helped connect UMD fans around the nation with men’s hockey watch parties during the second consecutive national championship season by the team.
- Launched new UMD Mentor Program in partnership with CLA, LSBE, SCSE, and Career & Internship Services.
- Collaborated with the Department of Civil Engineering to host their first-ever alumni reunion in recognition of the 10-year anniversary of the department.
- Launched a new event series, Bulldogs Behind the Scenes, aimed at educating alumni about local businesses and providing a new professional development opportunity.
- Created a new annual alumni event, the Twin Cities Alumni Social, in partnership with BOLD. The Twin Cities event is focused on networking and responding to the interests of recent graduates.
- Designed, coordinated, and hosted an alumni relations conference for alumni professionals from the Upper Midwest region.

Many of the highlights from 2018-19 were made possible through groundwork laid in previous years. In particular, the hockey watch parties, the Civil Engineering Reunion, and Bulldogs Behind the Scenes were developed quickly and executed efficiently because the team has experience in building similar programs. The new Mentor Program and Twin Cities Alumni Social also benefited from planning that began before 2018. A key step moving forward will be for the team to evaluate the successes and failures of these (and other) programs as they move beyond the pilot phase.
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. Volunteerism
2. Draw Alumni Back to UMD
3. Outreach
4. Collaboration

Goal Area 1: Volunteerism

Develop programs that enable alumni who want to contribute their time and talent to UMD to find meaningful volunteer roles. Identify volunteers, guide them to appropriate roles, and acknowledge their contributions.

Goal Area 2: Draw Alumni Back to UMD

Design programs that draw alumni back to campus and to Duluth.

Goal Area 3: Outreach

Create methods of outreach that bring UMD resources and institutional pride to alumni in places where they live and work.

Goal Area 4: Collaboration

Focus on collaboration and partnerships with internal and external units to help further the mission of Alumni Relations.
IV. Objectives and Assessment

Objectives:

1. Build on the growth of Bulldogs of the Last Decade (BOLD) by developing a consistent schedule of events and expanding volunteer opportunities.

2. Build on success of affinity based reunions.

3. Launch UMD Mentor Program.

4. Build on initial success of Bulldogs on the Block in year two of the event.

5. Enhance ability to assess the success of events and programs along with each individual event or program’s alignment with the department’s strategic plan.

6. Work with partners to design and implement events that provide opportunities for professional development and learning.

Objective 1: Build on the growth of Bulldogs of the Last Decade (BOLD) by developing a consistent schedule of events and expanding volunteer opportunities.

Assessment Strategy: Events in summer, fall, and spring; new members recruited and placed in BOLD roles.

Action Steps: Under the guidance of Assistant Director Mollie Nelson the BOLD Executive Committee created a new alumni event (Twin Cities Alumni Social) and returned to campus for their annual in-person meeting.

Outcome: The new Twin Cities Alumni Social was one of the most well-attended events of the year. Over 90 guests attended the event at a brewery, Lakes & Legends, co-owned by a UMD alumnus. Volunteers and staff agreed that the event should be continued in future years; with careful financial planning the department should be able to sustain the event. The social occurred in summer; BOLD-led events were not planned for winter and spring. Recruitment of new members remained challenging in 2018-19. The BOLD Executive Committee at the end of 2018-19 was as follows:

Kimberly Newton ’14, Chair
Charlie Gordon ’16
Jireh Mabamba ’17

Discussions about joining BOLD occurred with graduating members of Student Association and the Grad Party Planning Committee, but ultimately those discussions have not yet led to formal volunteer roles. During the in-person meeting in spring 2019, BOLD members had a networking lunch with members of Student Association. This proved beneficial to both groups, and may lead to
further collaboration between the two (in addition to creating a potential pipeline for new BOLD volunteers).

What We Learned: As in 2017-18, BOLD members continued to be most engaged when presented with actionable tasks and concrete deadlines. This is likely why the volunteers enjoyed working on the Twin Cities Alumni Social. The group remains committed to hosting at least two events each year, with talk of another service project in 2019-20. Recruitment of new BOLD members remains challenging for staff and existing BOLD members. In anticipation of the Twin Cities Alumni Social in 2019-20, each BOLD member is tasked with identifying their individual desired outcomes for the event. Staff and volunteers believe this strategy and planning will help embolden BOLD volunteers to conduct more intentional outreach and information gathering at the event, ultimately leading to future conversations with prospective volunteers.

Objective 2: Build on success of affinity based reunions.

Assessment Strategy: Use of volunteer committees; collaboration with UMD departments; high guest satisfaction; year-to-year attendance increases.

Action Steps: Collaborated with academic partners and volunteers to host the Civil Engineering Reunion in October; worked with a volunteer committee to host the 50th Reunion in June.

Outcome: The Civil Engineering Reunion was well received by the alumni, faculty, and staff who attended. The use of a volunteer committee for this event was less necessary than other events because the programming was limited to three events. The committee was helpful in recruiting classmates to attend, and approving basic messages and event decisions. The 50th Reunion Planning Committee grew significantly in numbers from the previous year:

Alta Oben ’69, Co-Chair
Steve Welsh ’69, Co-Chair
Janet Grindy Cornelison ’69
Mike Dean ’67
Mary Ebert ’70
Fred Friedman ’69
Tom Haller ’69
Jerry Knickerbocker ’68
Teri Polga O’Gara ’69
Sue Sommer-Kresse ’69
Gail Schipper Tate ’69
Kaye Boyle Witzman ’69

The committee was more active in outreach to classmates in 2018-19 than in the prior year. Additionally, the group helped lead two Greek society reunion lunches on 50th Reunion weekend and an optional dinner following the Friday evening reception. Unfortunately, the hard work of the committee did not result in increased attendance at the 50th Reunion. Attendance remained flat from 2018 to 2019. Guests who responded to the post-event survey expressed high levels of satisfaction with the event.
What We Learned: From the Civil Engineering Reunion it became clear that if volunteers are used they need to have a strong role to play in the overall planning of the reunion. Asking volunteers to approve an existing plan will not help them develop ownership, and will lead to volunteers less compelled to conduct peer outreach. It is worth considering whether volunteers are needed for each reunion, and if so, how they can be used more effectively when the event schedule is fairly limited. Lessons from the 50th Reunion were fairly similar to 2018: there needs to be a large, diverse volunteer committee representing many areas of campus life; outreach needs to be multi-faceted and should begin as early as possible; UMD alumni need significant convincing that this is a program worth attending.

Objective 3: Launch UMD Mentor Program.

Assessment Strategy: Successful match, completion, and overall satisfaction with the program by 60 students and 60 mentors.

Action Steps: Built a Mentor Program Advisory Committee including staff from CLA, LSBE, SCSE, and Career & Internship Services. Recruited and matched 60 students with 60 individual mentors. Hosted a kickoff event on campus in October. Scheduled a second event for April, but the event was snowed out. Conducted two surveys to assess satisfaction with the different areas of the program.

Outcome: The Mentor Program was a success in year one, albeit with plenty of lessons learned along the way. Recruiting students was far easier than anticipated. The program also drew strong interest from alumni wanting to mentor students. Finding precise matches was occasionally difficult. The kickoff event was a huge success. The reaction to the program in conversations with students, mentors, and via survey was overwhelmingly positive. Many commented that more structure is needed to guide the mentoring relationship.

What We Learned: The mentoring program at UMD can work. There is significant interest from students, alumni, and the colleges. Developing a program that involves more events and greater overall structure will benefit the students and mentors. The project is very staff-intensive, and the allocation of time to the project will only grow as greater structural support is implemented (e.g. more events, a monthly newsletter). Partnership with the colleges is critical to the success of the program. Their involvement in student recruiting and selection is particularly helpful. Financial support from the colleges will remain essential for the program to continue.

Objective 4: Build on the success of Bulldogs on the Block (BOTB) in year two of the event.

Assessment Strategy: Twenty or more locations; participant and volunteer satisfaction via post-event survey.

Action Steps: Staff used department communications and personal outreach to recruit past and new volunteer hosts for BOTB. The post-event survey was not distributed due to the lack of accurate guest lists from the various locations.
Outcome: Successfully hosted in 22 locations around the country. Overall satisfaction was lower than in year one based on conversations with location hosts. Many locations experienced lower-than-expected turnouts.

What We Learned: The Alumni Relations team needs to more effectively empower the volunteer hosts. The hosts need to find co-hosts so they are never at an event alone. The hosts need to write at least one email (or similar outreach) to the alumni in their region. Overall stewardship and management of the volunteers can improve through consistent personal contact from staff. The team will continue to tweak the marketing and messaging for the event to make the purpose and goals of the event more clear to alumni.

Objective 5: Enhance the team’s ability to assess the success of events and programs along with each individual event or program’s alignment with the strategic plan.

Assessment Strategy: Implement and use new event outline and event recap documents; improve data tracking in DMS.

Action Steps: Event outline and recap documents were created and modified throughout the year. Stand-alone event recap meetings were scheduled or incorporated into staff meetings. DMS data entry guide was created.

Outcome: The event outline and recap documents proved helpful. What was formally a system managed on an individual level is now standardized across the department. The system is especially helpful for collaborative projects, and for reflections at points throughout the year (e.g. event recap documents were relied on heavily during planning for 2019-20). The DMS data entry guide created a uniform approach to recording Alumni Relations event and program data in DMS. The guide was helpful to both staff and student workers.

What We Learned: The team benefits from written documents that created standardized processes for some work functions. There was initial concern that the added forms and guide would create a paperwork burden; this was not the case. Additional modifications to the events forms and DMS guide will be necessary as the department continues to grow.

Objective 6: Work with partners to design and implement events that provide opportunities for professional development and learning.

Assessment Strategy: Growth in Coffee & Connections attendance and use of speakers from variety of specialties; expansion of Bulldogs Behind the Scenes; growth in TC Networking Night.


Outcome: The department continued to see strong attendance and growth in events and programs related to professional development and learning. In particular, Bulldogs Behind the Scenes has
generated some of the best attendance of any alumni events hosted in the Duluth region over the past three years. Coffee & Connections maintained modest attendance levels in 2018-19, typically yielding 10 total guests each session.

*What We Learned:* Alumni want more Bulldogs Behind the Scenes-type programming. The department is focused on increasing these options in 2019-20 to meet demand. Additionally, the interest from local businesses has exceeded expectations with multiple companies expressing a desire to host. With attendance of nearly 100 guests, the Twin Cities Alumni Social proved that alumni will pay to attend a networking event that does not include a formal program, and instead focuses on providing a forum for connecting with other alumni. Coffee & Connections is a valuable program because it aligns well with the goals of the department, but attendance continues to be a struggle. An enhanced marketing effort and location change may benefit the program in 2019-20. The popularity of the speakers and their content have a huge influence over the quality of the program.
V. Resources

Staff

Alumni Relations had a staff member, Julie Visger, depart in April 2019. Austin Sommerfeld joined the team in June 2019.

Organization Chart

Director – Matthew Duffy

Assistant Director – Mollie Nelson

- Student Worker – Kayla Kendall
- Student Worker – Olivia Schultz
- Student Worker – Christine Hafdahl

Alumni Associate – Austin Sommerfeld

- Graphic Design Intern – Kate Shelley

Overall, the department remained largely stable in 2018-19. Julie Visger’s departure in April was mitigated by the relatively quick hire of Austin Sommerfeld to fill the Alumni Associate role. Kayla Kendall and Olivia Schultz returned as student workers in 2018-19, providing experience and leadership as the department transitioned to a new office space with new colleagues. Kate Shelley reported to Julie Visger during her time as the Graphic Design Intern.
Budget

Alumni Relations relied on seven budgets and funds to accomplish the goals and tasks of the department in 2018-19:

- O&M budget for staff salary and benefits.
- SE&E budget for operational expenses.
- Revenue budget for ticketed events and sponsorships.
- Apter Endowed Fund for costs associated with alumni events.
- Alumni Scholarship Fund for awarding six student scholarships.
- Homecoming budget.
- Mentor Program budget for funding expenses related to the program.

Summary of expenses and revenue:

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>2018-2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior Year Carry Forward</td>
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<tr>
<td>Fiscal Year End Carry Forward</td>
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<tr>
<td>Total Carry Forward</td>
<td>50,017</td>
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<tr>
<td>Revenue</td>
<td></td>
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<td>State O&amp;M Appr Redistribution</td>
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<tr>
<td>External Sales</td>
<td>23,193</td>
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<tr>
<td>Gifts/Bequests</td>
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<tr>
<td>Total Carry Forward + Revenue</td>
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<tr>
<td>Expenses</td>
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<td>Payroll</td>
<td>159,494</td>
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<td>Fringe</td>
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<td>27th PD Accrual PR &amp; Fringe</td>
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<td>General Oper Supplies and Services</td>
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<td>Telecommunications</td>
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<td>Travel</td>
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<td>Federal Non-Reimbursable</td>
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<tr>
<td>Consulting and Professional Services</td>
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<td>Non-Capital Equipment</td>
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<td>Short Term Rents &amp; Leases/Bldg/Fac</td>
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<td>Repairs and Maintenance</td>
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<td>Student Assistance</td>
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<td>Enterprise Assessment</td>
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<td>Total Expenses</td>
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<tr>
<td>Transfers</td>
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<tr>
<td>---------------------------</td>
<td>------</td>
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<tr>
<td>Transfers In</td>
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<tr>
<td>Transfers Out</td>
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<tr>
<td><strong>Total Transfers</strong></td>
<td>702</td>
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<tr>
<td><strong>Ending Balance</strong></td>
<td>49,050</td>
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