



UMSL Alumni Association – Governance Committee Meeting  
Thursday, July 16<sup>th</sup>  
4:30 – 6:00pm (Virtual Only)

[Zoom Link](#)

- |       |                                                                                    |                                 |
|-------|------------------------------------------------------------------------------------|---------------------------------|
| I.    | <b>Welcome</b>                                                                     | Kat Riddler, President          |
| II.   | <b>Staffing Updates</b>                                                            | Lisa Capone, Interim Ex. Dir.   |
| III.  | <b>Board Roster &amp; Engagement Metrics</b>                                       | Kat Riddler, President          |
|       | a. Officers and Committee Chair Review                                             |                                 |
|       | i. <b>Vote:</b> Secretary Position                                                 |                                 |
|       | b. New Board of Directors Confirmation                                             |                                 |
|       | i. Request to continue recruitment                                                 |                                 |
|       | c. Tracking Engagement Requirements ( <a href="#">Statement of Understanding</a> ) |                                 |
| IV.   | <b>FY27 Business Plan Goals &amp; Integrated Calendars</b>                         | Lisa Capone, Interim Ex. Dir.   |
|       | a. Department Goals                                                                |                                 |
|       | b. Event/Program List & Signature Event Update                                     |                                 |
|       | c. Volunteer Sign Up (Board Activity) and Volunteer Workers                        |                                 |
| V.    | <b>Committee Purpose &amp; Activities</b>                                          | Kat Riddler, President          |
|       | a. Purpose Statements and Calendar of Work                                         |                                 |
|       | b. Committee Member Assignment Confirmation                                        |                                 |
| VI.   | <b>Affinity Group Chairs and Roster Review</b>                                     | Samuel Fredeking, VP            |
|       | a. Communication Plan with Unit Lead and Chair                                     |                                 |
| VII.  | <b>UMSLAA Financials and Budget</b>                                                | Lisa (on behalf of Ryan Frisch) |
|       | a. FY27 Association Budget                                                         |                                 |
|       | i. Edward Jones annual spending distribution                                       |                                 |
|       | ii. <b>Vote:</b> FY27 Budget Approval/Adoption                                     |                                 |
|       | b. Standard Operating Procedures Written                                           |                                 |
| VIII. | <b>New Business</b>                                                                | Kat Riddler, President          |
| IX.   | <b>Conclusion &amp; Adjournment</b>                                                | Kat Riddler, President          |

| FY27 Board of Directors Roster - UMSL Alumni Association |            |                                                                                                          |              |                                                |                                                                                             |                |                             |                      |                                        |                         |                    |                  |
|----------------------------------------------------------|------------|----------------------------------------------------------------------------------------------------------|--------------|------------------------------------------------|---------------------------------------------------------------------------------------------|----------------|-----------------------------|----------------------|----------------------------------------|-------------------------|--------------------|------------------|
| Last Name                                                | First Name | Email                                                                                                    | Phone        | Degree/Year                                    | Employment Info                                                                             | Officer        | Committee Chairs            | Governance Committee | Committee Assignment                   | Term Number DURING FY27 | Current Term Start | Current Term End |
| Riddler                                                  | Kat        | <a href="mailto:anime_kat13@yahoo.com">anime_kat13@yahoo.com</a>                                         | 636-699-8760 | BA 2014 (English); MA 2016 (English); MBA 2018 | Business Senior Project Advisor at Evernorth                                                | President      |                             | Governance           | Advocacy                               | 3                       |                    | 6/30/2027        |
| Fredeking                                                | Samuel     | <a href="mailto:samfredeking@gmail.com">samfredeking@gmail.com</a>                                       | 636-614-5296 | BA 2013 (Psychology); MBA 2017                 | HR Manager at HTH, Founder at Peak Performance HR Solutions                                 | Vice President | Affinity Group Council      | Governance           | Affinity Leadership Council            | 3                       | 7/1/2026           | 6/30/2028        |
| Frisch                                                   | Ryan       | <a href="mailto:ryanjf@outlook.com">ryanjf@outlook.com</a>                                               | 314-805-9627 | BSEE 2004                                      | Senior Manager at Hunter Engineering                                                        | Treasurer      |                             | Governance           | Affinity Leadership Council            | 2                       | 7/1/2026           | 6/30/2028        |
| Anson                                                    | Melissa    | <a href="mailto:dorn.melissa@gmail.com">dorn.melissa@gmail.com</a>                                       | 314-249-7926 | MBA 2019                                       | Marketing Advisor, Cigna Healthcare                                                         | Secretary      |                             | Governance           | Advocacy                               | 2                       | 7/1/2026           | 6/30/2028        |
| Reifschneider                                            | Dave       | <a href="mailto:dlr91969820@gmail.com">dlr91969820@gmail.com</a>                                         | 636-248-4527 | BSBA 1988                                      | Partner, Edward Jones (Retired Dec 2023)                                                    | Past President |                             | Governance           | N/A                                    | 3                       |                    | 6/30/2027        |
|                                                          |            |                                                                                                          |              |                                                |                                                                                             |                |                             |                      |                                        |                         |                    |                  |
| Anderson                                                 | Stan       | <a href="mailto:stan@onetenmarketing.com">stan@onetenmarketing.com</a>                                   | 314-753-6672 | BSBA 1978                                      | Owner, One Ten Marketing                                                                    |                |                             |                      | Affinity Leadership Council            | 3                       | 7/1/2025           | 6/30/2027        |
| Chant                                                    | Mary       | <a href="mailto:marychant@msn.com">marychant@msn.com</a>                                                 | 573-303-6765 | BSW 94                                         | CEO, Missouri Coalition for Children                                                        |                | Advocacy                    | Governance           | Advocacy                               | 3                       | 7/1/2025           | 6/30/2027        |
| Hunter                                                   | Amy        | <a href="mailto:ahunter@caleres.com">ahunter@caleres.com</a>                                             | 314-258-5838 | BA 1994 (English)                              | Vice President, Diversity Equity Inclusion at Caleres                                       |                |                             |                      | Affinity Leadership Council            | 2                       | 7/1/2026           | 6/30/2028        |
| Kerford                                                  | Alex       | <a href="mailto:alexander.kerford@edwardjones.com">alexander.kerford@edwardjones.com</a>                 | 314-749-3845 | BLS 2012 (Liberal Studies)                     | Financial Advisor, Edward Jones                                                             |                |                             |                      | Advocacy                               | 3                       | 7/1/2025           | 6/30/2027        |
| Lee-Cole                                                 | Anitra     | <a href="mailto:anitraleecole@gmail.com">anitraleecole@gmail.com</a>                                     | 614-893-1617 | BSBA 1999                                      | Chief Human Resources Officer at YWCA Metro St. Louis, Founder at Gateway People Strategies |                |                             |                      | Advocacy                               | 3                       | 7/1/2025           | 6/30/2027        |
| Luong                                                    | Paul       | <a href="mailto:luongp@umsl.edu">luongp@umsl.edu</a>                                                     | 314-600-6860 | OD 2016                                        | Optometrist and Owner, Complete Eye Care in Ladue                                           |                |                             |                      | Advocacy                               | 2                       | 7/1/2026           | 6/30/2028        |
| Monger                                                   | LaVell     | <a href="mailto:contact@ldmonger.com">contact@ldmonger.com</a>                                           | 314-496-8849 | BA 2016 (Anthropology)                         | Partner, Director of Business Development & Outreach at RTW Photography                     |                |                             |                      | Affinity Leadership Council            | 2                       | 7/1/2026           | 6/30/2028        |
| Trouton-Alexander                                        | Katie      | <a href="mailto:Kathryn.trouton-alexander@edwardjones.com">Kathryn.trouton-alexander@edwardjones.com</a> | 636-734-6199 | BSBA 2010                                      | Director- Sales Pipeline & Culture at Edward Jones                                          |                |                             |                      | Student & Alumni Engagement            | 3                       | 7/1/2025           | 6/30/2027        |
| Wombles                                                  | Tim        | <a href="mailto:womblest@umsystem.edu">womblest@umsystem.edu</a>                                         | 217-714-1034 | MFA 15, MBA 2024                               | Manager of Web and Digital Communications at UMSL                                           |                | Student & Alumni Engagement | Governance           | Student & Alumni Engagement            | 3                       | 7/1/2026           | 6/30/2028        |
| Horner                                                   | Eli        | <a href="mailto:hornereli@gmail.com">hornereli@gmail.com</a>                                             |              | MS (Criminology) 2023                          | Sr. Project Manager, House Everyone STL                                                     |                |                             |                      | Student & Alumni Engagement            | 1                       | 7/1/2027           | 6/30/2029        |
| Conway                                                   | Maddie     | <a href="mailto:madilynn.woodham@edwardjones.com">madilynn.woodham@edwardjones.com</a>                   |              | BSBA 2020 (Psychology); Honors                 | Program Manager, Edward Jones                                                               |                |                             |                      | Student & Alumni Engagement            | 1                       | 7/1/2027           | 6/30/2029        |
| New Board Member                                         |            |                                                                                                          |              |                                                |                                                                                             |                |                             |                      |                                        |                         |                    |                  |
| Blanner                                                  | Joe        | <a href="mailto:jblanner@mlklaw.com">jblanner@mlklaw.com</a>                                             | 636-248-4527 | BSPA 1998                                      | Partner at McCarthy, Leonard & Kaemmerer                                                    | Ex-Officio     |                             |                      | Advocacy                               |                         |                    |                  |
| Countryman                                               | Marcia     | <a href="mailto:countrymanm@umsl.edu">countrymanm@umsl.edu</a>                                           |              | Assoc Teaching Prof, Account                   | Associate Professor, UMSL                                                                   | Ex-Officio     |                             |                      | Student & Alumni Engagement            |                         |                    |                  |
| Ganz                                                     | Dave       | <a href="mailto:ganz@umsl.edu">ganz@umsl.edu</a>                                                         | 314-971-9949 | Emeritus Assoc Dean; Emeritus Asst Prof        | Associate Dean Emeritus, UMSL                                                               | Ex-Officio     |                             |                      | HOLD                                   |                         |                    |                  |
| Freerks                                                  | Terry      | <a href="mailto:terryfreerks@gmail.com">terryfreerks@gmail.com</a>                                       | 314-496-4282 | BA 1977 (History)                              | Retired                                                                                     | Ex-Officio     |                             | Governance           | Student & Alumni Engagement (5k, etc.) |                         |                    |                  |
| Capone                                                   | Lisa       | <a href="mailto:lcapone@umsl.edu">lcapone@umsl.edu</a>                                                   |              |                                                | Vice Chancellor, Advancement                                                                | Ex-Officio     |                             | All                  | All                                    |                         |                    |                  |

Total Members by Committee

|                             |   |
|-----------------------------|---|
| Governance                  | 8 |
| Affinity Leadership Council | 5 |
| Advocacy                    | 7 |
| Student Engagement          | 6 |

Total Members by Term Number

|        |   |
|--------|---|
| Term 3 | 9 |
| Term 2 | 5 |
| Term 1 | 2 |

\*7 roll off June 2027

21 Board of Directors; 16 Voting; 5 Ex-Officio

## FY27 Board of Directors Engagement Tracker - UMSL Alumni Association

[illegible]

FY27 Advancement Goals

|      |  |  |  |  |
|------|--|--|--|--|
| KEY: |  |  |  |  |
|------|--|--|--|--|

| MILESTONES/OBJECTIVES | Other Units Involved | STATUS | START | END |
|-----------------------|----------------------|--------|-------|-----|
|-----------------------|----------------------|--------|-------|-----|

|                                                                                                         |                         |                                                   |           |          |
|---------------------------------------------------------------------------------------------------------|-------------------------|---------------------------------------------------|-----------|----------|
| <b>(1) Campaign Milestones</b>                                                                          |                         |                                                   |           |          |
| Campaign Communications Framework and Publicity Plan supporting annoucement (including 2 BWF trainings) | Adv. Comms; Marcom      | Project Kicked off; up to 50% Milestones Complete | July      | December |
| Campaign Communications reporting framework (internal, external, boards, etc.)                          | Adv. Comms; EDR         | Not Started                                       | October   | December |
| Campaign Volunteer Identification and Onboarding                                                        | Development, Chancellor |                                                   | September | December |
| Campaign Reporting Suite                                                                                | Adv. Services           | Not Started                                       | July      | October  |
| Campaign specific Donor Recognition (campaign gift, chancellor circle refresh; etc.)                    | EDR                     | Not Started                                       | September | December |

|                                                                                                             |                       |                                                   |           |           |
|-------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------|-----------|-----------|
| <b>(2) Operational and Capacity Building Projects</b>                                                       |                       |                                                   |           |           |
| Chancellor Onboarding Plan for Implementation by January 1                                                  | All                   | Not Started                                       | July      | September |
| Chancellor Monthly Agenda and Report Templates                                                              | All                   | Not Started                                       | September | December  |
| SharePoint file structure and navigation clean                                                              | All                   | Project Kicked off; up to 50% Milestones Complete | July      | December  |
| Alumni NEW financial framework established and operationalized for successful monthly closes and compliance | Alumni, Adv. Services | Project Kicked off; up to 50% Milestones Complete | July      | July      |
| Full use of student workers (job descriptions; budget tracking; training; etc.)                             | All                   | Project Kicked off; up to 50% Milestones Complete | August    | January   |
| Student Ambassador Program                                                                                  | EDR; Alumni           | Project Kicked off; up to 50% Milestones Complete | September | December  |
| Alumni Event Volunteers Program                                                                             | Alumni; VC            | Not Started                                       | July      | September |
| CRM Software Database Conversion                                                                            | All                   | Project Kicked off; up to 50% Milestones Complete | Ongoing   |           |

|                                                                                                         |  |             |         |  |
|---------------------------------------------------------------------------------------------------------|--|-------------|---------|--|
| <b>(3) Raise \$25M to achieve approx \$150M+ fundraising production by campaign public announcement</b> |  |             |         |  |
| \$15,450,000 Development                                                                                |  | Not Started | Ongoing |  |
| \$4,550,000 Annual Giving & White Mail (including Mercantile, GIKS, etc.)                               |  | Not Started | Ongoing |  |
| \$3,000,000 ORECD                                                                                       |  | Not Started | Ongoing |  |
| \$3,000,000 STLPR                                                                                       |  | Not Started | Ongoing |  |

ALUMNI ENGAGEMENT & ASSOCIATION

|                                                                                                                                                                                                                           |               |  |         |           |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|--|---------|-----------|
| <b>(1) Advance Campaign Priorities and Event/Operational Standards</b>                                                                                                                                                    |               |  |         |           |
| Ensure all alumni engagement opportunities identified through integrated college/school/unit planning and calendar are completed with accuracy and in line with stated activity objectives.                               |               |  | Ongoing |           |
| Integrate philanthropic storytelling, donor impact, and campaign messaging into alumni engagement opportunities where appropriate. Includes scripting and visual elements that support campaign and university priorities | Adv. Comms    |  | Ongoing |           |
| Consistently execute new event standards including advanced calendaring, briefing documents, project plans, event metrics and post event reporting/debriefs, etc.                                                         |               |  | Ongoing |           |
| Use CRM event module to track event participation and metrics and review for trends to inform decision making                                                                                                             | Adv. Services |  | October | January   |
| Execute strong monthly strategy contribution for Dean meetings with gift officer                                                                                                                                          |               |  | Ongoing |           |
| Successfully and accurately execute new financial model and monthly framework                                                                                                                                             | Adv. Services |  | Ongoing |           |
| Evaluate and create revised SOPs for Licence Plate Program and Alumni ID cards                                                                                                                                            |               |  | July    | August    |
| Create RFWAC move in and office operations plan for implementation starting in September                                                                                                                                  |               |  | July    | September |
| Create job descriptions and training/processes for student workers to be better leveraged and expand staff capacity                                                                                                       |               |  | July    | August    |
| Create and onboard Alumni Event Volunteers Program to expand staff capacity                                                                                                                                               |               |  | October | January   |
|                                                                                                                                                                                                                           |               |  |         |           |

|                                                                                                                                                                                                                  |  |  |                  |          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|------------------|----------|
| <b>(2) Strengthen Student Engagement and Alumni Celebration Programs</b>                                                                                                                                         |  |  |                  |          |
| Relaunch and operationalize (monthly) the reimagined Triton Traditions collaboration through a shared ownership model with campus partners.                                                                      |  |  | July             | August   |
| Strengthen student-to-alumni transition initiatives. Guide redesign and enhancement efforts through ROI evaluation. Implement approved recommendations for Triton Toast, Family Legacy, and related programming. |  |  | Ongoing by event |          |
| Design standardize recurring program models for Dining with Tritons to elevate participant experience, create efficiencies to excute, and limit staff requirements to produce successfully                       |  |  | July             | August   |
| Redesign Golden Graduation, Family Legacy Pinning Ceremony,UMSL Night at Ballpark, and other signature events to align with campaign priorities and engagement metrics                                           |  |  | October          | December |

|                                                                                                                                                                                                                                           |               |  |         |           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|--|---------|-----------|
| Finalize and implement student ambassdor program components with EDR                                                                                                                                                                      | EDR           |  | July    | August    |
| 3) Expand and Activate Alumni Volunteer Engagement and Leadership                                                                                                                                                                         |               |  |         |           |
| Launch and operationalize the Alumni on Campus volunteer initiative, effectively capturing alumni volunteering opportunities currently taking place, and supporting the placement of upcoming alumni volunteer opportunities.             |               |  | July    | September |
| Implement volunteer tracking and reporting processes within CRM to measure volunteer engagement, participation, and impact.                                                                                                               | Adv. Services |  | August  | October   |
| Launch Alumni Owned Businesses Network Program; ensure annual and ongoing maintence and promotion                                                                                                                                         |               |  | July    | September |
| Create Alumni Volunteer training/onboarding process                                                                                                                                                                                       |               |  | October | December  |
| (4) Strengthen UMSL Alumni Association Governance and Stewardship                                                                                                                                                                         |               |  |         |           |
| Consistently activate high quality board and committee meeting prep and support activities (calendarng, advanced agendas/packets; minutes; digital repository; roster management/engagement tracking; etc.)                               |               |  | Ongoing |           |
| Fully implement formal Alumni Association budget governance framework.                                                                                                                                                                    |               |  | Ongoing |           |
| Increase utilization (and support processes) of board <b>Standing Committees</b> in support of new purpose/procedures document and alumni engagement efforts across integrated calendars to enhance staff capacity and targeted outcomes. |               |  | Ongoing |           |
| Increase <b>Alumni Affinity Group</b> involvement in volunteering, volunteer leadership, and event execution in support of new purpose/procedures document and alumni engagement efforts across integrated calendars.                     |               |  | Ongoing |           |
| Develop and launch Volunteer of the Year to acknowledge alumni achievements, professional accomplishments, volunteer contributions, and community impact to coincide with annual State of the Association.                                |               |  | July    | September |
| Develop a process for recognizing alumni accomplishments and milestones (industry awards, business anniversaries, professional honors, etc.) through personalized stewardship efforts and internal tracking.                              |               |  | January | April     |
| 5) Greater St. Louis and Regional Plan                                                                                                                                                                                                    |               |  |         |           |
| Establish and utilize Greater St. Louis regional alumni data sets to support event and communication segementsations                                                                                                                      |               |  | July    | August    |
| Establish and execute percent goal for events and program held off campus and within the regions; achieve                                                                                                                                 |               |  | Ongoing |           |
| Host virtual or hybrid events throughout year to connect with alumni living outside of STL Region                                                                                                                                         |               |  | Ongoing |           |
| Create support and partnership plan for Regional work in Primary and Secondary markets to support Dev. for FY28                                                                                                                           |               |  | March   | April     |
|                                                                                                                                                                                                                                           |               |  |         |           |

| Date/Month | Event                                                                                        | College/Unit                               | Committee Alignment                   | Affinity Group Alignment        | Registration Volunteers | Speakers | Guest Engagement |
|------------|----------------------------------------------------------------------------------------------|--------------------------------------------|---------------------------------------|---------------------------------|-------------------------|----------|------------------|
| 8/14/2026  | UMSL College of Optometry Alumni & Friends Weekend: Through the Lens of Legacy               | Optometry                                  | Student & Alumni Engagement Committee |                                 |                         |          |                  |
| 8/20/2026  | Legacy Pinning Ceremony                                                                      | Alumni Engagement                          | Student & Alumni Engagement Committee |                                 |                         | X        |                  |
| 8/20/2026  | Triton Traditions Blitz #1 at New Student Orientation                                        | Alumni Engagement                          | Staff                                 |                                 |                         |          | X                |
| 8/20/2026  | RICHTER FAMILY WELCOME & ALUMNI CENTER - Donors & Dignitaries Event                          | Advancement                                | Governance/Board                      |                                 | X                       |          | X                |
| August     | Fireside Chat: Purpose Beyond Performance featuring Kyra Hungerford                          | Athletics                                  | Staff                                 |                                 |                         |          |                  |
| August     | New School of SWPBS - Alumni Communication Blitz                                             | Social Work & Psychological Brain Sciences | Staff/Advocacy Committee              |                                 |                         |          |                  |
| September  | CEU-supported engagement                                                                     | Social Work & Psychological Brain Sciences | ALCC                                  | Social Work Affinity Group      |                         |          |                  |
| 9/12/2026  | FALL Alumni Sports Day: M/W Soccer vs. Drury                                                 | Athletics                                  | Staff                                 |                                 | X                       |          | X                |
| 9/24/2026  | RICHTER FAMILY WELCOME & ALUMNI CENTER - Open House / State of the Association / Alumni VotY | Alumni Association                         | Board                                 |                                 | X                       |          | X                |
| September  | Harris Center Conservation Forum Alumni VIP Pre-Reception                                    | Arts & Sciences                            | ALCC                                  | Chemistry Affinity Group        |                         |          |                  |
| St         | White Coat Ceremony                                                                          | Nursing                                    | Staff                                 |                                 |                         | X        |                  |
| September  | Accounting Alumni Recruiter Event & Networking Reception                                     | Business                                   | ALCC                                  | EGSCOB Affinity Group           |                         |          | X                |
| 10/17/2026 | UMSL 5K (paired with Triton Traditions blitz)                                                | Alumni Engagement                          | Student & Alumni Engagement Committee |                                 | X                       |          | X                |
| October    | Local & Loyal - Fall - Bike Stop Cafe & Bakery, St. Charles (Jodi Devonshire)                | Alumni Engagement                          | Student & Alumni Engagement Committee |                                 | X                       |          | X                |
| October    | Dining with Tritons: Triton Business Scholars (w/ specific RISE Academy tables)              | Business                                   | ALCC                                  | EGSCOB Affinity Group           |                         |          |                  |
| October    | NABA Panel                                                                                   | Business                                   | ALCC                                  | EGSCOB Affinity Group           |                         | X        |                  |
| October    | Panel: The State of Public Education, featuring UMSL alumni superintendents                  | Education                                  | ALCC                                  | Circle of Educators             |                         |          | X                |
| 11/3/2026  | Distinguished Alumni and OYA Awards                                                          | Alumni Engagement                          | Student & Alumni Engagement Committee |                                 | X                       |          | X                |
| November   | Supply Chain Networking Social                                                               | Business                                   | ALCC                                  | Supply Chain Affinity Group     | X                       |          | X                |
| November   | Dining with Tritons: AA Advocacy Committee - with student group Anita Manion                 | Advocacy                                   | Advocacy Committee                    |                                 |                         |          |                  |
| November   | Giving Day (paired with a Triton Traditions blitz)                                           | Alumni Engagement                          | Board                                 | N/A                             |                         |          | X                |
| November   | Back in the Lab: Alumni Simulation Experience Night                                          | Nursing                                    | Student & Alumni Engagement Committee |                                 |                         |          |                  |
| November   | Music Fall Festival                                                                          | Arts & Sciences                            | Staff                                 |                                 |                         |          | X                |
| November   | Finance Career Conference                                                                    | Business                                   | ALCC                                  | EGSCOB Affinity Group           |                         |          |                  |
| November   | UMSL Explore Engineering Day                                                                 | Engineering                                | ALCC                                  | Engineering Affinity Group      |                         |          |                  |
| December   | Local and Loyal                                                                              | Alumni Engagement                          | Student & Alumni Engagement Committee |                                 | X                       |          | X                |
| December   | Retirees Association Holiday Luncheon                                                        | Retirees Association                       | Retirees Association                  |                                 |                         |          |                  |
| January    | Hall of Fame                                                                                 | Athletics                                  | Staff                                 |                                 |                         |          |                  |
| February   | Alumni-Owned Business Network Gathering at EIC                                               | Business                                   | Student & Alumni Engagement Committee |                                 | X                       |          | X                |
| February   | Alumni Pre-Reception: Beta Alpha Psi Student Awards                                          | Business                                   | ALCC                                  | EGSCOB Affinity Group           |                         |          |                  |
| February   | Law Alumni Gathering - mixing in pre-law students                                            | Honors College & CAS                       | Student & Alumni Engagement Committee |                                 |                         |          | X                |
| February   | Fireside Chat: "The Shift that Changed My Life"                                              | Nursing                                    | Staff                                 |                                 |                         | X        |                  |
| February   | AAAC Signature Event: BLACK IN ST. LOUIS                                                     | African American Alumni Chapter            | ALCC                                  | African American Alumni Chapter | X                       |          | X                |
| March      | Student Pitch Competition                                                                    | Business                                   | ALCC                                  | EGSCOB Affinity Group           |                         |          | X                |

| Date/Month  | Event                                                                                              | College/Unit                               | Committee Alignment                   | Affinity Group Alignment   | Registration Volunteers | Speakers | Guest Engagement |
|-------------|----------------------------------------------------------------------------------------------------|--------------------------------------------|---------------------------------------|----------------------------|-------------------------|----------|------------------|
| March       | Engineering Reunion VIP Reception at Pi Day Celebration                                            | Engineering                                | ALCC                                  | Engineering Affinity Group |                         |          | X                |
| March       | Alumni Panel: Life After the Game -- Translating Athletics to Career Success                       | Athletics                                  | Staff                                 |                            |                         | X        | X                |
| March       | State of Vision Care in St. Louis Brunch                                                           | Optometry                                  | Staff                                 |                            |                         |          | X                |
| March       | UMSL Educators Spotlight: 2 Day Blitz (Boboc on-site in schools)                                   | Education                                  | Circle of Educators                   |                            |                         |          |                  |
| March/April | Supply Chain & Analytic Research Symposium                                                         | Supply Chain                               | Supply Chain Affinity Group           |                            |                         |          |                  |
| April       | Spring Sports Alumni Day                                                                           | Athletics                                  | Staff                                 |                            | X                       |          | X                |
| April       | Local & Loyal                                                                                      | Alumni Engagement                          | Student & Alumni Engagement Committee |                            |                         |          | X                |
| April       | Honors College Legacy Celebration (farewell to Provincial House building; "homecoming" for Honors) | Honors College                             | Staff                                 |                            |                         |          | X                |
| April       | C.A.M.P. 2027 (Counseling Alumni & Students Mixing with Community Partners)                        | Education                                  | ALCC                                  | Circle of Educators        |                         |          |                  |
| April       | Dining with Tritons: Advanced BSN Cohort                                                           | Nursing                                    | Staff                                 |                            |                         |          |                  |
| April       | Athletics Giving Day                                                                               | Athletics                                  | Staff                                 |                            |                         |          |                  |
| April       | International Business alumni-to-student program                                                   | Business                                   | ALCC                                  | EGSCOB Affinity Group      |                         | X        | X                |
| 4/23/2027   | Undergraduate Research Symposium Judging                                                           | Arts & Sciences                            | Student & Alumni Engagement Committee |                            |                         |          | X                |
| May         | Education Annual Conference                                                                        | Education                                  | ALCC                                  | Circle of Educators        |                         |          |                  |
| 5/7/2027    | Arianna String Quartet Alumni VIP Pre-Reception                                                    | Arts & Sciences                            | Staff                                 |                            |                         |          | X                |
| May         | Student & Alumni Awards, Alumni of the Year Award                                                  | Social Work & Psychological Brain Sciences | ALCC                                  | Social Work Affinity Group | X                       |          | X                |
| May         | White Coat Ceremony                                                                                | Optometry                                  | Staff                                 |                            |                         | X        |                  |
| 5/15/2027   | GOLDEN 50th REUNION                                                                                | Alumni Association                         | Staff                                 |                            |                         |          | X                |
| May         | TRITON TOAST                                                                                       | Alumni Association                         | Student & Alumni Engagement Committee |                            | X                       | X        | X                |
| May         | Salute to Business Celebration                                                                     | Alumni Engagement                          | ALCC                                  | EGSCOB Affinity Group      |                         |          |                  |
| June        | Retirees Association Annual Business Meeting & Spring Luncheon                                     | Retirees Association                       | ALCC                                  | Retirees Association       |                         |          |                  |
| June        | Night at the Ballpark (paired with Triton Traditions blitz)                                        | Alumni Engagement                          | Board                                 |                            | X                       |          | X                |
| June        | Friends of Higher Education Panel and Awards                                                       | Alumni Engagement                          | ALCC                                  | Advocacy Committee, Board  | X                       |          | X                |
| June        | Local & Loyal                                                                                      | Alumni Engagement                          | Student & Alumni Engagement Committee |                            |                         |          | X                |
| June        | Wine Night at the Richter (TENTATIVE)                                                              | Alumni Association                         | Staff                                 |                            | X                       |          | X                |
| June        | Engineering Summer Camp                                                                            | Engineering                                | ALCC                                  | Engineering Affinity Group |                         |          |                  |

# Governance Committee Purpose and Procedures

## Governance Committee

- Governance Committee members are defined in the bylaws.
- Governance Committee meeting topics and agenda are drafted by the Executive Director and confirmed by the President. The final agenda and any materials necessary for advance review shall be sent to committee members at least 3 business days prior to the meeting.
- The Director and Secretary shall take minutes of the Governance Committee meetings. The Director will draft minutes and provide them to the Secretary for review. The Executive Director will review final minutes and approve for upload into the Association electronic portal within 10 business days of the meeting.

## General Guidelines

The following are general guidelines for the timing of required topics and duties:

### August 27, 2026

- Confirm annual goals for Standing Committees and communication plan to Affinity Group Steering Committees. Chairs and Executive Director finalize agenda for first steering committee meeting of the year, in late July or early August.
- Conduct Board Orientation for new Directors.
- Finalize plan for State of the Association meeting.
- Review the bylaws to ensure annual operations meet requirements set forth by the bylaws.

### November 5, 2026

- Review of annual financial audit.
- Review and confirm the annual goals of the Association are on track.
- Review and confirm Standing Committee goals are on track.

### February 4, 2027

- Review the Executive Director's fiscal duties and achievement of goals. These comments shall be reported to the Vice Chancellor for University Advancement and may be given to the Executive Director.
- Review and confirm the slate of nominations prepared by the Executive Director for candidates for Board service beginning July 1.
- Review and confirm the annual goals of the Association are on track.
- Review and confirm Standing Committee goals are on track.

### May 20, 2027

- Review and comment on Standing Committee goal attainment and determine communication plan to members of the committees.
- Review and confirm high level annual goals of the Association and university's alumni engagement strategy.
- Review and confirm the final board/committee meeting calendar for the fiscal year.
- Review and confirm the budget for the upcoming fiscal year.



- Review and confirm the slate of nominations prepared by the Executive Director and President for the Chairs associated with the Standing Committees beginning July 1. Committee Chairs must be a Director of Board.
- Incoming Standing Committee Chairs nominate members of the Standing Committee, which requires Executive Director, President, and Governance Committee review and consent.
  - o Must have at least 3 Board members on each Standing Committee.
  - o Additional members must represent committee goals as stated in the additional procedures below.
  - o Member communication plan is confirmed.

## Roster

| Title                                       | Name               |
|---------------------------------------------|--------------------|
| President                                   | Kat Riddler        |
| Vice President & ALC Committee Chair        | Samuel Fredeking   |
| Treasurer                                   | Ryan Frisch        |
| Secretary                                   | Melissa Anson      |
| Immediate Past President                    | Dave Reifschneider |
| Advocacy Committee Chair                    | Mary Chant         |
| Student & Alumni Engagement Committee Chair | Tim Wombles        |
| Ex-Officio                                  | Terry Freerks      |
| Ex-Officio & Vice Chancellor                | Lisa Capone        |

## Staff Liaisons

| Title                    | Name                 |
|--------------------------|----------------------|
| AVC & Executive Director | Lisa Capone, Interim |

# Affinity Leadership Council

## Purpose and Procedures

### Affinity Leadership Council

- The Affinity Leadership Council is chaired by the Vice President of the Board.
- Affinity Leadership Council members include 3 Board members and the leader (1) or co-leaders (2) of each officially recognized alumni affinity group.
- The Affinity Leadership Council is responsible for the following:
  - Ensure Association and University alumni engagement strategic direction and annual goals are known and adopted by the affinity group leaders and communicated to members of the affinity group steering committee to facilitate program alignment.
  - Review, evaluate, and confirm program alignment of affinity groups to stated strategic direction and annual goals in coordination with the Executive Director on an annual basis.
  - Review and confirm affinity groups comply with organization bylaws and other policies and laws where applicable annually.
  - Conduct a minimum of two meetings annually.
- Affinity Leadership Council meeting topics and agenda are drafted by the Executive Director and confirmed by the Vice President (chair). The final agenda and any materials necessary for advance review must be sent to committee members at least 3 business days prior to the meeting.
- The Assistant Director shall take minutes of the Affinity Leadership Council meetings, provide them to the Executive Director, and upload them into the Association electronic portal within 5 business days of the meeting.

### General Guidelines

The following are general guidelines for the timing of required topics and duties:

#### August 10, 2026

- Chair communicates strategic direction and annual goals of the Association and university's alumni engagement strategy to affinity group leaders.
- Executive Director communicates specific alumni engagement goals and requests from university partners (i.e. Deans or Directors) to affinity group leaders for use in program planning.
- Review and confirm affinity group program calendar and budget for year.
- Conduct an orientation for new affinity group leaders and members of the Affinity Leadership Council if needed.
- Review terms for Affinity Group chairs and Steering Committee members to plan for Fall/Winter nomination process to fill following year vacancies.

#### January 13, 2027

- Review affinity group programs and goal attainment year-to-date and plan for or assess changes for Spring semester programming.
- Review Spring semester calendar of activities and strategies.
- Review and confirm affinity group budget is on track for fiscal year.

- Discuss future work and goals of committee for review and assessment during the fiscal year planning process in Spring.

## Roster

| Name                    | Group                           |
|-------------------------|---------------------------------|
| Samuel Fredeking, Chair | VP of Board of Directors        |
| Ryan Frisch, Treasurer  | Board Committee Member          |
| Stan Anderson           | Board Committee Member          |
| Amy Hunter              | Board Committee Member          |
| LaVell Monger           | Board Committee Member          |
| Lisa Capone, Ex-Officio | Board Committee Member          |
|                         |                                 |
| VACANT- ASSESS          | African American Alumni Chapter |
| Stan Anderson           | Business                        |
| Michael Finkes - ASSESS | Chemistry                       |
| Clark Hickmann - ASSESS | Education                       |
| Clark Hickmann          | Retirees Association            |
| Semir Vasvovic - ASSESS | Engineering                     |
| Chelesa Holden          | Social Work                     |
| Cassie Bianculli        | Supply Chain                    |

## Staff Liaisons

| Title                                 | Name                 |
|---------------------------------------|----------------------|
| AVC & Executive Director              | Lisa Capone, Interim |
| Director, Alumni Engagement           | VACANT               |
| Assistant Director, Alumni Engagement | Kevin Smith          |

**Related Events:** See Affinity Group Document

# Student and Alumni Engagement Committee Purpose and Procedures

## Alumni and Student Engagement Committee

- The Alumni and Student Engagement Committee Chair is determined by the Governance Committee.
- Alumni and Student Engagement Committee members are determined by the Chair in consultation with the Executive Director and Governance Committee and must include 3 Board members.
- The Alumni and Student Engagement Committee is responsible for the following:
  - o Ensure Association and university alumni engagement strategic direction and annual goals are known and adopted by the committee members to facilitate program alignment.
  - o Work with Executive Director to develop, support, promote, and sustain traditions and programs that build meaningful relationships with alumni and students. Examples include but are not limited to the following: Convocation speakers, Legacy Pinning speakers, 5K participants, Triton Toast, Dining with Tritons initiatives, Triton Traditions, Homecoming activities, Alumni-Owned Business, regional alumni events, and more.
  - o Actively identify and recruit alumni volunteers, working with Board members and Committee members on annual process to identify, refer, and connect alumni to the alumni engagement team at UMSL to facilitate high-quality volunteer efforts.
  - o May speak to student groups about the Alumni Association and future involvement.
  - o Work with Executive Director to survey students and UMSL faculty/staff on best ways alumni can serve students.
  - o Work with Executive Director to survey alumni to determine highest priority/highest interest professional development and engagement programs.
- Alumni and Student Engagement Committee meeting topics and agenda are drafted by the Executive Director (or may be delegated to the Assistant Director) and confirmed by the Chair. The final agenda and any materials necessary for advance review must be sent to committee members at least 5 business days prior to the meeting.
- The Assistant Director shall take minutes of the Alumni and Student Engagement Committee meetings, provide them to the Executive Director, and upload them into the Association electronic portal within 3 business days of the meeting.

## General Guidelines

The following are general guidelines for the timing of required topics and duties:

### August 12, 2026

- Chair communicates strategic direction and annual goals of the Association and university's alumni engagement strategy to members.
- Review and confirm committee metrics and calendar of work for the year.
- Conduct an orientation for new members of the Alumni and Student Engagement Committee if needed.

## January 20, 2027

- Review programs and goal attainment year-to-date and plan for or assess changes for Spring semester programming.
- Review Spring semester calendar of activities and strategies.
- Discuss future work and goals of committee for review and assessment during the fiscal year planning process in Spring.

## Roster\*

| Name                          | Group                  |
|-------------------------------|------------------------|
| Tim Wombles, Chair            | Board Committee Member |
| Katie Trouton-Alexander       | Board Committee Member |
| Eli Horner                    | Board Committee Member |
| Maddie Conway                 | Board Committee Member |
| Marcia Countryman, Ex-Officio | Board Committee Member |
| Terry Freerks, Ex-Officio     | Board Committee Member |

## Staff Liaisons

| Title                       | Name                 |
|-----------------------------|----------------------|
| AVC & Executive Director    | Lisa Capone, Interim |
| Director, Alumni Engagement | VACANT               |
| Alumni Engagement Officer   | Kate George          |

**Related Events:** See Event Calendar Document

# Advocacy Committee

## Purpose and Procedures

### Advocacy Committee

- The Advocacy Committee Chair is determined by the Governance Committee.
- Advocacy Committee members are determined by the Chair in consultation with the Executive Director and Governance Committee and must include 3 Board members.
- The Advocacy Committee is responsible for the following:
  - Ensure Association and university alumni engagement strategic direction and annual goals are known and adopted by the committee members to facilitate program alignment.
  - In coordination with the Exec. Director and Chief of Staff, the Committee recognizes elected officials and other leaders who help support UMSL in these ways.
  - In coordination with the Executive Director, organize and disseminate (i.e. monthly/bi-monthly) communication campaigns to amplify key UMSL initiatives and messages (e.g., strategic plans, campaign, achievements, community engagement, etc.).
  - In coordination with the Exec. Director, identify and connect key community, alumni and business stakeholders to engage UMSL leadership to advance university priorities.
  - With the Director, help coordinate UMSL leadership (Deans, Center Directors, etc.) trips to Jefferson City as needed to facility university priorities.
- Advocacy Committee meeting topics and agenda are drafted by the Executive Director (or may be delegated to the Director) and confirmed by the Chair. The final agenda and any materials necessary for advance review must be sent to committee members at least 3 business days prior to the meeting.
- The Director shall take minutes of the Advocacy Committee meetings, provide them to the Executive Director, and upload them into the Association electronic portal within 3 business days of the meeting.

### General Guidelines

The following are general guidelines for the timing of required topics and duties:

#### August 3, 2026

- Chair communicates strategic direction and annual goals of the Association and university's alumni engagement strategy to members.
- Review and confirm committee metrics and calendar of work for the year.
- Discuss and confirm bi-monthly digital communication plans.
- Conduct an orientation for new members of the Advocacy Committee.

#### October 7, 2026

In Fall, the Advocacy Committee shall meet to discuss and confirm bi-monthly digital communication plans.

#### January 27, 2027

- Review programs and goal attainment year-to-date and plan for or assess changes for Spring semester programming.
- Issue nomination process for and make recommendations for Friends of Higher Education; Nominations reviewed by committee staff by March (preparing for June event).

- Discuss and confirm bi-monthly digital communication plans.

## April 5, 2027

- Discuss and confirm bi-monthly digital communication plans.
- Discuss future work and goals of committee for review and assessment during the fiscal year planning process in Spring.
- Finalize plans for June Friends of Higher Education Event with Staff

## Roster

| Name                    | Group                  |
|-------------------------|------------------------|
| Mary Chant, Chair       | Board Committee Member |
| Alex Kerford            | Board Committee Member |
| Paul Luong              | Board Committee Member |
| Kat Riddler             | Board Committee Member |
| Anitra Lee-Cole         | Board Committee Member |
| Melissa Anson           | Board Committee Member |
| Joe Blanner, Ex-Officio | Board Committee Member |
|                         |                        |
| Rory Riddler            | Committee Member       |
| Jim Wallis              | Committee Member       |
| Ian Simmons             | Committee Member       |
| Felicia Hampton         | Committee Member       |
| Jack Shelton            | Committee Member       |

## Staff Liaisons

| Title                       | Name                 |
|-----------------------------|----------------------|
| AVC & Executive Director    | Lisa Capone, Interim |
| Chief of Staff              | Adella Jones         |
| Director, Alumni Engagement | VACANT               |

## Events:

| Date/Month | Event                                                                                | Registration<br>Volunteers | Speakers | Guest<br>Engagement |
|------------|--------------------------------------------------------------------------------------|----------------------------|----------|---------------------|
| August     | School of Social Work, Psychological Brain Sciences Communication Blitz/Announcement |                            |          |                     |
| November   |                                                                                      |                            | X        |                     |
| Spring     | University leader trips to Jefferson City (TBD; i.e. Nursing Day, etc.)              |                            |          | X                   |
| June       | Friends of Higher Education Panel and Awards                                         | X                          |          | X                   |

# Affinity Group Charges Documents

## Current Affinity Groups:

- African American Alumni Chapter – one to two activities
- Chemistry – one to two activities
- Ed G. Smith COB – one to four activities
- Education – one to four activities
- Engineering – one to four activities
- Social Work – one to two activities
- Supply Chain – one to two activities

## Other:

### Retirees Association

*Retirees Association Holiday Luncheon (December)*

*Retirees Association Annual Business Meeting & Spring Luncheon (June)*

## Recent History Groups:

- DBA
- Honors College
- Political Science



## African American Alumni Chapter FY27

|                           |                                                                                                                                                                     |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Chair</b>              | <b>TBD</b>                                                                                                                                                          |
| <b>Co-Chair</b>           | <b>TBD</b>                                                                                                                                                          |
| <b>University Liaison</b> | <b>TBD</b>                                                                                                                                                          |
| <b>Committee Roster:</b>  | Debra Tolliver-Nash, Linda Brown Reed, Sharon Holbrooks, Mark Anthony Jones, Shirley Harvey, Petra Baker, Edward Scruggs, Mildred Simmons, Michael Taylor, one more |

### Related Events

| Date/Month | Event              | Registration<br>Volunteers | Speakers | Guest<br>Engagement | Audience   |
|------------|--------------------|----------------------------|----------|---------------------|------------|
| February   | Black in St. Louis | X                          |          | X                   | All Alumni |

### Purpose and Procedures

Alumni Affinity Groups are UMSL Alumni Association organized communities that bring together alumni of a specific school, college or shared interest. The purpose of alumni affinity groups is to increase alumni engagement in service to their college/unit, to current students, and to the University in general. Examples include but are not limited to the following:

- To provide coordinated opportunities for all alumni to interact meaningfully with the University and its activities, thus facilitating information sharing about the University and its programs within that group's particular area of study and/or interest.
- Professional development and networking with other alumni (industry panels, career support)
- Creating a pool of volunteer leaders for university, college or unit liaisons to utilize in support of affinity group activities or strategic work of the university.
- To serve as ambassadors of UMSL by sharing the positive impact that the University has in the local, regional and national communities.
- To support students currently attending (or interested in attending) through formal and/or informal mentoring opportunities. Affinity Groups are encouraged to volunteer for Dining with Tritons or similar, to participate in a student club/organization event, to speak to classes as needed and to volunteer for other relevant opportunities as they are presented.
- To celebrate and recognize the impact of volunteering and philanthropy, thus encouraging more alumni to get engaged in ways that enhance University priorities.

Coordinating these activities (typically one to two annually) are important for managing resources (both staff time and budget), ensuring higher turnout and participation, and having meaningful alignment and outcomes for the Affinity Group activities that positively impact the needs of both the alumni and University. The following outlines the guidelines for planning and coordinating activities annually.

***Activities beyond events are an important aspect of Affinity Group work.***

1. Each Alumni Affinity Group may have one university liaison identified by the Executive Director to help inform priorities.
2. The Executive Director will meet with the university liaison at the beginning of the fiscal year to discuss top alumni volunteer and engagement priorities and draft a proposed calendar of activities, noting all-alumni activities where promotion and attendance by Affinity Groups are encouraged.
3. The Executive Director will assemble all Affinity Group proposed activity calendars and associated budgets into a single document for review by the Governance Committee and ALC.
4. The Executive Director will work with the ALC Chair to share strategy and create an implementation plan for calendar of activities with the Affinity Group chair (or co-chair).
5. Affinity Group Chair and Steering Committee work with the Director and/or Assistant Director as assigned to implement plans within budget and meet activity metrics.

**Affinity Group Chairs and Steering Committee**

Each Affinity Group Steering Committee should have one leader (Chair) that serves on the Affinity Leadership Council (Board Committee). There should also be a vice chair for when the chair is unable to attend/run meetings. Each serves a concurrent two-year term. Each Affinity Group may have a Steering Committee with up to four additional members.

Officers and members of affinity groups are identified by the Executive Director with input from the ALC Chair and Affinity Group Chair and Vice Chair. Where multiple candidates are viable, a slate of candidates will be given to the ALC Chair to recommend a selection to the Governance Committee. Affinity group steering committees should meet twice annually to plan activities and assign volunteer roles. Affinity group meetings will be staffed by the Director or Assistant Director as assigned. Meeting agendas will be created or approved by the Assistant Director and Chair(s). Quorums are not necessary for an affinity group meeting as these groups do not have a voting component.

**Affinity Group Approval and Recognition**

Alumni Affinity Groups are recognized by the Alumni Association Governing Board through an annual review and recommendation process conducted by the Executive Director in coordination with the Governance Committee of the Governing Board.

## Chemistry Alumni Affinity Group FY27

|                           |                                                                                                        |
|---------------------------|--------------------------------------------------------------------------------------------------------|
| <b>Chair</b>              | <b>Michael Finkes</b>                                                                                  |
| <b>Co-Chair</b>           | <b>TBD</b>                                                                                             |
| <b>University Liaison</b> | <b>Keith Stine, Department Chair</b>                                                                   |
| <b>Committee Roster:</b>  | <b>Joe Bono, Michael Houser, Pat Armbruster, Timothy Miller, Bruce Ritts, Gregory Webb, Lol Barton</b> |

## Related Events

| <b>Date/Month</b> | <b>Event</b>                                      | <b>Registration<br/>Volunteers</b> | <b>Speakers</b> | <b>Guest<br/>Engagement</b> | <b>Audience</b> |
|-------------------|---------------------------------------------------|------------------------------------|-----------------|-----------------------------|-----------------|
| September         | Harris Center Conservation<br>Forum Pre-Reception | X                                  |                 | X                           | Science Alumni  |

## Purpose and Procedures

Alumni Affinity Groups are UMSL Alumni Association organized communities that bring together alumni of a specific school, college or shared interest. The purpose of alumni affinity groups is to increase alumni engagement in service to their college/unit, to current students, and to the University in general. Examples include but are not limited to the following:

- To provide coordinated opportunities for all alumni to interact meaningfully with the University and its activities, thus facilitating information sharing about the University and its programs within that group's particular area of study and/or interest.
- Professional development and networking with other alumni (industry panels, career support)
- Creating a pool of volunteer leaders for university, college or unit liaisons to utilize in support of affinity group activities or strategic work of the university.
- To serve as ambassadors of UMSL by sharing the positive impact that the University has in the local, regional and national communities.
- To support students currently attending (or interested in attending) through formal and/or informal mentoring opportunities. Affinity Groups are encouraged to volunteer for Dining with Tritons or similar, to participate in a student club/organization event, to speak to classes as needed and to volunteer for other relevant opportunities as they are presented.
- To celebrate and recognize the impact of volunteering and philanthropy, thus encouraging more alumni to get engaged in ways that enhance University priorities.

Coordinating these activities (typically one to two annually) are important for managing resources (both staff time and budget), ensuring higher turnout and participation, and having meaningful alignment and outcomes for the Affinity Group activities that positively impact the needs of both the alumni and University. The following outlines the guidelines for planning and coordinating activities annually.

***Activities beyond events are an important aspect of Affinity Group work.***

1. Each Alumni Affinity Group may have one university liaison identified by the Executive Director to help inform priorities.
2. The Executive Director will meet with the university liaison at the beginning of the fiscal year to discuss top alumni volunteer and engagement priorities and draft a proposed calendar of activities, noting all-alumni activities where promotion and attendance by Affinity Groups are encouraged.
3. The Executive Director will assemble all Affinity Group proposed activity calendars and associated budgets into a single document for review by the Governance Committee and ALC.
4. The Executive Director will work with the ALC Chair to share strategy and create an implementation plan for calendar of activities with the Affinity Group chair (or co-chair).
5. Affinity Group Chair and Steering Committee work with the Director and/or Assistant Director as assigned to implement plans within budget and meet activity metrics.

**Affinity Group Chairs and Steering Committee**

Each Affinity Group Steering Committee should have one leader (Chair) that serves on the Affinity Leadership Council (Board Committee). There should also be a vice chair for when the chair is unable to attend/run meetings. Each serves a concurrent two-year term. Each Affinity Group may have a Steering Committee with up to four additional members.

Officers and members of affinity groups are identified by the Executive Director with input from the ALC Chair and Affinity Group Chair and Vice Chair. Where multiple candidates are viable, a slate of candidates will be given to the ALC Chair to recommend a selection to the Governance Committee. Affinity group steering committees should meet twice annually to plan activities and assign volunteer roles. Affinity group meetings will be staffed by the Director or Assistant Director as assigned. Meeting agendas will be created or approved by the Assistant Director and Chair(s). Quorums are not necessary for an affinity group meeting as these groups do not have a voting component.

**Affinity Group Approval and Recognition**

Alumni Affinity Groups are recognized by the Alumni Association Governing Board through an annual review and recommendation process conducted by the Executive Director in coordination with the Governance Committee of the Governing Board.

## Ed G. Smith College of Business Affinity Group FY27

|                           |                                                                                     |
|---------------------------|-------------------------------------------------------------------------------------|
| <b>Chair</b>              | <b>Stan Anderson</b>                                                                |
| <b>Co-Chair</b>           | <b>TBD</b>                                                                          |
| <b>University Liaison</b> | <b>Shu Schiller, Dean</b>                                                           |
| <b>Committee Roster</b>   | <b>Need to recruit – list of prospects include Carter Cassel, Ralph McNeal, TBD</b> |

### Related Events

| <b>Date/Month</b> | <b>Event</b>                                                             | <b>Registration<br/>Volunteers</b> | <b>Speakers</b> | <b>Guest<br/>Engagement</b> | <b>Audience</b>                       |
|-------------------|--------------------------------------------------------------------------|------------------------------------|-----------------|-----------------------------|---------------------------------------|
| September         | Accounting Alumni Recruiter Event & Networking Reception                 |                                    |                 | X                           | Accounting Alumni                     |
| October           | Dining with Tritons: Triton Business Scholars (w/ specific RISE Academy) |                                    |                 |                             | Specific                              |
| October           | NABA Panel                                                               |                                    | X               |                             | 3-4 Business Professionals            |
| November          | Finance Career Conference                                                |                                    |                 |                             | Specific                              |
| February          | Alumni Pre-Reception: Beta Alpha Psi Student Awards                      |                                    |                 |                             | All Business Alums                    |
| March             | Student Pitch Competition                                                |                                    |                 | X                           | 3-4 Business Alums                    |
| April             | DBA Weekend                                                              |                                    |                 |                             | TBD                                   |
| April             | International Business alumni-to-student program                         |                                    | X               | X                           | 3-4 Int'l Business alum professionals |
| May               | Salute to Business Celebration                                           | X                                  |                 | X                           | TBD                                   |

### Purpose and Procedures

Alumni Affinity Groups are UMSL Alumni Association organized communities that bring together alumni of a specific school, college or shared interest. The purpose of alumni affinity groups is to

increase alumni engagement in service to their college/unit, to current students, and to the University in general. Examples include but are not limited to the following:

- To provide coordinated opportunities for all alumni to interact meaningfully with the University and its activities, thus facilitating information sharing about the University and its programs within that group's particular area of study and/or interest.
- Professional development and networking with other alumni (industry panels, career support)
- Creating a pool of volunteer leaders for university, college or unit liaisons to utilize in support of affinity group activities or strategic work of the university.
- To serve as ambassadors of UMSL by sharing the positive impact that the University has in the local, regional and national communities.
- To support students currently attending (or interested in attending) through formal and/or informal mentoring opportunities. Affinity Groups are encouraged to volunteer for Dining with Tritons or similar, to participate in a student club/organization event, to speak to classes as needed and to volunteer for other relevant opportunities as they are presented.
- To celebrate and recognize the impact of volunteering and philanthropy thus encouraging more alumni to get engaged in ways that enhance University priorities.

Coordinating these activities (typically one to four annually) are important for managing resources (both staff time and budget), ensuring higher turnout and participation, and having meaningful alignment and outcomes for the Affinity Group activities that positively impact the needs of both the alumni and University. The following outlines the guidelines for planning and coordinating activities annually.

***Activities beyond events are an important aspect of Affinity Group work.***

1. Each Alumni Affinity Group may have one university liaison identified by the Executive Director to help inform priorities.
2. The Executive Director will meet with the university liaison at the beginning of the fiscal year to discuss top alumni volunteer and engagement priorities and draft a proposed calendar of activities, noting all-alumni activities where promotion and attendance by Affinity Groups are encouraged.
3. The Executive Director will assemble all Affinity Group proposed activity calendars and associated budgets into a single document for review by the Governance Committee and ALC.
4. The Executive Director will work with the ALC Chair to share strategy and create an implementation plan for calendar of activities with the Affinity Group chair (or co-chair).
5. Affinity Group Chair and Steering Committee work with the Director and/or Assistant Director as assigned to implement plans within budget and meet activity metrics.

### **Affinity Group Chairs and Steering Committee**

Each Affinity Group Steering Committee should have one leader (Chair) that serves on the Affinity Leadership Council (Board Committee). There should also be a vice chair for when the chair is unable to attend/run meetings. Each serves a concurrent two-year term. Each Affinity Group may have a Steering Committee with up to four additional members.

Officers and members of affinity groups are identified by the Executive Director with input from the ALC Chair and Affinity Group Chair and Vice Chair. Where multiple candidates are viable, a slate of candidates will be given to the ALC Chair to recommend a selection to the Governance Committee. Affinity group steering committees should meet twice annually to plan activities and assign volunteer roles. Affinity group meetings will be staffed by the Director or Assistant Director as assigned. Meeting agendas will be created or approved by the Assistant Director and Chair(s). Quorums are not necessary for an affinity group meeting as these groups do not have a voting component.

### **Affinity Group Approval and Recognition**

Alumni Affinity Groups are recognized by the Alumni Association Governing Board through an annual review and recommendation process conducted by the Executive Director in coordination with the Governance Committee of the Governing Board.

## College of Education Alumni Affinity Group FY27

|                           |                           |
|---------------------------|---------------------------|
| <b>Chair</b>              | <b>Clark Hickmann</b>     |
| <b>Co-Chair</b>           | <b>Helene Sherman</b>     |
| <b>University Liaison</b> | <b>Marius Boboc, Dean</b> |
| <b>Committee Roster</b>   | <b>To Be Recruited</b>    |

### Related Events

| Date/<br>Month | Event                                                                       | Registration<br>Volunteers | Speakers | Guest<br>Engagement | Audience             |
|----------------|-----------------------------------------------------------------------------|----------------------------|----------|---------------------|----------------------|
| October        | Panel: The State of Public Education, featuring UMSL alumni superintendents |                            |          | X                   | All Education Alumni |
| March          | UMSL Educators Spotlight: Blitz over 2 days (Boboc on-site in schools)      |                            |          |                     | Specific             |
| April          | C.A.M.P. 2027 (Counseling Alumni & Students Mixing w/Community Partners)    |                            |          | X                   | Counseling Alumni    |
| May            | Education Annual Conference                                                 | X                          |          | X                   | All Education Alumni |

### Purpose and Procedures

Alumni Affinity Groups are UMSL Alumni Association organized communities that bring together alumni of a specific school, college or shared interest. The purpose of alumni affinity groups is to increase alumni engagement in service to their college/unit, to current students, and to the University in general. Examples include but are not limited to the following:

- To provide coordinated opportunities for all alumni to interact meaningfully with the University and its activities, thus facilitating information sharing about the University and its programs within that group's particular area of study and/or interest.
- Professional development and networking with other alumni (industry panels, career support)
- Creating a pool of volunteer leaders for university, college or unit liaisons to utilize in support of affinity group activities or strategic work of the university.
- To serve as ambassadors of UMSL by sharing the positive impact that the University has in the local, regional and national communities.
- To support students currently attending (or interested in attending) through formal and/or informal mentoring opportunities. Affinity Groups are encouraged to volunteer for Dining with Tritons or similar, to participate in a student club/organization event, to speak to classes as needed and to volunteer for other relevant opportunities as they are presented.



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## Engineering Alumni Affinity Group FY27

|                           |                                                                |
|---------------------------|----------------------------------------------------------------|
| <b>Chair</b>              | <b>Semir Vajzovic</b>                                          |
| <b>Co-Chair</b>           | <b>Ellen Prinster</b>                                          |
| <b>University Liaison</b> | <b>George Nnanna, Director; Jody O’Sullivan JEP</b>            |
| <b>Roster:</b>            | <b>Need to recruit – list of prospects include Greg Helton</b> |

### Related Events

| Date/Month | Event                                                   | Registration<br>Volunteers | Speakers | Guest<br>Engagement | Audience               |
|------------|---------------------------------------------------------|----------------------------|----------|---------------------|------------------------|
| November   | UMSL Explore Engineering Day                            |                            |          |                     | 3-4 Engineering Alumni |
| March      | Pi Day Celebration                                      |                            |          |                     | 2-3 Engineering Alumni |
| March      | Engineering Reunion VIP Reception at Pi Day Celebration |                            |          | X                   | All Engineering Alumni |
| June       | Engineering Summer Camp                                 |                            |          |                     | 2-4 Engineering Alumni |

### Purpose and Procedures

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- Professional development and networking with other alumni (industry panels, career support)
- Creating a pool of volunteer leaders for university, college or unit liaisons to utilize in support of affinity group activities or strategic work of the university.
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## Social Work Alumni Affinity Group FY27

|                           |                                                  |
|---------------------------|--------------------------------------------------|
| <b>Chair</b>              | <b>Chelesa Holden</b>                            |
| <b>Co-Chair</b>           | <b>TBD</b>                                       |
| <b>University Liaison</b> | <b>Sharon Johnson, Dean</b>                      |
| <b>Roster:</b>            | <b>Need to recruit – build list of prospects</b> |

### Related Events

| <b>Date/Month</b> | <b>Event</b>                                            | <b>Registration<br/>Volunteers</b> | <b>Speakers</b> | <b>Guest<br/>Engagement</b> | <b>Audience</b>        |
|-------------------|---------------------------------------------------------|------------------------------------|-----------------|-----------------------------|------------------------|
| August            | New School<br>Announcement Blitz                        |                                    |                 |                             |                        |
| September         | CEU-supported<br>engagement                             |                                    |                 |                             | All Social Work Alumni |
| May               | Student & Alumni<br>Awards, Alumni of the<br>Year Award |                                    |                 | X                           | TBD                    |

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## Supply Chain Alumni Affinity Group FY27

|                           |                                                                                                                                       |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| <b>Chair</b>              | <b>Cassie Bianculli</b>                                                                                                               |
| <b>Co-Chair</b>           | <b>Andrew Baer</b>                                                                                                                    |
| <b>University Liaison</b> | <b>Jill Bernard Bracy, Director of the Supply Chain Center of Excellence</b>                                                          |
| <b>Roster:</b>            | <b>Derrick Freeman, Jarret Sullivan, Christopher Mondy, Peyton Gallagher, David Swiercek, Amber Gergen, Katie Loomis, Ini Abejide</b> |

### Related Events

| <b>Date/Month</b> | <b>Event</b>                               | <b>Registration<br/>Volunteers</b> | <b>Speakers</b> | <b>Guest<br/>Engagement</b> | <b>Audience</b>                                          |
|-------------------|--------------------------------------------|------------------------------------|-----------------|-----------------------------|----------------------------------------------------------|
| November          | Supply Chain Networking Social             | X                                  |                 | X                           | All Supply Chain Alumni, UMSL<br>Alumni SC professionals |
| March/April       | Supply Chain & Analytic Research Symposium |                                    |                 |                             | All Supply Chain Alumni, UMSL<br>Alumni SC professionals |

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**UMSLAA 501c3 Budget Draft FY27**

| <b>UMSLAA (501c3) Budget FY27</b>                                | <b>INCOME</b>    | <b>EXPENSE</b>  | <b>NOTES</b>                                                                              |
|------------------------------------------------------------------|------------------|-----------------|-------------------------------------------------------------------------------------------|
| <b>REVENUE/INCOME</b>                                            |                  |                 |                                                                                           |
| Income from Edward Jones Portfolio (transferred to US Bank acct) | \$14,000         |                 |                                                                                           |
| <b>TOTAL REVENUE</b>                                             | <b>\$14,000</b>  |                 |                                                                                           |
|                                                                  |                  |                 |                                                                                           |
| <b>EXPENSES</b>                                                  |                  |                 |                                                                                           |
| Registration fee w/State of Missouri                             |                  | \$15            |                                                                                           |
| Insurance - D&O and liability                                    |                  | \$3,000         |                                                                                           |
| Governing Board mtgs                                             |                  | \$1,800         | 1 mtg off-campus; 4 mtgs on-campus w/snacks                                               |
| Accounting software (Intuit Quickbooks)                          |                  | \$1,385         |                                                                                           |
| Financial Audit                                                  |                  | \$5,000         | Recommend every other year; need to encumber \$5,000 each year for total cost of \$10,000 |
| 990 Filing Fee                                                   |                  | \$300           |                                                                                           |
| Bookkeeping                                                      |                  | \$0             | Savings of \$5,500 in bookkeeping fees over FY26                                          |
| State of the Association costs                                   |                  | \$2,500         |                                                                                           |
| <b>TOTAL EXPENSES</b>                                            |                  | <b>\$14,000</b> |                                                                                           |
|                                                                  |                  |                 |                                                                                           |
| <b>University Funds (FYI)</b>                                    |                  |                 |                                                                                           |
| <b>REVENUE/INCOME</b>                                            |                  |                 |                                                                                           |
| UMSLAA Endowment Annual Distribution                             | \$20,000         |                 |                                                                                           |
| General Revenue Account (Operations)                             | \$59,000         |                 |                                                                                           |
| General Revenue Account (Salary & Benefits)                      | \$743,140        |                 |                                                                                           |
| <i>Ticket Sales (acct 0000) marked below</i>                     | \$26,000         |                 |                                                                                           |
| <b>TOTAL REVENUE</b>                                             | <b>\$848,140</b> |                 |                                                                                           |
|                                                                  |                  |                 |                                                                                           |
| <b>EXPENSES</b>                                                  |                  |                 |                                                                                           |
| <b>Salary &amp; Benefits</b>                                     |                  | \$743,140       |                                                                                           |
|                                                                  |                  |                 |                                                                                           |
| <b>Affinity Group Activities</b>                                 |                  |                 |                                                                                           |
| African American Alumni Chapter                                  |                  | \$3,500         | Black in St Louis;                                                                        |
| EGSCOB                                                           |                  | \$4,850         | Dining w/Tritons; Salute to Business                                                      |
| Chemistry                                                        |                  | \$1,000         | Alumni reception at existing event (Harris Center?)                                       |
| Circle of Educators                                              |                  | \$2,500         | 2 school visits w/dean;                                                                   |
| Engineering                                                      |                  | \$1,000         | Pi Day                                                                                    |
| Social Work                                                      |                  | \$500           |                                                                                           |
| Supply Chain                                                     |                  | \$1,000         | Networking event                                                                          |
| Retirees Association ( <i>Ticket Sales - acct 0000</i> )         | \$1,000          | \$1,500         |                                                                                           |
|                                                                  |                  |                 |                                                                                           |



**UMSLAA 501c3 Budget Draft FY27**

| <b>UMSLAA (501c3) Budget FY27</b>                         | <b>INCOME</b> | <b>EXPENSE</b> | <b>NOTES</b>                                                      |
|-----------------------------------------------------------|---------------|----------------|-------------------------------------------------------------------|
| <b><i>College/Unit Activities</i></b>                     |               |                |                                                                   |
| Athletics                                                 | \$1,000       | \$4,000        | Fall (soccer) & spring event; Hall of Fame?                       |
| Honors College                                            |               | \$2,500        | Honors Alumni Homecoming at Provincial House                      |
| College of Nursing                                        |               | \$2,600        | Back in the Lab; Alumni Panel; Dining w/Tritons w/Adv BSN co-hort |
| College of Optometry ( <i>Ticket Sales - acct 0000</i> )  | \$1,000       | \$3,000        | Spring brunch "Vision 2027"; White Coat                           |
| College of Arts & Sciences                                |               | \$500          |                                                                   |
|                                                           |               |                |                                                                   |
| <b><i>Signature Events/Initiatives</i></b>                |               |                |                                                                   |
| UMSL 5K ( <i>Ticket Sales - acct 0000</i> )               | \$9,000       | \$9,000        | Estimated expenses                                                |
| Alumni Awards Reception (DAA, OYA)                        |               | \$7,500        |                                                                   |
| Legacy Pinning                                            |               | \$500          | re-order pins                                                     |
| Local & Loyal                                             |               | \$3,000        | 1 event in fall; 2 events in spring                               |
| Triton Business Network                                   |               | \$750          | Alumni-owned businesses at EIC                                    |
| Night at the Ballpark ( <i>Ticket Sales - acct 0000</i> ) | \$12,000      | \$14,000       | 600 alumni tickets (\$25 ea)                                      |
| Triton Toast                                              |               | \$7,000        |                                                                   |
| Triton Traditions                                         |               | \$500          | Snacks for blitz #1                                               |
| Volunteer Initiative                                      |               | \$1,000        | Polo shirts for volunteer workers;                                |
| Committee Mtgs                                            |               | \$500          | Snacks, drinks for misc. mtgs                                     |
| Advocacy                                                  |               | \$3,000        | Dining w/Tritons; Friends of Higher Educ                          |
| Golden Grads ( <i>Ticket Sales - acct 0000</i> )          | \$1,000       | \$3,800        |                                                                   |
| State of the Association                                  |               | \$6,000        |                                                                   |
| Wine Tasting at the Richter - event                       | \$1,000       | \$5,500        | spring 2027 event                                                 |
|                                                           |               |                |                                                                   |
| <b><i>Business Travel</i></b>                             |               | \$9,000        |                                                                   |
| <b><i>Printing/Copy Services</i></b>                      |               | \$1,000        |                                                                   |
| <b><i>Postage/Shipping</i></b>                            |               | \$2,000        |                                                                   |
| <b><i>Training &amp; Development</i></b>                  |               | \$1,500        |                                                                   |
| <b><i>Office Supplies</i></b>                             |               | \$500          |                                                                   |
| <b><i>Dues&amp; Memberships</i></b>                       |               | \$500          |                                                                   |
| <b>TOTAL EXPENSES</b>                                     |               | <b>848,140</b> |                                                                   |
|                                                           |               |                |                                                                   |
|                                                           |               |                |                                                                   |