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## Alumni-relations programs

Anonymous

James H. Karales

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# Alumni-Relations Programs

'A vast pool of goodwill, a valuable asset  
to the firm'





"We are trying to impress all our offices with the advantages of putting alumni relations on a more formal, structured basis than may have been their practice in the past," said Jule Phoenix, Executive Office partner in charge of the Practice Development Department. "The firm has always valued its alumni. The ties between the firm and its alumni form a strong relationship that benefits the firm's practice and the alumni in their career development."

In Chicago, where a reception and open house early this year marked the launching of a new alumni program, partner in charge Jerry Kolb, partner Dick Fremgen and manager Jon Trevelise would agree.

In New York City, where DH&S has for many years supported a strong and varied alumni program, partner in charge Pat Waide and partner Gene Bonstein would agree.

In Charlotte, where a reception this past February celebrated the formation of a new DH&S alumni association, partner in charge J. Cary Findlay and partner Charlie Trice would agree.

And so would partners in other offices with active alumni programs. The methods used to maintain good relations with alumni, Jule pointed out, are as varied as the sizes of DH&S offices, their geographical locations and the personal approach of the partner in charge. There are cocktail parties, technical seminars for clients and alumni, picnics, golf, family outings, dinners, dinner theater and dinner-dances.

"Although the offices generally have done a fair job of staying in touch with their alumni," Jule said, "strengthening relations with these people is a matter of great interest at the highest management levels." A strong alumni program, he continued, was one of the recommendations made to the Policy Committee by the Advisory Committee on Objectives and Planning, the latter a panel headed by Charlie Steele shortly before he assumed the position of managing partner.

Much of the present thinking on alumni relations results from the findings of a survey of our offices conducted last fall by Jule's group under the direction of Hugh McCandless, public relations counsel for the firm. "The survey confirmed the fact that nearly all our offices keep alumni records, and most have regular reunions with their alumni, too," Hugh said. "We were impressed as well with the imagination shown by various offices in arranging alumni functions that are well attended."

This diversity of approach is illustrated clearly in the case of the three offices cited earlier: New York, where a strong and active alumni program is a long tradition; Chicago, which is exploring the specific direction it wants to take in the future after a successful start; and Charlotte, where, after an equally auspicious beginning, management has decided on a somewhat different approach.

Because of the size of the office, it is not surprising that New York's alumni program is one of the most ambitious — there are, for example, more than one thousand names in its regularly updated alumni directory. In the opinion of Pat Waide and Gene Bonstein, variety is not only the spice of life, it is the key to an effective alumni program.

"We prefer to vary our program from year to year," Pat said, "because giving the program variety makes it more interesting for our alumni."

In 1978, for example, the New York office sponsored a dinner-dance for alumni and their wives. The party was held in the spring to hail the change in the firm's name to Deloitte Haskins & Sells. Last fall the office staged a cocktail hour and stag dinner at the New York Hilton for some four hundred alumni and more than one hundred DH&S people. Highlights of the dinner included talks by Charlie Steele and Pat Waide.

What's on tap for 1980? According to Pat Waide, the office is planning a reception, probably early in the fall, to celebrate its recent move to the World Trade Center. How far ahead does the office plan its alumni programs? Definite plans have not yet been drawn for 1981, according to Pat, but at the moment a dinner-dance seems most likely.

One of the more interesting aspects of the New York approach, however, is the fact that the office has its own program while at the same time encouraging and giving support to an alumni association headed by Jack Hanrahan of the Equitable Life Assurance Society and Dick Piluso of Loews Corporation. "This is a strong, active group," Gene Bonstein said, "which maintains an independent schedule of activities and finances itself. We do lend it assistance and support, but the association operates quite independently."

What lies ahead for the New York office alumni-relations program? Gene said that changes are being studied. "We are considering the effectiveness of expanding our approaches to an alumni program. I think it's safe to say that we are definitely moving toward a more structured program than we've had in the past," he observed, "and there are a number of ideas and approaches that we want to study and evaluate. We have excellent relations with our alumni here in New York and we want to ensure that anything we do only improves that relationship."

In Chicago, PIC Jerry Kolb asked partner Dick Fremgen and manager Jon Trevelise to take charge of the development of an alumni-relations program. The project was begun with the compilation of as complete a listing of Chicago alumni as was possible to put together. Copies of the initial directory were distributed to partners and managers in the Chicago office as well as those alumni listed in the directory.

Because the Chicago office has been in the Standard Oil Building for only three years and many of the alumni had not had an opportunity to see the new quarters, the reception was held in the Mid-America Club on the eightieth floor of the building. This allowed the reception to be combined with an open house at the DH&S offices.

More than seventy alumni, including one — a nonclient — who journeyed up from St. Louis to attend the affair, met with DH&S partners, managers and staff at a reception that started at five o'clock and went well past the official seven o'clock wrap-up.

According to Dick, once the office had decided to put a



more formal alumni program into operation, there had been considerable discussion of the relative merits of various activities. "You can, of course, come up with a rather long list of options if you put your mind to it," he pointed out. "What we wanted was something that would serve as a natural kickoff to the program, would be well attended, and would provide the ideal environment for old acquaintances to see each other again and perhaps for new friends to be made. A reception at the close of a business day seemed most likely to attract the largest number of people who already were in Chicago but who might have to catch a train or drive to their homes in the suburbs." Although the formal program was the reception and open house, the occasion was used by some partners and managers to renew old friendships over dinner afterward.

Dick pointed out that the affair also provided an ideal situation in which DH&S management could sound out alumni about their preferences for future meetings. "People tend to be relaxed at informal receptions like the one we held," he observed, "and you can pull someone into a corner for a few minutes of quiet discussion about what that individual would like to see in the way of an alumni program. Obviously not everyone will want the same things; but that in itself helps in planning not only what types of affairs will be held in the future but who will be invited. You don't want to think in terms of a monolithic bloc labeled 'alumni.' These are individuals in different executive positions and with varying interests. Changes in tax laws might be very important to some, but of limited interest to others more concerned with revisions of accounting and auditing regulations. The reception provided an excellent opportunity to poll a representative selection of Chicago alumni and to gather information needed to develop a better program for the future."

Both Dick and Jon Trelvise concur that a program of separate social and technical elements will be most effective. "Our view now," Dick said, "is that we'll want to plan an annual calendar of three or four meetings. One will be purely social, like the opening reception. The others will be a combination of technical and social." Dick noted that blanket invitations will not be sent for technical sessions. "We're convinced that staging technical sessions only for those alumni who need that information and background is the way to go. In the long run you accomplish more with less effort if you match your audience to the topic. We recognize, however, that we've still got a lot to learn about setting up an effective program. We will discuss the project's progress with our people and with alumni in the

*(from top)*

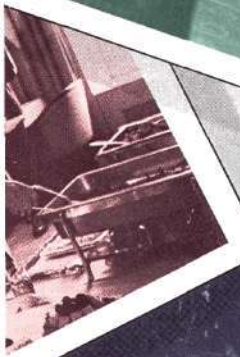
*Chicago office partner in charge Jerry Kolb (c.) discusses progress of alumni reception with partner Dick Fremgen (r.) and manager Jon Trelvise.*

*New York office partner in charge Pat Waide (l.) chats with alumni prior to start of dinner.*

*Chicago reception*







months and years ahead to make any changes necessary to meet their changing needs."

Charlotte, like Chicago, kicked off its alumni-relations program with a reception at the end of the business day. Charlotte's affair at the Sheraton Center was by all standards a success, with some seventy-five alumni and perhaps fifty DH&S people from our offices in the Carolinas gathering on one of the city's rare snow days. But there the similarity ends. According to partner Charlie Trice, who set up the office's alumni program, Charlotte management decided to encourage formation of an alumni association. "We believed that creation of an active alumni association was preferable because we had decided that the primary emphasis of such a group should be social."

Charlie asked Eugene Johnson, a DH&S alumnus now with the insurance brokerage firm of Johnson & Higgins, located in the same building as DH&S, to head formation of an alumni committee that now includes four other persons. "We had a list of our alumni, their home addresses and business affiliations," Charlie said, "and as the committee began working on forming the association we gave it as much help as we could, including the assistance of Kay Nussman, my secretary." Charlie, of course, stayed in close contact with Gene Johnson and with the other members of the committee.

"The opinion of most of our alumni," Charlie continued, "is that there's no need to schedule special seminars for them at this time. We normally invite alumni to client seminars, and our alumni tell us that this practice is quite satisfactory. At least for the present, they say, the association should be socially oriented."

The committee plans a second affair, probably a family picnic to be held late in the summer or early fall. "Everyone is enthusiastic about the new alumni association," Charlie said, "and there's general agreement that we want to feel our way along for a while. I think that two annual social events scheduled by the association, combined with invitations to alumni to attend client seminars sponsored by the Charlotte office, will be sufficient for the immediate future. We don't believe there's any need to be locked into a rigid schedule or program right now. We want to be flexible, to change as the alumni program gathers steam."

For Jule Phoenix, DH&S alumni represent a vast pool of goodwill, a valuable asset to the firm. "One reason we have excellent relations with most alumni is because they realize we are interested in their career development. These programs build alumni-firm relationships, and build on them too. Naturally we want to strengthen our ties with these people.

"We are, as a firm, solidly committed to a strong alumni-relations program and we urge all alumni to keep us informed of their progress, where they are located. This is particularly important when an individual moves from one city to another. We hope that every alumnus will make it a point to check in by mail or by phone with the nearest DH&S office once he or she settles down. These are people about whom we care very much," Jule said, "and we want to stay in touch with them." □