



INTERNAL

Volunteer Engagement Plan

Three year plan (2024 -2026)

Updated: April 26th, 2024

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Executive Summary

In alignment with the aims of ***Ahead of Tomorrow (2023-30)***, *Strategy #3, locating community at the heart of all we do*, and the ***Community Implementation Plan***, Alumni Engagement is committed to supporting the development of a coordinated volunteer engagement plan that will support institutional and community goals. The ***Alumni Volunteer Engagement Plan*** will aim to, where appropriate, lead, collaborate, facilitate and partner upon volunteer engagement efforts at UCalgary and with our external and community partners. This plan is grounded in best practices and sources from *Volunteer Canada* and several U15 institutions.

This plan outlines three primary goals:

- Enhance the UCalgary volunteer experience, driving an increase in volunteer participation, engagement, satisfaction, and enthusiasm.
- Establish Alumni Engagement as a leader in volunteer engagement at the university by creating a culture of collaboration and resource sharing amongst internal UCalgary partners. This includes being a partner to our colleagues in Alumni, Community & Partnerships (ACP) that lead institutional, governance, and partnership endeavours, and supporting the campus-at-large with the benefits of volunteer engagement.
- Collaborate with colleagues and partners in ACP and across campus to establish the University of Calgary as a destination for impactful volunteer experiences and as a community leader in best practices.

This plan outlines key components of volunteer engagement at UCalgary, with insights on the current state and progress to be made over the course of three years. The components are as follows:

- Volunteers: definitions, recruitment, training, stewardship and recognition
- Partners: campus and community partner collaborations
- Data and Operational Processes

Over the course of three years, dedicated effort will be made by Alumni Engagement as a leader, collaborator and partner in volunteer engagement across campus. The following table is a workplan to achieve three primary goals. These are further expanded upon in the tactics of each section.

Category	Year one	Year two	Year three
Volunteers: Recruitment	Report metrics quarterly for inclusion in quarterly reports, track alumni volunteer requests, numbers and other details on an on-going basis		
	Use BBCRM and Better Impact to drive data-informed decision-making, establishing an intentional recruitment plan that connects alumni to meaningful volunteer experiences		
	<p>Increase the number of campus opportunities supported with alumni volunteers; increase the number of professional volunteer requests supported from campus partners.</p> <p>Number of UCalgary opportunities supported by alumni engagement:</p> <ul style="list-style-type: none"> Year 0: 11 Target Year 1: 13 Target Year 2: 15 Target Year 3: 17 <p>Number of eligible volunteers in the Better Impact Platform:</p> <ul style="list-style-type: none"> Starting Point (March 2023): 334 Target end of Year 0: 670 Target end of Year 1: 870 Target end of Year 2: 1130 Target end of Year 3: 1468 	<p>In collaboration with campus, support the recruitment of alumni volunteers for more community partner led events; establish alumni engagement as a key source of recruitment support for professional volunteers, increasing alumni professional volunteers.</p> <p>Number of external community opportunities supported by alumni engagement:</p> <ul style="list-style-type: none"> Year 0: 3 Target Year 1: 4 Target Year 2: 6 Target Year 3: 8 <p>Number of engaged alumni volunteers in BBCRM / Tableau:</p> <ul style="list-style-type: none"> Year 0: 1419 Target end of Year 1: 1700 Target end of Year 2: 2050 Target end of Year 3: 2450 	<p>In support of campus, support volunteerism with community and industry partners; maintain and continue to develop opportunities for alumni as professional volunteers across campus.</p> <p>Number of professional volunteer requests from community partners supported by alumni engagement:</p> <ul style="list-style-type: none"> Year 0: 0 Target Year 1: 3 Target Year 2: 4 Target Year 3: 6
Volunteers: Training	Curate comprehensive training and resources to support volunteers and on-campus volunteer leads	Regularly audit and improve resources and supports in consultation with best practices and other post-secondary institutions	
Volunteers: Stewardship	Strategically survey volunteers to understand their interests and needs with appreciation		
	Develop a communications schedule, incorporating stories, emails and channels from key areas on campus		

and Recognition	Develop a volunteer toolkit and sustainable recognition program in consultation with other volunteer leads on campus		
Partners: Campus	Deepening, increasing and enhancing university partner collaborations and support for alumni volunteer recruitment, engagement and reporting through 1:1 meetings, attendance and participation in different groups and communities across campus		
	Facilitate a Community of Practice as a collaborative space for university volunteer leads to connect, collaborate, learn and share resources		
		Develop and iteratively consult on a volunteer engagement menu of support that Alumni Engagement will maintain and provide to partners as appropriate	
Partners: External	Deepen and enhance relationships with campus and community/industry partners, through alumni channels, the ACP portfolio, and campus partners		
		Provide alumni volunteer recruitment support to community partners.	Support existing and developing work with industry partners to engage alumni volunteers
Data and Operations	Consistently empower, support and advocate for and with partners to enable increased accuracy and effectiveness of our data management and reporting.		
	Facilitate training to maintain best practices in reporting through Community of Practice and offer support with partners	Support on-campus efforts to understand tools and systems to manage volunteer engagement from the alumni perspective	

Introduction

Alumni Engagement has developed a three-year plan to support alumni volunteer engagement, taking guidance from *Ahead of Tomorrow (2023-30)* and the *Community Implementation Plan*. This plan is aligned with *Strategy #3, locating community at the heart of all we do*, in *Ahead of Tomorrow*, however, as the *Community Plan* outlines, the aims of all strategies cross-cut campus and community.

The *Alumni Volunteer Engagement Plan* will aim to, where appropriate, lead, collaborate, facilitate and support alumni volunteer engagement efforts at UCalgary. This plan is grounded in best practices from *Volunteer Canada* and an environmental scan of U15 volunteer engagement practices .

This plan outlines three primary goals:

- Enhance the UCalgary alumni volunteer experience, driving an increase in alumni volunteer engagement and satisfaction.
- Establish Alumni Engagement as a leader in volunteer engagement at the university by creating a culture of collaboration with others in the volunteer management space and with the broader campus. . This includes being a partner to our colleagues in Alumni, Community & Partnerships (ACP) that lead institutional, governance and partnership endeavours, and supporting campus at large with the benefits of alumni volunteer engagement.
- Collaborate with colleagues and partners in ACP and across campus to establish the University of Calgary as a destination for quality and impactful volunteer experiences.

This plan outlines key components of volunteer engagement at UCalgary, with insights on their current state and progress to be made over the course of three years. The components are as follows:

- Volunteers: definitions, recruitment, training, stewardship and recognition
- Partners: campus and community partner collaborations
- Data and Operational Processes

Please see the *Executive Summary* or *Appendix One* for a summary outlining the areas of work that will take place over the three years. The following pages will outline each area of Alumni Volunteer Engagement in detail. Please see *Appendix Two* for relevant definitions on the types of volunteerism and engaged individuals and partners on campus.

Volunteers

Volunteer Recruitment

Current State

In November of 2023, the number of volunteers in Alumni Engagement's scope in Better Impact was 585, marking a 75% increase from March of 2023. This does not include professional or governance volunteers, and does not account for the break down of alumni vs non-alumni volunteers. Current alumni volunteerism is tracked and recorded based on Advancement's database.

Future State

Alumni Engagement will lead, where appropriate, collaborate and support an overall increase in alumni volunteer engagement across campus. This will involve:

- Deeper understanding of existing volunteerism across campus, through the support of coordinated recruitment and reporting.
- Additional and deepened collaborative relationships with both university and community partners recruit and report on alumni volunteer engagement.
- University partners will support each other in volunteer recruitment by promoting opportunities and sharing insights about the effectiveness of various recruitment tactics.

Key Tactics

Inform volunteer recruitment based on ongoing efforts across campus and commit to data-driven decision making.

- Deepen and develop campus relationships to better understand existing personal and professional volunteerism and increase reported numbers.
- Dedicated efforts in socializing the benefits and value of alumni volunteers to campus partner initiatives, and the benefits of collaborating with Alumni Engagement for support.
- Facilitate a Community of Practice, supporting campus and providing alumni perspective.
- Expand the volunteer pool through various channels that could include UCalgary communications, and networks of existing volunteers.
- Collaborate with university and community partners to grow the collective university volunteer pool by establishing a network of volunteer leads for cross-promotion and sharing.

Success Metrics

- Alumni volunteer recruitment success will be measured by the size and the growth rate of the volunteer pool, and the number of alumni volunteers who participate in activities across volunteer types.
- Assessed quarterly with data entry and reporting.

Volunteer Training

Current State

Current volunteer training for university roles is not consistent across the university, and volunteers who participate in events with various partners encounter a variety of different experiences. There is not currently a volunteer training standard or a central suite of volunteer training guidelines or templates.

Future State

A high-quality volunteer training program will be in place and delivered to volunteers across the university. Alumni will develop a toolkit through curation and collaboration with others in volunteer management on campus, through insights from other institutions, focusing on the quality of experience for alumni. This will be facilitated through:

- Alumni Engagement, in collaboration with other campus partners and volunteer leaders, to enhance the quality and consistency of volunteer experiences and support UCalgary becoming known as a destination for volunteering.
- Alumni Engagement will support university partners through collaboration to develop a train-the-trainer model. This will aim to empower and sustain the volunteer-leader network and ensure a consistent, high-quality experience.

Key Tactics

Implement a holistic and transferable volunteer training toolkit. Training components could include virtual onboarding, covering expectations and roles, event context and impact training, and emergency and safety information. Training resources will be accessible for any campus partner for their utilization and customization

- Develop and offer training support to university partners in collaboration with the Community of Practice. This includes the opportunity for train-the-trainer supports.
- Curate resources which reflect current best practices in volunteer engagement.

Success Metrics

- Accessible resources and supports for campus partners to recruit, train and track alumni volunteers.
- Increased alumni volunteer participation and satisfaction.
- Increased numbers of engaged campus partners accessing resources and recruiting alumni volunteers.

Volunteer Stewardship and Recognition

Current State

Current volunteer stewardship includes deploying thank you emails after personal volunteer activities through Better Impact. Professional and governance volunteers in Alumni Engagement receive standardized recognition and appreciation gifts. Personal, professional and governance volunteer stewardship and recognition across campus varies dependent on host unit. National Volunteer Week is a concentrated period of appreciation for volunteers, often marked by email communications and bespoke volunteer perks and benefits.

Future State

Alumni volunteers through Alumni Engagement's volunteer portal will be:

- Engaged through strategic communications which will inspire alumni to engage as volunteers and provide a sense of connection to the university.
- Alumni Engagement will provide standardized recognition for alumni volunteers.

Key Tactics

- Establish and maintain alumni volunteer engagement communications that steward volunteers specific to their recent volunteerism and highlight upcoming opportunities.
- Ensure that National Volunteer Week communications celebrate, thank, inspire and engage alumni volunteers on an annual basis and is aligned with ACP and other campus partners
- Implement a volunteer recognition program. Recognition activities could include appreciation communications, recognition awards, special offers or discounts.
- Continue to incorporate suggestions and feedback from volunteer satisfaction surveys into future practices to improve volunteer experiences.

Success Metrics

- Resource development that can be shared with campus partners and is designed collaboratively with other volunteer leaders.
- Increase in alumni volunteer participation rates
- Increase in alumni volunteer pool
- Increased alumni volunteer satisfaction and improved survey results

Partners

Campus Partners

Current State

Alumni Engagement currently supports several UCalgary partners by recruiting alumni volunteers for programs, initiatives and events. It also includes recruiting governance volunteers for committees and bodies across campus, as a function of the UCalgary Alumni Association (UCAA). Governance volunteers are noted here as a reported type of volunteerism that happens across campus, but as a UCAA function, it is not within scope of this plan.

Future State

Alumni Engagement will collaborate on, and lead the facilitation of:

- A Community of Practice of UCalgary partners who lead and support volunteers. UCalgary partners will be actively involved in shaping a shared space for collaboration and learning.
- University partners will be offered resources that will elevate the quality of alumni volunteer engagement and enhance the overall experience for volunteers.

Key Tactics

- Expand Alumni Engagement's network of partners, by building and deepening campus relationships.
- Support existing partners with consistent coordination to enhance alumni volunteer numbers, experience and back-end reporting.
- Facilitate a Community of Practice for leaders of volunteers on campus to connect, collaborate, learn, and share.
- Curate a collection of volunteer engagement resources consultatively with partners.
- Do environmental scan of national best practices in the post-secondary and non-profit sectors to aid in resource development.

Success Metrics

- Increase in size and growth rate of alumni volunteer pools as a result of collaboration with partners and supports for additional alumni volunteer opportunities
- An increase in requests from campus partners in recruiting all types of alumni volunteers, leading to reciprocal support and reporting activities.
- Increase in the total number of opportunities available to alumni volunteer community through partners.

External Partners

Current State

Alumni Engagement has collaborated with community partners through existing campus partner relationships. These opportunities are typically with flagship community partners, or have arisen on an ad hoc basis. To date, this has included supporting volunteer recruitment for Calgary Pride (within UCalgary's activations and for other Pride-led pieces) and with Beakerhead.

Future State

The university will support partners with volunteer recruitment by:

- Expand the promotion of community partner volunteer opportunities to the alumni community, within existing volunteers, and in leveraging communications (website, Alumni News and/or social media) to broaden reach and scope. These partnerships will expand the number of opportunities available to alumni volunteers, enhance the university's connection to the community, and establish the university as a hub for meaningful volunteer experiences.
- As partnerships and initiatives are developed within ACP and across campus with community and industry, alumni volunteer engagement will become an area for external partners to engage with UCalgary. Alumni Engagement will establish itself as a curator of alumni volunteer opportunities on campus, in community, and where aligned, with industry partners.

Key Tactics

- Support UCalgary partners who have existing community organization connections that are looking to collaborate.
- Provide support to community and industry partners through alumni volunteer recruitment.
- Work closely with Partnerships team and Alumni Business Development Lead to curate meaningful volunteer opportunities for alumni. This could include engaging their staff in volunteerism, establishing connections with more alumni and curating opportunities with Alumni Programs, campus and/or community partners

Success Metrics

- Success will be measured by the number of community partnerships that are supported with recruitment, promotion and engagement.
- Documented criteria and process for entering into volunteer engagement agreement with community and industry partners.
- Increase in number of alumni volunteers.

Data and Operations

Volunteer Data Management

Current State

The current metrics on volunteer participation levels recorded in Advancement's database do not reflect the actual volume of volunteer activities occurring across the university. Campus partners utilize their own distinct processes and systems to track volunteers and may or may not track all volunteerism as defined in the engagement scoring model. The current categories of volunteerism and mechanisms to report are defined by the Alumni Engagement Scoring Model and existing processes.

Future State

University partners will:

- Track all volunteer engagement data in BBCRM.
- Alumni Engagement will continue to champion engagement tracking in partnership with colleagues in ACP and those that connect to Advancement.
- Alumni Engagement will continue to collaborate with Advancement Services to increase understanding and utilization of systems to support partner tracking and reporting.

Please note that the future state will be directly influenced by the definitions being refined through efforts by the Engagement Data Working Group. This could include the definitions and types of volunteering, and the mechanisms to report.

Key Tactics

- Support university partners in the data tracking process by demonstrating value, providing support navigating access to technology and systems, and providing data entry training, resources, and templates.
- Improve the accuracy of information in the university data management systems by implementing initiatives to encourage volunteer-led updates and explore options for system integrations or sharing.

Success Metrics

- Successfully supporting an increase in the data tracking activities across the university will increase the number of recorded volunteer occurrences and in turn an increase in assigned volunteer engagement scoring model points.
- Increased data quality.

Volunteer Operational Processes

Current State

The current system used for UCalgary volunteers on campus is divided into siloed portals for each unit, leading to a lack of information about administrative and volunteer usage. The system allows volunteers to identify and tag themselves with types of opportunities they are interested in. As it's facilitated through Risk and Insurance Management to adhere to UCalgary protocol, it is unclear if this is appropriate for the expansion of volunteer opportunities with and for external partners.

Future State

The quality of the volunteer experience will be enhanced through:

- Improvements to the application and sign-up process. Alumni volunteer experience will become more accessible and intuitive, including clear instructions and an effective communications structure.
- Implementation of a process for recruiting volunteers for opportunities hosted by university partners, designed by the Community of Practice as it is established.

Key Tactics

- Review the current volunteer application and role sign-up processes, identifying obstacles on participation levels to improve the quality of the alumni volunteer experience.
- Engage with system administrators via the Community of Practice to better understand the system and potential opportunities to enhance experience for volunteers and collaborators.
- Support ACP if an external tool is implemented for external opportunities and coordinate a process to ensure quality alumni volunteer experience in usage.

Success Metrics

- Enhancements to the quality of the volunteer experience will be reflected in volunteer satisfaction survey results.
- The percentage of successful alumni volunteer applications will increase along with alumni volunteer participation rates and pool numbers.
- Through evolving work and on-campus collaboration, a direction and process to facilitate volunteerism with partners will be determined, bolstering UCalgary's reputation as a hub for meaningful alumni volunteer opportunities.

Appendix One: Indicative Work Plan

Category	Year one	Year two	Year three
Volunteers: Recruitment	Report metrics quarterly for inclusion in quarterly reports, track alumni volunteer requests, numbers and other details on an on-going basis		
	Use BBCRM and Better Impact to drive data-informed decision-making, establishing an intentional recruitment plan that connects alumni to meaningful volunteer experiences		
	<p>Increase the number of campus opportunities supported with alumni volunteers; increase the number of professional volunteer requests supported from campus partners.</p> <p>Number of UCalgary opportunities supported by alumni engagement:</p> <ul style="list-style-type: none"> • Year 0: 11 • Target Year 1: 13 • Target Year 2: 15 • Target Year 3: 17 <p>Number of eligible volunteers in the Better Impact Platform:</p> <ul style="list-style-type: none"> • Starting Point (March 2023): 334 • Target end of Year 0: 670 • Target end of Year 1: 870 • Target end of Year 2: 1130 • Target end of Year 3: 1468 	<p>In collaboration with campus, support the recruitment of alumni volunteers for more community partner led events; establish alumni engagement as a key source of recruitment support for professional volunteers, increasing alumni professional volunteers.</p> <p>Number of external community opportunities supported by alumni engagement:</p> <ul style="list-style-type: none"> • Year 0: 3 • Target Year 1: 4 • Target Year 2: 6 • Target Year 3: 8 <p>Number of engaged alumni volunteers in BBCRM / Tableau:</p> <ul style="list-style-type: none"> • Year 0: 1419 • Target end of Year 1: 1700 • Target end of Year 2: 2050 • Target end of Year 3: 2450 	<p>In support of campus, support volunteerism with community and industry partners; maintain and continue to develop opportunities for alumni as professional volunteers across campus.</p> <p>Number of professional volunteer requests from community partners supported by alumni engagement:</p> <ul style="list-style-type: none"> • Year 0: 0 • Target Year 1: 3 • Target Year 2: 4 • Target Year 3: 6
Volunteers: Training	Curate comprehensive training and resources to support volunteers and on-campus volunteer leads	Regularly audit and improve resources and supports in consultation with best practices and other post-secondary institutions	
Strategically survey volunteers to understand their interests and needs with appreciation			

Volunteers: Stewardship and Recognition	Develop a communications schedule, incorporating stories, emails and channels from key areas on campus		
	Develop a volunteer toolkit and sustainable recognition program in consultation with other volunteer leads on campus		
Partners: Campus	Deepening, increasing and enhancing university partner collaborations and support for alumni volunteer recruitment, engagement and reporting through 1:1 meetings, attendance and participation in different groups and communities across campus		
	Facilitate a Community of Practice as a collaborative space for university volunteer leads to connect, collaborate, learn and share resources		
		Develop and iteratively consult on a volunteer engagement menu of support that Alumni Engagement will maintain and provide to partners as appropriate	
Partners: External	Deepen and enhance relationships with campus and community/industry partners, through alumni channels, the ACP portfolio, and campus partners		
		Provide alumni volunteer recruitment support to community partners.	Support existing and developing work with industry partners to engage alumni volunteers
Data and Operations	Consistently empower, support and advocate for and with partners to enable increased accuracy and effectiveness of our data management and reporting.		
	Facilitate training to maintain best practices in reporting through Community of Practice and offer support with partners	Support on-campus efforts to understand tools and systems to manage volunteer engagement from the alumni perspective	

Appendix Two: Volunteer and Partner Definitions

Volunteer management on campus falls into compliance with Risk and Insurance Management, and these definitions ensure compliance with institutional practices:

- **UCalgary Volunteers:** Individuals who provide assistance to the university without financial payment. The activities must be initiated by a university faculty or business unit. UCalgary volunteers managed by Alumni Engagement include alumni, students, staff, and community members.
- **UCalgary Staff Helpers:** UCalgary employees who help at key university events. They are paid for their time as staff, but since the roles they fill are outside of the scope of their job, engagement scoring model points in the university's volunteer tracking systems are attributed.
- **Community Partner Volunteers:** Alumni Engagement supports community partners by sharing their volunteer opportunities. These opportunities are managed by external community organizations so the volunteers are not considered UCalgary volunteers.
- **UCalgary Partners:** University faculties, departments, or business units that Alumni Engagement collaborates with and supports in their volunteer recruitment, management, and engagement.
- **Community Partners:** Community organizations that operate externally from the university. The university supports community partners by promoting their volunteer opportunities.

Alumni Engagement uses an engagement scoring model to define and track volunteerism across three broad categories. These categories are leveraged within and outside of Alumni Engagement for all tracking within the engagement scoring model:

- **Governance Volunteering:** Volunteer positions on university councils, including Senate, Board of Governors, University of Calgary Alumni Association Board of Directors or Board Committees, faculty-based boards, committees, or councils such as the Dean's Circle.
- **Professional Volunteering:** Professional experience is shared within the UCalgary community. Volunteer roles could include keynote speakers, emcees, panel members, program facilitators, presenters, moderators, experiential learning supervisors, focus group participants, and mentors.
- **Personal Volunteering:** Volunteer engagement in an event support capacity. Roles could include event registration, set-up, tear-down, speaker introductions, and photo booth support.