



The New Rules of Engagement

Building the Next Generation of Alumni Leaders and Volunteers

Advancement Forum



Thank You For Joining Us!

The Fourth 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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["New Rules of Engagement" White Paper](#)



[Practice Briefs and Implementation Manuals](#)

Other Sample Archived Webinars Include...



Applying the New Rules of Engagement to Campaign Leadership Webinar



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

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



From “Help Wanted” to Executive Recruiting

A Mass Customization Approach to Better Leader and Volunteer Engagement

Status Quo	New Imperative	Rationale for Change
Roles require volunteer time moreso than their specific talents	 Create Skills-Based Volunteer Roles	Skills-based roles allow volunteers to make a distinctive contribution
Institutions market generic one-size-fits-all appeals and hope alumni opt in	 Make Proactive Asks	Proactive asks help institutions target and engage particular segments
Lowest-common-denominator messaging to all alumni does not attract highest-value segments	 Surface Promising Individuals to Match to Specific Volunteer Roles	Crafting opportunities to fit individual strengths and preferences for high-value segments offers higher return on investment

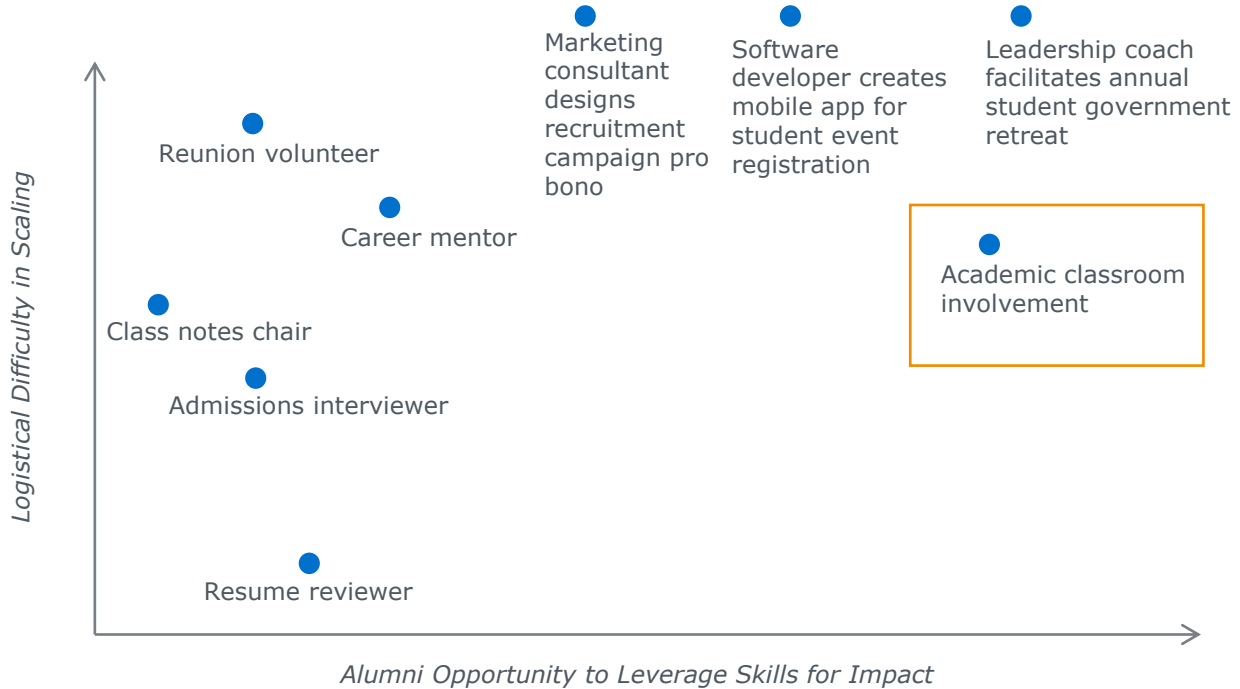
Rule Three: Broker Smarter Matches

Develop mass-customizable skills-based roles and make proactive asks of highest-potential alumni to engage in them



I'd Like to Thank the Academy

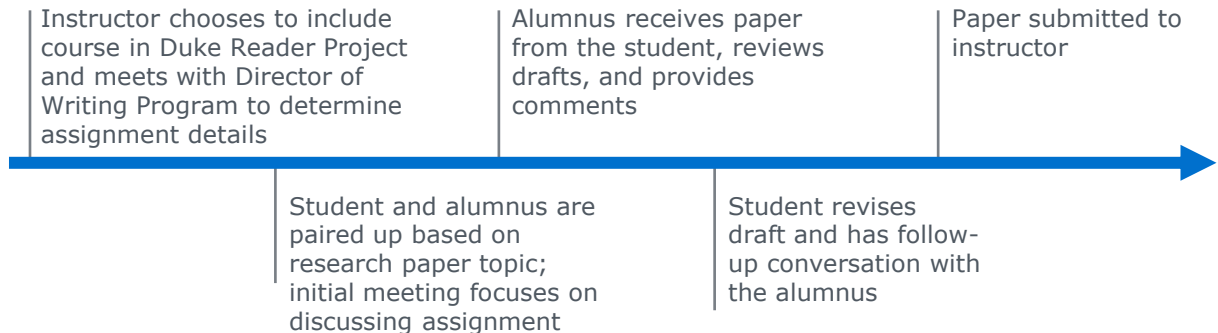
Academically-Based Skills-Focused Roles Offer Highest Promise



It Takes a Village

Bringing Students and Alumni Together in the Classroom

“Duke Reader Project” Leverages Alumni Skills and Knowledge



Representative Examples



Students taking American business history course are paired with labor lawyer and financial journalist



Student writing memo for "Counterterrorism Law and Policy" course received feedback from Coast Guard commander



A student in environmental science course works with wildlife expert on sea turtle conservation paper

Source: Moskovitz, Cary. "Engaging the University Community in Undergraduate Writing Instruction." *Liberal Education*, Summer 2010, 48-53. ; Moskovitz, Cary. "Reader Experts Help Students Bring the Write Stuff." *Chronicle of Higher Education*, March 27, 2011. ; EAB interviews and analysis.



The Write Stuff

Alumni Relish Opportunity to Share Expertise with Students

Results of Duke Reader Project

88%

of students say it helped them write a better paper

71%

of alumni said it was a "very good" or "good" experience

89%

of alumni volunteers are repeat or returning volunteers

35%

of alumni volunteers have served 4 or more semesters in the program

In Their Own Words

"I enjoyed the engagement with the student, the in-depth exploration of the issues in her paper, and the chance to use my experience writing and editing on legal/public policy matters."

Alumni Survey Respondent

Alumni Are An Untapped Resource

"The Duke Reader project makes use of a remarkably rich but otherwise untapped educational resource—the many members of our community who normally play no direct role in the institution's educational mission... Audiences for writing projects have ranged from the highly specialized – biochemists, national security experts, policymakers– to educated lay readers with an interest in nature, genomics, philosophy, or film."

*Dr. Cary Moscovitz,
Director, Writing in the Disciplines Program*

“Professor For a Day” Initiative

Bringing Real World Insights Into the Classroom

“Professor for a Day” Schedule



Dean of College of Engineering and Computer Science invites 30 top prospects or donors to one-time volunteer event



Guest Lecture

Each participating alumnus teaches one or two class sessions in his field



Dean’s List Luncheon

Alumni join 100+ high-performing current students for lunch



State of the College Speech

Dean’s speech recognizes donor volunteer’s contributions

One alumnus invited to give keynote address

Inspiring Testimonials

“When I first joined the College, I took a look at what I had to show potential donors to explain why they should invest in the college...What stood out were our inspiring first-generation student engineers who were driving their own educations.”

*Hart Roussel
Director of Development*

50%

Yield of invitees to attendees

Putting Entrepreneurial Skills to Work

University of Calgary Embeds Volunteers into the Classroom

“Entrepreneurial Thinking” Course Logistics

- Taught by one instructor and two graduate assistants
- Required course for second year business students
- 450 students broken into 90 teams to create business plan for new corporate or social venture
- Students teams pitch concepts for over \$100,000 in cash and in-kind prizes

A Host of Roles for Volunteers

- 90 business advisors
- 52 industry consultants that help students refine their ideas
- 42 judges who evaluate student pitch presentations
- Additional opportunities for guest lecturers, mentors, and networking

Skills-Based Roles Attract Different Segments¹

70%

of participants never engaged before as volunteers

80%

Of volunteers have titles suggesting major gift capacity²

38%

Of participants are alumni; remainder are community members

1) Initial estimates based on preliminary review

2) Does not include current active prospects or donors

Targeting High-Value Potential Volunteers

Focusing in on Alumni Who Can Move the Dial, Financially or Otherwise

Know Your Audience...

“Instead of programming for a mythical 'average alumnus'... alumni professionals are focusing more narrowly on two groups: the tiny fraction of alumni who are already loyal members, donors and volunteers, and the larger, more fickle group of alumni who are willing to engage with alma mater, but only if they see opportunities that speak to their personal and professional needs.”

*Andy Shaindlin
Vice President
Grenzebach Glier and Associates*



Baseline Programming

- All-call and open events and opportunities that allow for on-ramp for potentially interested persons to engage
- “Keep the Porch Light On”
- Communicates that every alumnus matters

Strategic Engagement

- Targeted and customized opportunities meant to make inroads into high-value segments or important constituencies
- Necessarily limited in number and invite-only or open only to those eligible based on program criteria

Surfacing Alumni Inclined to Engage

Susquehanna Micro-Asks Detect Alumni Affinity and Philanthropic Propensity

Deploying “Affinity Detectors” Test Willingness to Engage

- 1 Ask alumni to share business cards for admissions display on various careers that liberal arts majors enter and for distribution to interested students
- 2 Ask alumni to share community service involvement, especially board service, for alumni social impact report

Process Every Spring Semester



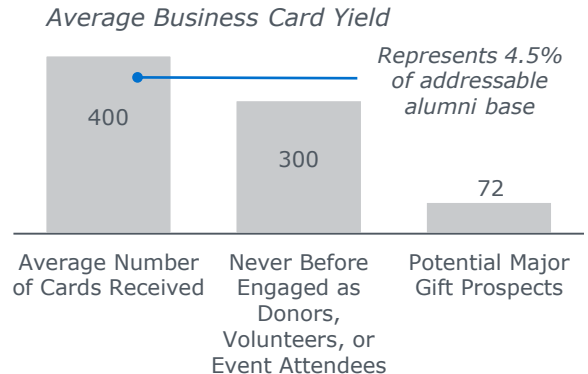
Use e-mail campaign and phonation callers to contact alumni



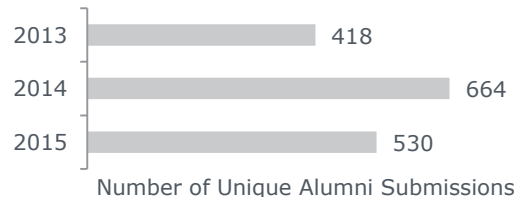
Update alumni information in advancement database



Share persons of interest with campus partners



Response to Community Service Reporting



Sourcing Future Alumni Leaders

Accelerating the Self-Identification Process

University of Nebraska-Omaha's "Young Alumni Academy"

Relying on a Proven Model



- Inspired by U.S. Chamber of Commerce's 10-month leadership programs for emerging professionals
- Alumni professionals from diverse fields invited to apply for program
- 40 individuals chosen for each cohort

Creating a Cohort of Leaders



- Participants attend monthly meetings with built-in time for networking
- Sessions include presentations by UNO leaders on topics such as the university's budget or athletics
- Final meeting drills down into volunteer activities at the institution

Building Current and Future Leaders

4-8

Graduates in each cohort immediately placed in university volunteer leadership roles

180+

Cohort graduates represent bench of future volunteer leaders across key industries in Omaha

From 30-Somethings to Engaged Philanthropists



Johns Hopkins University Focuses on Developing Donor Volunteers

“Second Decade Society” Key Components



Focused Recruitment

- 10-20 new members added each year, individuals usually in their early 30s
- Nominations sourced from faculty, current members, staff, and volunteer ranks



Giving Circle

- Members pay and allocate dues each year among various projects
- About 80% of funds go to supporting unpaid public service internships



Engagement and Philanthropy Education

- Members volunteer for various admissions, career, and student leadership initiatives
- Goal is to position members as the next generation of Johns Hopkins volunteer leadership
- Members gain in-depth knowledge on institutional governance and fundraising

Oh, the Places They Go

Pathing Individuals to Higher Levels of Leadership and Giving

A Virtuous Cycle of Upgrades at John Hopkins University

Volunteering Upgrades



Structured off-boarding process: staff works with members in final three years to identify next steps

Philanthropic Upgrades



Members asked to contribute annual dues, resulting in \$70,000 each year for the giving circle



Most members go on to serve on advisory councils, the alumni board, and in other roles



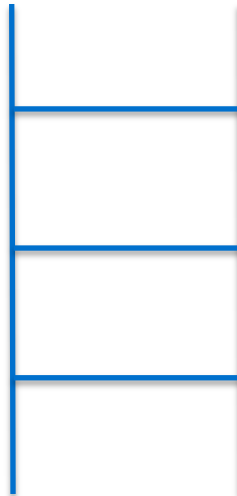
Each member solicited for unrestricted annual fund ask customized to capacity



Numerous SDS alumni have gone on to serve on the Hopkins Board of Trustees



About 10 members are in process of making their first major gift to the institution at any given point



McGill University Produces Internal Roster of “Must-Watch” Volunteers



Purpose

To identify, track, and “career path” high-potential leaders to increasingly responsible volunteer roles and to offer a structured education in understanding the institution

Key Steps for Creating the List

- 1 Solicit nominations from deans, unit development staff, and senior advancement leaders
- 2 Identify criteria for adding individuals to the watch list, including capacity and demonstrated effectiveness as a volunteer
- 3 Evaluate all names and cull the list to 100 individuals on the watchlist
- 4 Assign individuals to a “volunteer prospect manager” who identifies next steps for volunteering and crafts overall engagement plan
- 5 Revisit and update list annually

Needles in the Haystack

Impact and Engagement Matrix Reveals Highest ROI

University of Waterloo Segmentation Reveals Must-Engage Constituents

High Potential for Impact	Potential Leaders 3,346 alumni (3%) Percentage of total giving pool (2%) Average lifetime giving (\$737)	Leaders 1,248 alumni (<1%) Percentage of total giving pool (78%) Average lifetime giving (\$94,897)
	Sleepers 128,823 alumni (87%) Percentage of total giving pool (13%) Average lifetime giving (\$158)	Champions 12,481 alumni 9% Percentage of total giving pool (7%) Average lifetime giving (\$819)
Low Potential for Impact	Low Current Engagement	High Current Engagement



How Waterloo Did the Math

- **Engagement:** Conducted individually-identifiable survey of alumni with 10% response rate, generalized the top engagement correlates from respondents, and extrapolated for remaining 90% of alumni based on existing data
- **Impact:** Built a predictive impact model based on existing information in database, factors relevant to university strategic plan (e.g., international address) and purchased data on wealth and job titles



A Sudden Realization

“Some of the best alumni programs have 30% alumni engagement. When analyzing who these engaged alumni are, it’s highly likely that they are younger, live close to your campus and are not able to do much for you. If we continue to add resources to the traditional engagement strategies we’ll engage more alumni who are replicas of the folks we’ve already engaged, or we’ll offer redundant additional events, services and communications for those already engaged.

...If we truly want to advance the university, we need to engage those alumni who can have the greatest impact on funding, recruitment, graduate employment, internationalization and enhancing our institutional brand profile. Our executive-level (Leaders and Potential Leaders) are best positioned to help us achieve our top strategic goals. Sadly, this important group is usually missed in traditional alumni programming models.”

*Jason Coolman
Associate Vice President of Development
University of Waterloo*

Reinventing the Alumni Engagement Playbook

Retasking Alumni Relations to Engage "Potential Leaders" at Waterloo

Old Model



20 FTEs

Dispersed across central alumni office and academic units

- Oversee small portion of alumni base inclined to engage in mass efforts such as events, services and communications
- Offer duplicate programming



New Model



10 FTEs

Central office

"Serving the Base"

- Execute large-scale and traditions-based programming open to all alumni
- Host regional events with general content in areas with large alumni populations



10 FTEs

Academic units

"Targeted Advancement"

- Develop relationships with faculty, staff, or alumni who may be able to connect to Potential Leaders
- Design personalized volunteer roles, bespoke programming, and intimate invite-only events

Change Takes Time

Waterloo Still Processing Impacts of New Model

Short- and Medium-Term Results



Engagement with hundreds of Potential Leaders and several major and transformational gifts



Discovery of 300 planned gift prospects, majority of whom were under 40



Successful international recruitment partnerships with Potential Leaders in Singapore and Bermuda

50%

Of academic units adapted alumni relations staff to new model, yielding closer collaborations with development

Long-Term Goals



Continuing to transition alumni relations staff in remaining units to new strategic role



Development of protocols to quantify impact of new strategy, including number of Potential Leaders converted to Leaders

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Implementation Manuals From This Webconference Include...



- Top 100 Leaders Roster
- Junior Feeder Boards
- Data-Driven Alumni Strategy Development
- Affinity Detectors
- Alumni Leadership Academy



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