

## **Alumni Relations and Affinity Programming Policy (5.01)**

Category: Advancement

Number: 5.01

Responsibility: Vice-President, University Advancement

Authorization: Board of Governors

Approval Date: May 1, 2001

*Revised, April 7, 2009 (Added **CRITERIA FOR U OF S AFFINITY PROGRAMS & PROVIDERS**)*

### **Purpose:**

To ensure that the identification, tendering, contracting, and management of benefits and services for alumni of the University of Saskatchewan (alumni as defined by the University of Saskatchewan Alumni Association constitution) are managed centrally by the University Advancement office.

To ensure that all revenues generated from the marketing of contracted programs and services to alumni are used to benefit alumni by supporting on-going alumni relations programming managed by the University Advancement office, University of Saskatchewan.

### **Policy:**

All contracted benefits and services to be offered to alumni will be contracted by the University Advancement office in accordance with the tendering and contract procedures established through Purchasing Services at the University of Saskatchewan.

Revenues generated from these contracted programs and services will be used to support the on-going alumni relations programming at the University.

### **Procedure Summary:**

The University Advancement office will manage the programs, determine and approve the acceptable marketing approaches, ensure that the affinity programs (revenue programs) are coordinated with the fundraising efforts of the University, and meet the legal obligations and policies as defined by the Freedom of Information Act and the University.

**Contact:** Vice-President, University Advancement, (966-1602)

**Website:** <http://www.usask.ca/alumni>

## **CRITERIA FOR U OF S AFFINITY PROGRAMS & PROVIDERS**

Affinity Programs are administered by external service providers. University Advancement's responsibility is to help promote these programs and to provide the mailing lists and trademarks for the marketing materials.

Affinity Programs must align with University of Saskatchewan goals and priorities. These programs must provide a positive benefit for alumni and create goodwill and enhance the University's reputation. An Affinity Program provider will be a company with a long-standing reputation and will provide appropriate references from other companies (preferably Universities).

In accordance with the tendering and contract procedure established through the University of Saskatchewan's Purchasing Services and Corporate Administration offices; there must be a written contract between the Affinity Program provider and the University of Saskatchewan. The contract will define the following:

- Length of contract (between 1 and 10 years)
- Types of services being offered to alumni are unique or exclusive
- Financial benefits accrue to Alumni Association or University Advancement
- A concise marketing plan with a target audience and schedule for advertisements
- Appropriate approval from University Advancement to proceed with the marketing plan
- Test marketing of a product or service that is clearly outlined
- Confidentiality of the use and management of database information
- Minimum of at least \$1,000 annual net profit

A signed Confidentiality Agreement between a third-party mailing house, the Affinity Program provider and the University of Saskatchewan is required to ensure adherence to the Freedom of Information and Protection to Privacy Act.

Affinity Programs will be measured and evaluated annually against the criteria and contracts. Changes to the marketing plan will be undertaken as deemed necessary based on the annual program review, the various surveys which have been conducted, alumni response to programs, and statistics available from service providers. Programs that do not meet the criteria will be considered for elimination or redesign.

University Advancement staff and Alumni Association volunteers will not be allowed to promote their own business or interests within the Affinity programs.

## **CRITERIA FOR PRODUCTS**

The products will be of high quality and seen as a value to alumni. Products evaluations will be based on sales numbers.