



# THOMPSON RIVERS UNIVERSITY

---

Alumni & Friends

## THOMPSON RIVERS UNIVERSITY ALUMNI AND FRIENDS ASSOCIATION

---

### OPERATIONAL PLAN MAY 2010

*"The development process of this document has been a collaborative effort between the Thompson Rivers University Alumni & Friends Association and the TRU Advancement Office. The emphasis is on achievable actions that can be implemented, reviewed and measured. This is working document that will be updated on an annual basis." Approved by the TRU Alumni and Friends Association Board, May 2010.*



## **1.0 Mission Statement**

1.0.1 To Promote Excellence in Alumni Relations for the Benefit of the TRU Community

## **1.1 Core Values**

- 1.1.1 Foster loyalty to Thompson Rivers University (TRU)
- 1.1.2 The unique identity and history of Thompson Rivers University
- 1.1.3 Contribute to the development and growth of the university.
- 1.1.4 Communicate the impact of post-secondary education on the economic health of the community.
- 1.1.5 Promote the institution regionally, provincially, nationally and internationally.

## **1.2 Core Principles**

- 1.2.1 Collaborate with the staff, faculty and administration of Thompson Rivers University.
- 1.2.2 Financial Viability
- 1.2.3 Relevancy and Excellence
- 1.2.4 Work Effectively
- 1.2.5 Accountability Partnership with the TRU Community, Alumni and Friends

## **1.3 Core Activities**

- 1.3.1 Award bursaries and scholarships to students and returning alumni.
- 1.3.2 Create avenues for alumni representation on the governing body and committees of the institution.
- 1.3.3 Connect alumni with classmates, current students, faculty, staff and events for the purpose of socializing, networking, career mentoring, and other social and professional development opportunities.
- 1.3.4 Effectively administer the Alumni Association's programs & services.
- 1.3.5 Engage campus energies, ideas and resources to make programming relevant to all alumni.
- 1.3.6 Honour the successes, achievements and high leadership standards of TRU Alumni and Friends.
- 1.3.7 Involve, develop and recognize volunteers within the Alumni Association programming.
- 1.3.8 Inform Alumni and Friends of the growth, vitality and intellectual life of the campuses using existing social media, websites, publications and events.
- 1.3.9 Invest in building pride in TRU and value in being a TRU Alumni by creating a sense of community, accessibility and responsiveness as we continue to find ways to extract the wisdom of our Alumni and Friends to benefit the continuous development of our students, staff, faculty and alumni.
- 1.3.10 Promote the value of membership.



## Current Activities

### 2.0 Alumni and Friends:

#### 2.1 Awards:

- 2.1.1 Research, record, honour and archive the achievements, innovations and accolades of TRU Alumni.

#### 2.2 Events:

##### 2.2.1 Chapters:

- 2.2.1.1 Membership building, socialization, fun and education

##### 2.2.2 Fundraising:

- 2.2.2.1 Build alumni endowment and program funding. (*e.g. golf*)
- 2.2.2.2 Encourage partnerships with public and private sectors.

##### 2.2.3 Social:

- 2.2.3.1 Provide avenues where alumni can connect to classmates, students, faculty and campus.
- 2.2.3.2 Provide networking opportunities for Alumni and Friends.
- 2.2.3.3 Socialization, family fun and connection. (*e.g. reunions*)

#### 2.3 Programs:

##### 2.3.1 Affinity Program:

- 2.3.1.1 Offer discounts to alumni based on large group buying power.
- 2.3.1.2 Negotiate financial return to the Alumni Association through affinity partnerships.

##### 2.3.2 Benefit Cards

- 2.3.2.1 Create and communicate the benefits of membership.

##### 2.3.3 Bridges: TRU Alumni and Friends Magazine

- 2.3.3.1 Reflect the vitality and intellectual life of the campuses, students and alumni
- 2.3.3.2 Circulation includes TRU Community, mentors, donors, advocates, Alumni and Friends.

##### 2.3.4 Career Mentorship:

- 2.3.4.1 Provide career mentorship for recent grads
- 2.3.4.2 Invite established professionals to volunteers as mentors.

##### 2.3.5 Chapters and Groups:

- 2.3.5.1 Engage alumni groups based on common location and interest.
- 2.3.5.2 Provide volunteer development and mentorship to facilitate the initial group.

##### 2.3.6 Alumni Communication by School/Faculty:

- 2.3.6.1 Facilitate and encourage faculty/schools/departments to communicate with their alumni.
- 2.3.6.2 Supply schools and faculties with contacts for their department specific alumni.
- 2.3.6.3 Track frequency, messaging and accuracy of contact data.

#### 2.4 Volunteer Opportunities, Development and Recognition:

- 2.4.1 Provide development opportunities for Board of Directors and committee members.
- 2.4.2 Recognize volunteer contribution through formal and informal communications.
- 2.4.3 Utilize volunteers to increase involvement of students, Alumni and Friends with TRU, through special events, committees, mentorship and other program invitations.



### **3.0 Students**

#### **3.1 Awards and Recognition:**

- 3.1.1 Maintain the endowment fund to award yearly scholarships and bursaries.
- 3.1.2 Participate in campus recognition events such as, but not exclusive to: convocation and award presentations.
- 3.1.3 Recognize the accomplishments of top student leaders on campus as leaders of the future.

#### **3.2 Events:**

- 3.2.1 Build student familiarity with volunteering, giving back and the value of staying connected.
- 3.2.2 Utilize events to educate and inform our student body of the opportunities and tools provided by the Alumni Association.

#### **3.3 Programs:**

##### **3.3.1 TRU Career Mentoring Program:**

- 3.3.1.1 Expand services to link students and graduates with potential employers.
- 3.3.1.2 Provide students the opportunity to network with industry professionals.
- 3.3.1.3 Support students and graduates as they move into the workforce.

#### **3.4 Volunteer Opportunities, Development and Recognition:**

- 3.4.1 Provide opportunities for leadership experience on committees and with special events.
- 3.4.2 Provide opportunity for skill development, resume building and leadership mentoring.
- 3.4.3 Recognize volunteer contribution through formal and informal communications.

### **4.0 Thompson Rivers University:**

#### **4.1 Inform the Community:**

- 4.1.1 Create advocates for our institution by illustrating the achievements and successes of TRU Alumni, students and staff. Bridges will be a core activity in our communication strategy.
- 4.1.2 Help with recruitment, fundraising and policy development.
- 4.1.3 Maintain accurate data bases to assist the TRU Community with alumni connections.
- 4.1.4 Strategically participate in activities to foster loyalty to TRU, promoting the TRU and the Alumni Association.

#### **4.2 Involve the community:**

- 4.2.1 Create avenues to engage the leadership skills and valued voices of the Alumni Community.
- 4.2.2 Illustrate the value of alumni involvement in new initiatives on campus.
- 4.2.3 Program opportunities for alumni connection, increased student experience and enhanced community advocacy through the involvement of Alumni and Friends as event volunteers, committee members, career mentors, guest speakers and policy builders.

#### **4.3 Measure**

- 4.3.1 Coordinate annual review of accounts and budgets
- 4.3.2 Set goals for:
  - 4.3.2.1.1 Event participation.
  - 4.3.2.1.2 Endowment investment, fundraising and business partnership funds.
  - 4.3.2.1.3 Social media and web traffic.
- 4.3.3 Maintain accountability through program based reviews and surveys



5.0 Advancement Office Roles	5.0.1 Responsibilities
5.1 Alumni Officer, Program Management,	5.1.1 Assist with administration of board business and committee meetings, minutes, planning and implementation. 5.1.2 Maintain direct line of communication with committees 5.1.3 Manage approved and prioritized <b>core activities</b> , messaging and resources. 5.1.4 Prepare and present quarterly and annual reports. 5.1.5 Prepare and manage the budget. 5.1.6 Schedule and organize Board meetings.
5.2 Design Print Material	5.1.7 Design necessary collateral for the promotion of events and programs.
5.3 Event Planning	5.1.8 Assist with protocols, agendas, scripts and event timing. 5.1.9 Coordinate the venue, menu and special equipment needed for events. 5.3.3 Help recruit, train and inform volunteer or their roles within each project. 5.3.4 Manages advertising, communications and event budgets. 5.3.5 Manage invitation lists and data for specific program communications.
5.4 Fund Maintenance	5.4.1 Assist with fund coordination and maintenance. 5.4.2 Assist with money intake and credit and debit card transactions. 5.4.3 Manage award applications and distribution.
5.5 Magazine Support	5.4.4 Designate a writer to help with story development. 5.5.2 Provide a team of designers, communication specialists and office staff to ensure that each issue is released with a quality of excellence. 5.5.3 Provide a web specialist to put the magazine on the website.
5.6 Manage Data Bases	5.6.1 Record the successes, and contacts for the annual calling campaign 5.6.2 Create and manage mentors and protégé profiles to assist with pairings. 5.6.3 School/Faculty specific communications data. 5.6.4 Distributions list for Bridges, newsletters, invitation and program surveys.
5.7 Measure	5.7.1 Assist with survey placement on the web and collection of data.
5.8 Media and Marketing Strategies	5.8.1 Create effective messages and images to target specific audiences. 5.8.2 Promote events utilizing all communication avenues available.
5.9 Office Support	5.9.1 Handle incoming and outgoing mail. 5.9.2 Manages all phone, email and RSVP communications. 5.9.3 Meeting minutes for all Alumni Board meetings. 5.9.4 Record of office contacts. 5.9.5 Web changes and updates.
5.10 Research	5.10.1 Archive all researched material. 5.10.2 Record student leaders and awards. 5.10.3 Research alumni achievements, innovations, contacts and businesses. 5.10.4 Research data for Alumni News and Distinguished Alumni Awards.
5.11 Sponsorship Strategies	5.11.1 Assist with fundraising coordination. 5.11.2 Help identify new revenue generation or partnership opportunities. 5.11.3 Strategize to find sponsorships and advertising support for events.
5.12 Web and Social Media Design	5.12.1 Advice on: look, timing and information posted through each avenue. 5.12.2 Complement the marketing strategies to utilize electronic communication. 5.12.3 Facilitate the use of multi-media options to promote events and programs.
5.13 Vice President, Office of University Advancement	5.13.1 Assist with leveraging new initiatives, involvement and funding requests, 5.13.2 Board communication to staff will channel through the VP who is responsible for workload management and project prioritization. 5.13.3 Primary role is to manage staff and productivity.



<b>6.0 Board of Directors' Roles</b>	<b>6.0.1 Action Required (Includes but not exclusive to the following)</b>
6.1 Primary role is to govern and provide recommendations to the Alumni Officer and the VP of University Advancement. The Board determines the mission, vision, values – its purpose, priorities and targets of achievement.	6.1.1 Regularly attend board meeting. 6.1.2 Prepares constitutional changes/revisions for the AGM 6.1.3 Prepare for attendance at these meetings– verbal report, pre-read material. 6.1.4 Serve on at least one committee 6.1.5 Attend and participate in scheduled meetings 6.1.6 Prepare and review reports and recommendations 6.1.7 Represent the Alumni Association at community events. 6.1.8 Provide professional expertise to assist with Alumni Assoc. initiatives.
6.2 Bridges Magazine	6.2.1 Participate on the advisory board, which meets 3 times per year. 6.2.2 Assist with the identification and collection of stories for publication. 6.2.3 Assist with the collection of Alumni stories.
6.3 Career Mentor Program	6.3.1 Recruit necessary mentors to fulfill the pairing needs of the students. 6.3.2 Actively participate as mentors to our students. 6.3.3 Provide input on your discipline requirements for mentors or students.
6.4 Chapter Initiatives	6.4.1 Review policy and philosophies regulating chapter applications. 6.4.2 Participate in chapter events and assist with mentoring new chapters where applicable.
6.6 Distinguished Alumni Awards	6.6.1 Establish and implement format for the Distinguished Alumni Awards 6.6.2 Review program profile, award criteria and relevance on an annual basis. 6.6.3 Help with identification of possible candidates. 6.6.4 Adjudicate Distinguished Alumni Award nominations. 6.6.5 Play an active role in honouring and presenting the awards
6.7 Endowment Sustainability	6.7.1 Set target goals and plan events for fundraising to build endowment fund. 6.7.2 Recommend partners/vendors for Affinity partners. 6.7.3 Identify sponsorship contacts for special events and program initiatives.
6.8 Event Participation	6.8.1 Actively participate in events initiated by the Alumni Association. 6.8.2 Assist with message development for the Alumni Association. 6.8.3 Attend high profile award ceremonies and Distinguished Alumni events. 6.8.4 Review the criteria and value of the awards on an annual basis. 6.8.5 Recruit event volunteers.
6.9 Institution Policy and Governance Development	6.9.1 Recruit Alumni to serve on institution ad hoc and standing committees and assist with institution policy and governance.
6.10 Key Strategy Leadership	6.10.1 Chair event and program committees. 6.10.2 Create a communication plan, review, evaluate and recommend each year.
6.11 Maintain on Campus contacts	6.11.1 Identify and contact (where appropriate) the key players within the TRU Community to champion current Alumni Association programming.
6.12 Recruitment and Retention	6.12.1 Recruit, train and retain knowledgeable, concerned alumni for the sustainable participation on the board, committees or TRU governance.
6.13 Review program, event and activity relevance	6.13.1 Plan, Participate, Evaluate, Report, Recommend on committee initiatives. 6.13.2 Assist in the development of measurable and survey construction

<b>7.0 Role: Alumni and Friends Association</b>	<b>7.0.1 Action Required (Includes but not exclusive to the following)</b>
	6.4.3 Responsible for voting on the constitution at the AGM 6.4.4 Invited to participate in events and programs