

ALUMNI ENGAGEMENT SERVICES

TRENT UNIVERSITY

REVIEW ASSESSMENT AND RECOMMENDATIONS

Final Report – April 28, 2023

TABLE OF CONTENTS

Contents

Background	1
SWOT Analysis	3
Recommendations	23
Acknowledgements	37
Appendices	38

BACKGROUND

Background

INTRODUCTION

In August 2022, Shanna Hopkins, Director of Alumni Affairs at St. Francis Xavier University, was asked by the President and Vice-Chancellor of Trent University, Dr. Leo Groarke, to conduct an external review of Trent University's alumni affairs and alumni relations operations. Shanna Hopkins agreed and recommended that she be joined by her colleague, Mary Jessie MacLellan, former Alumni Affairs Director at St. Francis Xavier University.

The review was initiated to help ensure that the Trent Alumni Engagement & Services team, going forward listed as AES, was following best practices and that the services that they provide for alumni of Trent University are the best that they can be. The review was designed to examine all aspects of current alumni operations and activities, including but not limited to:

- the activities of the alumni association,
- communications and programming with and for alumni,
- alumni opportunities to meet and mentor students,
- alumni giving,
- college and departmental relationships with alumni,
- Durham campus alumni relations; and
- events like homecoming with a purpose of "providing recommendations on our current state and how we can improve alumni relations and engagement."

BACKGROUND

REVIEW FORMAT

From November 23-25, 2022, the reviewers visited Trent University and met with a wide range of stakeholders (*see Appendix A*) to learn and better understand the activities, initiatives, programs, and services currently in place as part of Trent University's alumni portfolio. Work began with a series of in-person and virtual interviews with both internal (staff) and external (alumni) stakeholders, a review of written submissions from stakeholders, an assessment of material provided by the President's Office (*see Appendix B*) as well as our general observations. To examine what is done well, address what needs improvement, explore new opportunities, and minimize risk, a SWOT (strengths, weaknesses, opportunities, and threats) analysis collates what we have heard, read, observed, and learned. Recommendations were gleaned from a review of the SWOT analysis.



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April 28, 2023

SWOT ANALYSIS

SWOT Analysis

STRENGTHS

- Well managed and highly regarded team

The Alumni team is recognized on campus and beyond as well-managed and highly regarded. There is a positive energy throughout the team which stimulates engagement and commitment to their role. There are many competing priorities in the Alumni department, and they are managed collegially and effectively. Staff are well known for their commitment to relationship building both internally throughout the campus and externally within the alumni and friends community. Staff are friendly and create a “part of the family” feeling. Words used to describe the team range from “amazing” and “knowledgeable” to “hard working.” The team was also described as creative and accustomed to doing much with limited resources. Colleagues have indicated that they find it rewarding to work together and have mutual respect and admiration for each other.

Many of the staff have worked in AES or at Trent University for an extended period and understand the Trent experience. The AES team is also committed to the heritage and stewardship of Trent University. They are strong promoters of heritage events which support the tradition and legacy of Trent.

- Excellent volunteer base
There are over one hundred committed volunteers connected to the Alumni department. Volunteers are used to support events, provide mentorship, etc. The number of volunteers is indicative of the level of engagement of Trent alumni and staff.
- Understanding of and commitment to philanthropy by the AES team
The Alumni team supports philanthropy by increasing alumni and donor engagement and enhancing the profile of Trent University. This commitment supports their colleagues in External Relations and Development to develop, inspire and nurture the institutional relationships needed to build, support, and attract funding.

SWOT ANALYSIS

- Strong team leadership

The Alumni Director is a strong leader with a commitment to identifying gaps within the team, programming, engagement strategies, etc. and has the innate desire to improve and make a difference. Her leadership in bringing an equity, diversity, inclusivity, and indigeneity (EDI) lens and recognizing the importance of diverse voice assisted with the integration of these principles into their strategies and operation.

- Life After Trent

The Life After Trent program creates opportunities for both alumni (recent and older) and students to connect. Students connect with alumni through a series of forums to discuss career, professional development, and networking opportunities. This program demonstrates to students the value of the alumni network, the meaning of life-long connection and presents an avenue for alumni to be engaged beyond a monetary donation. This program is indicative of collaboration between the Colleges, AES and Careerspace.

- Virtual and hybrid events

The COVID-19 pandemic necessitated that the Alumni department develop and provide expanded engagement opportunities for alumni. They transitioned well to virtual events and held many that were successful. Since the pandemic, they have continued with virtual events in addition to their typical in-person events. They have added hybrid events with a conscious effort to make the experience equally fulfilling for those who attend virtually and those who are physically present. The department embraced the challenge of doing things differently and were able to learn and grow through the pandemic.

- Lifelong email address

Graduates of Trent University can retain access to the email address provided to them as a student. It is a significant engagement opportunity. If the address remains active, the Alumni department has easy access to their graduates without the added pressure of soliciting their “after Trent” email address.

- Student employment

The practice of employing current Trent students within the Alumni department on a regular schedule is an excellent way to add depth to the department as well as provide current students with a deeper understanding of the role of the alumni department and the benefits

SWOT ANALYSIS

of staying connected to Trent University after graduation. The student employment model is an enviable, experiential learning opportunity in a post-secondary educational institution. The AES department is fortunate to have a team of students who work in their office to provide administrative, customer-focused support.

- Trent University Alumni Association (TUAA)

The TUAA Council is comprised of enthusiastic volunteers who bring great ideas and vibrant energy to the Trent alumni community. Their model of shared leadership with co-presidents allows for collaboration and greater versatility. It expands the reach of the TUAA and provides leadership opportunities for two engaged alumni as opposed to only one. Both presidents are active and connected to AES at Trent. The TUAA Council members are reflective of the diversity within the alumni community.

The revised and flexible structure of the TUAA Council is important as it gives added focus to the important and changing priorities of the university, the Alumni department, and the association itself. The committee-based model is adaptable and allows input from alumni beyond Council representatives. This broadens the opportunity for Trent alumni to become actively involved and expands the knowledge and experience base of the Council.

There are many strategic opportunities for Council members to become involved with committees such as Strategic Advisory, Homecoming (Head of Trent), Awards and Recognition, Trent Day, Convocation, and Durham GTA.

There is also a strong alumni chapter presence in areas such as Vancouver, Montreal, Ottawa, Durham, Toronto, New York, and Hong Kong.

- TUAA support of events

The co-presidents of the Association support university initiatives by attending many alumni events. Their presence is indicative of their commitment to Trent and their role as champions and advocates of the Trent education and experience.

- TUAA/Trent Alumni Engagement & Services Strategic Plan

The TUAA and the Trent AES department worked together to create a plan to set joint goals and targets in motion. This joint integrated strategic plan, 2016-2019 Strategic Directions,

SWOT ANALYSIS

coordinates the mission of both entities to work together toward a common goal. The combined effort and reporting to Trent University's Board of Governors elevates both the Association and the Department.

- Trent Day

The 2016-2019 Strategic Directions plan for AES and TUAA recommended "the launch of an annual Day of Service that promotes alumni volunteerism in their own communities." This goal was reached with the creation of Trent Day in 2021 which exceeded expectations and made an impact in broad engagement and in philanthropy. Celebrating support, service and spirit, Trent Day continues to reinforce the founding values of Trent University.

- Partnerships and collaborations across campus

The AES team indicated that they are keen to collaborate with other departments, e.g., Life After Trent program, partnership with the Careerspace office highlighting experiential learning and mentorship, and campus staff volunteers who come together to support Convocation events. The Alumni team enjoys opportunities to share resources with other departments for the benefit of both.

- Alumni Newsletter

Trent Magazine (2 issues per year) and the *Alma Matters* online newsletter (6 issues per year) in addition to the *Philanthropy Matters* newsletter (6 issues per year) provide valuable information sharing from the university to the alumni community. These initiatives market the university and share stories as well as encourage and promote legacy through philanthropy or student recruitment.

- Rental of Alumni House as event space

Alumni House is an excellent on-campus venue which provides the opportunity to have personal meetings with visiting alumni or students, a venue to host and welcome dignitaries, and a venue for campus events. As an on-campus venue, it promotes the alumni department and their mission. It brings recognition to the department and the staff.

- On-campus and signature alumni events

The annual regatta and homecoming event, Head of the Trent, is a popular event with the Colleges, students, and alumni. It is a well-managed event which engages alumni in a return

SWOT ANALYSIS

to their alma mater. Alumni reunion weekend in May also provides an additional opportunity for alumni to return to campus to reconnect with friends and familiarize themselves with the Trent of today.

Convocation ceremonies at Trent are another example of a well-managed, successful event which supports alumni engagement and provides lasting memories for Trent students and graduates.

The presentation of annual alumni awards which are coordinated with alumni events in chapter locations demonstrate that the Alumni department is responsive to the needs of their alumni. These awards acknowledge the alumnus/a within their own community allowing them to invite family to attend and to be featured in their hometown. It presents an occasion to strategically align with community in conjunction with other events.

There is a wealth of event management expertise in the AES team. The group has a strong sense of commitment to hosting events such as the Community Speaker Series which leave lasting impressions in the hearts and minds of attendees.

- Trent University Colleges

The college communities promote learning, embrace diversity, and foster meaningful connections among students – this system is a true gift to the Alumni department as it seeks to engage students and alumni. The strong college relationships support the connection to Trent and create a more engaged alumnus/a. From the applicant to the alumni, it is an additional engagement opportunity that can be fostered to deepen connection, e.g., scarfing traditions, college endowments, etc.

- Knowledge of alumni database

Alumni staff have an in-depth knowledge of Trent alumni and are a source of information on the alumni talent pool facilitating alumni profiles, volunteer opportunities, and identifying candidates for representation on Trent's Board of Governors.

- University and alumni engagement reputation

Trent University has a solid reputation as a university committed to their students and alumni. Results of a 2021-22 Alumni Engagement Survey by Engagement Analysis Inc. indicated that Trent's overall alumni engagement and the percentage of alumni that are

SWOT ANALYSIS

engaged with the TUAA and the University is significantly higher than its peer group engagement average and Canadian average.

- Best practice awareness and implementation

The AES team is active in finding and implementing best practices in their work. This involves both reviewing current practice and keeping up to date with others in the sector to evaluate different methods or approaches in their operations. An example is their intentionality to embed the principles of equity, diversity, inclusivity and indigeneity into their strategies and operations. This was recognized at the Canadian Council for Advancement of Education (CCAEE) with a presentation by Trent University's Alumni Engagement & Services Director.

- Chancellor support

Chancellor Stephen Stohn '66 is supportive of the AES team through his attendance and participation at events throughout the alumni community. This level of official support by the Chancellor builds trust within the alumni community and inspires great commitment to Trent University.

- Communications

The materials (both print and online/virtual) produced by AES are both polished and professional. There is a strong communications output which tells stories with oral narratives that are compelling and real through podcasts, magazine, newsletter, and social media content. The dynamic content creates a call to action that can ultimately change behavior and increase engagement.

- Trent University Association of Retired Persons (TUARP)

The TUARP is connected to the AES department for their facilitation and support. TUARP members are considered friends of the TUAA and able to access TUAA benefits, attend alumni events, etc. This connection helps to build engagement and facilitate connection between alumni of the university and the staff that had influence in their time at Trent.

- Community Relations at Durham

In the absence of an alumni presence at the Durham campus, the Manager of Community Relations position provides a community presence and supports Convocation.

SWOT ANALYSIS

- TrentUConnect

The TrentUConnect, a joint initiative from AES and Careerspace, is a virtual networking opportunity on the 10,000 Coffees platform. Students can tap into the power of the Trent community and find a network of champions. This mentoring platform creates a new way to network and connect virtually. As well as providing a service for students, it provides alumni with a way to give back to Trent University and support the next generation.

WEAKNESSES

- Alumni list protection and maintenance

The alumni contact list is well-maintained but Alumni staff are protective of the contact list. University departments and colleges want the opportunity to connect and collaborate with their own alumni but have not been able to access the database. These groups do not feel welcome or heard when they want to engage their department or college alumni which in turn prompts these groups to start their own lists which is not conducive to a complete database of updated contact information for all alumni.

- Alumni team's commitment to philanthropy

The primary purpose of the Alumni department is to manage the relationship between the university and its graduates. The department's commitment to fundraising is extensive and some have indicated that it seems to take priority over relationship building and management. The work of the department may not be well understood beyond External Relations. Is Trent putting fundraising first instead of engagement?

- Lack of visibility on campus

The Alumni department is falling under the radar with the current student population of Trent. Many students do not know where Alumni House is or what programs are available for alumni or how students can be engaged. The alumni team does great work with the Community Speaker Series, but many stakeholders are unaware that the alumni team is behind its coordination. It is important that AES shares their story.

- Engagement of younger alumni

Many alumni events do not engage the younger demographic of Trent alumni. Events such as receptions engage an older demographic or alumni with philanthropic potential. There

SWOT ANALYSIS

are missed opportunities to develop the lifecycle (prospective student to engaged alumnus/a).

- Limited resources at the Durham campus

The enrollment at the Durham campus of Trent University is realizing significant growth. As enrollment grows, so does the number of alumni. Without an alumni presence on the Durham campus, the purposeful engagement of students for the next phase of their relationship with Trent University is at risk. Durham alumni have indicated that they do not feel part of the discussion, do not have input in the alumni magazine or communication channels and have indicated that they feel disconnected, isolated and an afterthought.

- Collaboration

There are many opportunities for collaboration with other departments that are missed. Other campus departments have indicated that collaborating with the AES department can sometimes be difficult. There is limited direct connection between departments and the relationships built between departments tend to be more tactical and siloed. Internal communications with other university departments are also limited.

- Communications

The Trent University Communications Office builds and raises the university's profile and reputation internally and externally. It is critical that they work collaboratively with key stakeholders across the University so that they support strategic goals and initiatives of the university. With the management of alumni communications under the umbrella of AES, it is critical that their communications strategy is hand in glove with the University Communications strategy. There appears to be limited alignment between the two entities which results in fractured communications and lack of critical integration. With the lack of a centralized platform, both the University and the Alumni department are missing opportunities.

The same portal or channel is used for all alumni and philanthropic communications. With only one channel and the lack of a formal schedule of messages and release times/dates, a bottleneck develops. The volume and breadth of what is sent out to alumni (via email) needs to be examined and placed on the forefront of the planning process. The lack of a gatekeeper

SWOT ANALYSIS

role for communications (print or online) results in confusion and unclear direction on priority.

- Strategic Plan/Survey Results

The joint TUAA/Alumni Engagement & Services Strategic Plan is a thorough document which outlines the strategic direction for both entities for the 2016-2019 period. Internal Trent departments would welcome an opportunity to provide input on the plan or to have learned more from AES on how they could assist in making a difference.

The same comments were heard with respect to the results from the Alumni Engagement Survey by Engagement Analysis Inc. Sharing the results with other campus departments helps to engage them in the work and the mission. They too can support alumni goals and understand how they can adapt their work and their strategic plan to support the university.

- Recruitment (international and domestic)

The absence of an alumni driven strategy to support the recruitment of new students to Trent University is a missed opportunity. Early alumni engagement in the recruitment process is critical as alumni can demonstrate to prospective students the value of a Trent University education and experience. By fostering the personal and professional connections of Trent alumni, recruitment can grow and so will the alumni base.

- Colleges

Like recruitment, the absence of an alumni driven strategy regarding the Colleges at Trent University is a missed opportunity. Each College develops a keen sense of identity among faculty, staff and students and is a defining feature of student life at Trent. A strong College system is a gift to the Alumni department when building engagement.

As College principals and staff seek to build communities of living, learning, belonging and celebration, they see the value of connection with their college alumni. Without a formal strategy in place, they are struggling with access to alumni records and do not feel supported when they attempt direct reach out to alumni. This in turn creates an issue when Colleges seek to connect with their alumni on their own as the communication can appear disjointed – is it from Trent University or their respective College? These are one in the same and a

SWOT ANALYSIS

strategy to support the Colleges would in turn support the goals of greater alumni engagement for Trent University.

Another example is evident in the recent alumni survey results. The survey provided valuable information with respect to college engagement. College principals did not have access to these results, nor were they provided a synopsis of the resulting report. This information, together with an alumni-college strategy, would better serve both entities.

- Limited financial resources
The AES budget is low particularly with respect to travel. A lack of financial resources impedes achieving a target and can present significant frustration.
- Professional development
Professional development opportunities are limited for AES staff. These can help employees to earn and apply new knowledge and skills, stay relevant and up to date, and build morale. With an absence of dedicated professional monies or a strategy, alumni staff need an avenue to support their education and training.
- Outsourcing
Much money is spent on the outsourcing of media production, i.e., video and graphics. Is there an opportunity to train in house for this service?
- Student employment
The student employment model at Alumni House consists of three students who work in the office. Their schedules are based on availability and as students, it is understood and appreciated that their academics come first. This can present issues as there are times without coverage and this work then falls to permanent staff along with their other duties.
- TUAA
The current structure of the TUAA Council does not include an international representative. Given the growth in international recruitment and the alumni base, it is important that this view is not lost. As well, there is not a dedicated Council member role for Trent Durham alumni.

SWOT ANALYSIS

There is not a dedicated term for Council members. A dedicated term, e.g., 3-year term subject to a maximum of a second term, would allow for both consistency and turnover to bring in innovative ideas and perspectives.

- TUARP

With the AES team stretched for time and resources to build engagement, there may be possibilities with other departments to assist with TUARP, e.g., Human Resources.

- AES team – roles and responsibilities

The AES staff are wearing many hats with diverse responsibilities which can lead to confusion over who is responsible and a loss of focus. Some areas of note include the decision not to fill the position of Senior Manager of Integrated Engagement. Many of the duties were shared throughout the team resulting in a lack of integration.

When vacant positions are not backfilled, this presents an inherent weakness to the department as a whole. The increased responsibility placed on other staff members who must take on the additional work creates a lack of coordination and direction within the department and beyond.

The lack of a full-time administrative staff position within AES leaves staff feeling that a significant portion of their time is used to manage administrative details and reduces the time spent on alumni engagement work.

- Website

A department's website is the channel by which the external and the internal community connect. The current website is limited as a platform for engagement. Without direct department access to change/update the website, it is challenging for alumni to see changes and updates. Some items are buried on the website and not intuitively found. Some information on the website is outdated and not relevant to alumni.

- Space

There is limited space for physical growth within Alumni House. Staff are crowded and the current layout is not conducive to change.

SWOT ANALYSIS

OPPORTUNITIES

- Engagement of students while on campus

There is an opportunity to be more involved with students during their time on campus and introduce them to Alumni House and the staff. By creating awareness of the AES department, students will be much more familiar with the names of the staff and their roles as they transition to the Life After Trent program. This could be as simple as hosting open houses in Alumni House and hosting fun student-centered events to working with members of the senior class to create a Senior Class Fund. The goal of this fund would be to bring together members of the graduating class to celebrate their achievements, plan memorable senior year events and experiences, educate classmates about the importance of philanthropy, and encourage their peers to contribute to their senior class gift. The creation of a Senior Class Fund would be a starting point for the building of a lifelong relationship for the senior class with Trent University. This could result in the creation of a culture of giving as these students have an opportunity to leave a lasting philanthropic legacy for generations to come, all while creating an affinity for the University as they transition from students to alumni.

- Durham GTA

There is a huge opportunity to engage alumni from the Trent Durham campus. With over 9,230 graduates in their database, having a physical office space and visibility of a staff member would create an alumni culture for the University. There is potential to host events such as small speakers' series and subject to review, a separate Homecoming/Reunion celebration for this campus. These measures can lead to more affinity and increased giving overall. While there is a community engagement staff person at the Durham campus, the anticipated growth of the student/alumni population creates a potential that is beyond what a community engagement staff member can manage.

- Events

There is an opportunity to increase the overall number of events that the Trent AES hosts. There should be a focus to get back on the road post pandemic and re-engage chapters that might have been dormant for the past couple of years. From feedback received, there are alumni out there that want to get involved and volunteer and they are just waiting for the opportunity to be included. This can be beneficial to all aspects of the university, including

SWOT ANALYSIS

pure alumni engagement, recruitment of future students, and as a catalyst to create and strengthen relationships that could lead to an increase in donations.

- **International**
Utilize Trent International recruitment staff (in market) to host events or find rock star volunteers in countries that can host, promote, or support these events. These staff can help to build relationships and focus on creating and strengthening them. There is an opportunity and a desire to co-host events with Recruitment and Trent International.
- **Professional development**
Providing professional development opportunities for staff is important. Ensuring that there are monies allocated to providing these opportunities is a huge benefit for staff. Also providing opportunities and having funds allocated to send staff to present at conferences such as CCAE (Canadian Council for the Advancement of Education) is important. Whether it be in person at the national conference or via a virtual lunch and learn or webinar, providing staff with the opportunity to develop skills and expand their professional network can instill a sense of value and empowerment, which is vital for retention of employees.
- **Relationship creation**
There is a desire from many alumni to create relationships with the university that are not focused on philanthropic behavior as many do not always have the means to donate.
- **EDII**
Trent AES must continue to build on their work in EDII by committing to the principles of equity, diversity, inclusion, and indigeneity. This is important work, and AES can continue to be the leaders in promoting these initiatives.
- **Website redesign**
There is an opportunity to encourage relationship building on the Trent AES website by having a more enhanced, user-friendly website. This will allow AES team members to tell stories about Trent's amazing alumni. Currently the website is very focused on philanthropy.

SWOT ANALYSIS

There is a need to provide high value service with an expanded digital platform to connect with global audiences and create global chapters. There have been a high number of international graduates in the past number of years.

- Mentoring

TrentUConnect is one of the mentoring opportunities for students/alumni. It is based on the 10,000 Coffees online platform. This platform is externally funded through the RBC Future Launch program and Trent University is in year 3 of a 3-year sponsorship. As mentoring is a significant value-add experience for students and alumni, the last year of this contract is an opportunity to review all platforms to see which are most effective with engagement and cost.

In addition to student and alumni mentorship, there are always significant opportunities for internal mentorship (staff to staff).

- Alumni of Trent University vs. Alumni of Collegiate Program

AES should take advantage of the multiple ways alumni associate themselves to the University, i.e., Colleges, academic departments or faculties, athletics, etc. Whether alumni connect with Trent University as a whole or whether it is a direct College affinity, there are great opportunities for collaboration between AES and the Colleges, such as hosting events, utilizing shared resources and sharing alumni contact information.

- Life After Trent Program/Club

With over 10,000 new Trent alumni in the past five years, there is an opportunity to create a young alumni engagement strategy. This strategy could be focused on how to keep these recent grads connected and create meaningful ways for engagement that could lead to giving back as volunteers and perhaps eventually through the fundraising cycle. With enrollment growth at Trent, AES must be prepared with a plan to manage this growth. Is there an opportunity to expand the Life After Trent program with a marketing plan?

There is also an opportunity to begin building relationships with International students before they return home. When they arrive home, they become Trent ambassadors. AES must have visibility at the Trent International Gala, as this is a great opportunity to build relationships with international students before they return home.

SWOT ANALYSIS

- Integrated communications

There is great potential for collaboration with the University Communications department. An integrated communications approach will benefit Trent University as it will leverage the strengths of all departments.

- Increase affinity partnerships

There is an opportunity to explore additional affinity partners for Trent AES. By adding additional partners, i.e., a financial partner, there is a possibility of increasing affinity funds for the office that could be used for travel or supporting alumni events. With the growth in International students and alumni, there is an opportunity to look for international affinity partners as well.

- Volunteer recognition and management

Trent University recognizes and empowers volunteers throughout the calendar year. Whether they are volunteer staff that assist with Convocations and on campus events or chapter volunteers across Canada, they are well recognized. There is an opportunity to increase the number of volunteers by creating a tool kit for volunteers to reference, i.e., Chapter Handbook for an alumni volunteer that wants to start a chapter. By adding a link on the website for alumni to sign up to volunteer, volunteer numbers will increase.

- Convocation

Convocation is a critical point in the student life cycle. It is a significant opportunity to welcome and engage the newest alumni of Trent University. There is an opportunity to create a Convocation template that outlines the AES response. This document could serve as the basis for a welcoming strategy to engage the next generation of leaders.

- Trent Magazine

The production and distribution of *Trent Magazine* consumes much of the AES budget. The data contained from the EAI survey should be reviewed regarding a potential shift to a virtual only edition or the production of a smaller number of print copies. The money saved could be used for strategic alumni engagement, e.g., travel, events, etc. The EAI survey indicates a preference for virtual media.

SWOT ANALYSIS

- Collegiate programs

Head of Trent/Homecoming presents a time for Colleges to rekindle relationships as they organize/host their own events. The primary role of AES is to promote and publicize events to alumni returning to campus. There is a desire from the Colleges to meet more frequently to be able to create opportunities and collaborate to continue to strengthen the traditions with the Colleges. Is there an opportunity to host events in this similar format throughout the year?

- Athletics

With the shift to the post-pandemic world, varsity and recreational events are happening on campuses again. Athletics provides an easy way to create alumni engagement, setting up booths at some of these events at home games or being in the stands hosting a pre-game reception for road games is a simple means to connect with alumni and friends.

- TUAA

With the growth of the international student population over the past number of years, there is an opportunity to include or create a council position within the TUAA for international representation.

The creation of more regional chapters or special interest groups provides an opportunity for members of the TUAA to welcome students to chapters at an event held over the Convocation weekend. This could lead to increased visibility of the TUAA and a desire for more students to get involved with local chapters as they transition into the role of a Trent alumni.

The website should be an easy opportunity to promote upcoming events and to find out more about the TUAA, the chapters and special interest groups.

There is an opportunity to create a new strategic plan for the TUAA and the Trent AES office as the last strategic plan covered the period 2016-2019.

- Alumni Engagement & Services

There is an opportunity for AES to be more transparent with other on-campus departments and Colleges by sharing their strategies and plans. As they share what they are hoping to

SWOT ANALYSIS

achieve while making proactive connections with on-campus departments, all departments will benefit from shared goals and objectives.

THREATS

- **Lack of an integrated communication strategy**
Communication should not be a competition but rather a collaboration. There is limited integration between both departments (University Communications and AES) and there have been instances where people in both departments were working on the same story separately. This is not an efficient use of time and resources. It presents an uncoordinated and unorganized response. Without coordination for institutional/alumni/philanthropic messaging, Trent University can appear flat-footed and unresponsive.
- **Competing priorities**
The scope in AES has extended beyond pure alumni engagement to support philanthropy and there is confusion with respect to which is priority. Some alumni have indicated that they feel engagement is only based on ability to contribute to Trent financially and this presents a significant risk. There is a need to establish connection, strategy, and priority.
- **Convocation**
It was suggested that the planning and coordination of Trent University's Convocation ceremonies does not belong with AES – questioning whether the planning for Convocation is taking valuable time away from alumni engagement duties. If there is no connection to Convocation from an alumni perspective, does this present a risk to young alumni engagement?
- **Volunteer coordination**
Volunteers are essential to an alumni engagement strategy and there is significant risk if the volunteer base is not managed or coordinated. Volunteer engagement is critical to productivity. Without a coordinated approach, volunteers and staff alike can be apathetic.
- **Lack of collaboration**
When it is perceived or felt that there is a lack of collaboration between departments, this poses a significant risk to the goals of each department. Some examples indicated include reluctance to share information with the Colleges or other departments and reluctance to

SWOT ANALYSIS

share attendee bios or event attendee lists with university staff who are attending events or post event. A coordinated strategy for collaboration and a greater understanding of the goals and objectives of each department will help all departments to excel.

- High pressure environment

With many competing priorities, additional workload and responsibilities, some staff have indicated that the high-pressure environment is stressful, and demands are high. When vacant positions are not filled, there is risk of burn out of staff members who are shouldering the additional work. At times, the department's chain of command is not observed which results in increased levels of stress, frustration, and confusion for all. Staff need to challenge the way they think to embrace the future of engagement.

- Event management

The COVID-19 pandemic necessitated the move to a virtual event environment so as the university returned to in-person alumni events, the requests for hybrid events increased. Hybrid events require more sophisticated technology to ensure the attendee experience is valid for both in person and virtual. An increased investment in technology and dedicated IT support would be necessary to continue offering hybrid events.

- Financial Resources

Budget resources are imperative to the goals and objectives of AES. Budget resources are required to support the staff complement, alumni programming, host events (international and domestic), travel, complete projects, etc. With a limited budget, it is difficult to move the needle forward.

- Website and online presence

The inability to make changes on the website is challenging and results in an out-of-date online presence. As the website is the portal for alumni to access information and services, it is a significant risk if the information cannot be updated quickly. A website redesign could more prominently feature TUA or TrentUConnect, both of which could benefit from greater visibility.

For example, currently you must click three times from the main website to find out where Trent alumni chapters are located or what special interest groups the AES offers.

SWOT ANALYSIS

- Limited profile
The work of the alumni team is not well seen or identified by others. By increasing the profile of the AES team, the awareness of and support for their objectives will increase.
- Durham GTA
The lack of a coordinated alumni presence at the Durham GTA leaves these students without direct alumni connection. Growth in enrollment at Durham indicates future growth in the alumni population. Engagement begins throughout the student lifecycle.
- University reputation
In the past number of years, universities have noted an increase in student partying surrounding their annual homecoming celebrations. The Head of the Trent celebration is no exception. To ensure community safety and minimal disruption, consideration must be given on how to address this issue as the reputation of the university may be jeopardized.
- Fundraising and/or engagement
There is a risk if AES is perceived to be placing fundraising before engagement. By only inviting “highflyers” to events, the perception exists that money is the primary focus of engagement as opposed to relationship building.
- Strategic plan
The lack of a current strategic plan poses a risk to AES and TUAA as a plan presents measurable goals and provides direction. Without these, there can be a lack of focus and an inability to demonstrate results, value, and performance.
- Alumni contact information and alumni connection
Social media platforms have provided us with many opportunities to connect with alumni but unfortunately, it is often seen that these platforms do not provide information such as mailing addresses and telephone numbers. It continues to be a challenge to find current and up-to-date contact information for alumni. Without an innovative plan to collect this information, alumni departments are at risk of losing the connection with their stakeholders. There needs to be strategy built for both digital and traditional contact information. There

SWOT ANALYSIS

are alumni who do not use digital options so connecting with those people will remain a consideration and should be included within a strategy.

- Declining College engagement

According to the 2020-21 Alumni Engagement Survey by Engagement Analysis Inc., the affinity for Colleges has decreased by 9%. This presents a risk as the unique collegiate structure is a way to create greater affinity and engagement.

RECOMMENDATIONS

Recommendations

COLLABORATION BETWEEN DEPARTMENTS

For collaboration to grow and thrive, there needs to be a combined effort made to build trust. There are many opportunities for new, renewed, or focused collaboration amongst different university departments that could have positive results for Trent University from a recruitment or philanthropic lens and potentially lead to an increase in overall alumni satisfaction. This collaboration could result in an increase of alumni offerings and services, shared responsibility and overall opportunities that could be capitalized on by multiple departments. A symbiotic working relationship with Trent International could be the sharing of names/contact information or emailing out invitations for events that could be hosted by their recruiters or an alumni volunteer in a community abroad. By collaborating on the event together, the event could contribute to recruitment efforts if alumni are encouraged to bring prospective students to a Trent gathering entering them into the recruitment funnel. Similar collaborations could be happening with Research, Careerspace, Continuing Education, and the Colleges. These interactions could support lifelong learning, the Life After Trent programs and grow affinity partnerships. The sharing of schedules and strategies with other departments will be effective in ensuring all teams meet their goals. AES needs to see the value in working regularly with other departments and welcome opportunities for collaboration.

Recommendation: *Communication needs to be at the forefront as it helps to remove walls and barriers and creates great relationships, e.g., sharing of an alumni event with the recruitment team can help to support similar goals. Create quarterly meetings with different departments on campus that you can collaborate with, e.g., Continuing Education, Recruitment, International, Communications, Colleges. At these meetings, you can set forth shared schedules for upcoming travel, look for opportunities to collaborate on events and ways to share resourcing or costs.*

MENTORING

Whether alumni to student, alumni to alumni or senior staff to junior staff, mentoring is a way to give back and a way to pay it forward. Sharing experience and expertise is a form of engagement and a service to others. Embodying the motto of Trent University, mentoring is

RECOMMENDATIONS

valuing what has been learned, and what is yet to be discovered. TrentUConnect and Life After Trent are excellent examples of how powerful mentoring can be.

Recommendation: *Continue to build on mentoring programs with a review of all available mentoring opportunities. A careful examination will include a review of the successes and drawbacks and allow AES to adapt programs to achieve greater successes. For example, short session mentorship opportunities might be a way to connect more people, on-campus coaching, etc.*

SUPPORT THE CHAPTER NETWORK

Supporting the chapter network is an important part of an alumni engagement strategy. The development of a chapter handbook or guidelines will make it easier for volunteer alumni in a chapter area to develop a clear understanding of their responsibilities, policies, and procedures. As well, the AES team will appreciate having a best practices document for sharing and referral. With the transition to the post pandemic world, alumni and friends are looking for ways to get involved and feel more connected. Use this as an opportunity to make a call out to create more chapters and create a more formalized chapter model. While there are a number of chapters currently listed on the website, only a handful of them have returned to hosting in person events.

Recommendation: *Develop a chapter handbook that outlines the expectations and advantages of managing a chapter of local alumni or special interest group. This best practice document will support alumni volunteers and empower them to strengthen the alumni community and the relationship with Trent.*

TUAA

As a result of the interviews conducted and the documents submitted, it is clear that the TUAA and the AES have a solid relationship. The TUAA is comprised of volunteers that care deeply and compassionately about their alma mater. Led by passionate and motivated co-presidents, the TUAA strives to be a support system and a think tank for the AES team. They promote the Trent Fund, honour alumni and friends annually, and assemble volunteers to help with AES Signature events.

RECOMMENDATIONS

Recommendation: *The most recent joint integrated strategic plan for the TUAA and AES spanned 2016-2019. It is recommended that the AES department and the TUAA review the outcomes of the existing plan and begin to lay the groundwork for a new strategic plan.*

This plan should outline strategies for young alumni engagement, digital and social media, connection, Durham GTA, and overall engagement.

Recommendation: *Given the growth in international recruitment and the international alumni base, a dedicated Council member role should be created for a Trent International alumnus/a.*

Recommendation: *Ensure that the myCommunity website stays current with updated meeting dates.*

Recommendation: *Create length of term and term maximums for appointments to the TUAA Council, e.g., appointments shall be for a period of two years, to a maximum of a second term. This will allow for both consistency and turnover to bring in innovative ideas and perspectives.*

VOLUNTEER ENGAGEMENT

The engagement of Trent alumni as volunteers to support both Trent University and the TUAA is critical. Volunteers increase capacity and diversify what AES can do. To maximize contributions, volunteers need energetic leadership; they need to feel wanted and important. They need to have the support of AES with demonstrated energy and effort. Volunteers want and need to feel valued. As AES supports the empowerment of its volunteers, meaningful change will happen.

Recommendation: *Create a volunteer management strategy that will empower volunteers with meaningful engagement opportunities that advance the mission of AES.*

Recommendation: *A call out for volunteers to assist or host events or create new chapters could be done in the Trent Magazine or an edition of the Alma Matters newsletter. A challenge could also be put out on social media to alumni to identify leaders in their communities resulting in a list of alumni that Trent*

RECOMMENDATIONS

AES could tap into to become an advocate or social influencer for Trent, particularly around signature events, Head of the Trent, Trent Day, or Convocation, etc.

EVENTS

Organizing and executing events or providing resources for volunteers to host alumni events is one of the greatest ways to meet and engage with alumni, donors, and friends. Alumni events, whether in person or virtual, have a way of transporting alumni back to their days on campus by creating an easy and measurable way to engage and grow affinity.

While hosting in-person events is not a new concept to university alumni and development departments, the mandatory shift to virtual programming because of the COVID-19 pandemic created new and challenging opportunities for all academic institutions. Virtual programming became THE only way to connect with alumni and most organizations benefited from this shift as it provided an opportunity for alumni to be involved and feel connected in times of uncertainty. This was a way for universities to increase interest from alumni that might not typically attend an in-person event.

Recommendation: *As a means of continuing to increase engagement, it is recommended to continue to host hybrid and/or virtual alumni events.*

Recommendation: *Events should be segmented to target diverse groups, from high level donors meeting with senior leadership to alumni gatherings intended for all, including inviting prospective students, so that they get to meet and greet with alumni and senior leaders as well. This makes everyone feel special and valued. Targeting a broader demographic also has spinoffs of cultivating new relationships which over time can lead to more engaged volunteers, increasing student enrolment and higher levels of overall giving back to the University.*

Recommendation: *To properly equip volunteers, it would be beneficial to establish chapter guidelines or a handbook so that volunteers are aware of the requirements and the responsibilities involved in starting a chapter or hosting a Trent alumni event. It is important to create a measurable goal,*

RECOMMENDATIONS

e.g., it is recommended that Chapters host a minimum of two Trent alumni events throughout the course of a year. If there are fees or registrations associated with these events, it can be beneficial for AES to assist, as setting up these events in a current CRM system will allow for the tracking of attendance of alumni to score affinity and engagement more accurately.

Recommendation: *AES needs to create more special interest groups. For example, alumni from Trent that are lawyers could be invited to speak or be panelists and this could also serve as a collaboration with the CareerSpace for current students who are exploring a career in law. Aside from focusing on employment, there are several areas that could benefit from special interest coordination.*

Recommendation: *Evaluate all current events, both in-person and virtual, to see if they are providing value (both financial and human resource) and return on investment. Challenge the status quo and use this as an opportunity to be bold and make changes. Set goals for events so that you are able to measure performance.*

Recommendation: *Evaluate events that are planned currently during the Homecoming and Head of the Trent Regatta Weekend. Explore and challenge departments such as the Colleges and Athletics to provide additional events that AES can advertise. This will help to grow the number of alumni that return to campus for the weekend. Explore the option of celebrating class reunions by working with class representatives to host a class-specific reception or dinner on campus, e.g., acknowledge five- or ten-year milestones so that alumni get into the habit of planning to return to Trent to celebrate those important anniversaries.*

INTEGRATE COMMUNICATIONS

The implementation of a strategic vision for all Trent University communications is essential. Without an integrated strategy for university and alumni communication, both have the potential of failing. A strong collaboration between AES, Recruitment, International, Colleges

RECOMMENDATIONS

and University Communications is critical for success. University Communications should lead the development of stories that are designed to engage, inform, and deliver as greater operational efficiency and increased engagement will result. An integrated approach will provide a strategic vision on all publications. Currently there does not appear to be an awareness of the difference this can make. There is a lack of vision for how alumni communications can support Trent University goals. By collaborating and work together, an expanded reach would be achieved. With shared responsibilities under a central communications umbrella, there is greater knowledge, guidance, expertise, and collaboration.

Recommendation: *Implement an integrated university wide communication strategy and policy. This policy will promote both targeted and differential communications methods that are consistent and clear. Expertise can be shared, staff can be mentored, and the best messaging to support Trent University and AES will be achieved.*

Recommendation: *Develop a communications calendar outlining the anticipated yearly communication from various stakeholders and adjust to reflect university wide priorities.*

Recommendation: *Evaluate the focus of Trent Magazine. The magazine is not only an opportunity to engage an alumni population; it is an opportunity to market Trent University both nationally and internationally. Place editorial management responsibility for Trent Magazine under the shared direction of University Communications and AES to ensure that magazine can be the voice of the University.*

Recommendation: *Remove the silos and foster a team approach which will broaden perspective and increase collaboration. Working together is an opportunity to share expertise that will align both University Communications and AES.*

COLLEGE STRATEGY

The revival of the collegiate program at Trent University provides another potential form of alumni affinity and opportunity for engagement. According to the Engagement Analysis Inc.

RECOMMENDATIONS

Survey conducted in 2021, the affinity for the Colleges had dropped 9% since 2018. Having the collegiate program in place just adds another way that alumni can find and identify themselves as being an engaged alumni member. Some alumni identify and consult only with their program, or their College, so being able to collaborate on events and capture important alumni information is beneficial to AES.

Recommendation: *AES should implement a closer working model with the Colleges which will improve the current student and alumni experience. It is recommended to schedule monthly meetings to connect with the College Principals and members of AES to review upcoming events and opportunities which can ensure collaboration on potential engagement opportunities and reduce over-programming. This better integration of the two departments will strengthen the collegiate presence and help to foster affinity.*

Recommendation: *Create collegiate alumni societies and special interest groups. By hosting some in-person or virtual events, this could lead to engagement of alumni that might not have been previously connected to the AES office.*

Recommendation: *Continue to allocate space in the Trent Magazine and the Alma Matters newsletter to promote college events or college specific alumni stories.*

Recommendation: *Meeting with the Colleges regularly will aid AED in finding ways to be more aware and involved with the planning and execution of College weekends. These events serve as another touch point opportunity to meet and greet not only alumni but to connect and meet with current students early in the year. This helps with raising the overall awareness of who and what the AES team does.*

RESOURCES (FINANCIAL AND PERSONNEL)

As Trent University experiences significant growth in the student population, it is only natural that the alumni population will grow. As the number of alumni increases, so will the need for support, programming, increased engagement opportunities, etc. With ever higher demand for service comes the need for financial resources to support programming, training, etc. As

RECOMMENDATIONS

enrollment at Trent continues to grow, is the AES department resourced to be able to support and meet expectations?

Recommendation: *Evaluate the budget allocation to AES. Conducting a comparison of financial resources available to peer institutions may stimulate discussion on possibilities of how to grow the budget through innovative practice.*

PHILANTHROPY

The generosity of alumni through philanthropic engagement is fundamental in supporting Trent University's mission. Alumni engagement builds meaningful relationships that foster philanthropy. Their symbiotic support of each other is critical to continued growth.

Recommendation: *AES and Philanthropy work together to advance the needs of Trent University. Although AES is a driver for philanthropy, it is important that their focus remains on engagement to create the relationships necessary for long term gain.*

BUILDING STRONG FUTURE CONNECTIONS

From the time a student steps foot on campus, it is important that they begin to feel a sense of what is so special about Trent University. Whether they are the first in their family to attend or come from a long generation of Trent University graduates, it is important that they see themselves as an alumnus/a. The mission of AES includes growing connections with alumni and what better way to start than when they are students. In speaking with students on campus during the visit, not many were aware of where Alumni House was or what their staff did. There are opportunities to create ambassadors or class representatives that could be the conduit between AES and the graduating class.

Recommendation: *AES should facilitate relationship building opportunities with current students through their robust and evolving programming.*

Recommendation: *AES could hold moderated career advancement panel discussions with alumni.*

Recommendation: *Expand and further establish the TrentUConnect mentorship program.*

RECOMMENDATIONS

Recommendation: *Develop and deliver a suite of TUAAs resources to meaningfully engage students in their final year of study and to prepare them for Life After Trent.*

Recommendation: *Facilitate chapter introductions for students during the in-person Convocation weekend or virtually by way of welcome emails sent to graduates on their Convocation Day.*

FORMS OF COMMUNICATION

Communication is a critical component of any alumni engagement strategy. It is an avenue by which the university can provide valuable content to bolster engagement. It is important that information shared or provided is relevant to your audience and is current and timely. These varied methods of communication facilitate the flow of information to various stakeholders. Each method may target a different social or geographic demographic. To ensure that AES reaches all alumni, they maintain a variety of communication channels:

- digital social media accounts, i.e., Facebook, Twitter, Instagram, LinkedIn, YouTube, etc.
- Podcast – *Trent Voices*
- Website - <https://mycommunity.trentu.ca/>
- Print magazine - *Trent Magazine*
- Online newsletters *Alma Matters* and *Philanthropy Matters*

Recommendation: *Implement a social media strategy that evaluates and gathers metrics such as reach impressions, audience growth rate, engagement, video views, etc. These metrics can then be used to facilitate discussion on the best use of resources.*

Recommendation: *The AES website is the window for alumni to view upcoming events, programs, services, stay connected, etc. and must be updated on a regular basis with engaging stories that bolster engagement. Outdated material turns viewers away.*

Recommendation: *As costs for print media and postage escalate, continue to examine open rates on online newsletters and evaluate reach for both print and digital formats. These metrics can then be used to facilitate discussion on the best use of resources, i.e., print and digital.*

RECOMMENDATIONS

CONVOCATION

Signature and special university events present an opportunity to contribute to and celebrate the success of Trent University. They offer the Trent community, both internal and external, a chance to experience the university in a way that reflects the university's larger values. Given the importance of the University's convocation ceremony and the connection to the critical moment when a student becomes an alumnus/a, it is common for a university's alumni department to be responsible for the Convocation ceremony. Naturally, the compliance with academic degree requirements and the release of credentials sits with the University Registrar, but the way the convocation ceremony is experienced by students and families is an opportunity to grow and build upon the student experience and create a more engaged alumnus/a. Convocation presents a relationship growth opportunity for AES.

Recommendation: *Retain the responsibility for Trent University's convocation ceremony and significant institutional events with AES.*

AFFINITY PARTNERSHIPS

Having successful relationships with affinity partners can have huge financial benefits for AES while being an added value or bonus for alumni and friends. With the upcoming launch of the Manulife partnership, AES needs to find creative ways and channels to get this information out to all alumni eligible for their services and begin creating brand awareness. Growing affinity monies will create more opportunities to provide allocated funds for travel, professional development or hosting alumni events. Affinity partners such as TD Insurance also provide free professional development opportunities for their partners, e.g., this past winter, TD hosted a free series of webinar-based modules on Talking Digital. Affinity partners also are open to hosting events for your alumni, e.g., University of Calgary Alumni Webinar TD: How to Manage Your Money or Manulife has complimentary space available in their Toronto office for hosting alumni events.

Recommendation: *Collaborate with your current affinity partners to explore ways to grow your affinity programs, e.g., make a small financial investment in printed marketing collateral to distribute at in-person events which could pay off in greater dividends.*

RECOMMENDATIONS

Recommendation: *Review as a team how you currently market your affinity partnerships and brainstorm options to promote these programs, e.g., have pamphlets available for Orientation Day so that students are aware of options for savings on car/auto or tenant insurance. Growth of these programs will have a positive outcome for AES. Another example would be to ensure that your Human Resource Department is aware of all affinity programs so that when they meet with new university faculty and staff, they are made aware of the discounted services available to them.*

Recommendation: *Work with your current affinity partnership to see if there are areas for growth in services that you might be able to benefit from e.g., TD has just launched a Small Business Insurance Program.*

Recommendation: *Work with your affinity partners to ensure that you have the proper tools to promote their services, e.g., pamphlets, social media graphics, swag for events, pop up banners for events, etc.*

DURHAM GTA

The time has come to seriously consider having an alumni staff person on the Durham GTA campus. With just shy of 10,000 graduates, there is a real concern for the lack of connection that some of these graduates are feeling. This was also evident in the 2021 survey conducted by Engagement Analysis Inc. Only 3% of the survey respondents indicated that they were from Durham campus.

Recommendation: *Start to build a sense of place for the graduates of Durham campus by creating an AES Coordinator position and create a permanent alumni location on the Durham campus.*

Recommendation: *Provide the Durham GTA with communication opportunities to tell their stories and that of their alumni in the Alma Matters newsletter. Their staff should participate in brainstorming sessions on upcoming features.*

Recommendation: *Create opportunities to have events with the Durham campus. If they are not able to partake in the Community Speaker Series, create a different*

RECOMMENDATIONS

speaker series for this campus. A lack of connection with the Durham campus is a missed opportunity for engagement.

Recommendation: *Evaluate the possibility of Durham GTA hosting their own Homecoming or reunion weekend – separate from the Peterborough campus so that staff and senior leadership members can attend. This will result in the Durham GTA alumni feeling more engaged.*

ALUMNI ENGAGEMENT SURVEY

A significant investment was made in the Alumni Engagement Survey facilitated by Engagement Analysis Inc. The data that the survey provides is rich and can offer much information on trends which can be used to support decision making. The results of the survey have many implications for discussion on demographics, engagement, affinity, communications, programs and giving.

Recommendation: *Host an information session with stakeholders (in-person for campus departments and virtual for alumni) to discuss the results of survey and solicit feedback and input. The survey results combined with feedback from stakeholders will help to guide decision making.*

Recommendation: *Continue to track alumni engagement metrics. Tracking engagement will help to understand the effectiveness of Trent's alumni programs/services. Careful review of the data can help dictate an engagement strategy.*

ALUMNI HOUSE

Alumni House at Trent University is a hidden gem on the west side of the campus. This unique space is a home to the AES staff, houses the Alumni Association's Hall of Fame, displays numerous art pieces and heritage collections, and offers a quiet oasis on its outdoor patio. Alumni House is a gathering or meeting place for alumni and friends when returning to campus. Complete with a full kitchen that offers a space for intimate dinner gatherings and meetings for faculty and staff when hosting events. Originally built as a residence, Alumni House still maintains the home feeling and is used as an on-campus accommodation option for special guests of the University. Currently, the AES staff manage and take the bookings for Alumni House and prepare the space for guest usage along with the Caretaking department. Is using Alumni House as an accommodation option a loss leader or is this a revenue generator? Additionally, the

RECOMMENDATIONS

room that is rented out to guests is directly next to some of the current staff offices. Does this prevent staff from being in their offices once guests have arrived?

Recommendation: *While Alumni House is a beautiful space on campus, it is our recommendation that the rental space be turned into a staff office. The current office space on the main level is contained in a small area in Alumni House. By eliminating the rental space, this space could be used for the AES team to grow. With the removal of the room rental, there remains opportunity to utilize the downstairs dining room and living room space for the University to host special guests on campus.*

ACKNOWLEDGEMENTS

Acknowledgements

It was a pleasure to visit Trent University and review the Alumni Engagement Services department.

We would like to express our thanks to:

- Students, faculty, staff, and alumni of Trent University who took the time to meet with us or provide a written submission for consideration.
- The Alumni Engagement Services team are passionate about their work and should be very proud of their accomplishments in alumni engagement. Be loud and proud so that people know who you are and what you do!
- Nicholas Koehler-Grassau, Administrative Assistant to the President and Ngina Kibathi Muigai, Executive Director, Office of the President for hosting us on our visit to campus and their assistance throughout the review process.
- Dr. Leo Groarke, President and Vice Chancellor, who welcomed us to the Peterborough campus and placed his trust in us to review Trent University's Alumni Engagement Services.

By implementing effective strategic planning, Trent University can foster stronger connections between alumni and the University, increase alumni participation and support, and ultimately enhance the overall reputation and success of Trent. It is crucial for Alumni Engagement Services to continually evaluate and adapt its approach to ensure that it is meeting the evolving needs and expectations of its alumni community.

APPENDICES

Appendices

APPENDIX A

List of leaders and stakeholders who participated in the engagement sessions.

Interviews (virtual and/or in-person) were conducted with:

- Dr. Leo Groarke, President & Vice Chancellor
- Julie Davis, Vice President, External Relations and Development
- Lee Hays, Director, Alumni Engagement and Services
- Sherry Booth, Associate Vice President, Philanthropy and Alumni Engagement
- Marilyn Burns, Vice President, Communications and Enrolment
- Glennice Burns, Associate Vice President, International
- Joanne Sokolowski, Manager, Convocation and Alumni Relations
- Babin Joy, Alumni Engagement and Services Coordinator

- Cathy Bruce, Vice President, Research and Innovation
- Donald Gregory Fraser, Alumni Engagement and Communications Officer
- Danielle Britton, Alumni Engagement and Services Coordinator
- Kevin Whitmore, Director, Recruitment and Admissions
- Scott Henderson, Dean and Head, Trent University, Durham Campus
- Kevin Maina, Manager of Community Relations, Trent Durham Campus
- TUA Co-Presidents
- College Principal and College Heads

- Donna Doherty, Campaign Director, Philanthropy
- Chris Armitage, Director Portfolio Operations and Digital Philanthropy

Written responses were received from:

- Staff
- Faculty
- Alumni

APPENDICES

APPENDIX B

List of preparation/review material provided by the President's Office

- Trent University Alumni Engagement & Services Overview
- Organizational Charts for External Relations & Development portfolio
- Job Descriptions for Alumni Engagement & Services Staff
 - Director of Alumni and Donor Engagement
 - Senior Integrated Engagement Manager
 - Communications Officer, Philanthropy and Alumni Engagement
 - Coordinator, Alumni Communications & Digital Initiatives
 - Alumni Engagement and Services Coordinator
 - Convocation and Events Assistant
 - Manager, Convocation and Alumni Relations
- Alumni Engagement Services Budgets 2018 – 2022
- Portfolio Operations Benchmark Report 2022-2023
- TUAAs 2016-2019 Strategic Plan
- Trent University 2022 Report on Alumni Engagement (slideshow)
- Report on Alumni Engagement to the Board of Governors (May 2021)
- Measuring Alumni Engagement: 2021-2022 Alumni Engagement Survey
- Sample email invitations – Head of Trent, Trent Day, Welcome to TUAAs
- Sample event invitations – dinner reception and social
- Trent magazine, Fall 2022
- *Philanthropy Matters* newsletter samples
- *Alma Matters* newsletter samples
- Life After Trent invitation samples
- Alumni Giving data
- Alumni Fund analysis