

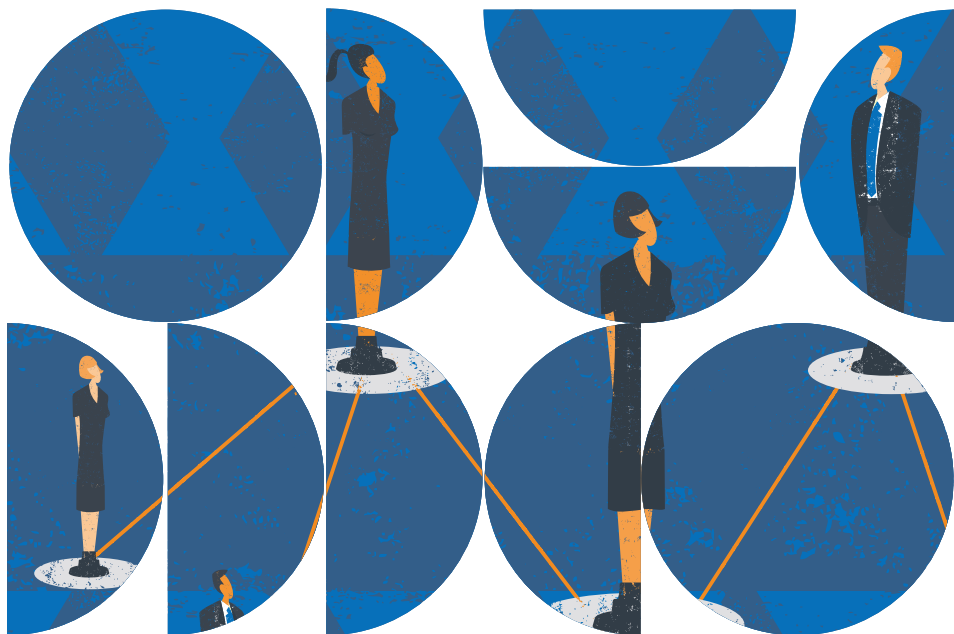


EAB

# The Strategic **Alumni** **Relations** Enterprise

Ensuring Relevance and Impact in a New Era

Advancement  
Forum







EAB

# The Strategic **Alumni Relations Enterprise**

Ensuring Relevance and Impact in a New Era

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# Top Lessons from the Study

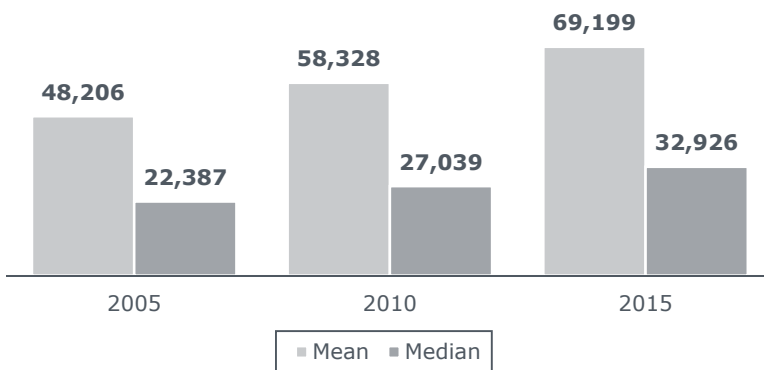
## A Rapidly Shifting Landscape

The alumni relations field has changed profoundly in recent years. Alumni populations are growing, donor counts are dropping, and alumni are increasingly unresponsive to their alma mater's traditional engagement efforts. As a result, the question of how to engage alumni is challenging advancement leaders across higher education.

New digital communication channels lead many alumni to circumvent their alma mater to connect with their former classmates, but even engaged alumni are dissatisfied by the underwhelming array of happy hours and social events that alumni relations professionals offer.

## Alumni Populations Continue to Expand...

Mean and Median Alumni of Record



## ...While Disengagement Grows

### An Era of Skepticism

45%

Of alumni under 35 disagree that their alma mater values its relationship with them by keeping them closely connected

## Rising Questions About ROI

The drop in engagement has come at a time when many senior leaders are asking about alumni relations' relevance within advancement. Engagement is a crucial part of cultivation, but many alumni relations professionals cling to their tradition of "friendraising" and avoid collaborations with development.

## Frequent Questions and Concerns from University Leaders



How do **social events** educate alumni about the institution's mission?



Do these activities **correlate with giving** later on?



Do alumni have the **time or desire to attend** our events?

## A New Path Forward

To adapt to this changing environment, innovative institutions take strides to meet the engagement needs of today's alumni while fostering a seamless transition between engagement and giving. They facilitate high-impact engagement through digital programming and targeted volunteer opportunities. At the same time, they hardwire organizational processes so that alumni relations and development professionals communicate, collaborate, and, in some cases, consolidate their operations.

Source: Voluntary Support of Education Survey, 2015; "Mood of Alumni 2010," Engagement Strategies Group, July 2010, <http://im.dev.virginia.edu/wp/engagementcommunity/files/2011/11/Mood-of-Alumni-2010.pdf>; EAB interviews and analysis.



# Essay: Alumni Relations in a New Era

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# The Changing Alumni Landscape

Today's alumni relations professionals face a profoundly different environment than their predecessors did. On the one hand, the enrollment boom of recent years has resulted in larger alumni populations. The average alumni body in the United States grew by about a third at both private and public institutions in the last decade. This growth has created immense problems of scale for engagement efforts.

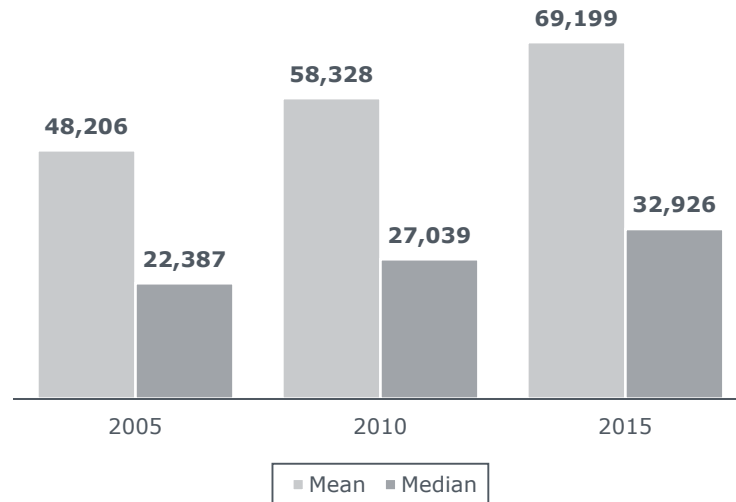
At the same time, the fundraisers whom alumni relations professionals work alongside—and sometimes report to—are seeing their donor numbers drop every year. Fewer people are giving, despite the growing number of prospects.

## An Expanding Base, but with Less Institutional Affinity

### Alumni Populations Continue to Grow...

*Mean and Median Alumni of Record*

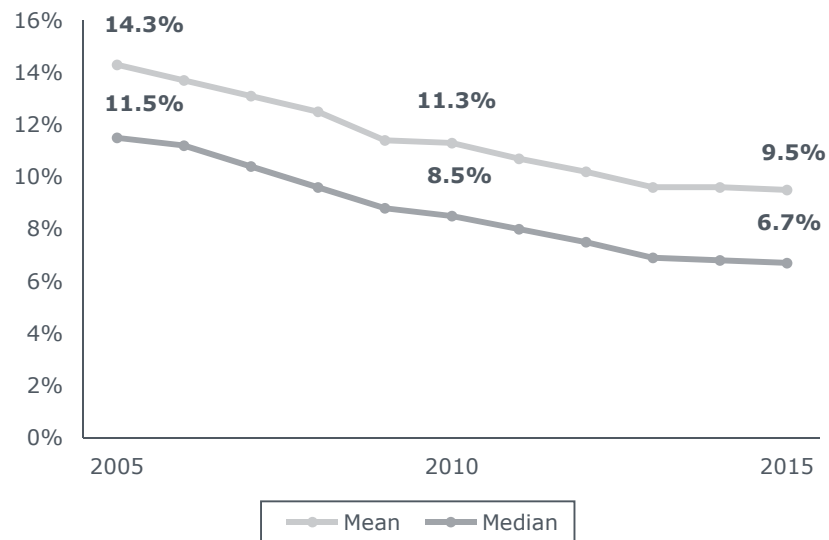
VSE Survey, 2005-2015



### ...While Participation Rates Free-Fall

*Mean and Median Alumni Participation*

VSE Survey, 2005-2015



Source: Voluntary Support of Education Survey, 2003-2013; EAB interviews and analysis.



# Trying to Turn the Tide

In the midst of these changes, institutional leaders are looking to alumni relations professionals for help. Investments in alumni relations continue to be strong.

These investments are used to fund a diverse suite of activities, including invitations to student activities, alumni board meetings, and alumni social gatherings. Most programs are staged in person and emphasize community-building and socializing among alumni.

## Institutions Invest in Alumni Programs to Drive Engagement



### Common Alumni Engagement Strategies

✓ Invitations to college events	✓ Invitations to student activities
✓ Alumni board meetings	✓ Affinity-based events
✓ Free alumni social gatherings	✓ College career services
✓ College volunteer opportunities	✓ Paid alumni social gatherings

Source: Voluntary Support of Education Survey, 2015; EAB interviews and analysis. See also Kroll J, Benchmarking Investments in Advancement: Results of the Inaugural CASE Advancement investment Metrics Study (AIMS), CASE, March 2012, pp. 22, 27.

# Young Alumni Remain Disengaged

Despite these investments, alumni relations professionals struggle to connect with many of their constituents, especially the youngest generation of graduates. Nearly half of young alumni believe that their institutions are not effectively engaging them. For them, in-person social events aren't enough.

These attitudes translate into declining attendance at events and generational gaps in alumni association membership. As a result of these trends, many advancement leaders have begun to worry about the future of alumni engagement at their institutions.

## Programming Proves Less Successful with Gen X and Millennials

### An Era of Skepticism

45%

Of alumni under 35 disagree that their alma mater values its relationship with them by keeping them closely connected

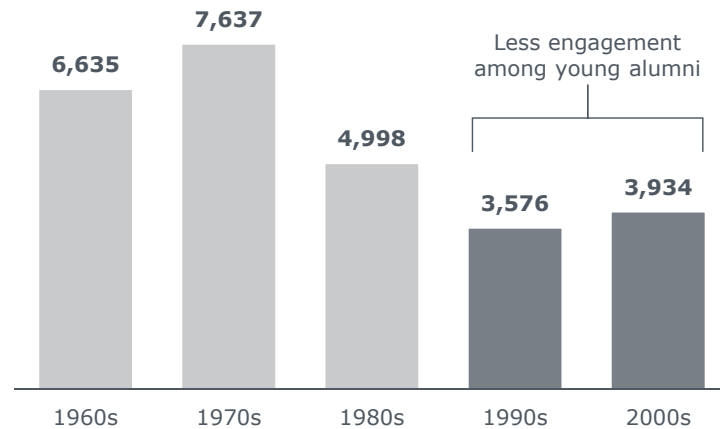
### Failing to Broaden Reach

"We keep attracting the same people to the same events. Our programs only touch a small group of alumni who are already committed."

*Chief Advancement Officer  
Public University*

## Alumni Association Membership by Decade of Graduation

Midwestern Public University, 2012



Source: "Mood of Alumni 2010," Engagement Strategies Group, July 2010, <http://im.dev.virginia.edu/wp/engagementcommunity/files/2011/11/Mood-of-Alumni-2010.pdf>; EAB interviews and analysis.

# The Digital Lives of Alumni

Advancement leaders often wonder why alumni ignore efforts to engage them. Perhaps the biggest reason is that alumni have found new, easier ways to connect with one another.

In the past, the alumni office was the conduit through which alumni found their old classmates and kept up to date with them. Today, that's not the case. The digital revolution of the past decade has changed that. Typically, alumni know who from their graduating class is getting married, having kids, starting new jobs, and moving to new cities long before the alumni office does. And if they want to touch base with them, they have countless ways to do so, from an email, to a Facebook or LinkedIn message, to a Snapchat.

## A Crisis of Relevance for Alumni Relations

### The Old Paradigm



Alumni relations offices broker relationships between alumni

### The New Paradigm



Alumni use social media to connect directly with each other

## The Disappearing Middleman

**57%**

of Millennials use Facebook to coordinate social plans at least once a week

**80**

Average number of pages, groups, and events to which a Facebook user is connected

**1.48M**

Average number of event invites that are posted every 20 minutes on Facebook

Source: "Fear of Missing Out," JWT Intelligence, March 2012, [http://www.jwtintelligence.com/wp-content/uploads/2012/03/F\\_JWT\\_FOMO-update\\_3-21-12.pdf](http://www.jwtintelligence.com/wp-content/uploads/2012/03/F_JWT_FOMO-update_3-21-12.pdf); "Facebook Statistics," Statistics Brain, July 1, 2014, <http://www.statisticbrain.com/facebook-statistics/>; Bullas J, "50 Fascinating Facebook Facts and Figures," April 28, 2011, <http://www.jeffbullas.com/2011/04/28/50-fascinating-facebook-facts-and-figures/>; EAB interviews and analysis.

# Tough Questions from the Top

The shift in engagement patterns couldn't come at a worse time for alumni relations professionals. While strong investments in alumni relations persist, institutional leaders' enhanced focus on outcomes and ROI has led them to ask a number of tough questions about engagement activities.

Alumni relations professionals are under more scrutiny today than at any point in the past. With institutional leaders trying to justify every dollar they spend on advancement, there's more skepticism than ever before about the purpose and value of alumni relations.

## CAOs and Senior Leaders Focus on Return on Investment

### Frequent Questions and Concerns



How do **social events** educate alumni about the institution's mission?



Do these activities **correlate** with giving later on?



Do alumni have the **time or desire** to attend our events?



What role can alumni relations play in the age of social media?



### The Rubber Meets the Road

"One of the biggest hurdles in our industry is that alumni offices think they are just about engagement. Engagement for what? Engagement for engagement's sake? There has to be a return. We are all about fundraising at the end of the day. If my alumni relations staff aren't helping our fundraisers out—if they're sitting behind a firewall—then they aren't doing their jobs."

Chief Advancement Officer  
Public University

# Hard to Quantify Impact

Ideally, this high-stakes climate would inspire alumni relations professionals to meet criticisms head-on and point to the tangible, concrete outcomes that their work supports. Sadly, this has not been the case.

While other units within the university have turned their sights to metrics that directly impact the institution's bottom line, alumni relations remains mired in the language of friendraising. Many alumni relations professionals continue to measure their success based on the "soft" metrics of engagement, satisfaction, and attendance. As a result, advancement leaders question what institution-wide goals engagement ultimately helps them achieve.

## In an Age of Belt-Tightening, Alumni Relations Rarely Points to Bottom Line

### Common Alumni Engagement Strategies

Office or Division	Returns or Outcomes
Development	Fundraising revenue number of gifts donor participation
Admissions	Matriculating students tuition revenue
Career Services	Job placements corporate partnerships
Advising	Year-to-year retention graduation rates
Alumni Relations	Engagement satisfaction attendance

"Soft," non-revenue metrics understate the importance of alumni relations

### An Existential Dilemma

"Our new board chair was rolling his sleeves up and trying to understand the nuts and bolts of the organization's budget. He saw the very significant investment we were making in alumni programming. His question to me, which really knocked me back on my heels because it was so unexpected, was, 'Why do we even have an alumni association?'"

*Chief Advancement Officer  
Public University*

Source: "Beyond Friendraising: The Shift to Metrics-Driven Alumni Relations," Academic Impressions, March 27, 2014, <https://www.academicimpressions.com/news/beyond-fundraising-shift-metrics-driven-alumni-relations>; EAB interviews and analysis.

# Happy Hours, BBQs, and Meet-Ups

The current roster of social events that fill engagement calendars do little to assuage fears about low-impact programming. While community-building among alumni is undoubtedly important—alumni networks do, in fact, add to the value of a degree—the events and activities that alumni relations professionals currently put on do little to further broader university goals.

Often, these programs persist because of inertia and tradition, rather than their role in achieving specific goals that the alumni office is pursuing.

## Programming Misaligned with Institutional Needs

### Events Calendar

*February:* Young alumni wine tasting  
*April:* Spring banquet  
*May:* Reunion festivities  
*June:* Soup kitchen volunteer day  
*September:* A cappella national tour  
*October:* Homecoming  
*November:* Cocktail hour for 1990s grads  
*December:* Holiday hot chocolate  
*January:* Ice-skating for alumni families

### Change of Focus

“In general, we as a profession are very good event planners. But instead, we should be thinking about ourselves as engagement officers. We should be saying, ‘This is my program area, this is my audience, these are my big goals—how are events going to help me with those?’ It’s more like, ‘This is my program area, these are the events I’m going to do.’ We need to flip that.”

*Jennifer Lynham Cunningham  
Senior Director, Metrics+Marketing  
Cornell University*

# Positioned for Great Impact

Innovative alumni relations units are starting to take a different approach. They identify their goals prior to planning programs, and they build out their engagement efforts for the express purpose of achieving them.

Importantly, their goals go beyond mere satisfaction and attendance, aiming instead at strategically critical institutional priorities.

No other unit is as well positioned as alumni relations to impact these priorities. By working with alumni, staff members can help fill the enrollment pipeline, support student and alumni career development, boost alumni advocacy, and further the advancement office's fundraising efforts.

Only by capitalizing on this position within the institution will alumni relations offices skirt a crisis of relevance.

## Alumni Relations Must Pivot to Capitalize on Engagement Opportunities

### At the Intersection of Institutional Needs



Source: EAB interviews and analysis.

# Calibrate Programming to Meet Alumni Demand

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The first step in transforming the alumni relations office into a more strategic operation is to offer programming that aligns with the needs and wants of today's alumni.

The vast majority of alumni look to their alma mater for little more than quick, one-off touches. Digital tools offer countless opportunities to stay relevant in the lives of alumni and, in some cases, draw them into more meaningful in-person programming.

For highly engaged alumni, offering opportunities to directly impact key institutional priorities will both heighten their affinity and demonstrate the value of alumni relations to institutional leaders.

## EAB Recommendation 1: Facilitate High-Impact Engagement

### **Pilot Digital Engagement Initiatives**

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Programming fits into busy alumni schedules and accommodates their desire to interact via digital channels

### **Create Targeted Volunteering Opportunities**

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Structured opportunities allow alumni to use their time and talent to support key institutional priorities, such as student recruitment and career development



# Develop Stronger Connections

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In addition to recalibrating programming, alumni relations offices should explore strategies to communicate, collaborate, and integrate with their colleagues in development.

Information siloes impede partnerships all across the university, but they are rarely more frustrating and avoidable than within university advancement. Best-practice institutions have explored ways to share information across the engagement-fundraising divide to better align alumni outreach with divisional goals.

Collaborating on programs has even greater potential for furthering the goals of both alumni relations and development while eliminating redundant activities. In addition, some institutions have gone beyond partnerships to actually merge alumni relations professionals and their fundraising counterparts in a single reporting line.

Together, these approaches to reorienting alumni relations will better align their efforts with the needs of their institutions and the alumni they serve.

## EAB Recommendation 2: Enhance Partnerships with Development

### **Streamline Information Sharing**

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Alumni relations systematically passes information on prospects to development professionals for use in cultivation

### **Prioritize Revenue-Oriented Programming**

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Alumni relations programming is tailored to further specific development goals, such as regional campaign penetration

### **Explore Organizational Realignments**

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Alumni relations staff take on development responsibilities through revised job descriptions and new reporting lines



# Digital Engagement Initiatives

## Recommendation 1: Facilitate High-Impact Engagement

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- Digital Faculty Interviews
- Alumni Engagement Web Portal

# Busy Is the New Normal

Today’s graduates have significantly less free time than alumni of previous generations. In some respects, this situation is of their own making. For many young alumni, a busy schedule is a status symbol that they meticulously cultivate. Long workdays are bookended by trips to the gym, drinks with friends, Skype conversations with old classmates, and other time-consuming activities.

In-person alumni relations programming has struggled to compete with these demands on alumni’s time. In fact, alumni cite the time commitment that engagement activities require as the primary reason they avoid them. For out-of-state alumni, the distance they must travel is a close second.

Despite the changing realities of alumni schedules, many alumni relations office continue to rely on an outdated social-event programming model.

## Millennials Struggle to Balance Packed Schedules and Commitments

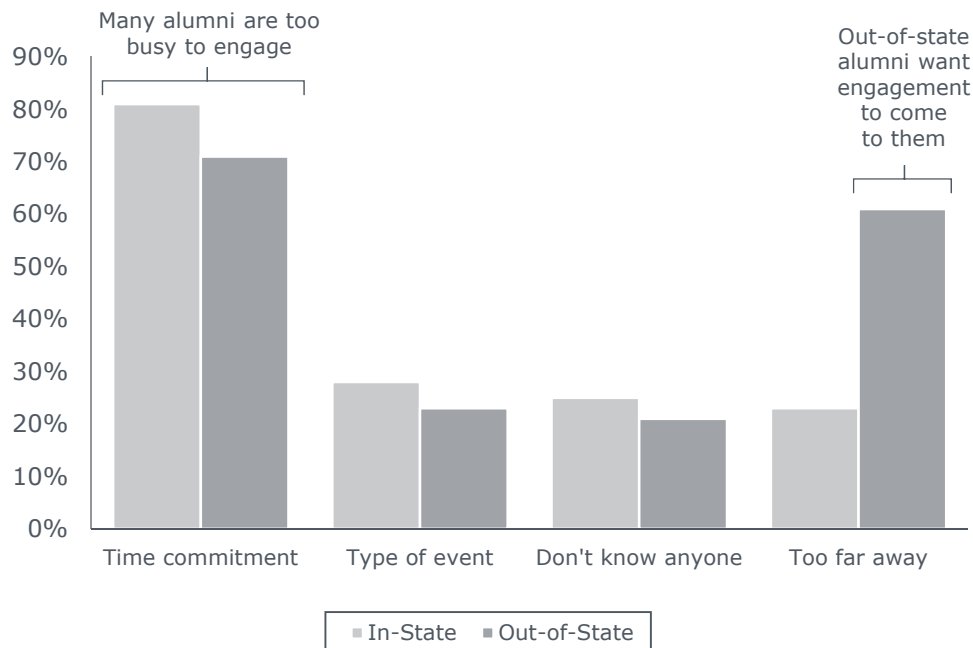
### The Overloaded Generation

“Our conversations take shape over who’s ‘swamped,’ ‘crazed,’ ‘overloaded’ or ‘hasn’t seen daylight in weeks.’ Oh—you slept in the office last Wednesday night? Never have time for lunch? You win.... For the Millennial set, a full Outlook calendar seems to have replaced the sports car as the new status symbol. Being busy means you’re important, needed, valued.”

Meghan Casserly  
Forbes

### Percentage of Respondents Citing Barriers to Participation in Alumni Activities

Alumni Attitude Study, 2001-2012



Source: Casserly M, "If Time Is Money, Millennials Are Broke—And They Couldn't Be Happier," Forbes, September 5, 2012, <http://www.forbes.com/sites/meghancasserly/2012/09/05/if-time-is-money-millennials-are-broke-busy-obsessed/>; "Alumni Attitude Study," CASE District III Presentation, [http://alumniattitudestudy.org/wp-content/uploads/2014/02/CASE-III-2014-Alumni-Speak\\_Findings-from-the-Alumni-Attitude-Study.pdf](http://alumniattitudestudy.org/wp-content/uploads/2014/02/CASE-III-2014-Alumni-Speak_Findings-from-the-Alumni-Attitude-Study.pdf); EAB interviews and analysis.

## Greener Pastures on the Web

Alumni relations offices persist with their traditional programming despite the growing alumni preference for digital engagement. Social media and other web-based channels have become staples of alumni lives. While young alumni use digital channels most heavily, every generation has taken to them in some capacity.

Yet these new forms of communication have gone largely ignored by the engagement specialists within advancement. To succeed in a world of disruptive innovations, alumni relations professionals must pivot to accommodate the behaviors of a wired alumni population.

### Today's Alumni Rely Heavily on Social Media for Connectivity



**23%**

of Facebook users check their accounts five or more times a day



**40M**

Photos are uploaded to Instagram by users every day



**1 in 5**

U.S. adults who use the internet read or post to Twitter accounts

#### Adapting to New Terrain

"The web is changing the way we do things. That darn screen levels the playing field."

*Ron Cohen  
Vice President for University Relations  
Susquehanna University*

Source: Honigman B, "100 Fascinating Social Media Statistics and Figures From 2012," Huffington Post, November 29, 2012, [http://www.huffingtonpost.com/brian-honigman/100-fascinating-social-me\\_b\\_2185281.html](http://www.huffingtonpost.com/brian-honigman/100-fascinating-social-me_b_2185281.html); Etherington D, "Instagram Reports 90M Monthly Active Users, 40M Photos Per Day And 8500 Likes Per Second," TechCrunch, January 17, 2013, <http://techcrunch.com/2013/01/17/instagram-reports-90m-monthly-active-users-40m-photos-per-day-and-8500-likes-per-second/>; "Social Networking Fact Sheet," Pew Research Internet Project, January 2014, <http://www.pewinternet.org/fact-sheets/social-networking-fact-sheet/>; EAB interviews and analysis.

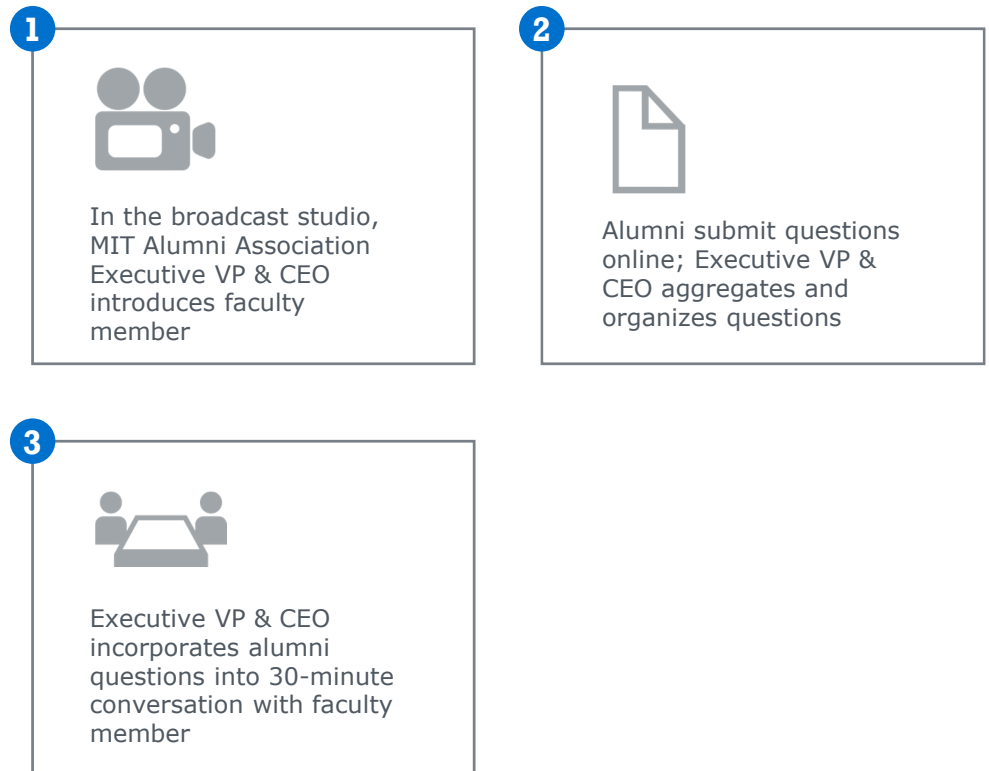
# Connect Alumni with Experts

One institution that has done a great job shifting their programming to cater to alumni's preference for digital engagement is the Massachusetts Institute of Technology (MIT). MIT hosts a Faculty Forum Online every month for 30 minutes. At these events the alumni association's executive VP and CEO interviews a faculty expert on a topic of high interest to MIT's alumni.

The interviews are broadcast live online during lunchtime, which allows MIT alumni around the world to tune in and hear their old professors expound on exciting topics. Alumni can also submit questions through MIT's online platform. The interviewer aggregates these questions and integrates them in real time into the conversations, which gives the Forums a participatory, high-touch feel.

## Short, Live-Stream Faculty Interviews Appeal to Alumni Interests

### Process for MIT's Faculty Forum Online



### Past Topics for Online Sessions

- Research in Women's Health
- Exploring Exoplanets
- Impact of the Presidential Election on Tax and Health Policy
- Climate Change Policy that Makes Economic Sense
- My Five Dinners with Ahmadinejad
- Privacy in the Digital Realm

Source: MIT, "Faculty Forum Online," <https://alum.mit.edu/learn/facultyforumonline>, accessed March 2014; EAB interviews and analysis.

# Continue the Conversation

MIT's Faculty Forums Online are just the tip of the engagement iceberg. Alumni who tune into the interviews can continue the conversation on the alumni blog, browse archived webcasts, or attend regional events themed around recent Forums that captured alumni interest.

These additional engagement opportunities illustrate a key component of successful digital engagement: rather than limit interactions to a single website, best-practice institutions lead with quick digital touches and transition interested alumni to more time-consuming activities. By proving the worth of engagement through low-commitment programming, they draw more alumni into meaningful engagement.

## MIT Uses Faculty Forum Sessions to Drive Alumni Interactions

### Opportunities for Additional Engagement



#### Interactions on Alumni Blog

Alumni participate in lively conversations in comments section of Forum-themed blog posts

#### Engagement with Archived Broadcasts

Digital library of past sessions allows alumni to view content at their convenience

#### Attendance at Regional Events

Regional MIT clubs host social events based on recent sessions to capitalize on interest and enthusiasm

### Alumni Respond with Gratitude and Enthusiasm

“What a breath of fresh air it is to learn that MIT is finally working on women’s health issues. Hurray! Keep up the good work.”

*MIT Alumni Blog Commenter*

Source: MIT, “Faculty Forum Online,” <https://alum.mit.edu/learn/facultyforumonline>, accessed March 2014; EAB interviews and analysis.

## ‘The Life of the Mind’

MIT’s digital engagement strategy paid off. Since its start in early 2011, the live-streamed Forums have on average attracted over 400 viewers each, while the archived interviews have brought in over 50,000 views from alumni around the world.

Their success is attributable to MIT’s efforts to align the Forums with the desires of their unique alumni population. MIT alumni are lifelong learners with strong ties to faculty members. Designing the program with those qualities in mind ensured its popularity.

Institutions that seek to replicate MIT’s success will want to consider what motivates and resonates with their alumni. Besides faculty members, potential candidates for interviews include career experts, student affairs administrators, and high-profile coaches.

### Faculty Research and Insight Differentiates MIT Forums



#### Keys to Success



##### Intellectual Stimulation

Staff pick topics that are newsworthy, align with alumni interests, and highlight MIT accomplishments; topics are chosen 4-8 weeks before broadcast to reflect current events



##### Exclusive Faculty Access

Sessions connect alumni with the world-class faculty members with whom they once studied

Source: MIT, "Faculty Forum Online," <https://alum.mit.edu/learn/facultyforumonline>, accessed March 2014; EAB interviews and analysis.

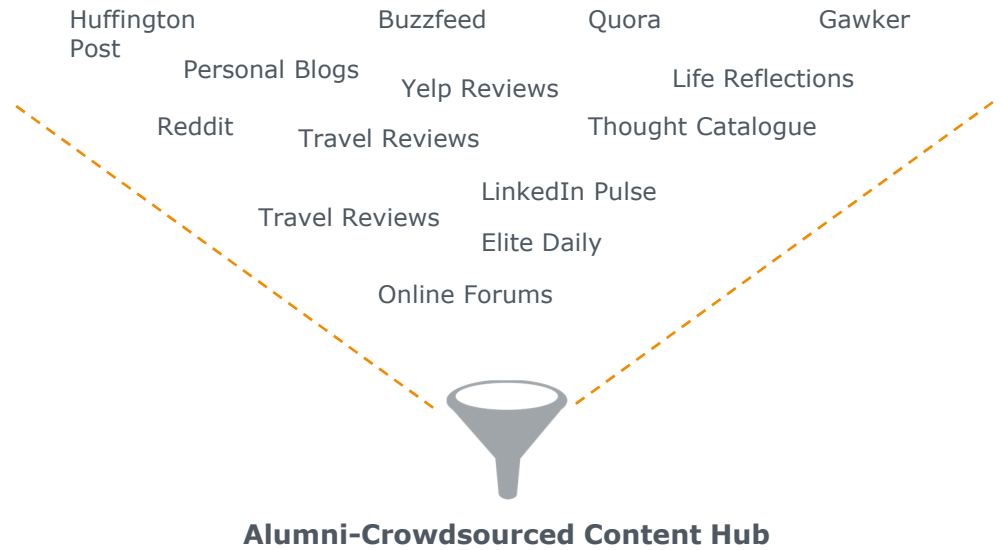
# The One-Stop Engagement Shop

The University of Virginia (UVA) has taken an even more comprehensive approach to digital alumni engagement. In Fall 2013, the university launched the UVA HoosNetwork, a one-stop-engagement shop for the alumni community.

The UVA HoosNetwork gives alumni an outlet for sharing stories, articles, and interviews with the broader alumni community. It also connects alumni who engage with the site to regional in-person events.

The site attracts about 30 new article submissions from alumni each month. These extensive offerings guarantee that any alumnus/a that visits the site will find something of interest.

## UVA's HoosNetwork Crowdsources Alumni Insights and Wisdom



The content hub displays a variety of articles, including:

- 5 Things I've Learned in 10+ Years of Corporate Marketing** (Author: DMarie-Dining)
- Skillet Apple Pie (Adapted from Trisha Yearwood's recipe)** (Author: DMarie-Dining)
- Western WAHOO** (September 4-6, 2015)
- Helping Your Child Learn Autonomy Through Choice** (Author: Please and Carrots)
- 15 Fun Things to Do With Kids in San Antonio** (Author: Kidventurous)
- Staying Fit While Traveling**
- 4 Tips for Surviving Law School**
- Returning to College After Serving**
- What to Wear to a Summertime Wedding** (Author: A Touch of Teal)
- The Cure for Career Confusion: Know What You Want in 5 Simple Steps**
- Gluten Free Vegan Brunch Menu** (Author: Veggie Quest)

Source: EAB interviews and analysis; "HoosNetwork." University of Virginia. 2015. <http://alumni.virginia.edu/hoosnetwork/>

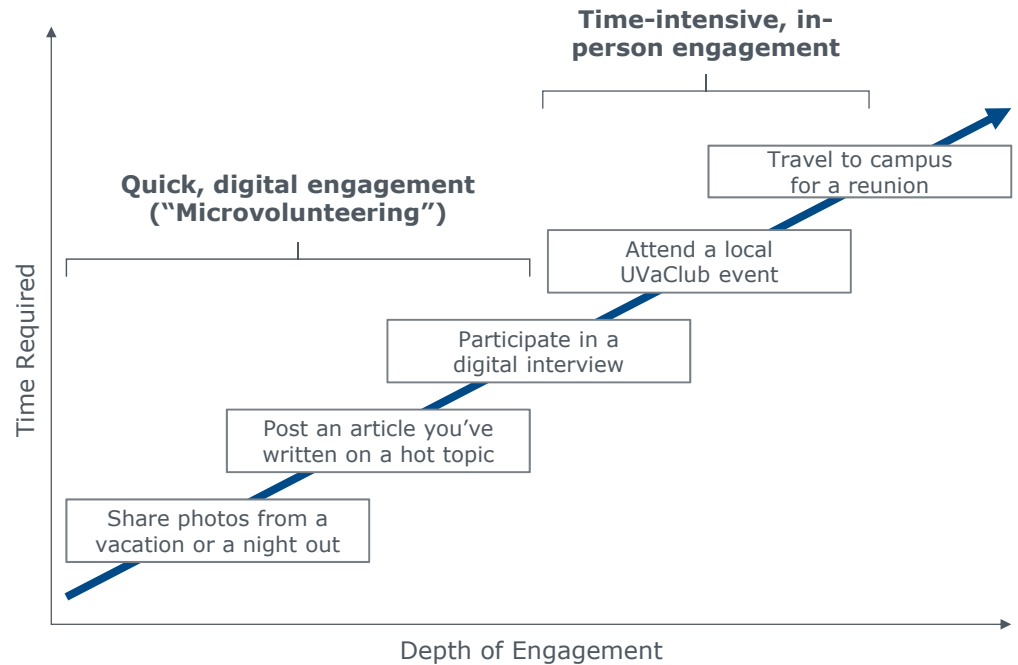


# Connecting on Their Own Terms

The ability to contribute content to the UVA HoosNetwork plays a key role in deepening affinity among alumni. For many UVA graduates, sharing photos with their fellow alumni or participating in a digital interview is all that they are initially willing to do to engage with the school. These touches are quick, easy, and they draw the alumni community together.

Alumni relations professionals at UVA hope that the positive experiences alumni have through “microvolunteering” will convince hesitant alumni to explore more time-intensive forms of engagement. The seamless integration of in-person event listings into the site builds connections between microvolunteering and attendance at regional and on-campus engagement activities.

## UVA HoosNetwork Promotes Deeper Engagement



Source: EAB interviews and analysis.

# Positioned for Success

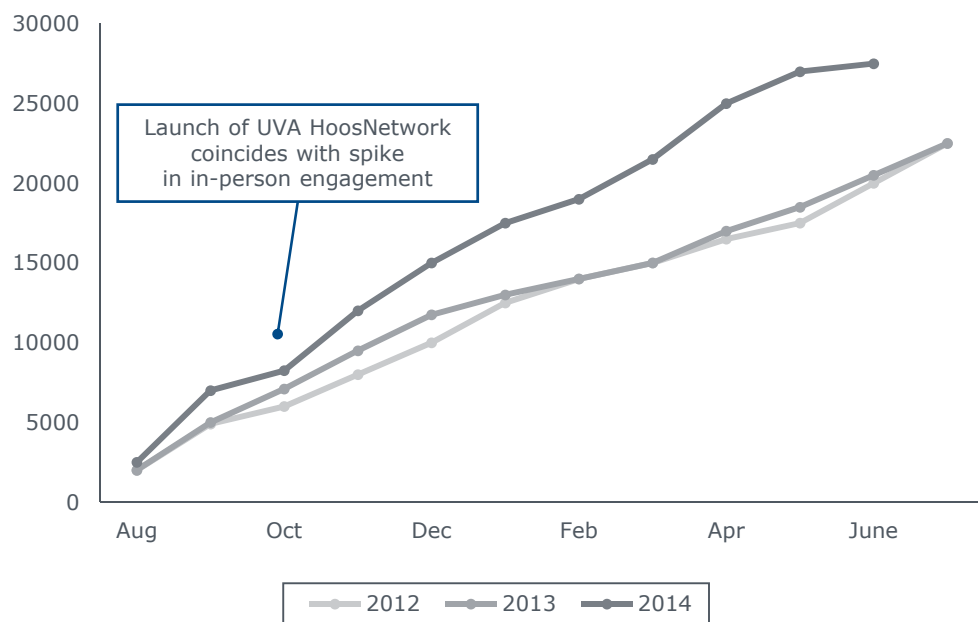
Tying microvolunteering to in-person activities through the UVA HoosNetwork has greatly benefited the university's engagement efforts. In year after the launch of the platform, registrations for in-person events spiked. In FY2014, UVA saw total registrations exceed the previous two years' totals by about 8,000 registrations.

Advancement leaders are beginning to consider how to use these gains to boost fundraising returns. One potential path is to use the extensive engagement data that the site generates to better estimate their alumni's propensity to give. With this information, they can prioritize cultivation so that the most likely alumni donors receive targeted, high-touch treatment.

## UVA HoosNetwork Opens Up Possibilities for Engagement and Giving

### UVA Office of Engagement Registrations

FY2012-FY2014



**Improved Prospecting**

“We have all the tools we need to prospect appropriately, just not the people power to do it. At the annual giving level we have people that have given \$2K per year for 30 years and have never been visited.... Our database is full of alums that have given big chunks of money that have never been truly cultivated. So the engagement data will help provide strength to our propensity scoring.”

*Ryan Catherwood  
Former Director of Engagement Strategy  
University of Virginia*

Source: EAB interviews and analysis.

# Moving from Engagement to Giving

Beyond propensity modeling, the UVA HoosNetwork will help fundraisers at the institution make the case for giving to a wide base of alumni. It does so by leading with engagement. The website offers the sort of high-quality engagement that proves the worth of an investment in UVA. In addition, it features links to the school's giving page and advertises a particularly high-impact scholarship, so alumni who feel inspired to make a financial contribution can do so easily.

A sophisticated next step in these efforts is to leverage user-level data that UVA gathers from alumni who sign into the site to segment fundraising appeals. While this initiative is still on the horizon for the institution, it's the sort of effort that has the power to transform fundraising.

## Next Steps for UVA HoosNetwork's Development Push

### Leading with Engagement and Advice

"When you graduate from college, you don't owe the institution anything. We're trying to lead with engagement opportunities and give back to alumni in the form of continued education and advice. Then, in the same breath—though perhaps in the second half of that breath—we'll bring up fundraising priorities."

*Ryan Catherwood  
Former Director of Engagement Strategy  
University of Virginia*

## 1

### Drive Online Giving Through UVA HoosNetwork

- Connect to giving pages in site footer and in text links throughout site
- Promote scholarship giving with featured story

## 2

### Use Engagement Data for Cultivation (Forthcoming)

- Segment solicitations based on website interactions
- Drive prospects to events that contribute to cultivation
- Identify likely donors based on website-prompted engagement

# Online Channels Sustain Alumni Connections

The best digital engagement initiatives offer alumni compelling experiences on the web while leading them to more intensive in-person activities.

Event tie-ins make sure that online engagement is elevated above all the other things alumni do on the web, transforming digital engagement into a community-building activity. Alumni-generated content and programming that conforms to alumni demand creates customized, meaningful experiences on the web. Lastly, the unique experiences that alumni can access through faculty interviews and a bounded university portal underscore why it is that they enrolled at the institution in the first place.

## Four Key Elements

### Digital Engagement Initiatives



#### Event Tie-Ins

Online programs prompt users to follow up at in-person events



#### Crowdsourced Content

Alumni add their voices and feel like collaborators rather than bystanders



#### Demand-Driven Programming

Content aligns with alumni interests and hot topics



#### Unique Experiences

Initiatives provide access to content alumni cannot find outside of the institution



# Targeted Volunteer Opportunities

Recommendation 1: Facilitate High-Impact Engagement

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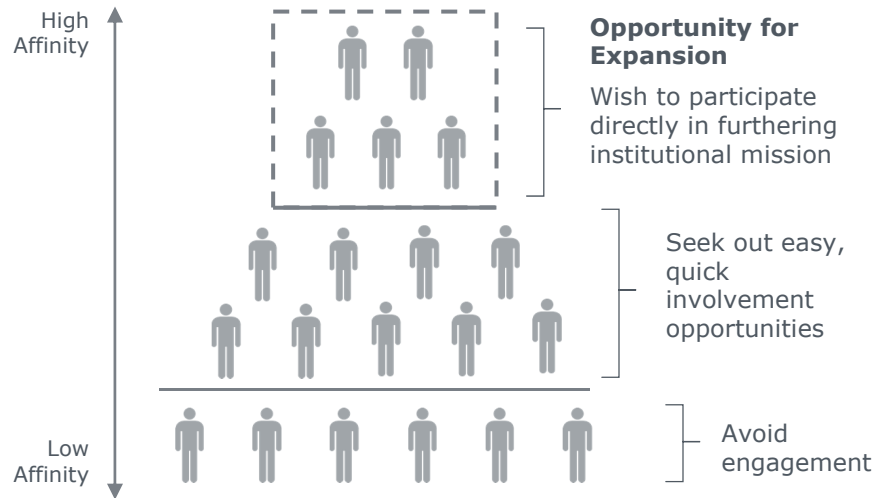
- Summer Melt Alumni Outreach
- Career Tour Host Opportunities

# Seeking a More Direct Connection

Alumni populations are diverse, and a one-size-fits-all approach to engagement is ill-suited to their needs. The digital engagement initiatives in the previous column do a great job of reaching alumni in the middle of the engagement pyramid. But what about alumni at the top of the pyramid? These loyal, committed individuals want something more than quick digital touches.

## Highly Engaged Alumni Want Deeper Involvement

### The Engagement Pyramid



Source: EAB interviews and analysis.

# Mismatched Expectations

In particular, high-affinity alumni want to directly participate in the important work that their alma maters undertake. They want to help shape the future student body, improve graduates' career outcomes, and share their life lessons with current students.

Yet most institutions offer little more than volunteer opportunities that focus on socializing. Unsurprisingly, organizing happy hours and recruiting alumni to reunion activities don't resonate with these mission-driven individuals.

## Alumni Enthusiasm Outpaces Current Volunteering Opportunities

### Alumni Want to Contribute to Institutional Priorities...



*I want to help students explore their career options and develop important professional skills*



*I want to identify prospective applicants and encourage them to attend my alma mater*



*I want to connect directly with students and share the life lessons I've learned with them*



### ...But Volunteer Programs Focus on Less Meaningful Activities

#### Alumni Leadership Openings

Organize regional happy hours and social events

Coordinate logistics for upcoming reunion

Recruit attendees for back-to-campus gatherings

Staff an information table at commencement

Serve as greeter at miscellaneous alumni events

Participate in service days in local parks and community centers

# Enrollment and Career Services

The tragedy of this situation isn't just that these alumni's desires are being unmet. It's also that there are big institutional problems that they could help with if only someone were to ask.

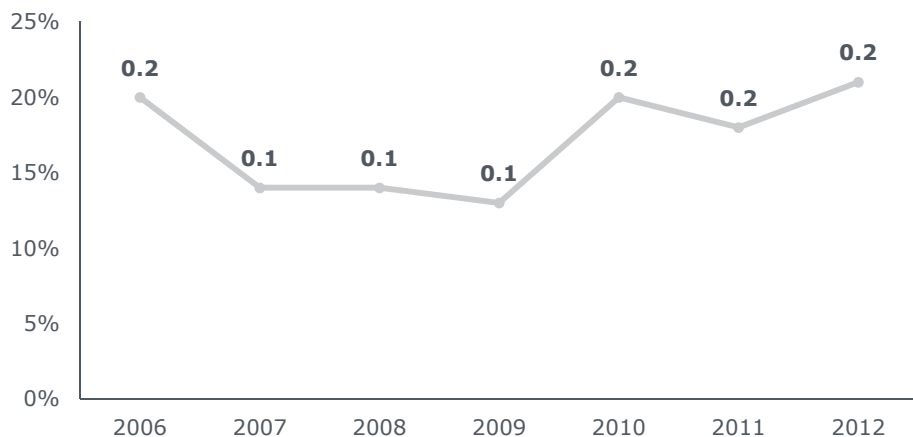
For a start, enrollment poses one of the biggest challenges to the future of higher education across North America. The number of schools failing to meet enrollment goals has shot up at the same time that tuition dependence has grown. Many institutions are unsure how they will fund their operations across the next decade.

At the other side of a college education, students who graduate face a stark career landscape. Unemployment and underemployment affect over half of all recent college graduates, and so far many career offices have struggled to help new graduates adjust.


## Two Areas Ripe for Greater Alumni Involvement

### Problems with the Recruitment Pipeline...

*Four-Year Institutions with Enrollment Shortfalls of 10% or More*  
n=1,349



### ...And with Job Placement After Graduation



### Career and Financial Outcomes of Graduates

<b>22%</b>	<b>46%</b>	<b>\$1.3 T</b>
Of bachelor's degree holders under 25 are unemployed or work too few hours	Of college graduates under 27 are in a job that doesn't require a college degree	Total U.S. student loan debt

Source: EAB analysis of IPEDS data; Economic Policy Institute analysis of basic monthly Current Population Survey microdata, from "The Class of 2015: Despite an Improving Economy, Young Grads Still Face an Uphill Climb" (May 27, 2015), <http://www.epi.org/publication/the-class-of-2015/>; Board of Governors of the Federal Reserve System, "Consumer Credit - G.19" (December 2015), <http://www.federalreserve.gov/releases/g19/current/>; EAB interviews and analysis.



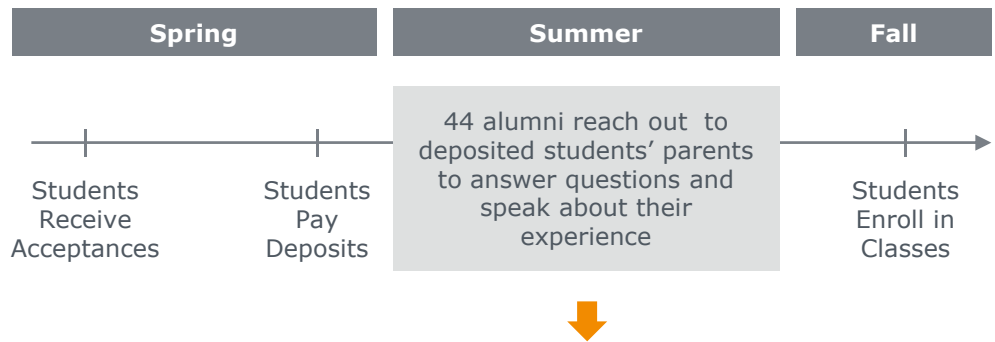
# Giving Alumni a Role in Enrollment

How can advancement leaders leverage the vast pool of talent at their fingertips—the loyal alumni who are looking for more to do—to make gains against these crises? One institution has gotten alumni volunteers involved in reducing a big admissions problem, known as “summer melt.” Trinity University in Texas saw far too many of its students deciding not to enroll at the institution, even after paying their enrollment deposits.

University leaders turned to alumni relations to help them solve this problem. Staff partnered in 2013 with 44 alumni volunteers who reached out to the parents of students who had just submitted their deposits. The volunteers congratulated parents on their students’ admission offer, talked about Trinity’s impact on their own lives—especially from a career angle—and shared stories from their student experiences. Their goal was not only to make Trinity seem real for the parents of these students, but also to convince them that an education from the school was a fantastic investment.

## Alumni Actively Participate to Decrease “Summer Melt”

### Trinity University’s Enrollment Timeline



### Alumni Outreach Talking Points

- Congratulate parents and answer questions
- Share stories from personal college experience
- Explain how Trinity has shaped current career
- Submit unanswered questions or issues to university representative

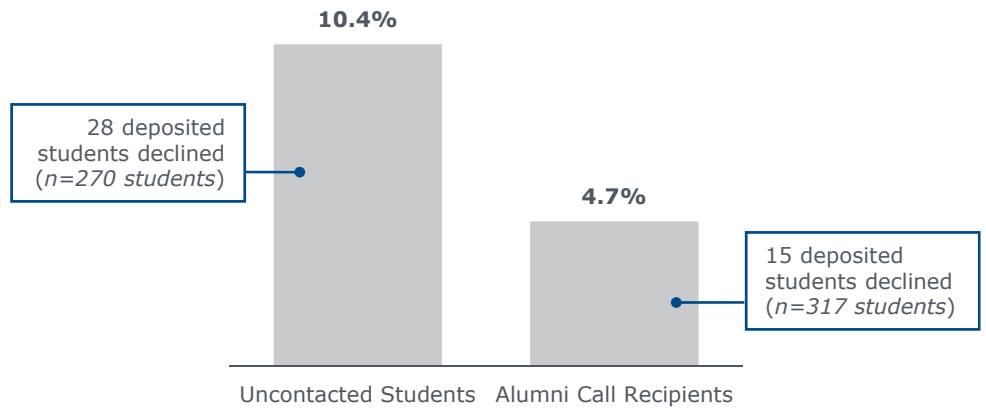
# A Twofold Impact

The work of Trinity volunteers reduced attrition significantly. For admitted students whose parents received a volunteer call, the attrition rate was a mere 4.7%. Those students whose parents didn't receive a call had an attrition rate that was more than double that, at 10.4%.

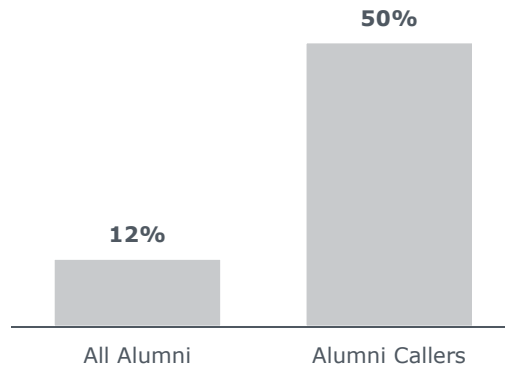
One collateral benefit of the alumni calling program is that it served as an engagement and stewardship opportunity for alumni donors. The alumni who make the calls are loyal donors to Trinity, giving at a 38% higher participation rate than the rest of the university's alumni. The calling program is another way to deepen their relationship to the institution, thereby achieving both alumni relations and development goals through a single initiative.

## Summer Outreach Blitz Spurs Matriculation and Engages Trinity Alumni

**Deposited Student Attrition Rate**



**Alumni Donor Participation Rate**



### A Meaningful Volunteer Opportunity

“In the summertime, we end up losing students who have been admitted to the university. Our two-week blitz helps decrease that summer fall-out, reconnects alumni to the institution, and gives volunteers a meaningful opportunity.”

*Lisa Baronio*  
 Vice President for Advancement  
 Trinity University

# Explore, Network, Cultivate

Increasing enrollments, of course, is only half the battle. In too many cases, graduates have nowhere to go after leaving school and few connections to help them find a job.

Ripon College turned to its alumni relations function to make progress on students' career outcomes. Alumni relations staff developed Career Discovery Tours, which engage high-capacity alumni as hosts for student job tours.

Staff recruit 12 alumni to host on average 12 students during a five-day tour of a city or metro area that focuses on a particular industry. Students visit and network with alumni hosts one at a time during the program, learning about their places of work and developing connections that may prove valuable when they embark on their own career searches.

## Ripon College's Career Tour Brokers Alumni-Student Connections



### Career Discovery Tour Goals

<p><b>Career Development</b> Help students explore career options through networking events and workplace tours</p>	<p><b>Alumni Cultivation</b> Establish relationships between development staff and high-value, hard-to-engage alumni</p>
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### Students

- Travel to a city
- Tour workplaces
- Learn about careers
- Network with alumni



### Alumni Relations Staff

- Support students' career explorations
- Introduce alumni to development staff



### Alumni

- Host student participants
- Offer career advice
- Meet advancement staff


# Getting Development in the Door

To build each year's program, Ripon takes a strategic approach to host selection. Advancement staff not only try to find alumni whose interesting jobs mean they can add something valuable to the career discussion, they also look for high net worth and development potential.

Recruiting these high-capacity hosts is not just the job of fundraisers at Ripon. Alumni relations has a seat at the table through the whole process, from identifying promising candidates, to reaching out to them with an invitation, to brokering an introduction to the gift officers who will end up cultivating them.

## Tours Target High-Potential Alumni to Host Students

- 1** Alumni relations partners with development to identify high-value alumni who may wish to host students
- 2** Director of alumni relations invites hosts to participate and coordinates tour logistics
- 3** Alumni relations introduces hosts to development staff during tour and helps create foundation for longer term relationship



### Alumni Host Checklist

- Interesting job

**AND**

- High-capacity donor

**OR**

- High-capacity, non-engaged prospect

**OR**

- Highly rated legacy prospect

# A Win-Win for Students and the College

Ripon students benefit in many ways. They walk away from the Career Discovery Tours with a high-value personal network that they can turn to during future job searches. They also learn new professional skills that they wouldn't have gleaned solely from Ripon's curriculum.

These student benefits alone are a big win for the college, but on top of that, Ripon is making inroads with hard-to-reach development prospects. Many of the alumni who participate in the Career Discovery Tours are unresponsive to development outreach prior to their involvement with the program. It is only when Ripon leads with engagement rather than fundraising that they open up.

## Tour Gives Students Invaluable Experience While Cultivating Donors



### Benefits to Students

- Students get first-hand experience with diverse industries
- Networking connections may later yield internship and job offers



### Benefits to Institution

- Tour cultivates major gift prospects for future giving
- Alumni find engagement-centered fundraising strategy compelling

### Career Engagement as Cultivation Strategy

"I had a colleague in development who told me that he had a prospect he visited last spring who had served as a host on a career discovery tour. The prospect said to him, 'Thank you so much for engaging me before asking for money.' Engaging them first has worked really well for us overall."

*Amy Gerretsen*  
Director of Alumni and Parent Relations  
Ripon College

# Aiming for More Than Engagement

Programs that involve alumni volunteers in advancing institutional priorities draw high-affinity individuals even closer to the school. Often, these programs require alumni relations professionals to reach across the aisle and form partnerships with their development colleagues, as well as with divisional leaders within career services and enrollment management. While these partnerships may occasionally prove difficult to negotiate, they bring concrete benefits to fundraisers, engagement specialists, and stakeholders across the institution.

By aligning engagement with institutional priorities, programs like Trinity University's and Ripon College's reinforce how important alumni relations is to achieving the institution's mission. They underscore that serving students well requires a smart alumni engagement strategy.

## Four Key Elements

### Targeted Volunteer Opportunities



#### Alumni-Student Interactions

Alumni interface directly with current and future students



#### Institutional Partnerships

Staff work with units where alumni have a natural fit and can effect change



#### Time-Intensive Involvement

Programs elicit investments of time and talent from high-affinity alumni



#### Financial Benefits

Programs generate tuition revenue or lay the groundwork for future gifts



# Streamlined Information Sharing

Recommendation 2: Enhance Partnerships with Development

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- LinkedIn Prospect Profile Reviews
- Alumni Relations Prospect Referrals
- Alumni Engagement Matrices

# ‘How Does This Impact Our Bottom Line?’

In recent years, alumni relations professionals have faced pressure from senior institutional leaders to better collaborate with development staff. Institutional leaders question the impact engagement programming has on fundraising outcomes, how affinity data is used in appeals, and whether alumni relations and development staff capitalize on opportunities for partnerships.

Part of this pressure has come from shrinking university budgets. In the face of revenue shortfalls, all hands are called upon to support the institution’s philanthropic efforts. But beyond that, institutional leaders see an overlap between the asks alumni relations professionals make for time and talent and the treasure that fundraisers seek. It’s only natural, they reason, for these ends to be pursued together.

## Alumni Relations Faces Pressure to Support Development

### Senior Leaders Question Alumni Relations’ ROI ?

- How are we leveraging alumni engagement to boost development?
- Do we segment engaged alumni for annual fund asks?
- Do our gift officers know which of their prospects are engaged?
- How often do development and alumni relations staff coordinate their activities?
- Why are we spending money organizing happy hours and park clean-ups?
- **How is alumni relations helping me hit my campaign goal?**



#### Time

Alumni go out of their way to participate in institutional activities and events



#### Talent

Alumni leverage their skills and expertise to benefit the institution and its students



#### Treasure

Alumni support the institution financially through consistent donations



# Getting a Foot in the Door

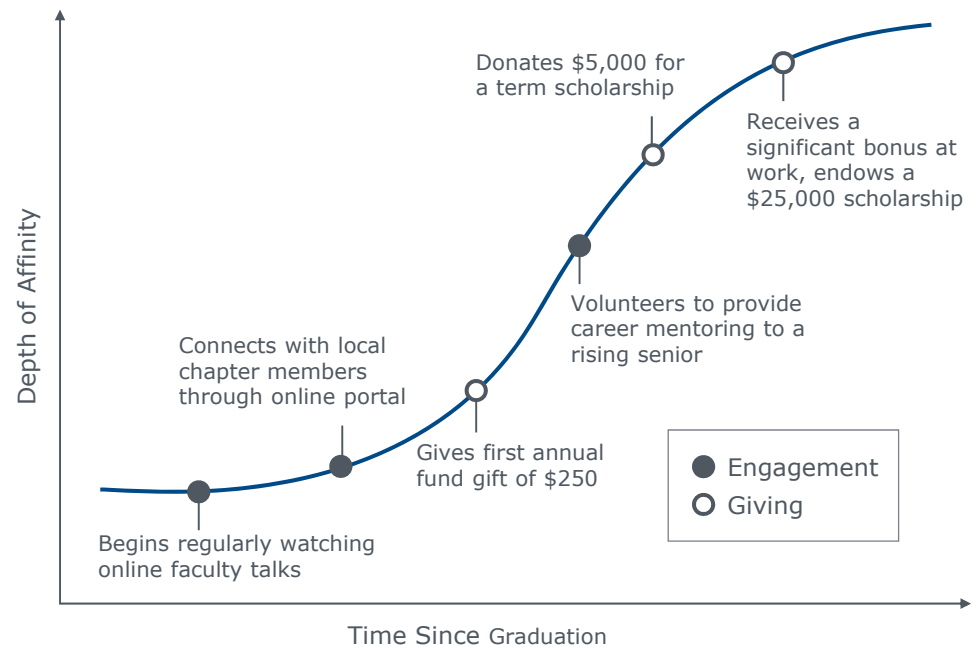
Often, alumni relations professionals resist calls for collaboration with development because they believe that their work will end up subordinate to fundraising. While that situation may play out at some institutions, it's much more likely that giving will support engagement as much as engagement will support giving.

At the most innovative institutions, engagement programming initiates the relationship with alumni, and development staff build upon that with a fundraising ask. But the relationship doesn't end there. After the alumnus/a gives a gift, development staff steer him or her back toward alumni relations for high-quality interactions that double as stewardship.

Alumni progress along the arc of affinity, jumping back and forth between engagement and giving. Each new step is deeper and more meaningful, regardless of which unit's goals it furthers.

## The Mutually Beneficial Relationship Between Engagement and Giving

### John Q. Smith's Interactions with His Alma Mater



Source: EAB interviews and analysis.

# The Information Ecosystem

For engagement and giving to build off each other, information needs to flow freely between alumni relations and development. Yet that doesn't happen at most institutions. Information siloes impede coordination and give rise to redundant outreach efforts across the advancement division.

The most forward-thinking advancement leaders aim for stronger, more communicative partnerships between development and alumni relations. When alumni participate in engagement activities, or when they give, both units know about it.

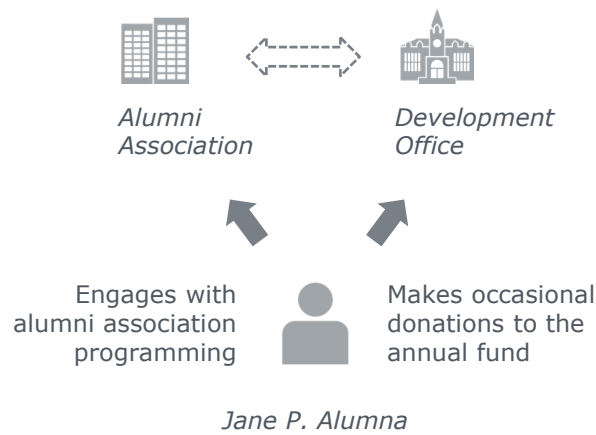
Information-sharing helps alumni relations staff identify prime candidates for engagement. At the same time, it allows fundraisers to better plan their development activities. Both units benefit from clearer communication.

## Best Practice Institutions Ensure Seamless Flow of Alumni Intel

### Current Practice

*Information silos prevent sharing of intel between advancement units*

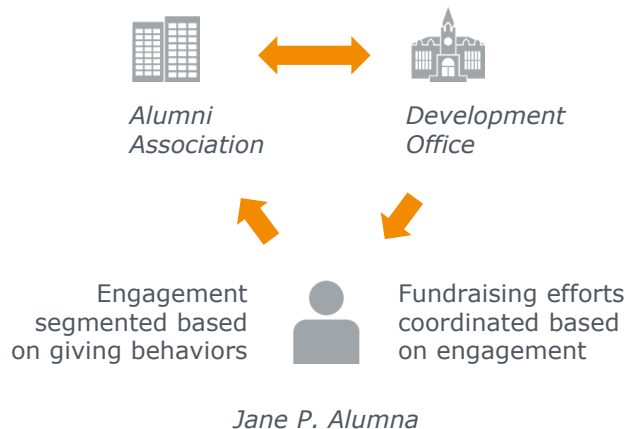
#### No coordination between units



### Ideal State

*Information passes easily and often between alumni relations and development*

#### Units share intel and sync outreach



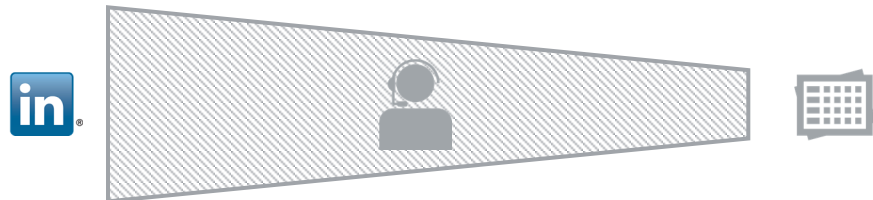
# Not Just a Networking Platform

One institution that's taking steps toward streamlining the flow of information between fundraisers and engagers is Carnegie Mellon University (CMU). Using a strategy first developed at Cornell, CMU is funneling information about the alumni who apply to join the CMU LinkedIn group over to prospect research.

When alumni request membership in the group, the administrative assistant in the Office of Alumni Relations and Annual Giving scans their profiles for capacity indicators, such as a C-suite job title or work in a high-income industry. Alumni who qualify are compiled in a list that prospect research vets. The best leads end up in major gift officers' portfolios. This strategy directly connects engagement to cultivation, ultimately improving the university's development outlook.

## LinkedIn Profile Reviews Surface Major Gift Prospects

### Carnegie Mellon's LinkedIn Prospecting Process



#### Step 1

Alumni apply for membership to Carnegie Mellon's LinkedIn group to connect with their fellow graduates

#### Step 2

The administrative assistant in the Office of Alumni Relations and Annual Giving scans profiles for indicators of capacity

#### Step 3

High-potential individuals are forwarded to prospect research for further review

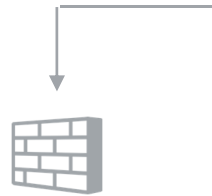
# Everyone Has a Part to Play

McMaster University has also explored ways to improve communication between alumni relations and development.

Advancement leaders at McMaster recently realized that information silos prevented fundraisers from using development outreach to capitalize on positive engagement programming. To remedy this situation, they launched an alumni relations contact report program that encourages alumni relations staff to identify promising fundraising leads that they encounter during their engagement work.

## McMaster's Contact Reports Help Alumni Relations Support Fundraising Goal

### Typical Approach



Engagement leads are not shared with prospect research or development



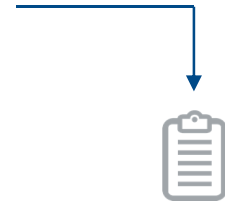
Positive alumni interactions have minimal impact on fundraising goals

### Office of Alumni Relations



Staff host events and programs that engage a broad base of alumni

### McMaster University Approach



Contact report goal incentivizes staff to surface prospects during events



New alumni connections yield major gift prospects and intel for annual giving strategies

# Make Sharing Easy

Alumni relations staff at McMaster are given a goal for the number of prospect referrals they must submit each year. Currently, this goal stands at approximately 10-15 referrals per person annually. To increase the quality of referrals, alumni relations staff are also trained on the indicators of a good prospect.

Prospect research staff also created an easy-to-use form that highlights key types of information to share with development. Fields include biographical updates such as promotions or new jobs, as well as suggested designations in the event the alumnus/a mentions any one part of campus that he or she feels strongly about.

Lastly, just-in-time reminders in the form of emails and other outreach keeps alumni relations staff on the lookout for good development prospects at times of year when they are interacting with lots of alumni.

## McMaster University Provides Prospect Referral Support to Staff



### Create Easy Referral Process

- Develop form for relaying prospect information
- Introduce protocol for reviewing alumni relations leads



### Train Engagement Personnel

- Review qualities of high-capacity prospects
- Discuss resources and templates for submitting leads to development



### Provide Just-in-Time Reminders

- Circulate just-in-time reminders multiple times every year
- Provide support to staff who undertake dedicated discovery calls



### Fields Included on Referral Reports

- Executive summary
- Strategy
- Next steps
- Biographical updates
- Giving stage (optional)
- Expected gift date (optional)
- Gift amount suggested (optional)
- Designations suggested (optional)

# An Uptick in Leads and Prospects

As a result of McMaster’s referral program, alumni relations staff consistently turn out 125+ referral reports every year. Advancement leaders also note that they have seen the quality of these leads increase over time. The growth in high-quality leads has strengthened McMaster’s major gift pipeline and positioned the university for strong development gains moving forward.

This initiative has not come without its challenges. The growth in high-quality prospects has strained McMaster’s development resources. In the coming years, advancement leaders at the university will focus on prospect prioritization and visit quality to achieve greater levels of efficiency.

## Seamless Referral Process Grows Prospect Pool

### Moving the Needle

125+

Contact reports filed every year



Increase in the number of worthwhile leads



Gains in the number of major gift prospects

### A Good Problem to Have

“At the same time that the amount of substantive prospects is growing thanks to upticks in the number of contact reports filed, we are shrinking major gift portfolios to allow for higher quality interactions between major gift officers and prospects. This means that we have an overflow of new prospects, most of whom flood new major gift officer portfolios.”

*Karen McQuigge  
Director of Alumni Advancement  
McMaster University*

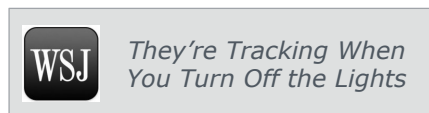
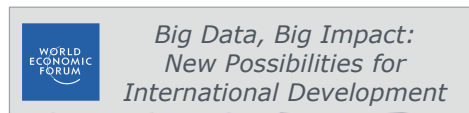
# A Host of Potential New Metrics

In recent years, the rise of Big Data has increased the value that people can extract from information. From international development to the energy sector, industries of all types are looking to data as a potential source for strategic insights and competitive intel.

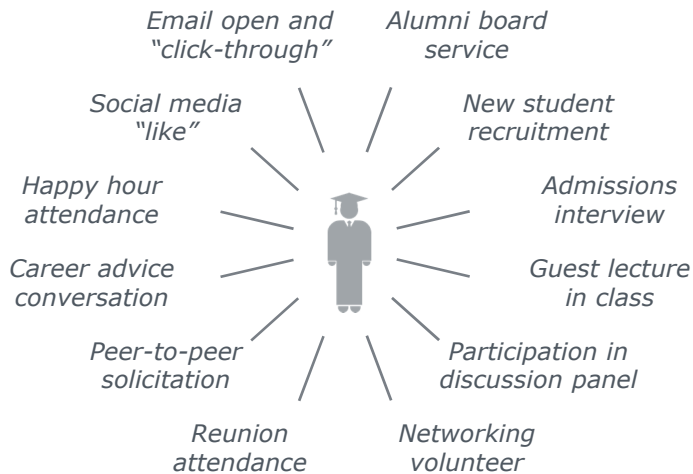
Alumni relations professionals have encountered the same abundance of data, yet they are often at a loss about what to do with it. Engagement touches are clear affinity indicators that could advance a wide range of university interests, including prospect prioritization, but these touches are typically approached in an unorganized manner. Alumni relations professionals struggle to determine what types of engagement are worth sharing with their development colleagues.

## Big Data Capabilities Expand Tracking Possibilities

### A Promising Path Forward in Big Data



### What Intel Is Worth Sharing?



Source: Lohr S, "How Big Data Became So Big," New York Times, August 11, 2012, <http://www.nytimes.com/2012/08/12/business/how-big-data-became-so-big-unboxed.html>; Dvoskin E, "They're Tracking When You Turn Off the Lights," Wall Street Journal, October 20, 2014, <http://online.wsj.com/articles/theyre-tracking-when-you-turn-off-the-lights-1413854422>; "Big Data, Big Impact: New Possibilities for International Development," World Economic Forum, 2012, <http://www.weforum.org/reports/big-data-big-impact-new-possibilities-international-development>; EAB interviews and analysis.

# Separate the Wheat from the Chaff

Recognizing this issue, some institutions have taken strides to catalog, categorize, and consolidate their engagement data in an alumni engagement matrix. The end goal of these efforts is to make the data useful and actionable for staff members throughout the advancement organization, especially those who fundraise from alumni.

Engagement matrices have proven popular at all types of institutions. A matrix will look vastly different depending on the campus that implements it. However, most alumni engagement matrices share some common characteristics. Typically, an engagement matrix assigns different point values to alumni for different types of engagement. Advancement staff use the points that alumni accumulate to segment them for additional engagement or cultivation.

## Alumni Engagement Matrices Zero In on Key Indicators

### A Sampling from the Field



**Marquette University**

- Up to 16 engagement points
- Individual staff focus on specific points
- Engagement points were selected based on giving correlation



**McMaster University**

- Metrics include giving, mentoring, volunteering, and social media
- Used to identify populations in need of more engagement
- Helps establish correlation between giving and engagement



**Portland State University**

- Six-point scale measures investment of time, talent, and treasure
- Alumni divided along eight degrees on involvement
- Highly engaged non-donors targeted for gifts



**Emory University**

- Engagement touches are coded in database
- Weights are assigned to engagements in which alumni volunteer with the university or to help alumni/students



# Finding the Deeply Engaged

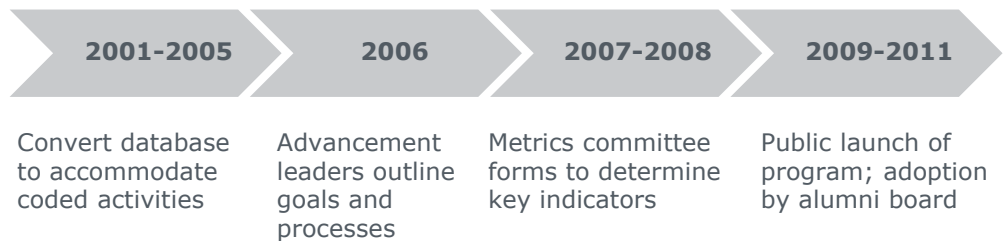
Emory University's engagement matrix is a particularly strong example of how advancement can leverage data to drive engagement and giving. Advancement leaders at Emory University took their first step toward an alumni engagement matrix in 2001, when they initiated a database switch that allowed for activities to be coded in alumni records. In 2007, key stakeholders sat down to determine which engagement touches deserved what weight.

What emerged was a tiered point system for engagement touches that assigns higher point values to actions that indicate deeper affinity. Lower-touch activities, such as helping with a student activity, earn smaller point allocations.

Emory's system gives advancement staff a granular look at the depth of affinity across the entire alumni community, as well as for individual alumni.

## Emory University's Weighting System Captures High-Affinity Activities

### Matrix Development Timeline



### Engagement and Activities

- 5 Points**
  - Attend a Board or committee meeting
  - Serve as a fundraising volunteer
  - Organize a speaker panel
- 3 Points**
  - Volunteer with admissions
  - Mentor a student
  - Come to a planning meeting
- 1 Points**
  - Nominate someone for an award
  - Help out with a student activity
  - Provide career advice to a student or alumnus/a

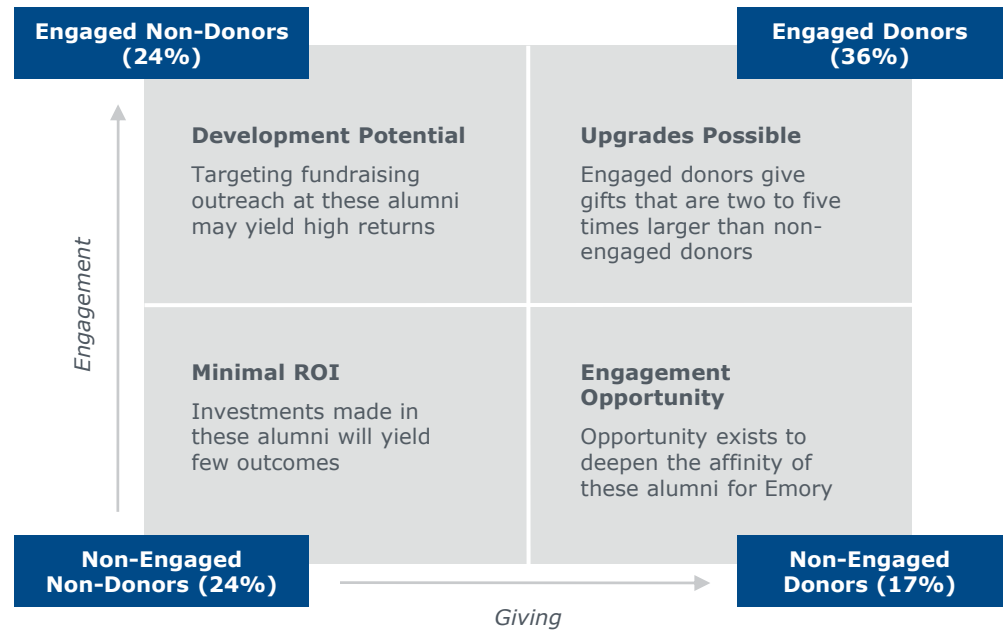
# Recalibrating Staff Efforts

The extensive engagement data that consistent reporting has generated allows advancement leaders to track affinity within the alumni community and prioritize future engagement and fundraising efforts.

After the implementation of the matrix, development staff began to ramp up their focus on the engaged non-donors whom the matrix indicated are high-affinity and potentially on the cusp of giving. Likewise, investments in disengaged never-givers were redirected to populations that demonstrated higher returns.

## Fundraisers Aim at Most Engaged Prospects

### Engagement and Giving Among Alumni Population



Source: EAB interviews and analysis.

# Cultivating the Base

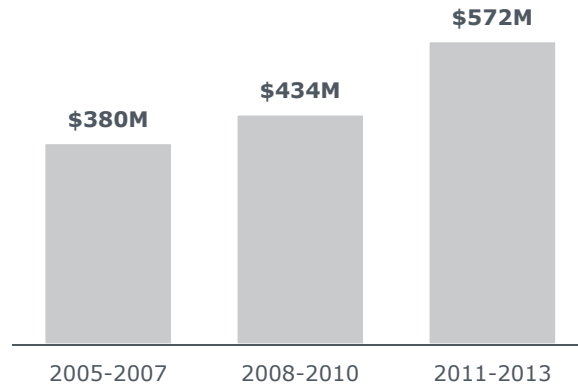
Emory’s alumni engagement matrix has contributed to its gains in fundraising and engagement in recent years. While correlation should not be taken to imply causation, the matrix has helped structure and support the alumni outreach efforts that both units undertake.

Development staff have built productive, high-return relationships with alumni to whom the matrix has directed them. Likewise, alumni relations staff have capitalized on the momentum and clear outcomes that the matrix provides to boost their affinity-building activities. Thanks in part to Emory’s engagement matrix, giving and engagement both spiked in the years after the system’s public launch.

## Jumps in Giving Correlate with Increased Engagement at Emory

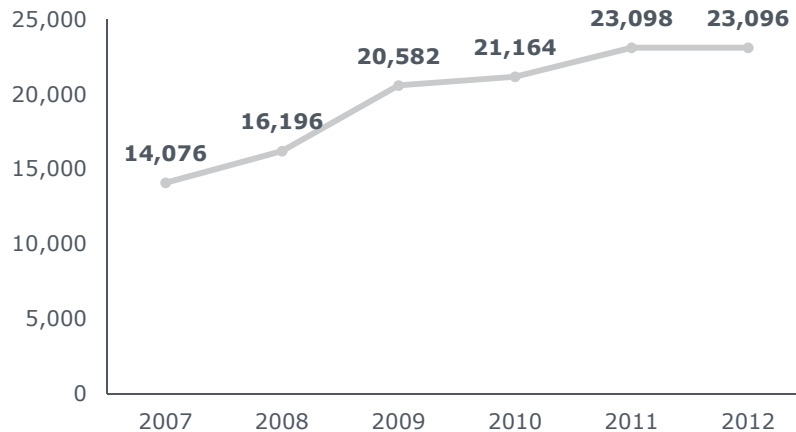
### Total Gift Revenue Received

2005-2013



### Number of Alumni Who Are Engaged

2007-2012



Source: Emory University, Annual Report, page 15, <http://www.emory.edu/president/annual-report/ar2013/report.pdf>; EAB interviews and analysis.

# Leverage Competitive Engagement Intel

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Advancement leaders must make sure a strong infrastructure is in place for alumni relations staff to share information about engaged alumni with their development colleagues. They must also develop user-friendly channels for passing leads, as well as support resources and trainings that help alumni relations professionals detect development potential in alumni.

Motivating staff to communicate is also critical. Innovative institutions do so by offering incentives for reporting and by forging a strong connection between engagement information and the daily work happening within development.

## Four Key Elements

### Streamlined Information Sharing



#### User-Friendly Channels

Staff can quickly and easily submit information about prospects



#### Support and Training

Development walks alumni relations staff through the signs of a good prospect



#### Reporting Incentives

Performance goals and competition among staff drive information sharing



#### Use in Daily Work

Engagement information informs fundraising strategy and brings gains in giving



# Revenue-Oriented Programming

Recommendation 2: Enhance Partnerships with Development

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- Emerging Leaders Dinners
- Prospective Donor Events
- Coordinated Campaign Events

# Align Engagement with Development

Although alumni relations and development specialize in very different areas—mass engagement for the one, philanthropic cultivation for the other—their work has significant overlap.

Advancement leaders should look to the places where engagement and giving converge to develop a highly effective and sustainable advancement strategy.

Collaboration is king in the strategic alumni relations enterprise. Each office brings its expertise to bear on the alumni participation problem. Institutions that have the good fortune to house collaborative units see their engagement and giving numbers climb as a result.

Still, many institutions struggle to broker collaborative partnerships between alumni relations and development. Advancement leaders encourage both units to reduce redundant efforts and achieve their goals through shared programming, but tangible progress remains elusive.

## Combine Unit Strengths to Enhance Fundraising Initiatives

### A Symbiotic Relationship Within Advancement



### The Engagement Multiplier

“The alumni relations officer on average is going to see 10 or 20 times more people than a major gift person and probably 50 times more than a leadership gift officer.... Many times when the alumni relations person comes back and says, ‘I met your prospect, John Doe,’ the development officer hasn’t had the opportunity to meet John Doe yet.”

*Jeffrey Schanz*  
Assistant Vice President for Alumni Relations  
Rensselaer Polytechnic Institute

# Using Engagement as a Launchpad for Development

The three institutions profiled here have hardwired collaborations between alumni relations and development. In each case, staff from both offices plan, execute, and follow up on programming that deepens affinity among alumni and advances fundraising efforts.

## Three University Case Studies

**1**

### Emerging Leaders Dinners

DePaul University



#### Purpose

Cultivate high-potential young alumni for future giving

**2**

### Prospective Donor Events

University of Oregon



#### Purpose

Discover and document alumni interests for future solicitation strategies

**3**

### Coordinated Campaign Events

Case Western Reserve University



#### Purpose

Connect with more alumni and increase campaign giving

# A Smarter Approach to Social Programming

Social programming for alumni is ubiquitous. The happy hour and its “small talk” equivalents have been staples of alumni engagement for decades.

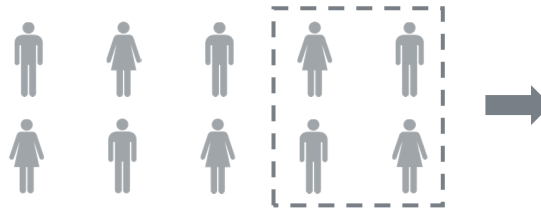
To change this paradigm, DePaul University decided to add on programming that was more intimate, targeted, and goal-focused. To do so, they forged a partnership between engagement staff and development team members.

The Emerging Leaders Dinners that DePaul started hosting in October 2013 target a small group of alumni under 40—about 10 to 14 per dinner—whom development identifies as priorities. They invite them to dine with the Assistant Vice President of Alumni Engagement or another advancement administrator at a trendy restaurant in the Chicago area.

## DePaul’s Emerging Leaders Dinners Cultivate Young Prospects

### Status Quo Alumni Programming

“Come one, come all” social events focused on small talk



### Emerging Leaders Dinners

- Invite list targets development priorities from young alumni population
- Conversations focus on hot topics and motivating issues
- Event includes segmented follow-up tactics for different prospect types

### More Than Just a Happy Hour

“We do the big events where a ton of people come. We do the alumni events where it’s at a bar. This is different. The alumni who come feel important, which is what we want them to feel.”

*Tracy Krahl  
Assistant Vice President of Alumni Engagement  
DePaul University*

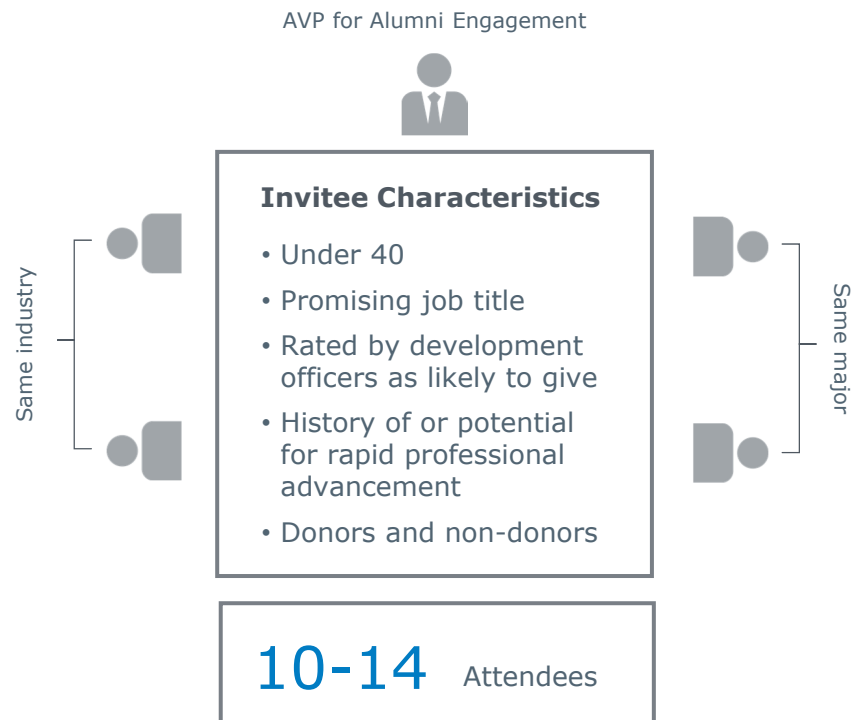


# Cultivating Movers and Shakers

Invitees include both donors and non-donors. Their unifying trait is that they have all been rated highly by development as having capacity now or in the future and as being likely to start giving or to upgrade.

Despite the development aims with which the dinners are planned, they are not explicitly framed around giving or marketed as fundraising events. Rather, engagement staff let conversation among alumni flow freely around high-interest topics. They ask the group how a DePaul education has helped them, and they spotlight exciting things that the school is doing that they might not know about. Advancement staff use these conversations as touch points to tactfully remind the group about the importance of giving.

## Alumni Connect with Each Other and Advancement Staff



### Letting Conversation Flow

“While your ultimate goal is to get alumni to give, you can’t start off with that when they walk in the door. Topics tend to converge around shared experiences at DePaul, such as a program that someone participated in or a scholarship that helped fund an attendee’s education. That’s when staff can gently underscore the importance of giving.”

*Tracy Krahl*  
Assistant Vice President of Alumni Engagement  
DePaul University

# Looking Beyond the Dinner

After the dinners, both engagement staff and development staff play a role in deepening affinity and leading attendees toward giving.

DePaul’s post-event cultivation strategy matches next steps to how much capacity and philanthropic propensity the attendees seem to have. For those whose likelihood to contribute seems low, alumni engagement staff focus their efforts around large-scale events, like cocktail receptions. Those who seem to hold more promise receive higher-touch outreach about opportunities like volunteering and alumni board service.

Meanwhile, development makes sure that all attendees receive an invitation to give at the President’s Club level, regardless of apparent capacity. They follow this unsegmented approach because they have found that the best way to truly qualify someone is to solicit them for a gift. On top of that, development staff take steps to build one-on-one relationships with the best prospects from these dinners.

## DePaul Develops Next Steps Based on Alumni Potential

### Event Attendee Follow-Up

Giving Potential	Next Steps ( <i>Forthcoming</i> )	Resource Investment
Low Likelihood to Give	<ul style="list-style-type: none"> <li>• Invitations to large-scale cocktail receptions</li> <li>• President’s Club solicitation through direct mail</li> </ul>	Medium
Medium Likelihood to Give	<ul style="list-style-type: none"> <li>• Follow-up calls or emails about engagement interests, such as giving or volunteering</li> <li>• President’s Club solicitation through direct mail</li> </ul>	Low to Medium
High Likelihood to Give	<ul style="list-style-type: none"> <li>• Special invitations for high-level engagement opportunities, including alumni board service</li> <li>• President’s Club solicitation through direct mail</li> </ul>	Medium to High

Source: EAB interviews and analysis.

# A Gap in the Middle

The University of Oregon has also launched programming that is based on a collaboration between alumni relations and development.

A few years ago, advancement leaders at Oregon realized that their existing programming was missing a strategically critical population. The Office of Stewardship put on events for existing donors, while the Alumni Association programmed for the entire alumni base, regardless of their giving history. These strategies were largely effective, but they meant that strong prospective donors—both never-givers and lapsed donors—were not getting the targeted, high-touch treatment that would help move them into the ranks of current-year donors.

## Existing Programming Missed Opportunity to Target Prospects

### Program Audiences at the University of Oregon



Source: EAB interviews and analysis.

# Tailoring Events for Prospects




The solution to this problem lay at the intersection of alumni relations and development. Advancement leaders turn to both engagers and fundraisers to select a small group of alumni who are deemed to be on the cusp of giving, renewing, or upgrading.

They then collaborate to stage events in key cities for a relatively small group of 100 or fewer attendees. These events are meant to illustrate the university’s impact and get alumni fired up about being a part of the community. Advancement staff not only integrate multimedia touches, but also have the mascot and charismatic faculty members on site.

## University of Oregon Aligns Event Strategy with Development Aims

### Alumni Association and Development Partner to Identify Likely Prospects...

#### Criteria for Invitation (At Least One)

	Alumnus/a is a current member of the alumni association
	Alumnus/a participates in chapter activities and has capacity
	Alumnus/a gave an annual gift in last three years

### ...And Stage Intimate, High-Quality Programming to Cultivate Them

#### Prospect Cultivation Event Elements

- 100 attendees or fewer
- Short presentations by charismatic professors
- Mascot on site for pictures
- Strategic use of multimedia to illustrate university’s impact
- Advancement staff in attendance for one-on-one conversations

## Mapping the Terrain

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Importantly, advancement leaders make sure that gift officers are in attendance, going through the crowd to meet with alumni. Though they aim to speak with all attendees, they focus in particular on high-potential alumni whom they have researched ahead of time. Through one-on-one conversations with these alumni, they are able to qualify them and figure out who deserves a spot in their portfolios.

For those attendees without major gift potential, advancement staff put up iPads around the room that allow users to choose for themselves how they want to be engaged going forward. They can indicate that they are interested in volunteer opportunities or getting involved in their local alumni chapter, or they can decide that giving is the right route for them and donate on the spot through a mobile card reader.

These events help the University of Oregon further fundraising goals while simultaneously boosting engagement among alumni.

### Gift Officers and iPad Stations Surface Leads and Identify Next Steps

#### Gift Officers Pinpoint Best Prospects



- 3 to 4 gift officers attend
- Attendee lists reviewed prior to event for capacity indicators
- Gift officers aim to talk to all 100 attendees
- After event, gift officers compile list of prospects with whom to follow up

#### iPad Stations Allow for “Self-Service” Engagement



- iPads set up around the room
- Attendees are prompted to select preferred methods of engagement, such as volunteering or giving
- Donations can be made on the spot through mobile card readers on iPads
- Information collected through iPads is forwarded to associated unit

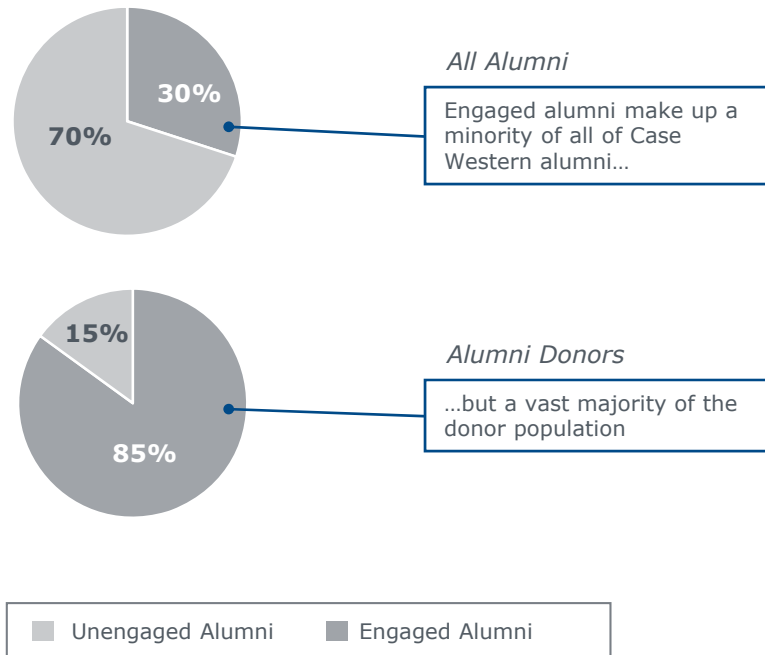
# A Call for Collaboration at Case Western

The most comprehensive approach to collaborative programming comes from Case Western Reserve University. Advancement leaders at Case Western took a look at their engagement and giving data around 2010. They found that engaged alumni only made up about a third of the total alumni population, but that when they restricted their search criteria to just donors, that figure grew to 85%.

Based on how closely engagement mapped to giving, they decided that their fundraising efforts had to better involve their alumni relations staff. They set out to integrate engagement programming at the chapter and regional level with their more targeted campaign programming.

## Engagement Data Drives Urgency of Alumni Relations Partnership

### Engagement in the Alumni Community



### Integrating with the Campaign

“From a strategic, mission-driven perspective, we’re working feverishly to integrate our chapter and regional activities with our capital campaign planning and our other regional events. It’s almost a stewardship activity, but it’s really more about presenting compelling, dramatic stories about the good that we’re doing for the world and how [the alumni’s] relationship to the university is supporting that good.”

*Tracy Krahl  
Assistant Vice President of Alumni Engagement  
DePaul University*

# Adopting a Dragnet Approach

To do this, they took the presidential events and school and college programs that have long been staples of their campaign programming and synchronized them with local alumni chapter activities and volunteering opportunities.

The end goal of these efforts is to saturate the areas their campaign targets with both development programs and engagement activities. Since there's such a strong correlation between engagement and giving, the overabundance of programming would bring in more alumni who will have a higher chance of converting into donors.

Since adopting this approach in 2010, Case Western has seen alumni giving more than double. That growth is due to more than just increases in giving across all donor types, as alumni giving has come to take up a larger share of total giving. Clearly, the efforts Case Western put into tapping regional alumni networks and leveraging engagement specifically for giving have paid off.

## Multiple Layers of Campaign Programming Saturate Key Regions

### Presidential Event



- Centerpiece campaign event rallies alumni and cultivates donors
- Major donors receive highly effective cultivation
- Presidential attendance builds buzz for all Case Western campaign activities

### School and College Programs



- Led by Case Western's eight schools and colleges
- Gives alumni an inside view of how donors' dollars are used
- Niche programming ensures all alumni find something that aligns with their interests

### Alumni Volunteering Activities



- Social activities promote networking and build community
- Multiple programs create an abundance of "touch points"
- Local networks accessed through alumni chapter leaders

### Moving the Needle

116%

Growth in total alumni giving, 2010-2013

14.6%

Growth in alumni giving as a percentage of total giving, 2010-2013

# Infuse Asks into Alumni Relations

For some alumni relations shops, collaborating with development staff on engagement programming is a controversial move. These shops seek to keep their engagement programming separate from fundraising activities.

But the field is changing. Forward-thinking alumni relations professionals grasp that building dual-purpose initiatives is a highly effective way to satisfy engagement goals as well as fundraising goals.

On top of that, there is no better way to underscore the contribution that engagement makes to the university than to use it as a segue to philanthropic asks. Alumni relations programming may be able to command the time and talent of alumni, but when alumni are finally asked to open their checkbooks, collaborative programming makes sure that they feel enough loyalty to the institution to do so.

## Four Key Elements

### Revenue-Oriented Programming



#### Seamless Coordination

Development and alumni relations staff work hand-in-hand to plan programs



#### Dual-Purpose Initiatives

Events feature options to give as well as engagement opportunities



#### Targeted Prospecting

Programming focuses engagement on high-potential alumni



#### Exclusivity and Access

Smaller numbers of alumni attend intimate events with senior leaders





# A New Frontier: Organizational Realignment

Recommendation 2: Enhance Partnerships with Development

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- Merger-Focused Environmental Scan
- Designated Collaboration Touch Points

# A New Professional for a New Era

Today's alumni relations professionals have to juggle a host of responsibilities. In addition to tending to alumni in a one-on-one, customized manner, they are being called upon more than ever to participate in more direct fundraising work, like prospecting from their pools of engaged alumni and cultivating them so that fundraisers can swoop in and make the ask.

## Juggling a Host of Strategically Critical Responsibilities



Source: EAB interviews and analysis.

# The Integrated Advancement Operation

This overlap has led some advancement shops to take steps to merge these two roles—engager and fundraiser. After all, alumni see the university as a single entity, and bringing a single voice to that relationship, instead of one from the engager and one from the fundraiser, is in many cases the best way to achieve an alumni-centered approach.

## Forward-Thinkers Move Toward Structures That Foster Collaboration

### A Single University Voice

- Traditional purview of alumni relations
  - Promote feelings of community among alumni
  - Connect alumni with current students and faculty members
  - Educate alumni about the institution’s mission and activities
- Traditional purview of development
  - Solicit annual gifts that fund operating costs and daily work
  - Steward philanthropic gifts to the university
  - Cultivate alumni who can fund major university priorities
  - Compile proposals for transformative philanthropic giving

### Aligning the Internal and External

“Alumni don’t care how advancement and alumni relations are structured. They want a seamless relationship with the university. They see all of us as part of the same university.”

*JuliAnn Mazachek  
President  
Washburn University Foundation*

# A Culture at Odds

Yet many institutions find this sort of integration to be difficult. Despite the overlap in responsibilities, the culture and priorities of many development shops is vastly different from that of their alumni relations counterparts. For fundraisers, their work is all about that next gift. Everything culminates in the ask. In contrast, many alumni relations professionals view whether or not someone gives as immaterial. They are focused on the relationship and on facilitating high-quality engagement.

These differences pose problems for advancement leaders who are looking to bring their alumni relations staff and development staff more closely together.

## Structural Barriers Prevent True Collaboration

### The Siloed Advancement Operation



#### Development

“Every day I’m thinking about that next gift.”

“I love working with my prospects, but I’m not afraid to let someone go if it’s not a productive relationship.”

“I’ll ask 100 times and get 50 nos. That’s fine—as long as the other 50 folks are giving.”



#### Alumni Relations

“In the end, everything we do is about engagement.”

“Some gifts might come from the relationships we develop. But that’s not why anyone’s in this business.”

“I want to give something back to the alumni I work with, whether they reciprocate or not.”

# Integration Bridges the Divide

Formal integrations are a popular solution to these problems across institution types. In both the United States and Canada, advancement leaders have seen the benefits of merging alumni relations and development. The University of Guelph and Eastern Washington University are two institutions whose mergers proved particularly successful.

The logistics and mechanics of formal integrations will vary by institution type, size, and location. While there is no one-size-fits-all approach to reorganizing advancement staff, some top lessons from these institutions can help guide advancement leaders who want to make sure a merger brings with it a culture change in addition to a new management structure.

## Top Lessons For Advancement Professionals



### University of Guelph

*Canadian, 19,400 undergraduates*

- Led by the Assistant VP of Alumni Advancement
- 7 alumni advancement staff, 4 annual fund staff, 1 communications staff
- Merged in 2010

#### Top Lesson

*Get Buy-In from Staff*



### Eastern Washington University

*Public, 12,600 undergraduates*

- Led by the Director of Alumni Advancement
- 2 alumni relations staff, 2 annual fund staff
- Merged in 2006

#### Top Lesson

*Create Multiple Touch Points for Collaboration*

# Get Buy-In from Staff

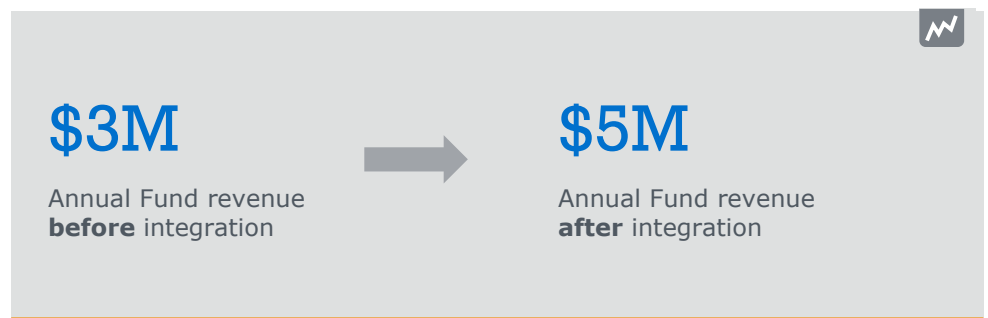
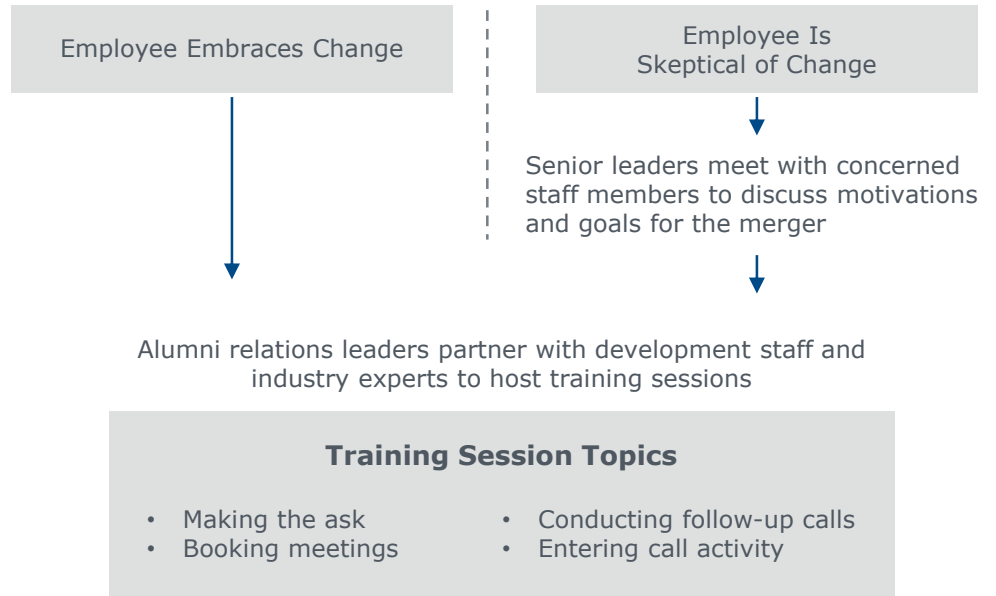
The University of Guelph merged their annual fund and alumni relations unit in 2010. When they did so, they integrated more development responsibilities into alumni relations staff members' daily work. These big shifts in how advancement staff did their jobs led senior leaders within the division to take a very deliberate approach to securing staff buy-in prior to the realignment.

Advancement leaders conducted an environmental scan of staff during the planning phases of the switch. They found that about 50% of staff were enthusiastic about the change. These staff members could be fast-tracked to training sessions that upskilled them around development.

The other half of staff members were more skeptical about the change. To get them onboard, senior leaders reached out for one-on-one conversations about why the merger was taking place and what it would entail for them. By allaying lingering fears about the merger, they ended up getting a lot of reluctant staff onboard and ensuring the success of the effort. In fact, thanks largely to the enhanced fundraising that came from having professional engagers contributing to development efforts, Guelph has grown its annual fundraising revenues by \$2M in the years since the integration.

## Environmental Scan of Staff at the University of Guelph

### "How Does the Employee Feel About the Transition?"

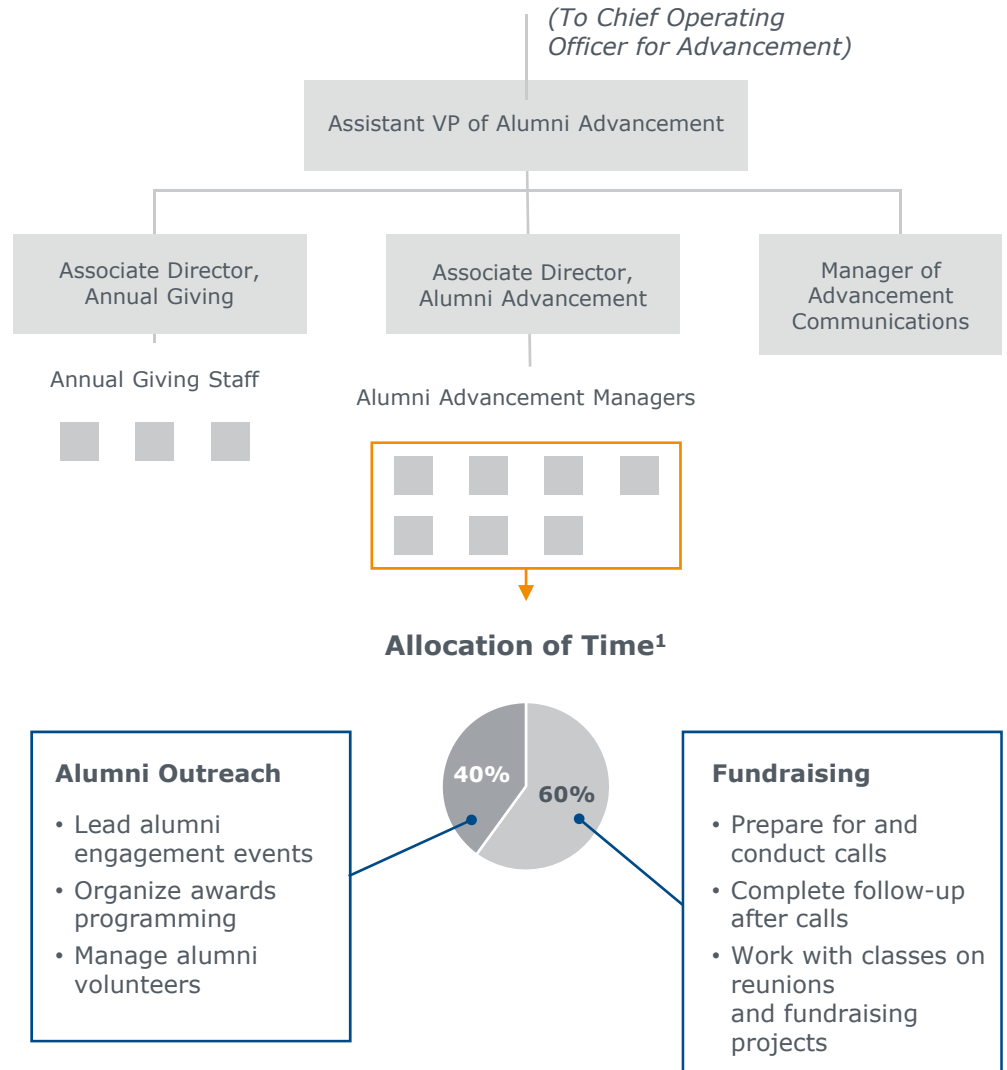


Source: EAB interviews and analysis.

# Redefined Job Roles at the University of Guelph

In addition to bringing their alumni relations staff under the purview of the same administrator as annual giving and advancement communications, the University of Guelph added development responsibilities to roles that formerly focused solely on engagement. Alumni advancement managers split their time between their traditional outreach work and direct fundraising efforts, such as calling prospects and coordinating class-based fundraising projects.

## Alumni Advancement Managers Dedicate Time to Fundraising



1) Allocation of time will transition to 50% alumni outreach and 50% fundraising after campaign's conclusion.

Source: EAB interviews and analysis.

# Create Touch Points for Collaboration

Advancement leaders at Eastern Washington University merged reporting lines for the annual fund and their alumni relations unit in the middle of the last decade. After they did so, they realized that there was still a risk that siloes would persist. A reorganized structure did not, by itself, overcome a historically divided culture.

To mitigate this risk, advancement leaders created ongoing touch points between staff members assigned to alumni relations and development. At biweekly divisional pull-ups and periodic collaborative brainstorming sessions, development and alumni relations staff meet to share their best ideas and adapt their programming to help further each other's goals. In addition, alumni relations events are staffed by all advancement personnel, which means staff members from both units are working side by side and fostering the sort of camaraderie that pays dividends throughout the year.

## Eastern Washington University Constantly Reinforces Partnership

### Designated Opportunities for Cooperation and Idea Sharing



#### Divisional Pull-Ups

All staff meet twice a month to coordinate communications and discuss current projects



#### Creative Brainstorming Sessions

Diverse perspectives are brought to bear on key creative challenges



#### Alumni Relations Events

Participation requirements at alumni events underscores "same team" sentiments

### Supporting Shared Goals

"Our model helps staff understand how what they do advances everyone's goals. If alumni staff are doing an event, for example, a 'donation' option during online registration can be selected at 'check out.' It's pretty seamless."

*Lisa Poplawski*  
Director of Alumni Advancement  
Eastern Washington University

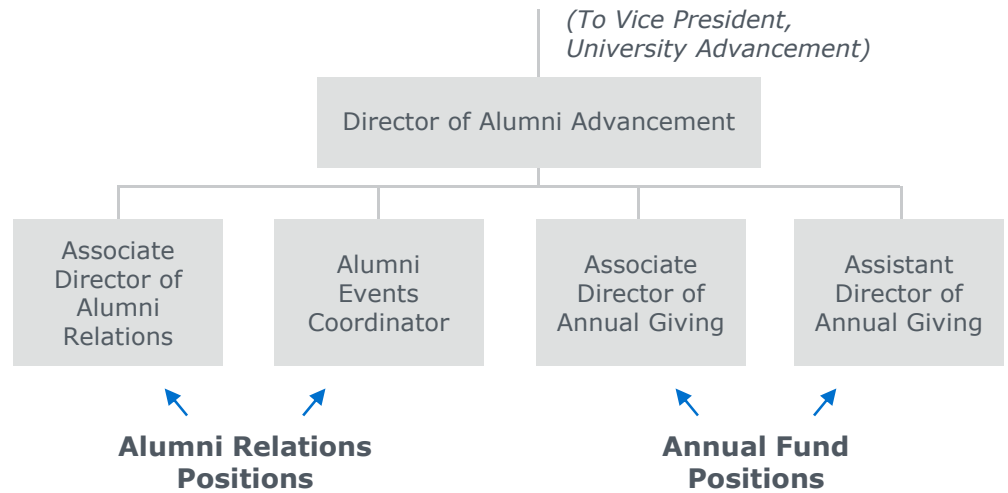


# Alumni Advancement at Eastern Washington

Eastern Washington recast the annual fund and the alumni relations office under the broader umbrella of “alumni advancement” when they merged these two units. The university has seen great outcomes as a result of this switch, including shared communications and more holistic planning sessions.

Perhaps the most impactful outcome was the merger’s effect on recruitment efforts within the advancement division. The switch has helped the school recruit fundraisers and alumni relations professionals who run to collaboration instead of away from it. This culture change will yield benefits for years to come.

## Adjacent Roles in Engagement and Giving Promote Cross-Pollination



**Integration Outcomes**

- Coordinated communications schedule
- Shared social media presence
- Solicitations and/or stewardship included in engagement outreach
- More perspectives brought to planning sessions
- Alumni hear “single voice” from university
- Recruitment of forward-thinking staff members

# Making It Work on Your Campus

Even advancement leaders who strictly adhere to the lessons that emerged from these three case profiles will find that mergers remain difficult propositions. The additional implementation recommendations presented here will help soften the process.

By evaluating where the division currently is in terms of both attitude and infrastructure, advancement leaders can avoid making costly mistakes. A dedication to professional development will make staff feel like senior leaders are following through on their ambitious plans. Rightsizing workloads is also important, as it communicates to staff that their needs and the realities of their new jobs have been taken into account in the planning process.

## EAB Recommendations for Organizational Realignments

Key Concepts		Steps for a Successful Merger	
Evaluate readiness	↓	✓	Dialogue with staff to assess cultural readiness for a change and estimate potential staff attrition
		✓	Assess state of advancement infrastructure and determine necessary technological integration
Upskill employees	┌	✓	Develop training resources and schedule professional development sessions to expand the skill sets of existing staff
		✓	Rewrite job descriptions to yield future candidate pools with skill sets that match new responsibilities
Rightsize workloads	┌	✓	Determine important unmet priorities that reallocated staff can help achieve
		✓	Audit existing workloads to eliminate low-impact activities and responsibilities

Source: EAB interviews and analysis.



# Conclusion

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# Becoming a Strategic Partner

The field of alumni relations has changed profoundly in the past few decades. While alumni relations professionals have traditionally focused on coordinating alumni social gatherings and affinity-based events, today they are expected to be ambassadors for their institution's research, teaching, and community partnerships.

## Modern Alumni Relations Must Advocate for Institutional Mission

### Ambassadors on the Front Line

"In the past, alumni relations professionals were mostly expected to schedule social events like reunions and make sure that events ran smoothly. Now, alumni professionals must be articulate in a way that previously was required only of front line fundraisers. To be effective, we have to know about institutional academic priorities, research initiatives, and how the work of our researchers, teachers and students is addressing larger societal issues."

*Andy Shaindlin  
Associate Vice President for Alumni Relations and Annual Giving  
Carnegie Mellon University*

## In-Demand Areas of Expertise for Alumni Relations



Cutting edge research and laboratory breakthroughs



Advances in pedagogy and exciting classroom activities



Involvement and partnership with surrounding community

# Now More Than Ever

This growth in expectations is a big challenge for alumni relations professionals. But like most challenges, it doubles as a big opportunity. Today's alumni have a wide array of needs that the old model of alumni relations is unsuited to satisfy. From keeping up to date with the institution on the go, to connecting with students, to finding new ways to make an impact, modern alumni have more potential than ever to be active partners to the institution.

At the same time, the needs of institutions are shifting. They are looking for more meaningful engagement from their alumni, while at the same time searching for new sources of revenue to supplement declining state appropriations and worrisome enrollment numbers.

Alumni relations staff sit at the crossroads of these needs. They occupy a place, now more than ever, where they can ably serve both their alumni and their institution.

## Alumni Relations Sits at the Intersection of Alumni and Institutional Needs



### Today's Alumni



How can I keep my alma mater in my life without attending lots of time-consuming events?

What opportunities do I have to directly connect with students?

How can I make an impact?



### Higher Ed Institutions



How can we engage alumni in ways that resonate with them?

What impact can our most involved alumni have on our priorities?

How can we consistently move alumni from engagement to giving?



### The Strategic Alumni Relations Enterprise



- Turn to digital platforms for quick but meaningful engagement
- Align volunteering opportunities with institutional priorities
- Collaborate extensively with development to boost fundraising outcomes and deepen alumni involvement

# Supporting Each Other's Goals

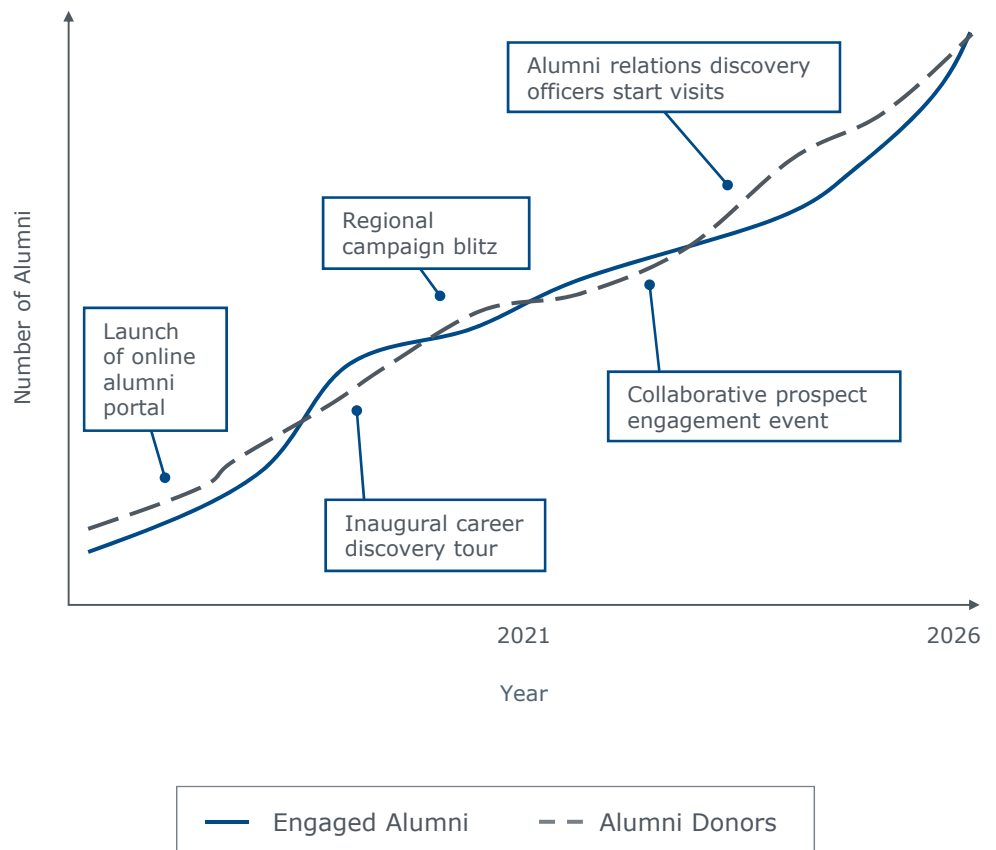
If alumni relations professionals do this right—if they program not for the back-slapping alumni of old, but rather for the mission-driven, high-impact alumni of today—then they will not only boost engagement, but also build a donor base that will help maintain the quality of education at their institutions for decades moving forward.

Ultimately, the efforts that innovative advancement divisions are taking to build strategic alumni relations enterprises will mean that the students of tomorrow have opportunities undreamt of by those of today.

## Collaborative Programming Creates Communities of Doers and Givers

### Number of Engaged Alumni and Alumni Donors

*Hazel University, 2014-2024*



# Advisors to Our Work

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The Advancement Forum is grateful to the individuals and organizations that shared their insights, analysis, and time with us. We would especially like to recognize the following individuals for being particularly generous with their time and expertise.

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