



# **Entertainment or Engagement: Maximize the Impact of Alumni Relations on the Road**

**CCAIE National Conference**  
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(Queen's University)  
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# Topics for discussion at end

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- Best venue you've used recently (and city)
- Best cheap idea (shoestring!)
- Coolest event trick (tricolour candy buffet)
- Unique format/unusual event



# Overview

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- Purposeful Programming – serving the institution’s mission; collaboration; goals and measures
- Principal/President as Chief Relationship Builder
- Tools of the trade – pre and post event
- Marketing and Communications
- Post-Event
- Events without your Chief
- Case Studies
- Top 10 things we’ve learned
- Your ideas



# Principal/President

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- As Chief Relationship Builder
  - High quality event to reflect status in organization – pay attention to the details
  - Ensure that the Principal/President is briefed on who to connect with – have a staff host for him/her for the event
  - Principal/President’s involvement builds profile for the local branch
  - Elevates the profile of alumni relations amongst colleagues
  - Alumni get the “inside information” directly from the Principal/President about the institution and its needs.
  - Have a call to action – what can alumni do?



# Getting Started

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- Before you start, ask and answer key questions:
  - Why are we doing this? (Clarify purpose and set measurable goals)
  - What are the expectations of the Principal and/or other administration involved?
  - What is the desired experience for attendees (i.e. what do you want them to take away)?
  - What is the budget \$\$\$\$\$\$?
  - How can this trip/event/activity help support the goals of:
    - Your institution
    - Development/Campaign
    - Alumni Relations



## Getting Started cont'd...

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- Link your work to the University's over-arching goals or strategic plan
- Is the Principal/President committed to alumni relations and advancement work? Build relationship with his/her office
- Start scheduling 18 months out



# Next Steps

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- Identify key stakeholders and invite to form a *Strategy Team* to identify key travel needs
- Map destinations based on group's priorities
  - Location of major prospects, asks
  - Key branches/alumni populations
  - Key student recruitment locations
  - President's commitments (COU, other meetings)
  - Key government offices
- Create proposed calendar of visits for a year
- Budget supported by all stakeholders



# Making it Worthwhile

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- Proposal for visit schedule connects to strategic goals for the institution
  - Opportunity to meet the “Wealth/Power Nexus” in each location
  - Meetings/asks with major prospects
  - Meetings with smaller key groups (giving societies, campaign cabinets, etc.)
  - Inclusive Branch event – anchors visit
  - Recruitment event if timing appropriate
  - Meet with the President/Principal of University in that community (potential press opportunity)
  - Other meetings as scheduled by the Principal/President



# Involving the Branch

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- General alumni event the key activity on the itinerary
- Assist Branch with funding, planning, legwork, sponsorship
- Branch provides advice on venues and recruits volunteers for the event
- Branch receives the spotlight: Branch President hosts; provide emcee; volunteers
- Attendance by Alumni Association leadership in support of the branch's work
- Public thanks from the Principal at event and private thanks after
- Arrange time for Principal/President to meet one on one with key Branch volunteers



# The Event

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- Nominal fee – subsidized by Alumni Relations
- Establish a format that works for that area
- Host at a unique venue or seek sponsorship
- Bring your school spirit to the event – engage via nostalgia and excitement about new initiatives
- Opportunity for pre- or post-events (exclusive for giving societies, specific faculty, etc...)
- Principal/President is the featured speaker
- Involve key people in program – Branch President, high-profile alumnus/a as MC, Alumni Association leaders, etc...
- Include other Deans and faculty, as appropriate
- Prizes are always a hit!



# Marketing and Communications

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- Marketing
  - Start the buzz early – engage key institutional leaders in that community
  - Quality invites and cast a wide net – emails, phone calls, mailed invite
  - Does your event have a ‘hook’?
- Communications
  - Develop a stump speech for events – what is core messaging
  - Coordinate messaging if multiple university reps speaking
  - Customize part of Principal’s address to the area
  - Identify media opportunities



# Sample Visit Itinerary

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## Sunday, April 22, 2007

**Flight:** Depart Toronto at 8:45 pm Arrive Victoria at 10:50 pm  
Flight XXX, Seat XXX Confirmation AC/MKNEPR

To Hotel: Get taxi at airport for travel to hotel

**HOTEL : Delta Victoria Ocean Pointe Resort, confirmation #, address, etc.**

Note: 3-hour time difference

## Monday, April 23, 2007

### Victoria

12:00-1:30 pm

Royal Legacy Society and Grant Hall Society Luncheon

3:30-4:30 pm

Major Gift call

**5:30-7:30 pm**

**Alumni Reception**

**Location: Delta Victoria Ocean Pointe Resort**

7:15 pm

Principal to leave Alumni Reception and go upstairs to the Recruitment event for fifteen minutes

7:00-9:00 pm

Recruitment Event – **Information Only (KRH to attend for 15 minutes) Location....**



# Sample Visit Itinerary cont'd...

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## Tuesday, April 24, 2007

## Vancouver

10:00-11:00 am	Major Gift call
12:00-1:00 pm	Lunch with Major Gift prospects
2:00-3:00 pm	Major Gift call
4:30-5:30 pm	Meet with Branch President and key volunteers prior to reception
5:30-7:30 pm	<b>Alumni Reception</b> <b>Location: Vancouver Art Gallery</b>

## Wednesday, April 25, 2007

10:00-11:00am	Major Gift call
12:00-1:30 pm	Lunch with President of UBC (photo opp)
2:30-3:30 pm	Major Gift
5:15-6:00 pm	Meet with key donors at their house prior to event they host on our behalf
6:00-8:00 pm	<b>Grant Hall Society Reception hosted by the Mr and Mrs Donor</b>
7:00-9:00 pm	<b>Recruitment Event - Information purposes only, location...</b>



# Post Event Follow Up

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- Follow up reporting critical
- Central coordination to ensure action items completed
- Post-event survey of attendees and volunteers
- Debrief with your President/Principal
  - What did he/she like best? Key contacts made? What priorities should there be for the next visit to that branch?
- Responsibility of the Strategy Group to provide details of the Visit to the group and follow up actions required
- Strategy Group debrief



# Post Event Report Sample Outline

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- Overview of trip/event
- Major Gift Visit Debriefs
  - Contact reports filed by Development Officers
- Events Reports
  - Final stats
  - Key contacts made – notes on alumni
- Summary of Action Items and Follow up
  - Principal's Office Action Items
  - Contact Info for staff involved
- Survey results from events
- Attendance lists (for reference)



# Benefits/Challenges

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## Benefits

- Heightened profile for the Branch drives future success
- Heightened profile for the work of Alumni Relations
- Great way to find prospective donors and volunteers
- Strengthens relationship with the Principal/President's Office and other key partners
- Efficient use of time and money
- Delivering on institution's key goals



# Benefits/Challenges

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## Challenges

- Time, \$ and Human Resources
- Balancing the priorities of key stakeholders
- Lots of last minute confirmations of arrangements



# Maximizing Impact without the Chief

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- Educational Offerings
  - Feature a Faculty member with “star power”
  - Feature an Alumni Achiever
  - Demonstrations, interactive sessions
- Layer your event for greater impact
  - Pre-reception for Giving Society members
  - Dinner following the Reception for key volunteers
- Collaborations with Recruitment/Admissions, Business Club, Campaign teams, Athletics, etc.
- Demographically targeted events (i.e. young alumni networking events)
- Other ideas?



# Case Study

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## Queen's University

- 100+ events per year outside Kingston
- 10-15 events per year with Principal
- Principal's events include cocktail receptions, award dinners, guest speakers and casual social events.
- Goals: general alumni engagement, profile for local branch, engagement of key donors, student recruitment, major gift visits, integration of all stakeholders
- Stakeholders: Alumni Relations, Annual Giving, Major Gifts, Principal's Office, Student Recruitment, Faculty Deans, Donor Relations, Marketing and Communications
- Recent example – NYC, New Jersey, Connecticut



# Case Study

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## UBC

- 50-100 events per year outside Vancouver
- President's visits include alumni roundtables with key connectors plus open events
- Goals: Introduce alumni to the President and vice versa, address why UBC matters, help connect alumni with one another, activate networks of local "connected" alumni volunteers, facilitate the work of UBC partners
- Stakeholders: Alumni Relations, President's Office, Faculties, International Office, Development Officer



# Case Study

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## UCC

- 10-50 events per year outside Toronto
- President's visits include receptions and dinners
- Goals: connect with alumni and friends, get people out
- Stakeholders: Coaches and student groups
- Recent successes: Dinner in London, UK (100+ attendees) and career mentoring session in NYC



# Top Ten Things We Have Learned

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1. Start early – 18 months out and look at the whole year
2. Listen to your Principal/President – seek out his/her feedback
3. Don't be afraid to ask for sponsorship/assistance from high-profile alumni
4. EVERYONE registers at the last-minute and NO ONE respects the RSVP deadline 😊
5. You can't have too many alumni staff at the event – take as many as you can afford



# Top Ten Things We Have Learned

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6. Sometimes it's the small events that are the best
7. Manage expectations carefully
8. The Devil's in the Details-absolutely all information (including minutia) goes in the Briefing Binder
9. Clearly articulate the goals, purpose and measures of success and ensure buy-in by all stakeholders
10. Show them "What's in it for them"



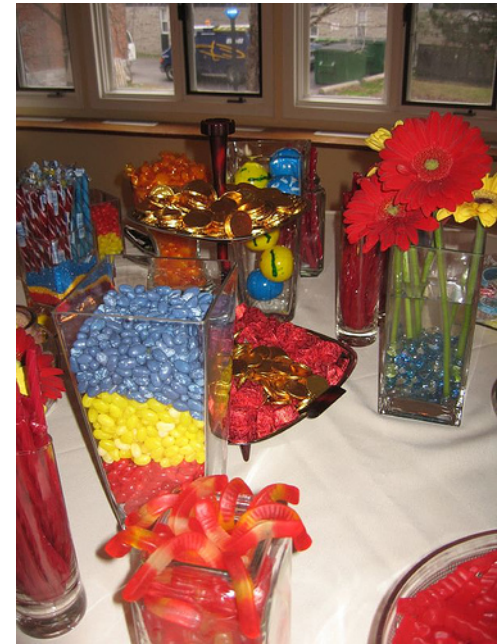
## Discussion time

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# Tricolour candy buffet



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**Thank you!**

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# Matrix for planning

## Volunteers

<p><b>The Draw</b></p> <ul style="list-style-type: none"><li>▪Celebrate the achievements of the Class of 2011 with the new students and their parents.</li><li>▪Meet new and current students, and other alumni from your hometown.</li><li>▪Share your Queen's experience, and the legendary Queen's spirit.</li><li>▪A chance to network with other local alumni and parents.</li></ul>	<p><b>Milestones</b></p> <ul style="list-style-type: none"><li>▪Volunteer Recruitment Begins</li><li>▪Registration Deadline</li><li>▪Volunteer Briefing Notes Sent</li><li>▪Event Week</li><li>▪Thank You and Survey</li></ul>
<p><b>Audience</b></p> <ul style="list-style-type: none"><li>▪Alumni, student, and parent volunteers.</li></ul>	<p><b>Experience</b></p> <ul style="list-style-type: none"><li>▪Volunteers should feel that they have instilled Queen's spirit in and welcomed the new class.</li><li>▪They should feel that they have added value to the event, and to the students' and parents' experience.</li><li>▪Volunteers should come away feeling that it was fun and interesting to meet the new class and their parents.</li><li>▪Alumni and parent volunteers should leave with a positive impression of Queen's students.</li><li>▪Positive feelings about the QUAA, STAR, the Alumni Office, and Queen's University.</li><li>▪A feeling that volunteers have contributed to making new students and their parents feel part of the Queen's community.</li><li>▪Volunteers should feel that they were well-prepared for their position, and had a significant role to play.</li><li>▪An understanding that there is a strong, vibrant, and active Alumni Branch/community in their hometown.</li></ul>