# AAA Partnership Fund: Application Process and Funding Deliverables Guide

This document can be used and referenced as a guide before, during and after your application to the **Alumni All-Access (AAA) Partnership Fund**. It includes information on the fund, the application process, deliverables, and best to help ensure the partnership runs smoothly. For ease of reference to key funding program timelines, we have included a reference table on the final page of this guide.

We highly recommend reaching out and connecting with us prior to your application and recommend leveraging this document as a resource during your planning stages and in post-event wrap up. You can access the Alumni All-Access (AAA) Partnership Fund application here.

## Table of Contents

# Application Timelines and Program Eligibility

If you are considering applying for partnership funds, please be aware that we require all programs to meet the same basic deliverables, and to adhere to our provided process timelines. Failure to meet either requirement will impact our ability to provide support.

Applications must go through a review process before final approval. This is to ensure that all deliverables will be met by both parties,

Applications are assessed by a review committee, and meetings are scheduled as applications are received. We require **two months** from application to event date to process the application and coordinate deliverables with the applicant.

## Application Timeline

Applications must be submitted a **minimum 2-months** in advance of the planned program date. This window gives Alumni Engagement time to review the application, assist with promotions and communications, solicit volunteers for the program, and to work with the applicant to ensure all other deliverables are met. Applications are assessed by a review committee and are scheduled as applications are received.

For a detailed breakdown of critical deliverable timelines, please see the **Funding Timeline Table** at the end of the document.

## Eligibility

Reviewers assess each application on several criteria designed to ensure that programs meet the stated deliverables, and to ensure the program provides value to the alumni community. Reviewers will assess applications based on the questions below:

- Is the program open to all UCalgary Alumni featuring content with broad appeal?
- Will Alumni Engagement have the opportunity to identify an appropriate representative to provide opening or closing remarks?
- Will any UCalgary Alumni be featured in the program? Speakers, researchers, etc.?
- Will the UCalgary Alumni post-program survey be sent to attendees following the event?
- Is there a commitment to track attendance/registration data for the purpose of internal alumni engagement scoring?
- Will the applicant share registration data once the event is complete for the sole purpose of internal alumni engagement scoring?
- Will Alumni Engagement receive recognition as an event partner/sponsor? (quantity and quality of recognition considered at review)
- How will the funding be used for the event?

Alumni Engagement will advise potential applicants on program eligibility and will provide feedback on any changes necessary to ensure the program aligns with funding requirements.

# Event Supports

Alumni Engagement is happy to support alumni engagement activity across UCalgary, without the need to apply for AAA Partnership Funding. On a case-by-case basis, we offer support for: communications, storytelling, and volunteer recruitment. These are optional supports for your partnered event.

## Communications

Alumni Engagement will work with the partner to leverage our communication channels to extend the reach of the event to our alumni community. In the application, partners can request:

- Social media posts and post sharing
- Inclusion in the Alumni Newsletter
- Data segmentation strategy for the purpose of event promotion appeals
- Direct email appeals to the alumni mailing list.

Requests for communications support require 5-6 weeks lead time and are contingent on staff availability. Requests for promotions in the newsletter are required **7 business days before** the newsletter is deployed. The newsletter is deployed on the second Tuesday of each month, and runs each month, except for July. In exceptional circumstances, the newsletter deployment date can be altered.

See the sponsor recognition section for social media handles and hashtags.

## Storytelling

Alumni Engagement works diligently to highlight the achievements and tell the captivating stories of UCalgary alumni. Where appropriate, we would like to coordinate, with the partner, the introduction of any notable alumni associated with the event to our Alumni Storyteller for the purposes of creating content for the Alumni Newsletter.

Depending on the scope of the partnership and alumni involved, the story and content curation can be a collaboration. In any stories that Alumni Engagement writes, we will connect with the partner to ensure accuracy of information and the opportunity to provide webpages and other relevant information. Stories will have the option of cross-promotion in UCalgary channels, through tags, content sharing and social tagging and posting.

If there is alignment and opportunity for a story, Alumni Engagement will connect no shorter than two months prior to the event. If you think there is a strategic storytelling opportunity you would like Alumni Engagement to consider, we require a minimum of two months notice.

## Volunteer Recruitment

We encourage partners to incorporate alumni volunteers wherever possible. We will work with partners to provide training for volunteers specific to the event, stewardship of the volunteers at the event, and any post-event follow up.

If volunteers are requested, Alumni Engagement will work with the partner on volunteer recruitment, communications, and will ensure volunteers are fully prepared for the event.

Volunteer recruitment requests must be made **1-2 months** before the event date.

Volunteers at your event could include personal volunteers (registration, wayfinding, etc) or professional volunteers (speakers, panellists, moderators, judges, etc). Alumni Engagement can support with recruitment of both types and will request information on the volunteers where relevant for reporting purposes. A template will be provided in circumstances where information is requested.

### Post-Event Debrief and Data Visuals

Alumni Engagement offers a post-event meeting to debrief any components of the partnership that are of interest to the partner or Alumni Engagement. This debrief can also include a check in on post-event components.

Alumni Engagement has access to a system that creates data visuals based on the event and the information in our system and that provided through reporting for the event. The visuals can help inform future event planning, including information such as: alumni vs non-alumni attendance, faculty representation by attendance, registration vs attendance rate, comparables to other events, etc. After event reporting is provided, Alumni Engagement uploads this to the system, and can provide visualizations to the partner at their request.

## Deliverables

There are several deliverables and requirements for successful funding requests. We will work with applicants to ensure that events meet these requirements, and that deliverables will be met.

### Funding

Successful applications will be provided funding of up to 25% of your total expenses, and up to the maximum agree upon amount. The funding amount requested **must be supported with a proposed budget**, submitted alongside the application.

Due to funding restrictions, reporting, and compliance reasons, we cannot transfer funds to you for this purpose. All expenses will need to be charged directly to our project at the time of payment.

All PeopleSoft expense methods (e.g.: Credit Card Reconciliations, Requisitions, Payment Request Forms) allow splitting of the expense across multiple accounting strings. Please ensure the expense initiator knows to charge XX% of each expense to accounting string provided upon funding approval.

If there are any questions, or concerns, regarding funding, **reach out before invoices are paid**.

If a funding error is made, it is incumbent upon the partner to work with their finance representative to resolve any issues.

### Registration

As a condition of funding, registration and attendance data must be provided to Alumni Engagement for the purposes of engagement tracking. To meet our data requirements, we require specific questions be included on the event registration page. The questions are:

- Did you graduate from UCalgary with a degree?
    - What is your UCID?
    - Degree?
    - Year of graduation?
    - Last name at convocation?

We can assist the applicant with setting up a registration page using our internal system, or the partner can use a platform of their choice. Registration and attendance data must be shared with Alumni Engagement regardless of platform used. A template will be provided to the partner for data formatting, to ease the data uploading process.

## Sponsor Recognition

As a condition of funding, Alumni Engagement will be recognized as a sponsor of the event. Contingent on the nature of the event, we ask to be recognized in the following ways:

- Pop up Banners at the event
- Booth or table for Alumni Engagement at event (where possible)
- Alumni Logo featured on the registration page.
- Alumni Logo featured on the event website.
- Alumni Logo featured in any promotional communications.
- Alumni Logo featured in any digital slides/screens/scrawls featured at the event.
- If using social media, that our handles are tagged:
  - On Twitter: @UCalgaryalumni
  - On Instagram: @UCalgaryalumni
  - #UCalgaryalumni on other platforms

The Alumni logo will be provided to the partner, along with an Alumni Brand Standards guide. We ask that a draft of promotional content be provided to our Communication Specialist to ensure brand compliance.

If Alumni Engagement is provided activation space for a table/booth and banner, we will be responsible for set-up and tear down. We will coordinate all activity with the partner to eliminate any imposition on the event.

## Opening/Closing Remarks and Alumni Speakers

As a condition of sponsor recognition, Alumni Engagement will be recognized as a supporter/sponsor of the event during opening and closing remarks.

Where possible and appropriate, a representative from the Alumni Association, or delegate, will be provided the opportunity to provide remarks on behalf of the Association and the Office of Alumni Engagement.

We will work with the partner to ensure that that the speaker is appropriate and is prepared in advance of the event.

## Event/Operational Support

In addition to funding support, Alumni Engagement can offer staffing support for the partner's event. This can include:

- Event set-up and teardown
- Staffing the check-in and registration table
- Volunteer management
- Alumni speaker stewardship

Event support is contingent on staff availability, is offered on a case-by-case basis and is at the sole discretion of Alumni Engagement.

# Post-Event Requirements

## Post-event Report

All partners are required to complete the post-event report, provided through the Submittable platform. Along with the final report, partners must provide a final budget, and registration/attendance data. Alumni Engagement will send the report template the next business day following the event.

## Post-Event Survey

Alumni sends our post-program surveys to all registrants of events, regardless of attendee status. As a deliverable of the Partnership Fund, Alumni requests campus partners commit to the distribution of post-program/event surveys to their attendees and registrants. Surveys can be **deployed by the partner**, or **by Alumni Engagemen**t at the partner's request. Alumni distribution requires **at least three weeks notice**, and the **immediate sharing of attendance data** post-event for distribution purposes.

Surveys count towards engagement and is a field that can be utilized in data visuals and debriefs. Alumni has a survey template with questions that can be adjusted to fit the context of your program, with the option of adding questions at your discretion. If you are unfamiliar with Qualtrics, have concerns, or would like support, please let us know and we are happy to help.

## Post-Program/Event Survey Process

Before the program/event, Alumni Engagement will connect with you about the survey. The best practice is to deploy your survey within **24 hours** of your event. When deploying a post-event survey, it is important to understand that responses **remain confidential** and are used only in aggregate reporting on alumni engagement. Additional questions you choose are for your utilization. Alumni **will not** report on these.

**If the Partner is deploying the survey:**

1. Request template from Alumni. Build your Qualtrics survey by starting as a copy from the template. Customize as you see fit for your interests and evaluation needs.
2. After your program, upload your registration/attendance list to Qualtrics, to create personalized survey links. Alumni can support with this – simply add us as a collaborator or connect and we'll assist.
3. Deploy your survey through an email tool to share the personalized links to everyone. You can do this through Marketo or another email system of your choosing.
4. The sooner you deploy your email after the program, the more responses you are likely to receive. Best practice would be within 24 hours.
5. You can optionally send a reminder email, developed in plans, or developed out of need to incentivize response rates.
6. We recommend closing your survey after one week.
7. After you close your survey, export the results, incorporate into the existing template, and send a copy to Alumni. Please reach out if support is needed.

8. Alumni will **only** utilize the template questions results. Please leverage the survey results as you see fit.

**If Alumni is deploying the survey:**

1. Please let us know **at least three weeks** prior to your event. Our team will connect with you to discuss the survey, template questions, and the benefits.
2. If you know what questions you would like to include, send them to Alumni to be included in the survey. We can support you in the question design as needed.
3. Your primary program contact will be added as a collaborator on the survey in Qualtrics. This will allow both parties to review the survey.
4. By one week before the program, Alumni will provide a draft of the survey for your review and approval.
5. Alumni will provide you a registration data template, used for uploading registration data into Qualtrics for unique link generation.
6. Within 24 hours of the program completing, please send in the provided registration data template, registration and attendance information.
7. Alumni will import the list, create personalized survey links, and export the list with links for deployment.
8. Please confirm with Alumni that the planned day to close the survey is still accurate. We recommend closing the survey after one week.
9. Alumni will close the survey, export the results, and share the results with you.

## Fund Timeline

Please note that we highly encourage pre-application consultations and are available to meet with you at any time prior to your submission. This indicative timeline begins with application submission.

| Timeline Milestone | Application Submission | Upon Application Approval | Event Lead-up | Event Day | Post-Event |
|---|---|---|---|---|---|
| | Minimum 2 months prior to event | 1-2 weeks post-approval | 2 months prior to event up to event day | | |
| Review Meeting | Review meeting is scheduled upon receipt of application. Goal is within a week of submission, pending availability. | | | | |
| Finance | | Accounting string provided. For external partners, payment will be processed upon receipt of invoice, or signed sponsorship agreement. | | | Final Budget is provided as soon as is reasonable, including the cost assumed by Alumni Engagement. |
| Communications and Social Media Support | Partner provides comms plan with application. Social media is scheduled with Comms Specialist. Event URL is shared with Alumni Storyteller for newsletter. | Alumni Logo provided for promotions. Comms Specialist reviews draft comms to ensure brand compliance. | 1 week before event: Event attendance reminders deployed. | Social media posts include #Alumni and are shared by Comms Specialist. | |
| Registration Data | | Partner will include required alumni related questions on registration platform, for the purpose of reporting. | | | Data is shared next business day, or as soon as reasonably possible. Data is used for post-event survey and must be provided. |
| Volunteers | Up to 2months lead time. Volunteer request submitted alongside funding application. Volunteer role templates will be provided for this purpose. | | 2 weeks before event: Volunteer shifts and attendance confirmed. | Volunteers will be provided directions in advance of the event. Either the partner, or Alumni Engagement, will be responsible for volunteer stewardship | Alumni Engagement will thank volunteers for their service. |
| Speakers | | Alumni Engagement will source appropriate speaker for event (if agreed upon). Speaker notes will be provided by AE and will be event appropriate. | 2 weeks before event: Speaker profile and speaker notes provided to partner. | Speaker will provide opening/closing remarks. | |
| Sponsor Recognition | | Alumni Logo featured on registration page, event website, any promotional communications, any digital slides/ screens/ scrawls featured at the event. | 2 weeks before event: Partner confirms the availability of a booth or table for Alumni Engagement at the event. | Partner recognizes Alumni Engagement as event sponsor. Recognizes any speakers or panelists as UCalgary Alumni | |
| Event Support | | Alumni Engagement and partner determine the support required for event day. | 1 week before event: Alumni Engagement will confirm any final support details, including event attendance, with partner. | Alumni Engagement will set-up table/booth and provide agreed upon event support. | |
| Post-Event Survey | | | Draft survey completed 1 week before event. | | Survey deployed as soon as registration data received. Survey responses are shared within 1 week of survey closing. |