



INTERNAL

Campus Partner Toolkit

Supports and Services for Campus

Updated: April 26th, 2024

Contents

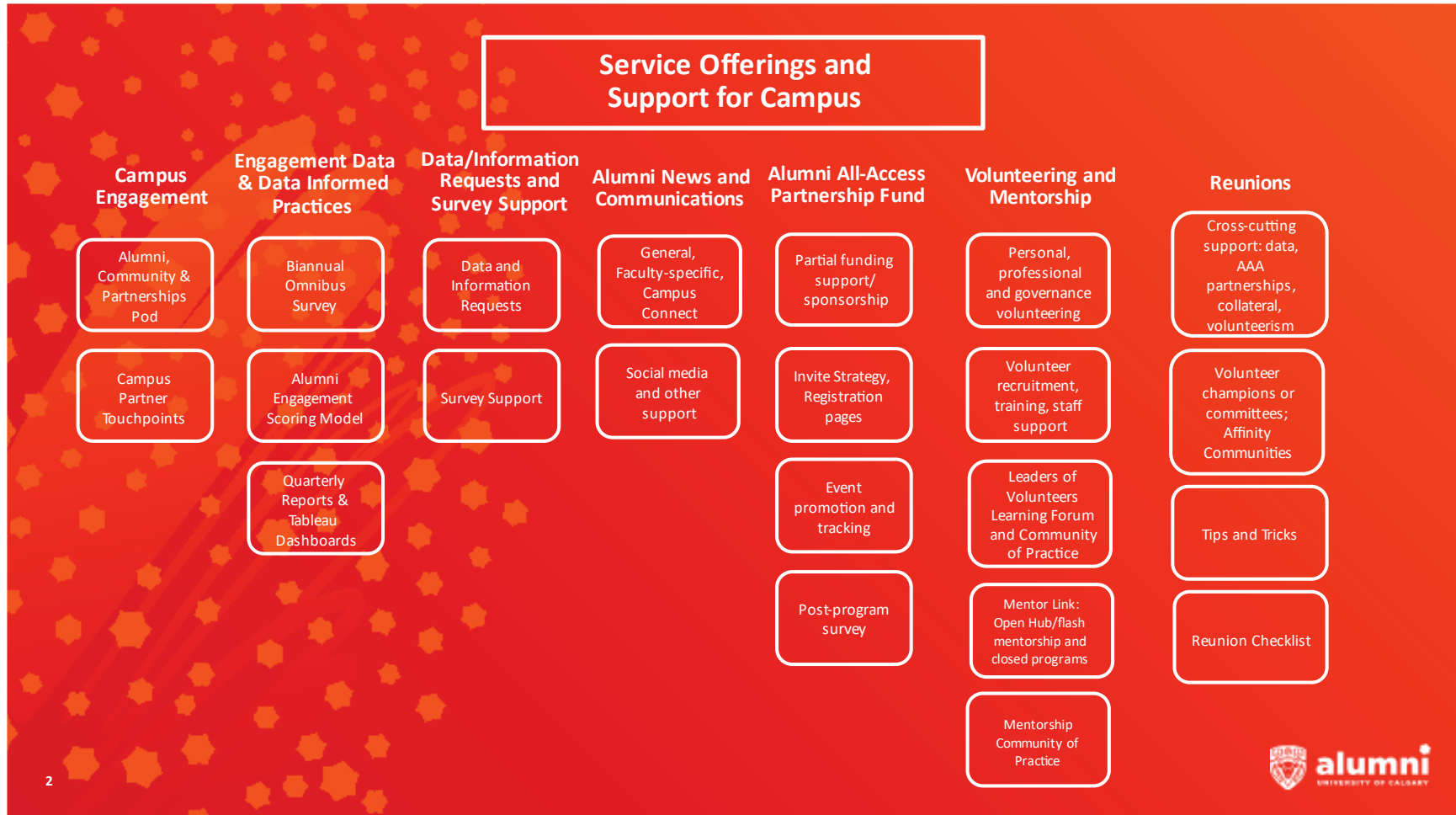
- Campus Partner Toolkit 1**
 - Supports and Services for Campus 1
- Visualizing Support for Campus Partners 4**
- Campus Engagement 5**
 - Alumni, Community & Partnerships Pod..... 5
 - Where to find more information and who to connect to:..... 5
 - Campus Partner Touchpoints 6
 - Where to find more information and who to connect to:..... 6
- Engagement Data & Data Informed Practices 7**
 - Biannual Omnibus Survey 7
 - Where to find more information and who to connect to:..... 7
 - Alumni Engagement Scoring Model 8
 - Where to find more information and who to connect with: 8
 - Quarterly Reports & Tableau Dashboards 9
 - Quarterly Reports 9
 - Tableau Dashboards 9
 - Where to find more information and who to connect with: 10
- Data/Information Requests and Survey Support 10**
 - Data and Information Requests 10
 - Where to find more information and who to connect with: 11
 - Survey Support 11
 - Where to find more information and who to connect with: 12
- Communications..... 13**
 - Alumni News 13
 - Where to find more information and who to connect with: 13
 - Social Media 13
- Alumni All-Access Partnership Fund 14**
 - Where to find more information and who to connect with: 15
- Volunteering and Mentorship..... 16**
 - Volunteer Engagement Overview 16
 - Volunteer Recruitment, Training and Staff Support 16
 - Campus Engagement 17
 - Where to find more information and who to connect with: 17
 - Mentorship Overview 18
 - Where to find more information and who to connect with: 18

Reunions: Cross-Cutting Support	19
Support referenced in the toolkit:	19
Support not referenced in the toolkit:	19
Tips and Tricks:	20
Shared Responsibilities Table:	21
Reunion Checklist:.....	22

Visualizing Support for Campus Partners

This visual outlines the various ways in which Alumni Engagement can support any campus partners. The following toolkit will focus on the supports and details within the areas outlined in the visual.

For all areas, relevant links and contact information are shared for utilization. If you are unsure what might benefit you, or who to contact, please connect with us at alumni@ucalgary.ca



Campus Engagement

Alumni, Community & Partnerships Pod

The Alumni, Community & Partnerships (ACP) Pod is an update from the Alumni Engagement Advancement Pod meeting that began in 2017. The Pod launched for the 2023-24 year to support any campus partner that has engagement activities, facilitated in a shared model by each team in the ACP portfolio. Additionally, the re-envisioning has been redesigned in alignment with the aims and cross-cutting goals of Ahead of Tomorrow, and the establishment of the ACP portfolio.

The ACP Pod has a threefold purpose:

- To better understand, create connections, and collaborate with our faculty partners and colleagues around engagement activities and opportunities.
- To create, and on occasion, facilitate, a space for silo breaking discussion, supports and awareness between faculties and units.
- To support faculty and unit understanding of the ACP portfolio and opportunities to get involved, collaborate, and garner support.

Who attends:

- Any campus partner, faculty or otherwise, that works in areas of engagement and is interested in participating.
- Each unit self-determines who from their team(s) should attend any/all sessions.
- Attendance and representation can vary as interest in topics and availability permit.

What the Pod looks like:

- Intended to be an engaged space for participant-driven discussion, presentation, problem-solving and collaboration.
- Opportunity to learn a bit more about the teams within ACP and how their work can support yours.
- Facilitated space for silo-breaking across units to discuss and align on what is of priority to them.

Where to find more information and who to connect to:

[Alumni, Community & Partnerships team](#) > [ACP Pod channel](#)

- Request access to the team, and you will have full access to the channel and all documents.
- All information grounding the Pod, and materials from each session will be uploaded to the site.

For more information, questions, or to discuss further, please reach out to alumni@ucalgary.ca.

Campus Partner Touchpoints

Alumni Engagement team members are available to meet with campus partners as your time and interests permit. These touchpoints are typically led with the Alumni Leadership Engagement and Recognition team. Many of the topics that can be discussed in these touchpoints are referenced across this toolkit. You may not know what could or should be, and that's what we're here to help with!

Topics to discuss include:

- Engagement data and informed practices
- Data requests and survey support
- Communications
- Alumni-Access Partnership Fund
- Volunteer and Mentorship opportunities
- Other opportunities
 - This could include items that connect across areas above, such as strategy development, event best practices, reunions, event collateral, alignment to central programming, and many more!

Championing your alumni and identifying champions

The alumni community is involved in so much across campus! If you are working with alumni in your area, and would like to help them get more involved, please let us know. We would be happy to connect and discuss engagement, stewardship, recognition, and other opportunities.

We are also available to help you identify engaged alumni that could be involved in your work. This could include speakers, champions, representatives and more. Our systems can support you in identifying highly engaged individuals to connect with.

Additionally, if you are interested in engaging your alumni community, but aren't able to lead on something, our suite of central programs are here for cross-promotion! From webinars, career focused initiatives, field trips and more – these can be promoted to any alumni. There are also offers, like with Scavenger Hunts, where you could leverage our license to host your own custom hunt.

Where to find more information and who to connect to:

For more information, questions, or to discuss further, please reach out to Pam Bergsteinsson at pam.bergs@ucalgary.ca or alumni@ucalgary.ca

If you are unsure what you could do, please reach out and we are happy to connect you to the right folks for support!

Engagement Data & Data Informed Practices

Biannual Omnibus Survey

The objective of Alumni Engagement's biannual survey is to better understand the experiences, interests, identity and general feelings and attitudes of alumni towards UCalgary, including programs, benefits, volunteering, giving and communications. The biannual omnibus survey invites a randomized sample of graduates to participate representative of contactable alumni, faculties and graduating years.

Sub-sections of the survey:

- Level of connection alumni feel to UCalgary
- Net promoter score alumni would rate about UCalgary
- Volunteer engagement perceptions, interests and satisfaction
- Giving to UCalgary or elsewhere
- Programs and benefits: awareness and satisfaction of UCalgary alumni programs, services and benefits
- Sentiment analysis on key topics, themes, issues and priorities for UCalgary alumni

How can this information be used in decision making:

- Strategy development
- Event or program ideation, planning and implementation
- Gap analysis and opportunity identification
- Communications planning
- Themes, interest areas, proclivity for general planning

Where to find more information and who to connect to:

The survey report is available for all campus partners to leverage information and findings as you deem appropriate for your initiatives.

- A copy of the report can be found here: [Alumni Omnibus Survey Report 2023 .pdf](#)
- This is saved in the [Alumni, Community & Partnerships](#) team > [ACP Pod channel](#).

To learn more about the biannual omnibus survey, please reach out to myan.pacholkow@ucalgary.ca

Alumni Engagement Scoring Model

What is the Scoring Model?

- Depth measure that Alumni Engagement uses to measure engagement.
- Incorporated into Advancement's BBCRM dashboard and Tableau data visuals.
- Score is calculated individually and can be used to better understand and determine engagement trends across engagement categories.
- Engagement must be maintained annually, otherwise the individual will lapse in score.

The seven engagement categories are:

Category	Type
<ul style="list-style-type: none">• Volunteering (personal, professional, governance)• Programs (registration and completing a post-program survey)• Giving (any amount)	Active
<ul style="list-style-type: none">• Awards (UCalgary Awards)• Profiles (UCalgary publication)• Interaction (meaningful, with an outcome deepening the relationship or furthering and opportunity)• Contact update (initiated by individual)	Passive

There are four market segments, grouping individuals based on points in the scoring model. They are:

- Transactional (0 points)
- Connected and Proud (7-17 points)
- Peeking Over the Fence (2-6 points)
- Ambassadors (18-50 points)

How can the Scoring Model help you?

- For faculty partners, to better understand your alumni community
- For faculty partners, to get a sense of the ways in which your alumni are engaged on campus
- For any partner, to identify prospective volunteers or other opportunities bespoke or higher impact in nature to individuals already engaged
- For any partner, to inform event or program planning based on registration and survey feedback
- For any partner, to identify gaps and opportunities

Where to find more information and who to connect with:

More information on the Alumni Engagement Scoring Model can be found in:

- [Alumni, Community & Partnerships team](#) > [ACP Pod channel](#) > [Alumni Engagement Resources](#)
- Quick link: [Alumni Engagement Scoring Model Fact Sheet](#)

For more information on the Engagement Scoring Model, and to learn more or discuss, please reach out to myan.pacholkow@ucalgary.ca

Quarterly Reports & Tableau Dashboards

Quarterly Reports

The quarterly reports are based on UCalgary's fiscal calendar but represent a 12 month period. As each new quarter is complete, a previous quarter 'falls off' the report. This is in direct alignment with the requirements of the Engagement Scoring Model, in which individuals must be retained each year.

What's included in the quarterly report:

- A snapshot of alumni engagement across campus and broken down by faculties
- Includes a visual snapshot of the central affinity partners
- For faculty partners, the rate of engagement and engagement numbers by segment
- For all partners, the number of engaged alumni by activity type and market segment over time

Tableau Dashboards

The Tableau dashboards make up much of the quarterly reports. Tableau is refreshed on an automated and daily basis with information from BBCRM. These dashboards can be filtered and utilized as campus partners see fit. The dashboards include:

- Information on the rate of engagement by faculty
- Market segments and ways to filter over time and by faculty/faculties
- Engagement activities and ways to filter over time and by faculty/faculties
- Partner event snapshot
- Faculty snapshots on demographics of individuals attending their events
- Volunteers and highly engaged individuals
- Stats and visuals on Alumni All-Access Programming
- Stats and visuals on the Omnibus Survey

How can you leverage Tableau?

- The more information that is reported on engagement activities, the more informed your trend analysis and data visuals can be!
- Decision making for events and programs based on registration trends and survey responses
- Better understanding engagement across different faculties
- Better understanding engagement over time and by different activities and segmentation
- Opportunity and gap analysis based on trends over time across and within faculties
- Development of trends and visuals with Alumni-All Access partners and other partners outside of faculties connected to Advancement alumni engagement, development, and communications
- Identify highly engaged individuals for bespoke volunteer opportunities
- Inform engagement strategies and planning

Where to find more information and who to connect with:

Quarterly reports can be found in:

- [Alumni, Community & Partnerships team](#) > [ACP Pod channel](#) > [Alumni Engagement Resources](#)
- There is a sub-folder called [Quarterly Engagement Reports](#), where you can view quarterly reports beginning in fall 2019, up to our most recent report.

Tableau is accessible at: <https://evisual.ucalgary.ca/#/home>

- For faculty partners, Deans and Development and Alumni staff should already have access. If you do not, you can request access at: <https://ucalgary.service-now.com/adv>

For more information or to access these files and resources, please reach out to myan.pacholkow@ucalgary.ca

Data/Information Requests and Survey Support

Data and Information Requests

Alumni Engagement is able to provide supports to request information from Advancement's BBCRM database, and provide information through ad hoc requests and queries.

For partners that do not have BBCRM access: we are able to support you in your data/information checks and requests for information.

Data and information requests could include, but are not limited, to the following:

- Alumni status checks for communications or other matters
- Individual profile updates for affiliations, committee involvement, interactions, etc
- Cross-referencing different data sources for campus involvement tracking
- Requests for information on alumni based on:
 - Certain faculties and graduation years
 - Geographical area
 - By engagement score or other scores
 - By indicative age
 - By workplace or industry (as known)
 - By committee, volunteer, event, award and other affiliations
 - ...And the list goes on!

What does support look like?

- For faculty partners:
 - If a department or unit not connected to development or communications reaches out, we will confer with you prior to acting (unless preferred process is already determined)

- Depending on your capacity, we are happy to support with data requests as desired. Please note that our access and result time does not vary from yours
- For partners without access to BBCRM:
 - We can do ad hoc requests for communications and other matters involving small numbers of individuals
 - We are happy to do data requests for larger initiatives, programs and events. Please note that we work with the Advancement data team for these, and requests will typically take up to three weeks

Examples of ad hoc requests: alumni status checks for VPR communications, Innovate Calgary event, Centre for Career and Personal Development Career Fair.

Examples of data/information requests: Faculty of Graduate Studies recent graduate recruitment events, any faculty department specific curriculum review surveys.

Please note: all information received in requests falls under FOIP and is to be used only for the purposes identified in the request. Information received from request is considered valid for two weeks from the date of delivery.

Where to find more information and who to connect with:

If you have already worked with a member of the Alumni Engagement team, please continue to leverage that contact. Otherwise, please reach out to alumni@ucalgary.ca

Survey Support

Survey responses from events and programs are included as an activity in the Alumni Engagement Scoring Model and used to measure overall satisfaction of alumni engagement efforts.

For any campus partner that coordinates events including alumni, we highly recommend best practices with some templated survey questions. For any campus partner that leverages event or program support through the Alumni All-Access Partnership fund, these templated questions are required.

The use of the templated questions means that:

- Survey engagement scores can be applied to all individuals for their engagement score, increasing accuracy
- Survey engagement scores apply to the event, which applies to the overall rate of engagement with the hosting faculty or unit
- An increased understanding, campus-wide, about the overall satisfaction and experience of programs/events for future planning across any partners

The templated questions Alumni Engagement provide are easily replicated across any event or program. You can add more questions for your event specific details or leave them exactly as provided. When responses are received, our team can support with data uploading.

The templated survey questions include:

- Ask if the registrant if they attended
- Their overall satisfaction with the event/program
- Their overall impression on the event/program meeting expectations
- How likely they are to join future events/programs
- How likely they are to recommend your events/programs to friends/family

What does support look like?

- Providing a Qualtrics template with the pre-baked questions for you to save and add your own questions
- Optional support with survey reviewing and/or troubleshooting
- Optional support with sending/distributing unique survey links
- Provision of an excel template for ease of reporting back and support with reporting results for inclusion in Tableau.

Please note: for survey results to be incorporated into the scoring model and for reporting, the responses are confidential. To be able to attribute engagement scores to individuals, and survey results to faculties, they are not anonymous. Please ensure that your communications and disclosure reference the use of information. All information collected by Alumni Engagement follows FOP and CASL guidelines of the University of Calgary.

Where to find more information and who to connect with:

Please email alumni@ucalgary.ca to gain access to the shared template on Qualtrics, for any training support and more information.

Communications

Alumni News

Alumni News is our monthly newsletter, sent out to all contactable alumni with valid email addresses.

For all campus partners, we are interested in highlighting your programs/events/initiatives that are open to alumni at large and have registration sites and reported information. If you have something you would like promoted, please connect with us!

For faculty partners, we can offer up to four faculty-specific versions of the newsletter. Faculty specific versions are:

- Versions of Alumni News that go solely to alumni from your faculty. These alumni would not receive the general newsletter in the month(s) that they receive your customized version
- Opportunity to highlight your faculty or community of specific interest to your community
- Components crafted or cultivated by you:
 - Up to three stories, called Alumni Exclusives
 - Up to three events/programs/initiatives to promote, in a section called Alumni Engagement Corner
 - Up to one ad banner to promote another activity of your choosing
- If you have a notable alum or compelling story to celebrate, let us know. We are happy to support with including this in the general newsletter, content dependent

Where to find more information and who to connect with:

- To view the Alumni News archive, please visit: <https://alumni.ucalgary.ca/news-stories/ucalgary-alumninews-archives>
- To see more information on the specifications and parameters for content and publishing timelines, please reach out to us.

For story ideas, faculty-version support, or other initiatives to promote, please reach out to us at ryan.ohashi@ucalgary.ca or alumni@ucalgary.ca

Social Media

In addition to our newsletter, we are also happy to amplify and promote campus and alumni initiatives on social media. Depending on what it is, we can repost or post independently on our Instagram account. If you are interested in this, please reach out to us at alumni@ucalgary.ca. We are also active in the Communicators Team.

Alumni All-Access Partnership Fund

Open to all campus partners, to support our campus and community, and enhance and engage alumni. Faculty, non-faculty, and community partners are invited to apply for funding and support. Applications to the fund are reviewed by a staff Advisory Group. The Alumni All-Access Process Document outlines the timelines, eligibility, optional supports, deliverables and other details in fulsome.

Alumni All-Access Partnership fund application:

<https://ucalgary.submittable.com/submit/258419/ucalgary-alumni-all-access-aaa-partnership-fund>

What is the Alumni All-Access (AAA) Partnership Fund?

- A supportive program to provide budgetary support and other operational details for events/programming across campus that include alumni engagement, up to 25% of your budget
- Other support could include invite strategy, registration pages, volunteer recruitment, presence at the event, reporting attendance and satisfaction surveys
- Application-based program, led out of alumni engagement, with a review committee
- The applying partner leads the event, alumni engagement provides a supportive role
- Data visuals and reporting post-event

There are four broad categories that applications to the fund can be considered:

Category	Example of Event
Broad interest – open to any alumni	Calgary Institute for the Humanities
Faculty or cohort specific	Faculty of Veterinary Medicine Reunion
Student-focused initiatives	Indigenous Students Graduation Ceremony
Community sponsorships	Calgary Pride

Intake periods:

	Application Deadline	Advisory Group Meeting	Funding Notification	Suggested Program Dates
Intake 1	May – end of June	July	End of July	October – December
Intake 2	August - end of September	October	End of October	January – March
Intake 3	November – end of December	January	End of January	April – June
Intake 4	February to end of March	April	End of April	July - September

Funding inclusions and requirements:

Our team can discuss these inclusions and requirements in further detail with you prior to your application and throughout planning of your event.

- Partner-led, alumni supported event
- Up to 25% of total budget
- Alumni presence/representative in the program
- Alumni Engagement brand visibility
- Registration data sharing
- Budget actuals (with the exception of sponsorship)
- Post-program event/event surveys

Please note that additional resources are available to guide prospective and current partners. These include communications and promotions support, volunteer requirement, and data analytics. Connect with us to learn more!

Where to find more information and who to connect with:

To view all information and the application form:

<https://ucalgary.submittable.com/submit/258419/ucalgary-alumni-all-access-aaa-partnership-fund>

For questions, further information, or to discuss a possible partnership, please connect with

ben.fleury@ucalgary.ca.

Volunteering and Mentorship

Volunteer Engagement Overview

Alumni Engagement can support any campus partners with their alumni volunteer recruitment and engagement efforts, as well as supporting staff in their roles as leads for volunteers.

Volunteer engagement on campus has central guidelines coordinated via Risk Management.

Three types of volunteering as defined by the Alumni Engagement Scoring Model:

- Personal volunteering: typically in an event support capacity.
 - Eg) event registrations, speaker introductions, set-up, wayfinding, etc.
- Professional volunteering: utilizing professional experience in a volunteer opportunity.
 - Eg) speakers, panellists, presenters, mentors, experiential learning supervisors, etc.
- Governance volunteering: volunteer positions of a governance nature in support of UCalgary councils, boards and committees.
 - Eg) Senate, Board of Governors, UCalgary Alumni Association, Dean's Circle, etc.

Volunteer Recruitment, Training and Staff Support

Alumni Engagement can support all campus partners with their volunteer recruitment.

For events that any campus partner is leading, needing personal volunteers:

- Recruitment support can be done through the UCalgary volunteer management tool, Better Impact, and/or through information requests, segmentation and appeals.
- Our team can support by promoting and/or recruiting alumni volunteers for your event(s).
- Our team can create activities to recruit volunteers from the existing pool of students, staff, alumni and community members in the tool.
- Better Impact recruitment can amplify your efforts and reach a pool of volunteers you may not otherwise have access to.

For efforts that any campus partner is leading, that requires professional volunteers:

- Recruitment is done on an ad hoc and bespoke basis based upon engagement data in our database and Better Impact. Our team will work with you to obtain details relevant for brokering connections.

For efforts that any campus partner is leading, that requires governance volunteers:

- These typically come through the Office of the Secretariat or Provost's Office, and the UCalgary Alumni Association works to fulfill these requests.
- For faculty or unit level governance volunteering, our team is available to support in a manner similar to professional volunteering.

Not sure which type of volunteer you need? Connect with us and we will support you.

Campus Engagement

Alumni Engagement facilitates a Volunteer Engagement Community of Practice. This Community of Practice is currently in development. The purposes of this are:

- To facilitate a collaborative space for silo-breaking and relationships across campus
- To meet and deepen relationships, share information, resources and practices, engage in professional development and spark collaboration
- To support the enhancement and consistency of the volunteer experience on campus

Any staff that work with volunteers and/or support activities that engage volunteers on campus are welcome to attend.

Alumni Engagement facilitates a Volunteer Engagement Learning Series. This series aims to provide educational and supportive opportunities for campus partners to engage in on different areas related to volunteer engagement. These opportunities will be developed in collaboration or partnership with the Community of Practice, and will be intended for staff that support on-campus volunteer activities.

Where to find more information and who to connect with:

Related to alumni engagement's volunteer processes, for support with recruiting, with the Community of Practice, or the Learning Series, please reach out to carmen.olsen@ucalgary.ca or alumnivolunteers@ucalgary.ca

Related to alumni volunteer opportunities and UCalgary platforms:

- For more information on volunteering through Alumni Engagement's webpage: <https://alumni.ucalgary.ca/volunteer>
- For more information on volunteer engagement as defined by Risk Management: <https://www.ucalgary.ca/risk/risk-management-insurance/services/volunteer-registration-and-management>
- To request an account as an administrator on Better Impact: <https://www.ucalgary.ca/risk/risk-management-insurance/services/better-impact-account-request>

Mentorship Overview

Alumni Engagement facilitates Mentor Link, a tool available across campus for any campus partner, their alumni, and their students. As a form of volunteerism, Alumni Engagement can support our campus partners through this online tool.

There are two primary ways in which our team can support utilization of Mentor Link:

- Closed programs: with Alumni Engagement support, any campus partner can manage their own mentorship program, for their mentors and mentees.
 - This is led by the partner, with set up, best practice, and troubleshooting support provided by Alumni Engagement.
 - Any campus partner, faculty or otherwise, could have a mentorship program.
 - These could be incorporated into curricular or co-curricular programs, or exist on their own as an activity.
- 'Flash' programs: these are 1:1 mentor-mentee informal relationships that exist outside of any closed program. Alumni and students can sign up for Mentor Link and connect.

In addition to the programs offered through Mentor Link, we facilitate a Mentorship Community of Practice. This Community of Practice allows

- Administrators and interested staff to come together across silos
- Share in best practices, problem-solving and discussion related to Mentor Link and mentorship.
- Learn about Mentor Link updates, access and usage.

Where to find more information and who to connect with:

- Visit Alumni Engagement's website on mentorship: <https://alumni.ucalgary.ca/career-development/mentorship>
- Make a profile on Mentor Link: <https://mentorlink.ucalgary.ca/v2/>

For questions or to learn more, please connect with us at mentorlink@ucalgary.ca

Reunions: Cross-Cutting Support

There are countless events, initiatives and opportunities that Alumni Engagement could support with. Most importantly, we seek to support your priorities. Please don't hesitate to connect with us for any questions about what could be at alumni@ucalgary.ca.

Reunions are a best in class engagement effort for your alumni, to promote your priorities, celebrate their success, and share more about what's happening in your faculty – all while building community.

Support referenced in the toolkit:

Reunions include a number of components that cross-cut a number of areas in this toolkit. The existing areas of support mentioned elsewhere include:

- Data and information requests for invitation and communications strategy
 - Faculty colleagues in development and/or communications should have database access to put in these requests. Our team can also support with this.
- Alumni All-Access Partnerships
 - In addition to the budgetary support, this partnership can also support with data segmentation, event pages, registration sign up, and post-event survey sending.
 - This supports efforts to ensure engagement data is tracked.
- Event collateral
 - Pull-up banners and tablecloths are available for you to lend.
 - Alumni pins can be requested.
 - Depending on your event type and registration, iPads can also be lent for tracking.
- Volunteer engagement
 - We can support your volunteer recruitment and training efforts to staff and support the event.

Support not referenced in the toolkit:

Not mentioned elsewhere in the toolkit, is the value of alumni volunteers as champions to activate and support planning of reunions. Faculty or partner-based alumni councils or committees are excellent partners for planning these events and engagements.

An engaged volunteer committee or council can support with:

- Capacity, interest and excitement about planning the event, including ideas that are nostalgic to their class or generation, and an engaged network to lean on.
- Event and experience planning.
- Hosting or acting as ambassadors at your event.

If you don't currently have a partner-based committee or council, you could look to start one. This would involve far more lead time than one upcoming reunion but could become fruitful for many cycles to come. To spark a committee or council:

- Look to better understand your highly engaged alumni – our team can help through Tableau, BBCRM and Better Impact.
- Look for past volunteerism or participation in faculty or partner committees.

Another opportunity would be an Affinity Community. Briefly mentioned in the alumni visual, Affinity Communities are alumni-driven and self-organized groups that are united by a common theme, such as a faculty, topic or location. Affinity Communities information:

- Receive up to \$4,000 annually for events and engagement efforts.
- Are led by the alumni, and receive support from our team.
- This could be an option to maximize interest for reunions or other engagement opportunities, so long as it remains true to the alumni-led initiative.
- www.alumni.ucalgary.ca/communities/affinity-communities

Tips and Tricks:

With thanks to the Cumming School of Medicine, the following tips and tricks for collaboration and planning timelines have been created. An indicative breakdown between the host (in this case, the campus partner) and the class (the alumni) have been delineated, considering the previously mentioned avenues for additional class and/or Alumni Engagement supports.

Shared Responsibilities Table:

	Class accountabilities	Host accountabilities
Venue(s)	<ul style="list-style-type: none"> • General tone, preferred space and atmosphere • When? Where? Time span and depth of engagement? 	<ul style="list-style-type: none"> • Review and sign contracts with vendors • Pay deposits for vendors and catering (if applicable) • Manage any on campus bookings
Activities	<ul style="list-style-type: none"> • Identify class lead(s) for activities or components • Determine the activities • Determine the other logistics and details 	<ul style="list-style-type: none"> • Create and provide online registration and collect fees if applicable
Communications	<ul style="list-style-type: none"> • Identify a lead for non-campus communications • Review contact lists, send updates to the host • Support special guest identification and invitation 	<ul style="list-style-type: none"> • Coordinate invitation emails from database as/if desired • Follow up communications • Update contact details as needed • Facilitate special guest invitations
Budget	<ul style="list-style-type: none"> • Does the class want to include giving? • If an Affinity community, apply for funding with Alumni Engagement 	<ul style="list-style-type: none"> • Facilitate event payments (if applicable) • Identify and connect with development opportunities • If interested, apply for Alumni All-Access Partnership funding
Event/Activity Day	<ul style="list-style-type: none"> • Leads, committee act as hosts for the event, supporting welcome and activity oversight • Dependent on interest and engagement of committee, could be lead for other recruited volunteers 	<ul style="list-style-type: none"> • Connect lead or committee to volunteers OR conduct volunteer overview for activity specific needs • Registration, set up, take down across staff and volunteers
Post-reunion wrap up	<ul style="list-style-type: none"> • If leveraging Affinity Community funds, provide any wrap up details needed • Lead and committee to thank contacts 	<ul style="list-style-type: none"> • Wrap up budgets and logistics as required for possible partnerships • Send post-program survey (Alumni Engagement can support this) • Upload attendance/surveys to BBCRM (Alumni Engagement can support) • Post-reunion communications

Reunion Checklist:

In chronological order, the following checklist has been derived. While this is an optimal timeline, it is not black and white. Alumni Engagement is here for consultation and support on best practices and priorities.

Tasks	Indicative Timeline
<ul style="list-style-type: none"> • Form a committee <ul style="list-style-type: none"> ○ Leverage an existing volunteer council? Affinity Community? • Data request for class list • Confirm committee as volunteers, tracking and ensure processes are met with confidentiality and risk 	<p style="text-align: center;">12 -18 months ahead of reunion</p>
<ul style="list-style-type: none"> • Location and activity schedule and itinerary drafted • Obtain relevant contracts and follow campus processes • Committee reviews class list, communications are drafted • save the date sent, tracking non-respondents, seeking updated contact info • Request lead and committees continue to spread the work • Internal calendar holds for relevant leaders and team members 	<p style="text-align: center;">9 – 12 months ahead of reunion</p>
<ul style="list-style-type: none"> • Draft budget for all activities • Request menus and other program offerings from venues • Identify wayfinding, parking and other logistics • If leveraging Alumni All-Access Partnership funding, submit application 	<p style="text-align: center;">6 – 9 months ahead of reunion</p>
<ul style="list-style-type: none"> • Online registration page development and finalization • Obtain relevant risk/other approvals • Ensure leads or committee as connected with relevant development staff • Meet with vendors and/or venue for specific menus, logistics and planning • Go live with registration page and all details • Send invitations to class list, track responses • Ensure compliance with risk and other UCalgary protocols • With vendor and venue information, determine if additional alumni volunteers are required • Engage Alumni Engagement for volunteer recruitment, if applicable' if leveraging Partnership funding, add to application or communications 	<p style="text-align: center;">4 – 6 months ahead of reunion</p>
<ul style="list-style-type: none"> • Registration reminder emails • Lead or committee to follow up as desired • Confirm menu and activity details • Ensure campus leaders, as applicable have confirmed attendance • Confirm funding, requirements and volunteers with Alumni Engagement, if applicable 	<p style="text-align: center;">2 months ahead of reunion</p>

<ul style="list-style-type: none"> • 'last chance' to register email sent • Final follow ups from committee 	<p>1 month ahead of reunion</p>
<ul style="list-style-type: none"> • Send reminder to attend with itinerary • Provide vendors and venues with final numbers • Confirm all campus technology and room needs • Prepare for on-site logistics (registration, s.w.a.g., etc) • Confirm volunteer lead if applicable • Prepare post-reunion survey and emails 	<p>1 week ahead of reunion</p>
<ul style="list-style-type: none"> • Mark attended individuals against registered, if applicable, or engage Alumni Engagement • Send post-reunion survey • Complete any specific reporting necessary and update database • Send post-reunion emails 	<p>After reunion</p>

