



The New Rules of Engagement

Building the Next Generation of Alumni Leaders and Volunteers

Advancement Forum



Thank You For Joining Us!

The Sixth 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](#)



[Register for Upcoming Webconferences in this Series](#)



["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

Also, you can find on-demand recorded versions of all previous webconferences in this series

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

We Can't Do It Alone Anymore

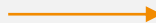
Foster Linkages Across Campus to Capitalize on Increasingly Granular Affinity



What Volunteers Want is Changing

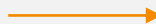


Alumni affinity for *institutional as a whole and class year*



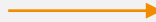
Alumni affinity increasingly tied to *academic area, identity group, co-curricular activity, etc.*

Alumni interested in learning about *university programs and activities*



Alumni interested in learning about *university's role in address of social and global problems*

Alumni content to respect *university's organizational structure*



Alumni interested in *multidisciplinary and cross-functional projects*

Alumni want *socially-focused* opportunities



Alumni want *more substantive, skills-based, segmented, and professional* opportunities

Alumni happy to *learn about* work of students and faculty



Alumni want to *interact directly with* faculty and students

The Center Cannot Hold

Myriad Forces Shifting Volunteerism to Units

Shifts to Come in Advancement's Role in Volunteer and Leader Engagement



Present: *What Volunteers Want is Changing*



Future: *Necessitating a Change in Strategy*

Alumni affinity increasingly tied to *academic area, identity group, co-curricular activity, etc.*

Alumni interested in learning about *university's role in address of social and global problems*

Alumni interested in *multidisciplinary and cross-functional projects*

Alumni want more *skills-based, segmented, and professional opportunities*

Alumni want to *interact directly with faculty and students*

1

Division of Responsibility Between Central and Units

2

Alumni Relations Staff Skillset and Competencies

3

Direction of Reporting and Tracking

Focus on coordination across units, rather than planning volunteer events

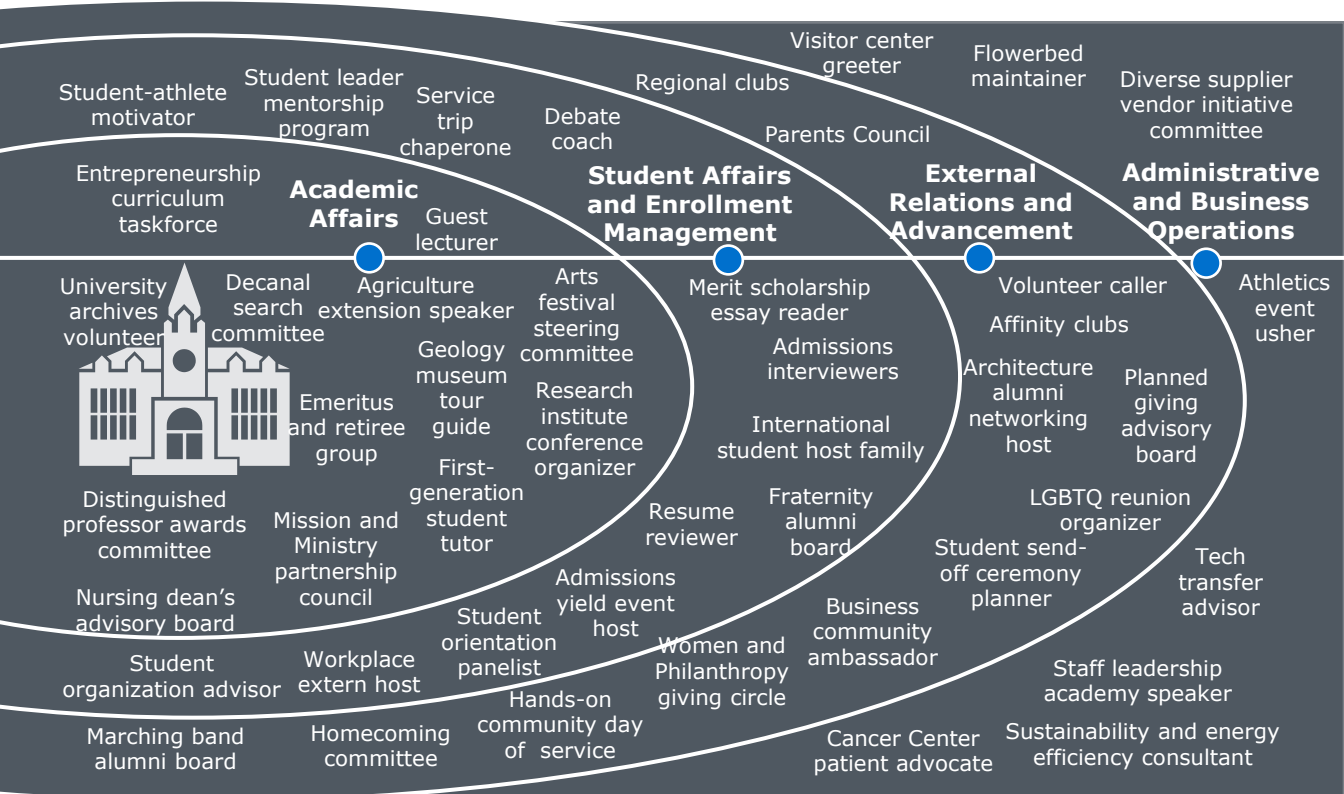
Acts as consultant, training units to craft engaging roles and utilize best practices in volunteer management

Shifts from volunteer opportunity provider to connector and concierge function

Champion data collection and tracking infrastructure for others

Hidden in Plain Sight

"Ghost Volunteers" and Secret Opportunities Already Haunt Campus





Trading Information For Recognition

Scaling Stewardship for Decentralized Units and “Ghost” Volunteers

University of San Diego’s Campus Alumni Engagement Form

Key Components

- Send e-mail three times a year after university events that engage many alumni volunteers
- Thank faculty and staff for engaging alumni
- Highlight how Alumni Association can support their efforts:
 - Arrange parking for alumni visitors
 - Provide appreciation gift for speakers/presenters
 - Send a year-end thank you note from the university to all alumni volunteers
- Ask units to complete Campus Alumni Engagement Form to access these benefits

- Alumni name, contact information, class year if known
- Date, time, and location of events
- Other staff, alumni, or faculty participants in program
- Description of capacity or role alumni volunteer is fulfilling
- Specific requests, questions, or notes

350

Number of alumni volunteers discovered through form in first three years, representing **32%** of annual volunteers

94

Unique submissions from campus units, over half from faculty



Another Kind of Venture Philanthropy

Subsidizing and Jumpstarting Innovative Volunteer Roles Across Campus

“Stanford Associates” Grant Program

A Seed Fund for Volunteering

- 1 Developed seed fund for innovative volunteer opportunities
- 2 Request proposals for new projects (or enhancements to existing ones) that engage alumni
- 3 Receive 15 proposals per year
- 4 Top proposals receive up to \$10,000 funding



Recently Funded Projects

- Public Service Fellows in residence program
- Female student leader mentorship initiative
- Volunteer-conducted oral history of Stanford LGBTQ community
- Training videos for project leaders for global day of community service
- Volunteer-reviewed literary awards program
- Social media campaign to profile Stanford volunteers through photography



Equipping Allies Across Campus

“The majority of grants go to units beyond the alumni and development division, in the research, academic, and student affairs sides...We always encourage our colleagues to incorporate alumni volunteers in their work, but this grant program shows support in a tangible and meaningful way.”

Ana Moreno VanDiver

Senior Manager for Alumni Volunteer Engagement

150+

Projects funded over the last 30 years, totaling \$800,000 of investment

Cops on the Beat

Creating Formal Roles and Structures at Three Institutions

	Seton Hall University	Ohio State University	Rutgers University
Structure	Created Associate Director for Campus Partnerships role in 2013 (1 FTE ¹)	Created Office of Volunteer Relations in 2014 (2 FTE)	Created Office of Volunteer Engagement in 2008 (6 FTE)
Key Duties	<ul style="list-style-type: none"> • Create and keep current master inventory of all volunteer roles • Collaborate with units to invite high-profile alumni back into classroom as speakers 	<ul style="list-style-type: none"> • Develop volunteer-facing portal and university-wide application system for selective roles • Conducts quarterly professional development meetings for volunteer managers across campus 	<ul style="list-style-type: none"> • 3 staff relationship managers work with assigned “clients” across units, schools, and alumni groups • 1 staff member focuses on data tracking across campus • Respond to alumni interest form submission within 48 hours with customized suggestions and follow up again within a week • Collaborate with development officers seeking roles for donors
Notable Achievement	Created new survey reporting practices for volunteering across the university	Held first day of community service for local alumni	Founded student alumni association to groom student leaders to be future alumni leaders

Recent Investments

First Mover

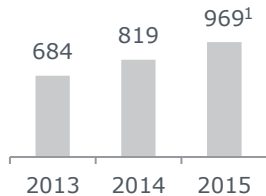
1) 50% of role dedicated to volunteering

Doing Well By Doing Good

No Wrong Way to Get Started



Number of Alumni Volunteers



800



volunteer signups facilitated through portal in the first year

140+



RUTGERS

Number of chartered regional, interest, and affinity volunteer groups

60%

Of academic units have posted at least one opportunity

47,130

Recorded volunteer hours across 2014-2015

Critical Considerations for Your Volunteer Management Structure



- Prioritize leadership level volunteers, mass volunteers, or both?
- Focus on strategy and coordination or administration of high-profile volunteer groups?
- How to organize decentralized collaboration? Options include liaison structure, indirect lines of management, monthly stakeholder meetings, and/or incentivized data reporting.

1) Goal for 2015

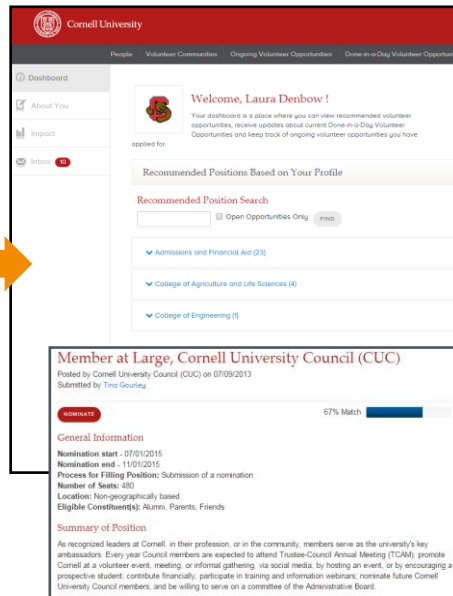
One-Stop Shop and On-Ramp for Volunteerism

"CUVolunteer" System¹ Matches Alumni Assets with University Needs

Where are you most experienced?

Select up to five... just click on the picture.





Welcome, Laura Denbow!

Your dashboard is a place where you can view recommended volunteer opportunities, receive updates about current One-in-a-Day Volunteer Opportunities and keep track of ongoing volunteer opportunities you have applied for.

Recommended Positions Based on Your Profile

Recommended Position Search

- Admissions and Financial Aid (2)
- College of Agriculture and Life Sciences (4)
- College of Engineering (1)

Member at Large, Cornell University Council (CUC)

Posted by Cornell University Council (CUC) on 07/09/2013
Submitted by Tina Gouging

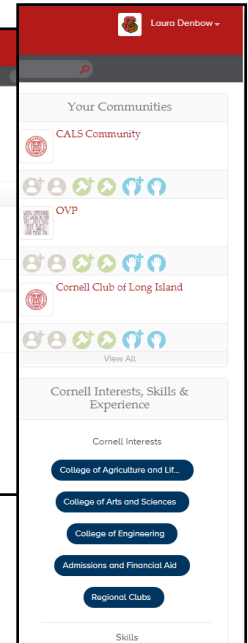
67% Match

General Information

Nomination start - 07/01/2015
Nomination end - 11/01/2015
Process for Filling Position: Submission of a nomination
Number of Seats: 400
Location: Non-geographically based
Eligible Constituent(s): Alumni, Parents, Friends

Summary of Position

As recognized leaders at Cornell, in their profession, or in the community, members serve as the university's key ambassadors. Every year Council members are expected to attend Trustee-Council Annual Meeting (TCAM), promote Cornell at a volunteer event, meeting or informal gathering, via social media, by hosting an event, or by encouraging a prospective student; contribute financially; participate in training and information webinars; nominate future Cornell University Council members; and be willing to serve on a committee of the Administrative Board.



Laura Denbow

Your Communities

- CALC Community
- OVP
- Cornell Club of Long Island

Cornell Interests, Skills & Experience

Cornell Interests

- College of Agriculture and Life Sciences
- College of Arts and Sciences
- College of Engineering
- Admissions and Financial Aid
- Regional Clubs

Skills

Recommendation engine diagnoses skills and interests; identifies open opportunities that match them; and explains next steps for contact, application, or nomination

1) Cornell University partnering with GiveGab to build first-ever volunteer management platform exclusively for higher education; currently seeking other alpha partners

Streamlining Management Across Campus

Common Back-End System Eases Decentralized Collaboration

Additional Key System Features for Advancement Stakeholders



MGOs can view volunteer profiles to see how they define interests and affinity and are automatically informed of all nominations and movements



Each volunteer organization and community has own page to store documents and enable communications



Volunteer managers curate own unit's roles on platform to create a "market" of opportunities and can headhunt best-fit prospects for new roles based on profile features

System Still in Testing Mode, but Already Garnering Buy-In

3,496

Number of volunteer opportunities loaded onto system thus far (**35%** require only self-nomination)

5,503

Number of volunteers added to the system (**21%** created profiles, rest were created for them)

3,043

Number of nominations to boards and councils submitted through system thus far (more than doubled from old manual system)

And That's Not All

A Host of Other Ways for Alumni Relations to Play a Strategic Role



**Pilot Digital
Engagement Initiatives**



**Create Targeted
Volunteering Opportunities**



**Streamline Information-
Sharing**



**Prioritize Revenue-Oriented
Programming**



**Explore Organizational
Realignments**

Broader Implications for Advancement



Greater intentionality and segmentation in targeting requires stronger data disciplines



Stronger collaborations among corporate, career, executive education, and workplace-facing staff members



Must work more closely with academic leaders, student affairs departments, athletics, etc. than ever before

Broader Implications for Alumni Relations and Volunteer Managers



A departure from current skillsets (from execution-oriented to more consultative in nature) and greater professionalization



Enhanced connectivity with development

**More Investment,
Not Less**

**But That Doesn't Mean It Will
Look the Same....**

Now Hiring the Alumni Relations Officer of 2025



Reimagining the Community and Constituency Management Enterprise

Relationship Engineer

MGO Who Doesn't Ask for Money

- Skilled executive communicator building pipeline of warm leads and generating social capital
- Makes targeted and proactive asks of portfolios of prospects, volunteers, prominent alumni and community members to generate affinity

Cultivation Consultant

Development Associate on Steroids

- Hand-in-glove partner to MGOs and staffer of boards and councils
- Facilitates and designs volunteer engagement to systematically penetrate valuable networks
- Two-year tours of duty across academic and student affairs units to develop volunteer capacity

Community-Embedded Organizer

Staffer to Work Between The Units

- Curator of alumni talent to execute on university strategic plan
- Activates alumni connections around interdisciplinary academic areas, multidisciplinary occupational clusters, cross-functional initiatives, social causes, and special populations that align with institutional priorities

Digital Engagement Director

Grounded Leadership Annual Giving

- Social media and communications guru
- Captures affinity intelligence from online media
- Designs opportunities for undercapitalized donors to engage remotely, including Google Hangout class speaking, Skype student discovery interviews, and invited content submissions

EAB Resources for You and Your Team

Supporting Implementation

Alumni Leader and Volunteer Resource Center



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



[Access Other Webconferences in this Series](#)



["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

Also, you can find on-demand recorded versions of all previous webconferences in this series



EAB

Education Advisory Board

2445 M Street NW, Washington DC 20037

P 202.266.6400 | F 202.266.5700 | eab.com