



# The New Rules of Engagement

Building the Next Generation of Alumni Leaders and Volunteers

Advancement Forum



# Thank You For Joining Us!

The First of Many Webinars in our “New Rules of Engagement” Series

## **The New Rules of Engagement: The Case for Investing in Volunteer Engagement**

*Building the Next Generation of Alumni Leaders and Volunteers: Part 1*

May 5, 3:00-3:30PM ET

## **The New Rules of Engagement: Rule One – Make It Easy to Say Yes**

*Building the Next Generation of Alumni Leaders and Volunteers: Part 2*

May 26, 3:00-3:30PM ET

## **The New Rules of Engagement: Rule Two – Meet Them Where They Are**

*Building the Next Generation of Alumni Leaders and Volunteers: Part 3*

June 7, 2:00-2:30PM ET

## **The New Rules of Engagement: Rule Three – Broker Smarter Matches**

*Building the Next Generation of Alumni Leaders and Volunteers: Part 4*

June 21, 2:00-2:30PM ET

## **The New Rules of Engagement: Rule Four – Embrace the “Me” Factor**

*Building the Next Generation of Alumni Leaders and Volunteers: Part 5*

July 7, 1:00-1:30PM ET

## **The New Rules of Engagement: Rule Five – Cultivate Campus Allies**

*Building the Next Generation of Alumni Leaders and Volunteers: Part 6*

July 21, 1:00-1:30PM ET



# EAB Resources for You and Your Team

## Supporting Implementation

### [Alumni Leader and Volunteer Resource Center](#)



["The New Rules of Engagement" Infographic](#)



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### *Archived Webinars*



**Applying the New Rules of Engagement to Campaign Leadership Webinar**



**Applying the New Rules of Engagement to Advisory Boards and Councils Webinar**

# The Anatomy of a Study

## EAB Research Process Overview



### **Comprehensive Literature Review**

- Scholarly publications and dissertations
- Industry periodicals and commentary
- Social media and blog updates



### **175+ Interviews**

- Chief advancement officers
- Assistant and associate vice presidents/chancellors for advancement
- Directors of alumni relations and volunteer programs (both central and in academic units)
- Nonprofit executives



# The Best of Times, The Worst of Times

## If This Is The Golden Age of Higher Ed Philanthropy...

**52** Number of \$1B higher ed campaigns in 2014-2015

**7M** Number of millionaire households in U.S. in 2014

## ...Why The Sense of Unease Across the Profession?

**8.3%** 2014 alumni participation rate, down from **8.7%** in 2013 and from **14%** in 2001

**75%** Of Millennials more likely to donate to favorite charity than to alma mater



### "Deep-Pocket Donors"

(January 28, 2015)

"Charitable donations to colleges reached an all-time high of nearly \$38 billion [in 2014] ...Donors increased the amount they gave colleges in 2014 by 10.8 percent, up from...2013, which was the previous historic high."

### Has "Peak Engagement" Passed?

"The way I've responded to uncertain future pipelines is to harvest maximum wallet share of every man, woman, and child of the 1960s and to plan for my retirement. Everyone's biggest fear that nobody is willing to say out loud is: Have we passed 'Peak Engagement'?"

*Vice President for Development  
Private Research University*

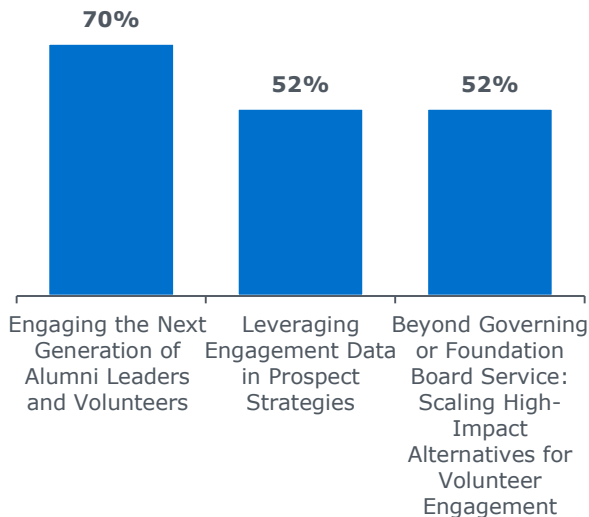


# Engaging the Next Generation

## Top of Mind for Member CAOs

### 2015 EAB Advancement Forum Topic Poll Results

n=56



### Why Focus on Alumni Leaders and Volunteers?

#### *Building a Relationship*

"Young alumni don't want to come to reunions or make fundraising calls, but they will help a student...how do we do more of *that*?"

#### *Deepening Affinity and Winning Loyalty*

"I fear that if I don't engage mid-career alumni as volunteers now, I'll lose them to another organization in their local community."

#### *Seeing ROI*

"My top donors are also engaged volunteers. They get to see the impact of their gifts and become connected. How do I scale that?"

#### *Realizing Strategic Priorities*

"Our new president unveiled a set of ambitious goals. We're going to need alumni help to achieve them, especially around career development."



# The Concept of Volunteering in Flux

## 20<sup>th</sup> Century Roles for 21<sup>st</sup> Century Volunteers

### The Volunteer Pyramid



### Board Service No Longer Appeals

“We [as a profession] used to believe that in order for alumni to understand and own the direction of the organization, and to give gifts at their highest potential, they had to be on a board...But it is increasingly clear to me that the next generation of big donors – now in their 40s and 50s – have very little tolerance for traditional boards. The terms are too long, it’s too much process, and most boards are not appealing to an intellectually curious and successful person who can’t commit to show up to meetings for a multi-year period. They appeal to the civic leaders of yesterday, not tomorrow. Donors will tell me: ‘Tell me what you want me to do and I will do it. But please don’t make me come to a meeting.’ ”

*Nevin Kessler  
President, Rutgers University Foundation*



# It's Not Them, It's Us

## A Moment of Candor



### **Not Well-Structured to Manage Large Groups of Volunteers**

*No Clear Owner Across Multiple Academic, Advancement, and Student Affairs Divisions*



### **Volunteer Management Widely Regarded as a Timesink**

*Some Lament a "Lost Art" as Usage of Volunteers in Fundraising Increasingly Deprioritized*



### **Technology and Greater Professionalized Staff Reduce Need**

*Institutions No Longer Need Volunteers as Force Multipliers in Previous Roles*



### **Not Engaging Largest Addressable Alumni Segment in 30s and 40s**

*Current Opportunities Most Appealing to Young Alumni and Senior Alumni, But Not Key Pipeline*





# Two Sides of the Same Coin

## Giving and Volunteering Inextricably Linked, Especially at the Top

### Unpacking the Connection

*What Does Volunteering Do?*



Enfranchises donor as stakeholder



Exposes donor to cause, personalizing and sparking emotional connection



Fosters sense of distinctive package of contributions



Wraps donor in positively reinforcing relationships and welcomes them to "inner circle"



Allows monitoring for impact and accountability

### A Snapshot of One University

*Cornell University, FY 2011-2012*

57%

Giving rate amongst volunteers – compared to **36%** from event attendees and **3%** from alumni who are neither

10x

Average differential in median gift size between alumni donors<sup>1</sup> who volunteer versus those who do not<sup>2</sup>

83%

Of top 320 donors who give >\$1M are volunteers

### Upgrades that Endure

The annual giving of average leadership volunteer: **\$916** in decade before term, **\$3,517** during term, **\$2,250** in four years after term ends, and **\$1,148** in decade after.

1) The average differential in median gift size between *non-alumni* donors who volunteer versus those who do not is 20x

2) The differential increases as alumni donors age: 3.5x for those under 40, 17x for donors 40-59, and 31x for donors 60 or older

# What I Want (When and How I Want It)

Trend: One-Size-Fits-All Doesn't Fit Any Longer

## Expectations of Today's Consumer



Made-to-order customized dining experience



Order items online and have them delivered anywhere, anytime



Homepage personalized with targeted recommendations based on previous choices



Boxes of lifestyle products curated to personal tastes

## Today's Alumni Volunteer Experience



Available opportunities focus on university interests and affinity areas predefined by staff



Volunteers must be available on the university's schedule and gather at locations that work best for institutional staff



Difficult to compare opportunities side-by-side as many roles have undetermined scope and timeframes



Every institutional touchpoint requires a new introduction; limited historical information on volunteer involvement and affinity



# Skills-Based Volunteering Movement Takes Hold

## Trend: Volunteers Increasingly Want to Use Their Expertise

### Resonating with Millennials

86%

Percent of Millennials who would enjoy using their skills, talents, or expertise to volunteer

72%

Of the 4M LinkedIn users who check interest in "joining a nonprofit board" and/or "skills-based volunteering" are Millennials – and top issue area is education

### Online Marketplaces Match Skilled Volunteers with Nonprofit Projects

**TAPROOT+** Browse projects Create a project Sign in

Use the below list to sort projects by category. Log in to show recommended projects based on your own skillset.

All categories Education

**Multimedia**

**Video production to celebrate high school opening**  
ASPIRA, Inc. of Illinois

⌚ Estimate: 6 weeks (30 hours)  
📍 Chicago, IL  
🏠 Local volunteer only

**Accounting & Finance**

**Coaching + recommendations on financial systems**  
TwinCities Tutoring

⌚ Estimate: 6 weeks (30 hours)  
📍 Minneapolis, MN  
📞 Can be done remotely

**Public Relations**

**Media strategy for foundation launch**  
Benignant De Eagle Foundation

⌚ Estimate: 6 weeks (30 hours)  
📍 Jamaica Plain, MA  
📞 Can be done remotely

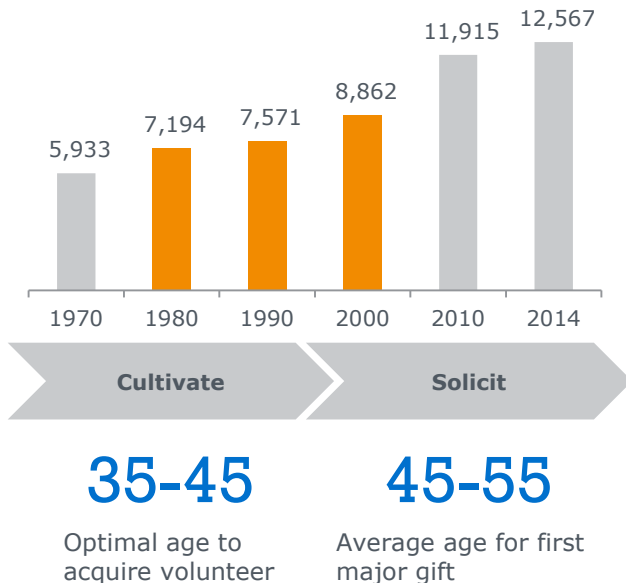
Source: "2014 Millennial Alumni Report." Achieve and the Chronicle of Philanthropy. 2014. [http://fi.fudwaca.com/ac/files/2015/04/MAR\\_Infographic-v4.pdf](http://fi.fudwaca.com/ac/files/2015/04/MAR_Infographic-v4.pdf) ; EAB interviews and analysis; Garriott, Omar. "Millions of LinkedIn Members Want to Volunteer Their Skills for Good ." *LinkedIn For Good Official Blog* (blog), January 30, 2015. <http://blog.linkedin.com/2015/01/30/millions-of-linkedin-members-want-to-volunteer-their-skills-for-good-infographic/> ; "Taproot Plus." <https://www.taprootplus.org/>

# Landing on Development's Doorstep

## Trend: Incoming Generations Inclined to Give Where They Volunteer

### The Rise of Generation X and Millennials

18 to 24 Year Old Enrollment, Select Years (in Thousands)



### A Window of Opportunity

“Generation X is now entering its peak earning years and the Millennials are not far behind. Engaging people under 45 now... as volunteers using methods that appeal to their giving nature truly makes sense.”

*Edith Falk  
Chair, Giving USA Foundation*

### How to Capitalize on This Opportunity?

- ✓ Develop flexible volunteer opportunities to deploy as cultivation or stewardship moves as needed
- ✓ Redesign traditional roles with engagement as primary endpoint, rather than welcome byproduct
- ✓ Invest in volunteer acquisition, especially among mid-career alumni

# The New Rules of Engagement

- 1 Make it Easy to Say Yes
  - 2 Meet Them Where They Are
  - 3 Broker Smarter Matches
  - 4 Embrace the “Me Factor”
  - 5 Cultivate Campus Allies
-

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