Montana Tech: Annual Program Review

Department: Alumni Engagement


Assessment Committee Review: Summer 2016
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Mission of Montana Tech Alumni Engagement Office
The Montana Tech Alumni Engagement’s mission is to strengthen the affinity and financial support of its alumni to their alma mater and to support the mission, goals and strategic plan of Montana Tech and the Montana Tech Alumni Association.

Montana Tech and Montana Tech Alumni Association Relationship
Montana Tech has an operating agreement with the Montana Tech Alumni Association. This agreement provides for mutually beneficial activities related to Montana Tech alumni and Montana Tech as outlined in the agreement (see Operating Agreement – Alumni Association). One important benefit listed under Tech’s responsibilities to the Association is that Montana Tech agrees to employ a Director of Alumni Engagement who shall function as the Association’s Executive Director. The responsibilities of the Executive Director are:

1. Serve as the principal liaison between the Association and Montana Tech
2. Be responsible for providing the continuity of records, activities, and programs of the Association;
3. Expedite the mutual interest of the Association and Tech Alumni Engagements;
4. Respond to emails and phone messages received by the Alumni Engagement Office on behalf of the Association;
5. Send notices of board meetings and financial reports to Board members;
6. Take meeting minutes and provide a copy to Board members prior to the next regularly scheduled meeting;
7. Continue the development of individual chapters;
8. Provide outreach services to alumni, including but not limited to alumni visits, publications, news releases, and website management;
9. Relay scholarship amounts approved by the Board for awards and allocation;
10. Submit all bills and notices to the Treasures or President for payment or processing;
11. Administer membership service programs on behalf of the Association and house all Association Documents

This individual is not a voting member of the Board.

Mission of Montana Tech Alumni Association
1. Serve the needs of alumni and to foster a spirit of loyalty and fraternity;
2. Maintain close relations among, Tech, its alumni, and the various constituencies it serves;
3. Promote enrollment and student retention;
4. Advance Tech through financial and professional support; and,
5. Assist the administration, faculty, and Board of Regents to fulfill the mission of Tech.
Objective 1. Serve the needs of alumni and to foster a spirit of loyalty and fraternity

Performance Criteria A: Increase engagement with alumni less than 10 years after graduation.
Assessment method: The Montana Tech Alumni Engagement Office is utilizing social media to increase engagement with alumni <10 years. Alumni specific groups and pages have been created for our Montana Tech alumni on Facebook and LinkedIn. While the Facebook page can be accessed by anyone interested in Montana Tech and calendar of events the LinkedIn Group is Alumni/Student specific and requires approval to join the group.

Evaluation: Reports obtained from Facebook indicate that 36% of the 684 alumni audience are ages 25 - 34 based members that provide their year of birth. The alumni population participating in the Facebook Alumni page is 9% of the 2,750 population between the ages of 25-34.

At this time LinkedIn does not have a demographics report available to its customers. Total LinkedIn participation in the Alumni group is 1,737 including current students and alumni.

Performance Criteria B: Increase exposure of Alumni Association to students.
Assessment method: The Montana Tech alumni Association has several programs currently in place to provide the current students the opportunity to network with current Association Board members and the Alumni Engagement Office.

1. Food for Thought – This program was implemented by the Alumni Association to provide students with water and grab and go snacks during finals week. The purpose of the program is to network with current students as well as other departments on Montana Tech’s campuses. Baskets of snacks and water are strategically placed around campus study areas where the majority of students congregated including, Prospector Hall, Centennial Hall, Library, Natural Resources Building and Highland College.

The Alumni Association evaluates this program annually during its budget review. As the program continues to increase in popularity the dollars allotted to support this program continues to increase.
2. **Ski Day** – The Montana Tech Alumni Association partnered with Student Life to provide the funds for lunch during the students annual Ski Day in January. This program continues to increase in popularity among not only the student but faculty/staff as well.

3. **Graduates Banquet** – Each year the Alumni Association holds an annual banquet the evening before commencement. Graduating seniors are invited as guests of the Alumni Association. Through advertising and collaboration with the Montana Tech Enrollment office mailings the attendance of graduates saw an increase from 9.3% in 2013 to 12% attendance in 2014.


5. **Mid-Year Graduation** – The Alumni Association co-sponsors a reception following December graduation for students, families, faculty and staff.

6. **Presence on the Alumni Association Governing Board** – The Associated Students of Montana Tech appoint 2 current students to represent the student body on the Association Governing Board as non-voting members.

**Performance Criteria C:** Create active alumni chapters.

Assessment method: Track the number of events at each chapter and Montana Tech’s presence at events.

<table>
<thead>
<tr>
<th>Alumni Chapters</th>
<th>2014 Events</th>
<th># W/Montana Tech Representatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anchorage, AK</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Billings MT</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Colorado</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Gillette, WY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Helena, MT</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Idaho Falls, ID</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Oklahoma City, OK</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Sheridan, WY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Southwest Montana</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Utah</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total Events</strong></td>
<td><strong>18</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Number of Events</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Montana Tech Representatives Attended</strong></td>
<td><strong>13</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Evaluation:** There are currently 10 Montana Tech alumni Chapters: Alaska, Billings, MT, Southwest Montana, Colorado, Gillette WY, Helena MT, Idaho Falls ID, Oklahoma City OK, Sheridan WY, and Utah. Established chapters continue to support Montana Tech and local alumni through events and socials. Additional Chapters that in the developmental stages are Bakersfield CA, Houston TX, and Calgary Canada.
Performance Criteria D: Increase activities and events locally and nationally.
Assessment method: Annually track the number of events through RE. Event planning consists of scheduling venues, setup, supervising onsite, mailings, emails, phone appeals, and data entry.

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Events</td>
<td>6</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>National Events</td>
<td>31</td>
<td>39</td>
<td>29</td>
</tr>
</tbody>
</table>


Objective 2. Maintain close relationships among, Tech, its alumni, and the various constituencies it serves

Performance Criteria A: Systematically collect feedback from alumni and constituencies.
Assessment method: Alumni Attitudinal Survey - In October 2014, Montana Tech launched the first Alumni Attitudinal Survey. The response rate was 19%; and, the mode of connection was evaluated. The survey included 22 questions exploring engagement and communication with Montana Tech, impact, relevance and perceptions of the reputation of Montana Tech, alumni experiences while at Montana Tech, and feelings about the preliminary list of campaign priorities and personal philanthropy.

The survey was distributed to 10,507 alumni, friends and parents for whom Montana Tech had a valid email address. In the cases where there were two emails per household, the survey was sent to both.

- Individuals were sent an email in advance from Donald M. Blackketter, Chancellor, Montana Tech, requesting their participation in the survey. This request was followed up a few days later with an email from the Chancellor that included the link to participate in the survey.
- The survey was deployed in mid-October, and remained in the field for two weeks.
- The survey invitation was received by 8,301 individuals, leading to 1,337 complete responses and 257 incomplete responses for a total of 1,594 responses.

The response rate of 19% is considered high compared to other colleges who received a response rate of 12% or lower from their alumni. Additional surveys will be considered when major changes on campus are eminent.

Evaluation: Survey Findings

Perceptions about Montana Tech are positive

- “Functional” and “Dependable” are the two words most frequently used to describe Montana Tech’s campus
• 89% hold “very positive” to “positive” attitudes toward Montana Tech

• Respondents perceive Montana Tech’s reputation among alumni, within industry, local community, and within Montana as mostly “excellent” to “good.” However, views of Montana Tech’s reputation nationally and internationally are less well-known.

**Communication and information from Montana Tech**

• Montana Tech Magazine and Personal Contact were rated as top information sources

• 30% feel “well informed” about Montana Tech

• 69% had direct, personal contact with Montana Tech within the last 2 years

**Views by Alumni of Montana Tech**

• 96% of alumni respondents feel “very positive” about their Montana Tech education

• **Academic Programs** and **Location** top the list of reasons why alumni respondents chose to attend Montana Tech

• 71% of alumni would attend Montana Tech again “without a second thought”

**Views of funding priorities and individual philanthropy are very solid; high marks for individual philanthropic interest and willingness to support the campaign**

• After reviewing the draft case document, “compelling” and “engaging” were the two words most often used to describe key initiatives outlined in the document

• 69% feel Montana Tech moving in the right direction

• 56% view campaign success as personally important

**Laboratories to advance students in STEM areas; endowment to enhance and expand graduate and undergraduate research programs; and endowed chairs and professorships** received high marks; these same three strategic initiatives top the list of priorities most likely to be supported financially.

• 50% (654 individuals) rank Montana Tech among their ‘high’ to ‘highest’ philanthropic priorities

• 30% (393 individuals) would expect to make a gift to the campaign

• “Grateful for Montana Tech education” rated among the top important reasons for making a gift to Montana Tech

• Providing testimonials, serving as a campus ambassador/recruiter, and providing local leadership were the top three activities selected by those who were interested in volunteering to help with the campaign

• 4% (50 individuals) already have Montana Tech in their estate plans; another 19% (242 individuals) would consider making a planned gift
Performance Criteria B: Help alumni be prepared to achieve their career goal and help them find quality jobs.

Assessment method: Career Services DIGGERRecruiting, Career Fair Information

Evaluation: The Alumni Engagement Office forwards all calls from companies looking to fill positions with experienced professionals to Career Services and are posted in DIGGERRecruiting. Alumni have unlimited view-only access free of charge. Alumni are able to search for and save job postings. For a nominal fee alumni are able to post and store resumes, cover letters, documents as well as apply online. Alumni are also encouraged to participate in Montana Tech’s Career Fairs which are held twice a year.

Objective 3. Promote enrollment and student retention

Performance Criteria A: Increase the identification of alumni interested in interacting with students and the opportunities to interact academically.

Assessment method: An annual summary of documented alumni/student attributes and documented interactions in RE.

Evaluation: RE has the ability to track alumni interested in connecting with students. This opportunity is promoted through direct contact with alumni at local and national alumni event. With the freshman engineering program, a student assignment in EGEN 194 involves working Career Services to identify and interview an alumni within the discipline. EGEN 194 began in fall 2014; and, the enrollment was 216 student in fall 2014 and 60 in spring 2015. At the time EGEN 194 was developed it was not a required assignment to find a mentor through Career Services. In 2014-2015 of the 276 students in the program 144 matches were made with alumni mentors.

<table>
<thead>
<tr>
<th>Number of Alumni with Contact information in Raiser’s Edge</th>
<th>11060</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number identifying interest in working with students</td>
<td>503</td>
</tr>
<tr>
<td>Percent (%)</td>
<td>5%</td>
</tr>
</tbody>
</table>

Performance Criteria B: At least 50% of companies at Montana Tech Career Fairs will have an alumni recruiting students.

Assessment method: An annual summary of documented alumni recruiters in the RE database and Career Services company summaries.

Evaluation: Although companies chose the recruiters sent to campus for Career Fairs, it is important to build relationships with the alumni and companies through these events. It is also important to acknowledge the alumni who are recruiting. Alumni recruiting are identified to the students by specific name tag recognition during the career fairs.
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Fall Career Fair</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Companies</td>
<td>101</td>
<td>123</td>
</tr>
<tr>
<td>Number of Companies with Alumni Recruiters</td>
<td>55</td>
<td>74</td>
</tr>
<tr>
<td>%</td>
<td>54%</td>
<td>60%</td>
</tr>
<tr>
<td>Spring Career Fair</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Companies</td>
<td>58</td>
<td>52</td>
</tr>
<tr>
<td>Number of Companies with Alumni Recruiters</td>
<td>35</td>
<td>17</td>
</tr>
<tr>
<td>%</td>
<td>60%</td>
<td>13%</td>
</tr>
</tbody>
</table>

**Objective 4. Advance Tech through financial and professional support**

Performance Criteria A: The Montana Tech Alumni Association manages several scholarship funds that were entrusted to the Alumni Association from alumni and their families. These scholarships are reviewed annually by the Association Scholarship Committee to access the availability of funds for distribution according to the criteria set by the donor.

In addition to the above mentioned individual scholarships, the Montana Tech Alumni Association and the Montana Tech Foundation operate under a Memorandum of Understanding for the management and investment of the David & Bette Gleason Endowed Scholarship Fund.

Assessment Method: The scholarships funds entrusted to the Montana Tech Alumni Association are managed by an independent brokerage firm for investment. Each account is review annually by the Association Scholarship committee to determine monies available for distribution according to the criteria set by the donor.

Evaluation: All scholarship applications filed by current and incoming students are filtered through the Montana Tech Scholarship Committee for distribution according to the criteria set by donors.

**Objective 5. Assist the administration, faculty, and Board of Regents to fulfill the mission of Tech**

Performance Criteria A: The Montana Tech Alumni Association President’s responsibilities.

The Montana Tech alumni Association President is the principal executive officer of the Montana Tech Alumni Association. The President’s duties as defined by the Montana Tech Alumni Association Bi-Laws are:

- Supervise and direct all business of the Montana Tech Alumni Association,
- Preside at Montana Tech Alumni Association Meetings and perform all duties of the office of President,
- The President or designee is an ex-officio member of each committee and chapter.
- The President or designee is a member of the Montana Tech Foundation Board and Foundation Board of Finance and Investment Committee
- The President or designated representative will officially represent the Montana Tech Alumni Association at all formal Events of the University as deemed appropriate by the Chancellor.
Performance Criteria B: Montana Tech Alumni Association Board Representation

The Montana Tech alumni Association Governing Board consists of two Montana Tech representatives who serve as liaisons between Montana tech and the Governing Board. One representative is the Director of Alumni Engagements and the other shall be a faculty/staff representative appointed by the Chancellor. The Chancellor and Vice Chancellor for Development and University Relations serve as advisors and partners of the Montana Tech Alumni Association.

Strengths:
Strengths of Montana Tech Alumni Engagement and the Montana Tech Alumni Association

- Working relationship with Montana Tech Advancement/Development Team
  - The Director of Alumni Engagement is part of the Montana Tech Advancement/Development Team which includes the Montana Tech Foundation and the Montana Tech Department of Public Relations and Marketing. Through this team effort the Office of Alumni Engagement is able to reach out to more alumni through publications, social events and travel.
- Diversity of MTAA Governing Board
  - The Montana Tech Alumni Association Governing Board is currently more diverse than it has ever been in age, gender, degree programs and areas of the country. In recent years the Governing Board has seen more applications than vacancies.
- Non-Dues paying Alumni Association
  - Through the generous estate gift to the Alumni Association by an alumnus the Montana Tech Alumni Association and the Montana Tech Foundation have worked together to honor the intent of the donor to “benefit Montana Tech”. A Memorandum of Understanding between the Montana Tech Alumni Association and the Montana Tech Foundation established the David and Bette Gleason Endowed Scholarship to students of all disciplines as well as provide annual operating cost for the Montana Tech Alumni Association.

As defined in the Alumni Association Bi-Laws All formers and current students who have successfully completed a degree and/or certificate program shall be considered members of the Montana Tech Alumni Association.

- Database Integrity
  - The Montana Tech Alumni Engagement office prides itself in the integrity of its alumni database. In 2014, the position of a full-time Database Administrator was established. In fiscal year 2014-2015 the Montana Tech Raiser’s Edge Database saw 2,312 updates or changes in individual alumni business/employment information and 8,346 updates/changes in preferred home addresses and email.
- Growth of Alumni Area Chapters
  - There are currently 10 Montana Tech alumni Chapters: Alaska, Billings, MT, Southwest Montana, Colorado, Gillette WY, Helena MT, Idaho Falls ID, Oklahoma City OK, Sheridan WY, and Utah. Established chapters continue to support Montana Tech and local alumni through events and socials. Additional Chapters
that in the developmental stages are Bakersfield CA, Houston TX, and Calgary Canada.

How will the program maintain the strengths?

- Working relationship with Montana Tech Advancement/Development Team
  - The Alumni Engagement Office will continue to work as part of the Advancement/Development Team to increase alumni events, socials, dinners and meetings.

- Diversity of MTAA Governing Board
  - The Montana Tech Alumni Association Governing Board will continue to communicate with alumni the importance of maintaining a relationship with Montana Tech and encourage members of all degree programs to consider participating on the Board.

- Non-Dues paying Alumni Association
  - The Montana Tech Alumni Association Governing Board will continue to work under the Operating Agreement between Montana Tech and the Montana Tech Alumni Association. The Montana Tech Alumni Association President continues to represent the Montana Tech alumni Association on the Foundation Board of Directors and Finance Committee. Through the generous contribution of David and Bette Gleason the Montana Tech Alumni Association Governing Board will continue to operate as a non-dues paying association.

- Database Integrity
  - The placement of a full-time Database Administrator in the Alumni Engagement Office has proven the need to continue updating an ever-changing database. The Alumni Engagement Office will take advantage of training offered to fully develop the database to the needs of Montana Tech.

- Growth of Alumni Area Chapters
  - The goal of the Montana Tech Alumni Engagement office is to establish 2 new chapters per year. As part of the Advancement/Development Team the outreach to alumni will continue to increase peaking interest in area chapters.

Weaknesses:

Weaknesses of Montana Alumni Engagement Office

- Inadequate staffing and operating budget funding.
  - As Montana Tech graduates a record number of students each year it only follows that the alumni base will continue to rise. It is anticipated in the next few years that 60% of our alumni population will have graduated within the last ten years. With this increase there will also be an increase in office expenses, travel expenses and event expenses to adequately communicate with Montana Tech Alumni. Currently the Montana Tech Alumni Engagement office continues to operate with minimal staff and funding to meet the needs of our growing population.

- Utility platform and alumni directory
  - The Montana Tech Alumni Engagement office manages the current Alumni website as well as the Montana Tech Alumni Association website. The purchase of an integrated
utility platform that will provide more timely messaging, alumni directory and news feed would help elevate the growing cost of mailing and provide a social platform for the Montana Tech Alumni to communicate.

How will the program address the weaknesses?

- Inadequate staffing and operating budget funding.
  - The Montana Tech Alumni Engagement office will continue to work under the operating budget provided until funds are available to increase the budget. Each year a projection of expenses is provided to the Budget Committee to address this increase.

  The Montana Tech Alumni Engagement Office also proposed the development of two positions to assist with increasing alumni population. The position of a Program Coordinator is requested to oversee chapter development, parent club programming and student alumni club programming. The position of an Event Planner is requested to oversee both on and off campus alumni functions.

- Utility platform and alumni directory
  - The Montana Tech Alumni Engagement Office continues to identify a software platform that would provide an alumni directory, event platform, social media, news feeds, streaming and podcasting. The estimated cost of software platform is added to the projected budget presented to the Budget Committee.