



The Friends of the University of Alberta Society (the *Friends*)

Strategic Plan 2020 – 24: Update Report 2022

This report is a review of the *Friends*' strategic agenda that was approved at the 2019 Annual General Meeting. For reference, the Mission, Vision, Key Results and Strategies stated in the 2020 - 24 Plan document are provided; these are unchanged. The Actions, Achievements and Accomplishments since the Plan was approved are noted, as are potential action considerations.

Thank you for your support of the *Friends* and its initiatives, events and other activities.

MISSION

The Mission of *The Friends of the University of Alberta Society* is to build and nurture a broad community of friends to support, celebrate and champion the University of Alberta.

VISION

***The Friends of the University of Alberta Society* will be recognized as successfully connecting the broader community to the University, championing the University within the community, facilitating educational engagement opportunities and a sense of lifelong learning among our members, and providing avenues for volunteer opportunities at and in support of the University of Alberta.**

Key Results & Strategies

1. Enhance and grow awareness of The Friends of the University of Alberta Society.	
Key Results	Strategies
<ul style="list-style-type: none"> ➤ Broader awareness of the <i>Friends</i> organization within the broader community as evidenced by participation in <i>Friends</i> events and volunteer opportunities. ➤ Broader brand recognition leading to greater engagement of the community in <i>Friends</i> sponsored events and activities. 	<ol style="list-style-type: none"> 1. Promotion through various social media channels and partner organizations such as the Alumni Association, University Board and Senate, etc. 2. Consistent and conspicuous branding at all <i>Friends</i> events and with all <i>Friends</i> associated or sponsored activities (e.g., awards and scholarships). 3. Continue to review the general audience and demographic of the <i>Friends</i> membership to enable relevant program development and to create reasons to join the <i>Friends</i>.
Actions, Achievements and Accomplishments	
<ul style="list-style-type: none"> ➤ Expanded promotional and visibility channels to include: <ul style="list-style-type: none"> • Three new fundraising channels on the <i>Friends</i> website; <ul style="list-style-type: none"> ○ Charitable Impact; ○ Benevity; and ○ Canada Helps. • Inclusion of <i>Friends</i> events on the University Club ‘events’ screen. ➤ Various photo ops clearly identifying the <i>Friends</i> and posted on the <i>Friends</i> website, with cheque presentations (e.g., U School, Humanities 101 and others). ➤ ‘Online’ events such as the Tory lecture have drawn participants beyond the Edmonton region, increasing participation considerably. 	
Potential Action Considerations	
<ul style="list-style-type: none"> ➤ Insofar as some events are currently being recorded for future and broader viewing, once in-person gatherings are deemed safe and are permitted, <i>consideration</i> will be given to live-streaming specific events (e.g., Tory Lecture and other presentations) to broaden coverage and connections with more <i>Friends</i> of the U of A . 	

Key Results & Strategies

2. Provide diverse engagement opportunities between the Friends and the broader community.	
Key Results	Strategies
<ul style="list-style-type: none"> ➤ Successful (i.e., well attended and positively reviewed) traditional events (e.g., Tory Lecture, Campus tours) and new events (e.g., Raise The Bar). ➤ New or unique events that reflect evolving societal interests and engagement opportunities. 	<ol style="list-style-type: none"> 1. Facilitate/organize a diverse range of events, speakers and other activities that highlight and/or directly feature connections to the University. 2. Consider new or unique events to augment, add to or replace current events, ensuring alignment with the traditions and mission of the <i>Friends</i>.
Actions, Achievements and Accomplishments	
<ul style="list-style-type: none"> ➤ Significant curtailment of events due to pandemic (COVID-19) restrictions. No ‘in-person’ events were held but there were two highly successful <i>Virtual</i> Tory Lecture events: <ul style="list-style-type: none"> • Dan Riskin in 2020 “<i>Making Science Accessible to Canadians in the Age of COVID-19</i>”. • W. Andy Knight in 2021 “<i>Governing Disorder in our Intermestic World</i>”. Both were well attended and had participants from multiple locations. ➤ Planning for and confirmation of the 2022 Tory Lecture: “<i>The Environmentalist’s Dilemma</i>”, scheduled for November 8, 2022 - likely as a virtual event. Please hold the date. ➤ Ongoing planning for a refreshed Raise the Bar program for 2022. Social gathering constraints and venue changes have been significant impediments to this <i>Friends</i> initiative; and to the planning and introduction of new events. 	
Potential Action Considerations	
<ul style="list-style-type: none"> ➤ Exploration of possible online/virtual or live events with high-profile speakers and/or topics of significant current interest of renown. One of the challenges for ‘big draw’ events is the requirement for enhanced funding to attract the speakers and provide suitable venues. This requires examination of past ‘big draw’ events and non-scholarship/award opportunities that may require overall or, at least, annual budgetary review and/or consideration of other funding options. 	

Key Results & Strategies

3. Maintain the <i>Friends</i> scholarship program.	
Key Results	Strategies
<ul style="list-style-type: none"> ➤ Clear charters and terms of reference are in place for all current scholarships and awards. ➤ All scholarships and awards are identifiable with the <i>Friends</i>. 	<ol style="list-style-type: none"> 1. Update all current scholarship and award documentation to ensure currency. 2. Review all discretionary scholarships and awards and update, as appropriate, ensuring alignment with the <i>Friends</i> mission, the item's Terms of Reference and available resources of the <i>Friends</i>.
Actions, Achievements and Accomplishments	
<ul style="list-style-type: none"> ➤ Confirmed and awarded the traditional scholarships: <ul style="list-style-type: none"> <u>Endowed:</u> <ul style="list-style-type: none"> • Isabel Munroe Smith Memorial Scholarship (\$500 X-1) • Helen McArthur Scholarship in Nursing (\$500-1) • Friends of UA Jeanne Suavé Undergraduate Scholarship Fund (\$2,500 X-1) • The RK Gordon Prize in Chaucer Fund (\$300-1) • Ailsa Heathcote Walker Memorial Prize Fund (\$400 X-1) • RH Beverly McLachlin Scholarship in Humanities (\$500 X-1) <u>Non-Endowed:</u> <ul style="list-style-type: none"> • Scholarship in Early Childhood Education (\$300 X-1) • Entrance Scholarships (\$300 X-3) • Friends of the University Graduate Award (\$5,000 X-2) ➤ An initial \$5,000 Award for U School (scaled back from \$10,000, due to initial budgetary constraints). Subsequently, an additional \$5,000 was added to restore the original annual amount; plus, reinstatement of the donation to \$10,000 for 2022). ➤ \$5,000 donation to Humanities 101 in 2020-22. ➤ General consideration of awards and non-endowed scholarships relative to budgetary capacity and reflection on pandemic constraints re: casino fund-raising. 	
Potential Action Considerations	
<ul style="list-style-type: none"> ➤ Undertake an 'annual' review of scholarships, bursaries, and other donations and awards, aligned with Strategy #2, above. 	

Key Results & Strategies

4. Ensure organizational sustainability of the <i>Friends</i>.	
Key Results	Strategies
<ul style="list-style-type: none"> ➤ The <i>Friends</i> remains a viable and vibrant organization in pursuit of its vision and fulfilling its mission in support of the University of Alberta. 	<ol style="list-style-type: none"> 1. Recruit members to the <i>Friends</i> Board with a view to constant renewal and effective organizational stewardship and sustainability. 2. Ensure effective management and administration of the <i>Friends</i> financial resources. 3. Provide volunteer opportunities for <i>Friends</i> members at large to ensure a cadre of enthusiastic volunteers for event promotion and active engagement in <i>Friends</i> activities (e.g., Casino fundraisers, assistance at the <i>Friends</i>).
Actions, Achievements and Accomplishments	
<ul style="list-style-type: none"> ➤ Albeit delayed, a highly successful casino in August 2021, with an enthusiastic and talented volunteer contingent, contributing almost \$95,000 to fund the <i>Friends</i> scholarships and other on-campus initiatives. Thank you to all of the volunteers who generously donated their time and talents to make our casino a success. ➤ Continued outreach and recruitment of new Board members to facilitate succession/renewal around the Board table. The 2022 Board membership and executive will be announced at the 2022 AGM. 	
Potential Action Considerations	
<ul style="list-style-type: none"> ➤ Promote expanded volunteer opportunities, beyond the bi-annual casino. ➤ Recruit new members to serve on the <i>Friends</i> Board. 	