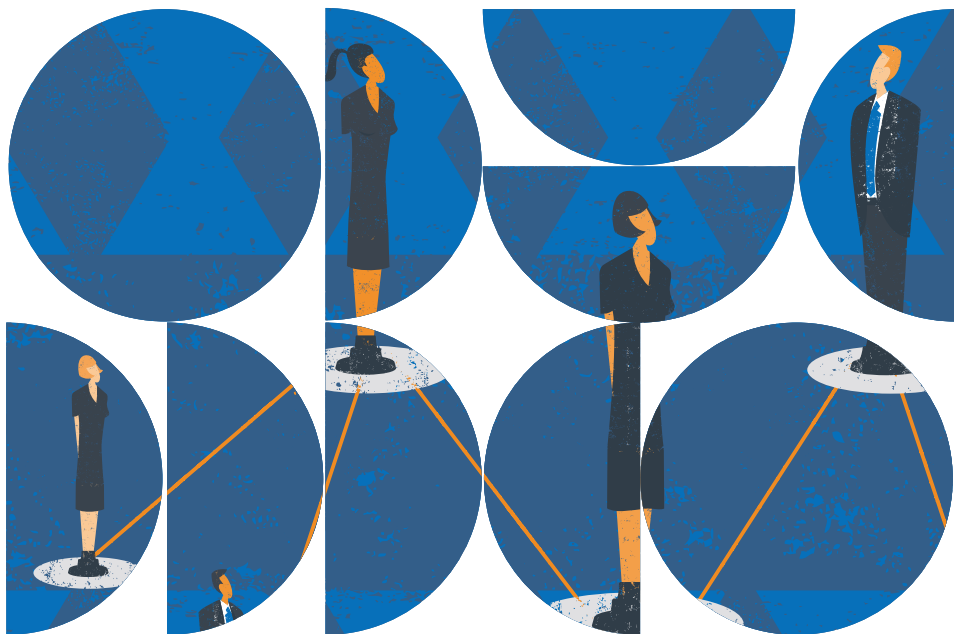




Elevating **Inclusion**

Building a Diverse Volunteer Community

Advancement
Forum





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Advancement Forum

Project Director

James Hurley

Contributing Consultant

Justin Kollinger

Maria Morrison

Design Consultant

Alyssa Dillon

Managing Director

Liz Rothenberg, PhD

About EAB

EAB is a best practices firm that uses a combination of research, technology, and data-enabled services to improve the performance of more than 1,200 educational organizations. EAB forges and finds the best new ideas and proven practices from its network of thousands of leaders, then customizes and hardwires them into every level of member organizations, creating enduring value. For more information, visit eab.com.

About the Advancement Forum

The Advancement Forum focuses on the full range of strategic and operational issues facing development and alumni relations executives and their teams. The depth of our dedicated focus on advancement combined with the breadth of EAB insight on broader higher education priorities uniquely positions the forum to serve all aspects of the chief advancement officer purview—advancement strategy and operations, alumni and volunteer engagement, and fundraising.

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Supporting Members in Best Practice Implementation

Resources Available Within Your Membership

This publication is only the beginning of our work to assist members in building a more diverse alumni volunteer community. Recognizing that ideas seldom speak for themselves, our ambition is to work actively with members of the Advancement Forum to decide which practices are most relevant for your organization, to accelerate consensus-building among key constituencies, and to save implementation time.

We offer a variety of services to assist you with your mission. For additional information about any of the services detailed below, please contact your organization's relationship manager or visit our website at eab.com. To order additional copies of this publication, please search for it by title on eab.com.

Implementation Road Maps and Tools

Throughout the publication, this symbol will alert you to any corresponding tools and templates available in the Toolkit at the back of this book. These tools are also available on our website at eab.com.

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Our website includes recordings of webconferences that can walk you through the practices highlighted in this publication. Forum experts are also available to conduct private webconferences with your team.

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Our experts regularly visit campuses to lead half-day to daylong sessions focused on highlighting key insights for senior leaders or helping internal project teams select the most relevant practices and determine next steps.



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Executive Summary

North America is far more culturally, racially, and ethnically diverse than ever before. Demographic shifts have been felt across college and university campuses as record numbers of historically underrepresented students enroll in college and attain degrees. These shifting demographics have been slowly changing the face of our institutional profile across the last decade. The changes in our student and alumni demographic profile present significant challenges and opportunities for advancement offices, particularly in developing a more diverse alumni volunteer community. Advancement and alumni leaders need not only to recognize the necessity to adapt traditional alumni volunteer structures to meet shifting priorities but to also create new alumni programming that resonates with an increasingly diverse alumni community.

Diverse alumni share the common experience that their time on campus was shaped, in part, by their affinity community. Advancement and alumni leaders need to acknowledge that reality and build a more diverse and inclusive volunteer community that acknowledges, reflects, and respects the experiences diverse alumni may have had on campus. These efforts not only allow advancement leaders to better engage their diverse alumni populations but also will ensure a healthy pipeline of alumni volunteers and leaders to sustain tomorrow's advancement enterprise.

This study equips advancement leaders with the data, practices, and tools required to develop and deepen a more diverse volunteer community. It does so by providing advancement professionals with a collection of best practices that:

1. Encourage advancement professionals to take inventory of existing efforts and better understand the diverse alumni experience.
2. Strengthen existing volunteer recruitment efforts with a focus on diversifying the volunteer ladder.
3. Recognize advancement's role in elevating the diversity and inclusion conversation on a regular basis throughout the institution.



The Importance of Diversity in Advancement Programs

SECTION

1

Diversity Is Everywhere

Increasingly Part of Daily Life

Diversity is more than just a buzzword in the 21st century—it is a way of life. The United States and Canada continue to become majority-minority countries, where a majority of the population identify as members of a minority group. The U.S. states of California and Texas have already crossed this significant milestone. Beyond the apparent shifts in demographic trends, diversity and inclusion-related conversations have penetrated many other aspects of our society, including pop culture, media, politics, and business.

Diversity on the Rise

USATODAY *Oscars 2017: Diversity Is Not a Simple Black-or-White Issue*



theguardian *A Cabinet That Looks Like Canada*



Diversity and Inclusion by the Numbers

\$150M

Total spend in 2016 at Google on diversity and inclusion-related efforts

35%

Likelihood that ethnically diverse organizations will outperform their peers

#1

Hiring diverse candidates was the top challenge for hiring managers at nonprofits in 2016

Diversity-related conversations took center stage at the Oscars in 2017, when *Moonlight* won the Academy Award for Best Picture. It is a coming-of-age film about a young black, gay man growing up in Miami. Mahershala Ali won the Academy Award for Best Supporting Actor for his role in that film, the first time a black Muslim man has won such an award. In the political arena, there was significant excitement in 2015 when the Canadian cabinet finally reflected the gender and ethnic diversity of Canada. In addition, business and nonprofit leaders have spent significant amounts of time and capital on diversity-related efforts, moving diversity from a “nice to have” to a “need to have.”

Sources: Murphy J, “Trudeau Gives Canada First Cabinet with Equal Number of Men and Women,” *The Guardian*, Nov 4, 2016; Puente M, “Oscar Nominations 2017,” *USA Today*, Jan 24, 2017; Wellford S, “Diversity Matters Outside the Boardroom,” *U.S. News & World Report*, Jan 18, 2017; Advancement Forum interviews and analysis.

Broadening What Diversity Means

Understanding the Range of Variables

As both the United States and Canada become majority-minority countries, it is essential for advancement leaders to reflect on the expanding scope and definition of diversity. While race and gender are certainly two important measures of diversity, they are not the only measures. Ethnicity, sexual orientation, and occupation are other measures of diversity that advancement leaders ought to consider when recruiting alumni volunteers. Our definition of diversity needs to expand as we engage and solicit an increasingly diverse alumni base.

The diversity wheel below highlights many of the nuanced measures of diversity that advancement leaders should consider.

Cognitive

How we think and process information

- Thinking
- Interpersonal
- Learning

Relational

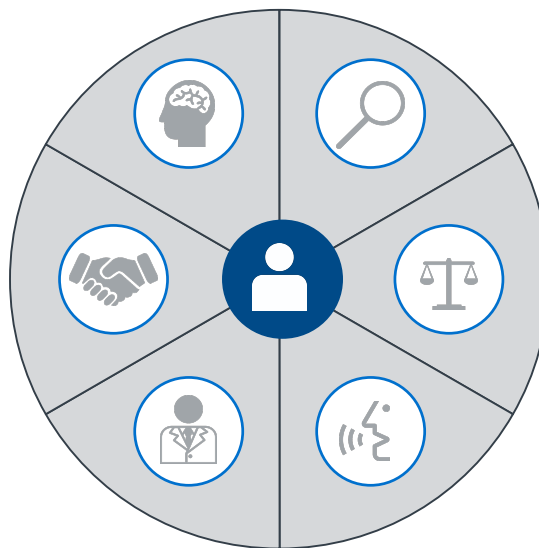
How we relate and rejuvenate

- Marital
- Generational
- Parental

Occupational

How we work and what we do

- Occupation
- Industry
- Tenure
- Affiliation



Physical

What others think they see

- Race
- Ethnicity
- Gender identity
- Appearance

Values

What we believe and feel

- Beliefs
- Culture
- Religion
- Attitudes

Societal

How we connect and relate to society

- Economic
- Political
- Origin
- Geographical

Sources: Loden M and Rosener J, *Workforce America*, New York: McGraw-Hill, 1990; Advancement Forum interviews and analysis.

The Business Case for Diversity

Diversity a 'Need to Have' in the Corporate World

The business world has been able to quantify the positive impact of a diverse workforce on its bottom line. Diversity in today's competitive marketplace is not only essential for success but also allows companies to better reflect the markets they serve, increase innovation within their workforce, and capture a stronger talent pool. It also allows companies opportunities to realize new and improved revenue streams. This fourfold approach to valuing diversity in the business world permits companies to make diversity-related investments due to computed and well-defined return on investment calculations.

Essential for Success

I am personally driven by the belief that **diversity makes organizations stronger, smarter, and more innovative**. At Accenture, we create an environment where our people are empowered to bring their individual points of view, experiences, cultures, skills—in other words their diversity—to the table, which results in the very best solutions for our clients and for our business. **Quite simply, inclusion and diversity are essential for success and relevance in today's world.**"

*Pierre Nanterme
Chairman and CEO
Accenture*

Why Diversity Matters to Business

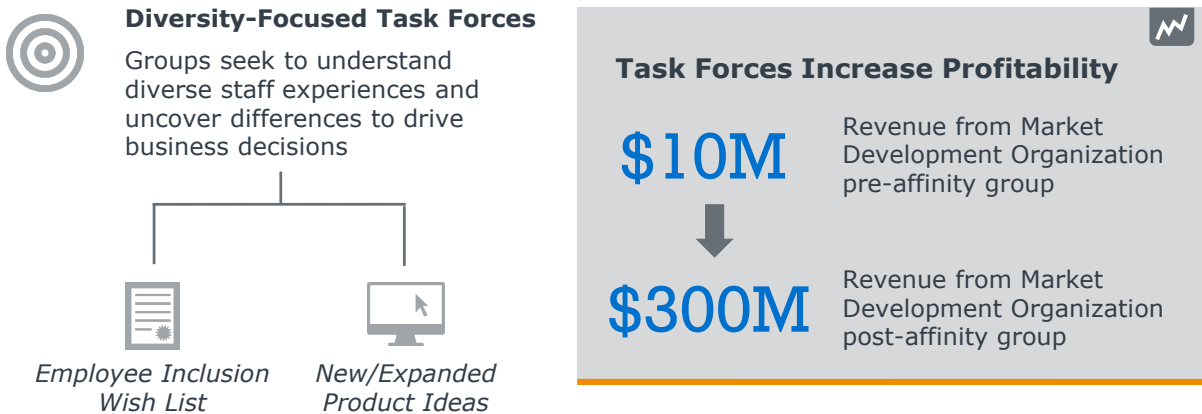
- 1** *Expands Talent Pool*
 - Better talent acquisition
 - Decreased turnover
 - Greater employee satisfaction
- 2** *Reflects Marketplace*
 - Better social responsibility initiatives
 - Higher customer satisfaction
 - Better corporate governance
- 3** *Increases Innovation*
 - Increased creativity
 - Better problem solving
 - Reduced conflict
- 4** *Improves Financial Performance*
 - Increased profitability
 - Improved sustainability
 - Enhanced productivity

Since the 1960s and 1970s, the nonprofit sector has been left behind in the diversity conversation, because diversifying their workforce has not become the same business imperative.

Impacting the Bottom Line

IBM's Diversity Task Forces Drive Revenue and Meaningful Change

Many companies provide programming around shared interests for employees. These programs often support diversity and inclusion efforts and most commonly have been titled "affinity groups" or "talent networking groups" (other company-specific terms can also be used). Affinity groups usually provide an opportunity for employees to inform senior management of practices and policies that impact their engagement and workflow as members of a particular community (e.g., an LGBT affinity group providing feedback on same-sex partner benefits or gender-neutral bathrooms). However, the affinity groups can also be tasked with suggesting possible new revenue streams or process improvements to existing practices based on their lived experiences as diverse individuals.



Increased Executive-Level Diversity at IBM, Since 1998

370%

Increase in female executives at IBM

233%

Increase in US-born ethnic minority executives at IBM

733%

Increase in LGBT executives at IBM

The Women at IBM affinity group not only developed a wish list for inclusion-related programming but also revamped the sales strategy for the Market Development Organization technology tool. The tool's main customers were small- and medium-sized enterprises (i.e., SMEs), which are disproportionately owned by women. Partly driven by a revamped sales strategy from the women's employee affinity group, the company increased the tool's revenue from \$10 million to \$300 million in only three years. As IBM's investments can attest, being able to better reflect and understand your marketplace is critical for financial success.

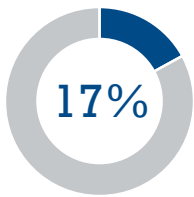
Sources: Thomas D, "Diversity as a Strategy," *Harvard Business Review*, Sep 2004; Advancement Forum interviews and analysis.

A Transition Happening on Campus

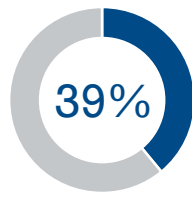
Changing Student Demographics in Higher Education

While the business world adapted and understood the impact of diversity programming on their bottom line, colleges and universities have not traditionally been as agile. However, across the last 30 years, there has been significant progress made in enrollment numbers across higher education. Today, nearly 40% of first-time student enrollments are from black, Hispanic, Asian-American, and biracial students. Further, females represent a majority of undergraduates on campus today. Advancement leaders need not only to understand what the diverse student experience was but also how to develop alumni programming that will be responsive to that experience.

Significant Progress from 1980 to 2016

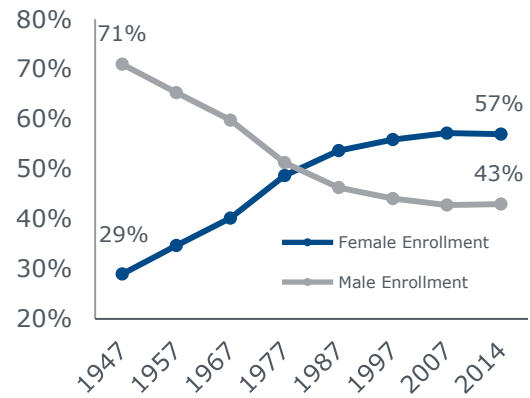


First-time enrollments from black, Hispanic, and Asian-American students in 1980



First-time enrollments from black, Hispanic, Asian-American, and biracial students in 2016

First-Time Students by Gender



High-Growth Student Populations, 1980-2016

285%

Growth in **Hispanic** enrollment

240%

Growth in **black** enrollment

375%

Growth in **Asian/Pacific-Islander** enrollment

Sources: U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics; Advancement Forum interviews and analysis.

Our Staff Doesn't Look Like Rising Donors

Significant Progress Elusive in Advancement

Part of the challenge that advancement leaders face in engaging diverse alumni revolves around staffing. Few development and alumni affairs professionals are diverse individuals themselves, as the industry data from CASE outlined below highlights. Therefore, our alumni rarely see themselves in the staff and leadership that create and support alumni programs. In addition, the senior-most board leadership roles (e.g., boards of trustees, campaign councils, advisory councils) have historically not highlighted the diversity in our alumni populations. Those leadership opportunities have largely been held by the traditional default donor perspective (i.e., white heterosexual males and couples from the silent and boomer generations). Recent industry calls to action have highlighted these challenges, but the industry has yet to see significant progress.

Industry Encouragement...

THE CHRONICLE OF PHILANTHROPY
Philanthropic Leadership Shouldn't Still Look Like the Country-Club Set

NPQ
Museums So White: Survey Reveals Deep Lack of Diversity



...Has Not Moved the Dial

9%

Percentage of staff who work in advancement at educational institutions who are diverse

21%

Percentage of CASE survey respondents who indicated they had no diverse talent working at their institution in advancement

Pale, Stale, and Male

"Our senior level staff and our senior level alumni volunteers have three things in common. They are all pale, stale, and almost always male. We need to do more work to engage the alumni leaders and donors of tomorrow and part of that means looking at our own organizations as well."

*Vice President for Advancement
Public Research University*



Sources: Cunningham S, "For Moral and Financial Reasons, Fundraisers Need to Be More Diverse," *The Chronicle of Philanthropy*, Apr 18, 2016; Brown K, "State of the Work," Rockefeller Philanthropy Advisors, 2015; Advancement Forum interviews and analysis.

Failing to Engage Diverse Populations Now

Because Their Experiences Weren't the 'Norm'

The face of the advancement profession is not going to change overnight, despite our most robust efforts. It is also true that diverse alumni programming need not necessarily be designed, run, or executed by diverse alumni relations professionals—all of our advancement staff need to be culturally competent to engage our alumni, diverse or otherwise. Having diverse voices at the table, however, helps combat implicit biases and unintended mistakes. Unfortunately, the engagement techniques that have worked to engage traditional alumni in the past are unlikely to resonate with an increasingly diverse alumni body. These programs rarely acknowledge that the student and alumni experience for diverse students was different than the “default” perspective. Diverse alumni rarely see other individuals like them highlighted in alumni programming, and they often feel isolated or marginalized as a result.

Status Quo Engagement Techniques

- ✘ Country club hosted gala dinner
- ✘ Campus-based alumni programming
- ✘ Reunion leadership giving volunteers
- ✘ Regional networking events

"Why are all these events at the country club? Nobody looks like me there."

"I don't want to return to campus. I don't have great memories from my time there."

"Why are there no women on this alumni panel?"

"I thought things had changed since the 1980s, so why are there so few students of color in these pictures?"

Minority Volunteerism Is Low Nationwide



It's Not for Me

Positions and advertisements do not speak to minorities' interests



Friend Had a Bad Experience

One bad experience snowballs into a chain of disengagement



Alone Again

Unwilling to be the only person from a given background



Doing a Favor

One-off events are considered “helping,” not “volunteering”

Already Stretched Thin

Diverse Alumni Leaders Face Many Demands on Their Time

In many cases, advancement leaders have identified a handful of diverse alumni affinity champions to help create a more inclusive environment. However, these alumni leaders are often few in number and cannot shoulder all the responsibility associated with building a more diverse community. The proliferation of 501(c)3 organizations and other nonprofits has created increased pressure on diverse volunteer leaders. Many other organizations are now competing for the talents, skills, time, and fiscal support of diverse individuals. The data below highlights the time demands that diverse board members face compared to their white peers.

Revisiting the Same Diverse Faces

1.55 Average number of boards on which **African American** board members serve

1.24 Average number of boards on which **Hispanic** board members serve

1.18 Average number of boards on which **white** board members serve



Searching for Unicorns

"I'm trying to build a pipeline of diverse alumni volunteers at all levels, not only because it is the right thing to do, but because it is the smart thing to do. **But I keep coming up empty or with the same short list of names.**"

*Vice President for Advancement
Public Research University*

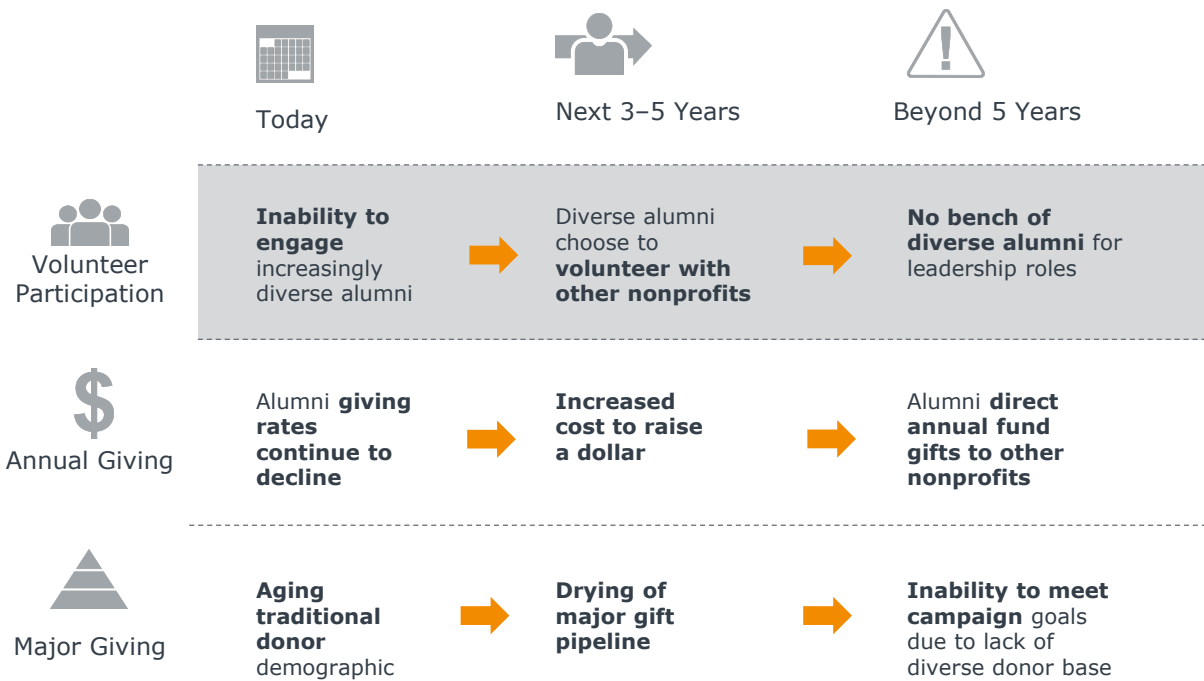


Sources: Ramirez J, "If Your Board Looked More Like Your Community," *New Faces*, June 15, 2016; Colby S and Ortman J, "Projections of the Size and Composition of the U.S. Population: 2014 to 2060," US Census Bureau, March 2015; Advancement Forum interviews and analysis.

A Cascading Set of Problems

Understanding the Cost of Inaction

Despite the challenges in diversifying the volunteer pipeline, the cost of doing nothing is enormous. Understanding how volunteer participation supports an annual giving program, which in turn fertilizes a major gifts program, is paramount to recognizing the size and scope of this challenge. If advancement leaders fail to engage increasingly diverse alumni, they will soon have no bench of diverse alumni leaders, leading to potential difficulties in meeting annual participation targets and development goals because of shifting demographics.



What's in a 'Board'?

Volunteerism Comes in Many Forms

The focus of this publication is on the highest level of alumni volunteer at colleges and universities. Often this means the board of trustees, but some institutions have little or no say in who sits on their appointed boards. In this circumstance, institutions do have control over who sits on campaign councils, foundation boards, and advisory councils and committees. It is our collective task to ensure that alumni leaders on these boards, cabinets, and councils—at all levels—reflect the diversity of our alumni and student populations.

What This Looks Like on Campus



“

The Volunteer Ladder

Trying to define an alumni volunteer is an impossible task. Our volunteer community is so vast, it touches all of the people we engage with. **We need to ensure that we are engaging more diverse folks at all stages of the volunteer ladder.**

*Vice President for Advancement
Private Baccalaureate College*

”



Understanding Diverse Alumni

Conducting a Gap Analysis

SECTION

2

- Sourcing Diverse Perspectives
- Conducting a Diversity Inventory
- Investing in New Diversity-Focused Programs

How Can We Enhance Our Efforts?

Three Steps to Conduct a Volunteer Gap Analysis

Most advancement professionals face a compound challenge—they are neither diverse themselves nor do they know what it was like to have been a diverse student on campus. This first section will explore how advancement teams can leverage the expertise and insight from diverse alumni to inform development and alumni programming. By asking diverse alumni to provide feedback, staff are better able to curate program offerings and seek additional investment to launch new programs. Furthermore, advancement staff can better market existing programs that meet diverse alumni needs. The three steps required to conduct a gap analysis are below and map to the institutional profiles on the following pages.

1

Source Diverse Perspectives



Black Alumni Listening Tour



Stanford Needs Alumni Perspectives

2

Catalog Current State



Diversity Inventory



Alumni Engagement Form

3

Launch New Initiatives



Targeted Alumnae Mentoring



Stepped Student Alumni Programming

Leading with Humility

Build Ways to Collect Feedback into Existing Events

The first step of conducting a gap analysis must be to source alumni feedback—it is crucial that advancement professionals ask diverse alumni what programming resonates with them and how they would like to engage with their alma mater. Samford University did exactly that by elevating the status of an existing alumni engagement touch point to source alumni feedback. Samford hosts an annual luncheon for their black alumni group but recently added new components to the celebration to gather diverse alumni feedback.

Gathering Alumni of Color Feedback



Talking Points for Diverse Alumni Gatherings

- ✓ What was your experience on campus like?
- ✓ How do you want to engage with your alma mater? How could we improve?
- ✓ What engagement asks resonate with you and your peers?
- ✓ How can Samford better signal our support for diverse students and alumni?
- ✓ Would you connect with fellow diverse alumni to encourage deeper engagement?

“This has been a great way to signal institutional leadership’s support while also sourcing feedback.”

*Chris Blazer
Senior Director of Alumni Programs and
Annual Giving
Samford University*

The advancement staff at Samford University received sample talking points (highlighted above) to guide their conversations with alumni of color. These talking points included conversations that may be considered difficult at times. Samford University noted that it is critical to lean into that discomfort to yield the best alumni intelligence. All advancement professionals who attend the annual event (e.g., CAO, gift officers, alumni relations staff) are provided with sample questions to consider prior to the event and are encouraged to pass along relevant follow-up to the appropriate advancement professional. This information is then collected and stored centrally.

Diverse Alumni Listening Tour

A diverse alumni listening tour question guide can be found on pages 64-67.

From Difficult Conversations to Results

Enhancing Diverse Alumni Engagement and Giving

In addition to sourcing valuable diverse alumni feedback, the Samford University alumni listening tour yielded strong participation and gift results. At the luncheon, the president of the Black Student Union launched a preapproved, 36-hour crowdfunding project to solicit dollars for diverse student programming and scholarships. While the advancement team raised \$1,200 at the luncheon event itself, they ultimately raised \$6,000 in the subsequent crowdfunding campaign. While the University raised money for scholarship dollars, the most substantive win was the fact that 43% of the individuals who made gifts were making their first donation to the University. This program helped enfranchise alumni of color to commit to their alma mater for the first time and surfaced valuable alumni intelligence.

Samford's Efforts Yield Unprecedented Response from Alumni of Color

\$1.2K

Dollars raised at luncheon event for **minority initiatives**

\$6K

Dollars raised via follow-up 36-hour **crowdfunding effort** for IMPACT Scholarship

43%

Percentage of donors **making their first gift** to Samford



"These alumni, they are accomplished, but some may not have had the best experiences at Samford. They want to ensure that the diverse students of today have a better experience. They insist that **their engagement and philanthropy positively impacts current diverse students.**"

*Chris Blazer
Senior Director of Alumni Programs and
Annual Giving
Samford University*



Crowdfunding Resources

Please access EAB's crowdfunding resources for further information on launching a crowdfunding campaign: eab.com/af/crowdfunding.

Creating Bespoke Initiatives to Gather Intel

'Stanford Needs Alumni Perspectives' (SNAP) Engagements

Another way to source diverse alumni perspectives is to create bespoke and targeted engagements. The Stanford Needs Alumni Perspectives (SNAP) engagement is a curated experience specifically designed to solicit alumni feedback from underrepresented groups (e.g., alumnae, LGBT alumni, alumni of color). The program is housed in the Office of Alumni Affairs and was developed in conjunction with related offices around campus (e.g., LGBT resource center). It aims to connect diverse alumni with the University and deploy those alumni as "volunteer strategists" on a specific, targeted topic and seeks diverse alumni feedback on existing diversity-focused programs sponsored by the University. By refining existing programs, the University is better able to reflect the programming desires of diverse alumni.

Program Purpose



To use high-potential alumni as volunteer "strategists" to address a key issue that a campus partner is seeking to resolve

Sample Engagements

- Offered guidance to Stanford Law School regarding women's engagement effort
- Developed first-generation alumni programming suggestions and plans



Key Logistics

- 3-4 annual SNAP engagements
- 6-12 diverse alumni volunteers selected to participate in each engagement
- Volunteers attend 1-3 working sessions either in person or virtually
- Staff guide high-performing diverse volunteers to next-step leadership roles

First-Generation SNAP

Goal:

Engage first-generation Stanford graduates and source feedback on alumni programming

Questions for consideration:

- What efforts resonate with first-generation alumni?
- How do you want to give back to Stanford?
- Where does Stanford have more work to do to connect with other first-generation alumni?

Each SNAP engagement is a stand-alone opportunity to engage 6–12 underrepresented alumni. The Office of Alumni Affairs hosts one to three working sessions for each SNAP engagement in conjunction with the cosponsoring unit or department (e.g., LGBT resource center). The inclusion of virtual working sessions or a conference line helps combat any geographical diversity challenges that might exist. Each session has a stated goal as well as questions for consideration by the group. The questions for consideration are prepared by the cosponsoring unit in conjunction with alumni affairs. The questions help Stanford develop and scope new related programming that alumni would like to see develop or refine existing programming.

Engaging Underrepresented Alumni

Moving Beyond the Usual Volunteers

One of the recent SNAP engagements was designed to solicit feedback from first-generation students who attended Stanford. It sought to understand their story and experience and to generate ideas for future alumni programming. The group developed a list of possible alumni-related activities, including an oral history project, where current first-generation students could document the lives and stories of first-generation Stanford graduates. Each SNAP engagement is eligible for \$10,000 of seed funding from the Stanford annual fund to launch the initiatives suggested. Other institutions could create crowdfunding campaigns to support programming surfaced through similar exercises.

First-Generation SNAP Feedback



Alumni speaker at first-generation student welcome dinner



Oral history project



First-generation alumni/student Thanksgiving dinner



First-generation mentoring

\$10K

Pilot project grant dedicated to support initiatives of first-generation SNAP



An On Ramp for Greater Engagement

“The idea behind the SNAP program was to **build and engage underrepresented alumni in positions of leadership and build that more intensive leadership pipeline.**

We need to do a better job of engaging those whose Stanford experience doesn't align with what we think is typical.”

*Katherine Toy
Associate Director, Alumni
Volunteer Engagement
Stanford University*

The SNAP program serves as a key gateway for diverse alumni volunteers at Stanford. The experience of serving as a key strategist for a specific and discrete SNAP engagement also allows alumni volunteers to explore what a more sustained volunteer commitment may look like.



Institutional Partner List

A tool to identify relevant campus partners that work with diversity-focused programming can be located on page 62.

How Can We Enhance Our Efforts?

Three Steps to Conduct a Volunteer Gap Analysis

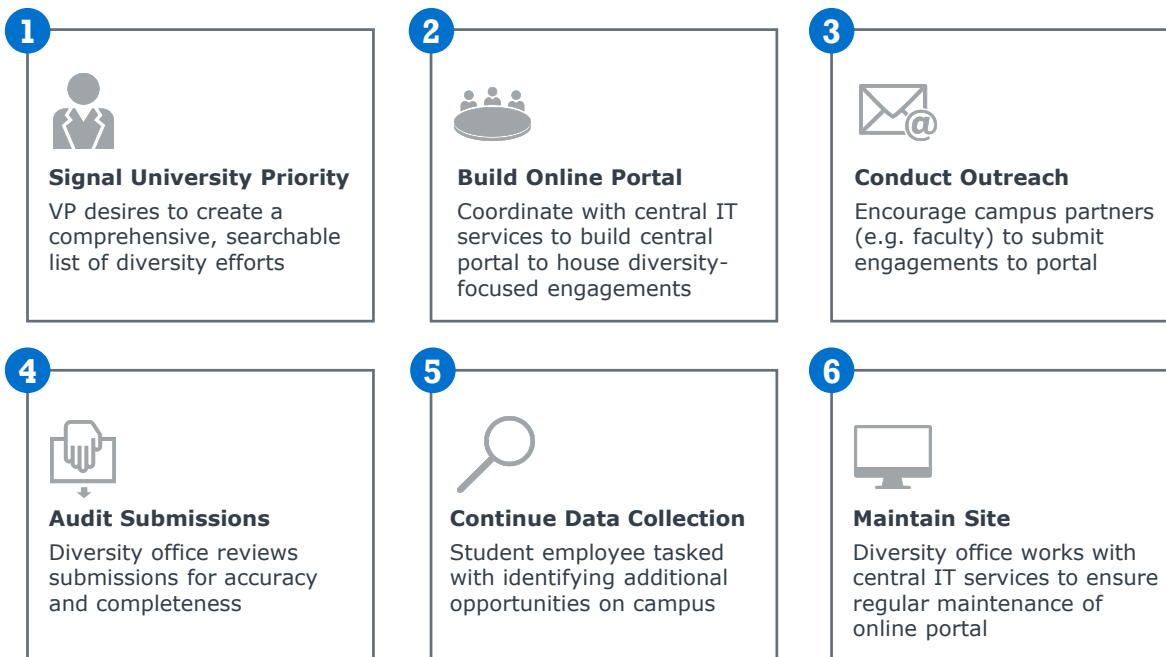
After collecting alumni feedback, do not immediately create or establish new programs. It is likely that related programming which meets the diverse alumni programming desires that were surfaced in listening tours and audits already exists. The following pages will help advancement offices unearth those related programs before investing in new programs.



Creating a Central Repository

Colorado State University's Diversity Inventory Process

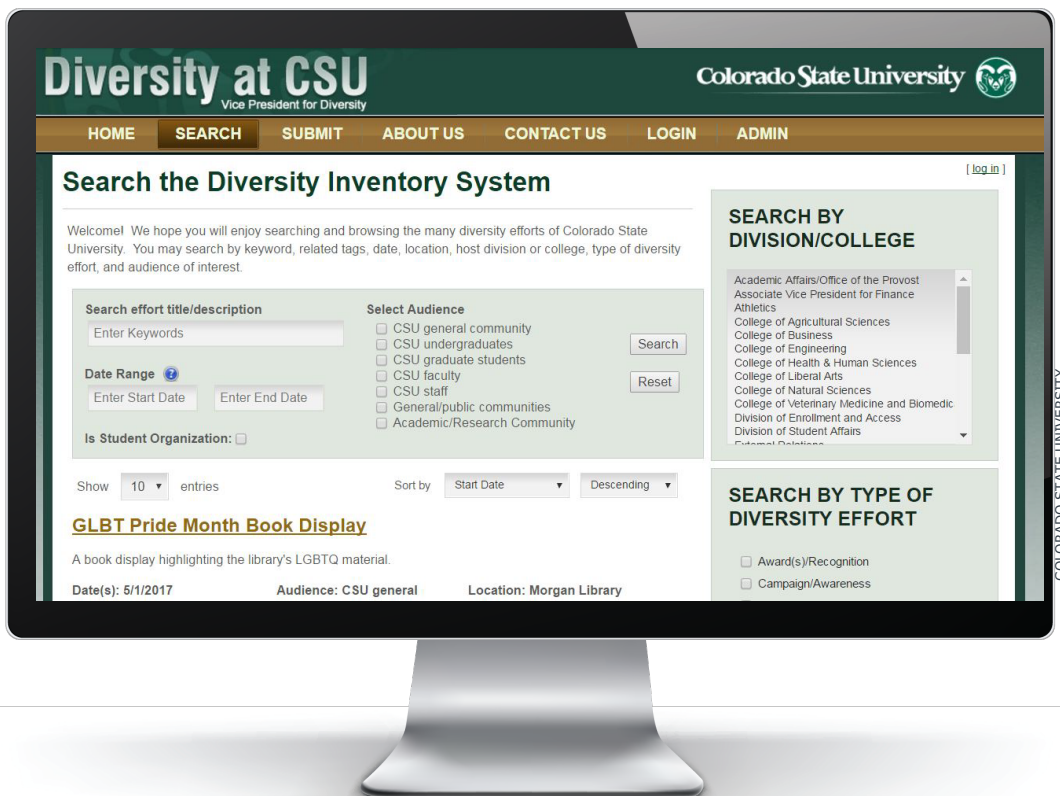
The office of the Vice President for Diversity at Colorado State University wanted to create a single one-stop shop where individuals could access a compendium of diversity-related programs, events, and engagements occurring across the University. They worked with the central IT office to build an online portal designed to house such an inventory. Then, staff asked faculty and unit leaders (e.g., Africana Studies department, LGBT resource center) via email to complete an online submission form highlighting diversity-focused initiatives hosted by their department or unit. To encourage greater unit and departmental participation, advancement teams taking on this effort should also highlight to departments and units how the advancement division can provide support in identifying high-caliber alumni volunteers for related programming.



Following the collection of submissions, staff in the office of diversity then edit the submissions for accuracy and concision before uploading them to the online portal. For advancement shops considering a similar approach, it is recommended to conduct an audit of the relevant programs on a semiannual, quarterly, or monthly basis. Student workers in alumni engagement divisions would be strong candidates for these audits as well as research efforts to uncover additional diversity-related programs across campus that may not have been surfaced in initial outreach to unit and departmental leaders.

Dynamic Online Portal Encourages Self-Service

The Diversity Inventory System at Colorado State University is a comprehensive, searchable listing of Colorado State University's various projects, initiatives, and activities aimed at advancing diversity, equity, and inclusion. It allows users to search based on audience (e.g., student, alumni), sponsoring unit (e.g., Hispanic studies program, LGBT student center, student organization), and prospective participants' availability or desired commitment.



The CSU Diversity Inventory System can be accessed at <http://diversityinventory.colostate.edu/home>.

Diverse Programming Audit Toolkit

Please see the related toolkit on pages 68-71 to conduct your own Diversity Inventory Audit to identify existing relevant programs.

Sources: Colorado State University, "The Diversity Inventory System," <http://diversityinventory.colostate.edu/search>; Advancement Forum interviews and analysis.

Taking Stock Before Launching New Initiatives

Diversity Inventory Highlights Current Opportunities at CSU

While conducting the diversity inventory, Colorado State University identified 83 ongoing diversity-focused or diversity-related programs across campus. Many of these programs were looking for alumni volunteers to engage. By curating the relevant programs into a single, on-demand, online portal, the University is better able to encourage prospective alumni volunteers to explore relevant programming online. A sample listing of some of the programs surfaced through this exercise is below:

83

Diversity-focused engagement opportunities surfaced through the Diversity Inventory at [Colorado State University](#)



Pride Month Book Display

Libraries

Provide curatorial and related expertise to University libraries' LGBT display in celebration of National Pride Month



Leadership Retreat

Division of Student Affairs

Assist with the Somos Rams Leadership Retreat for 25 CSU first-year Hispanic/Latina/o students



Diversity Committee

School of Social Work

Provide leadership and direction to the School of Social Work as they implement initiatives in its Diversity Plan



Archival Project

LGBT Center

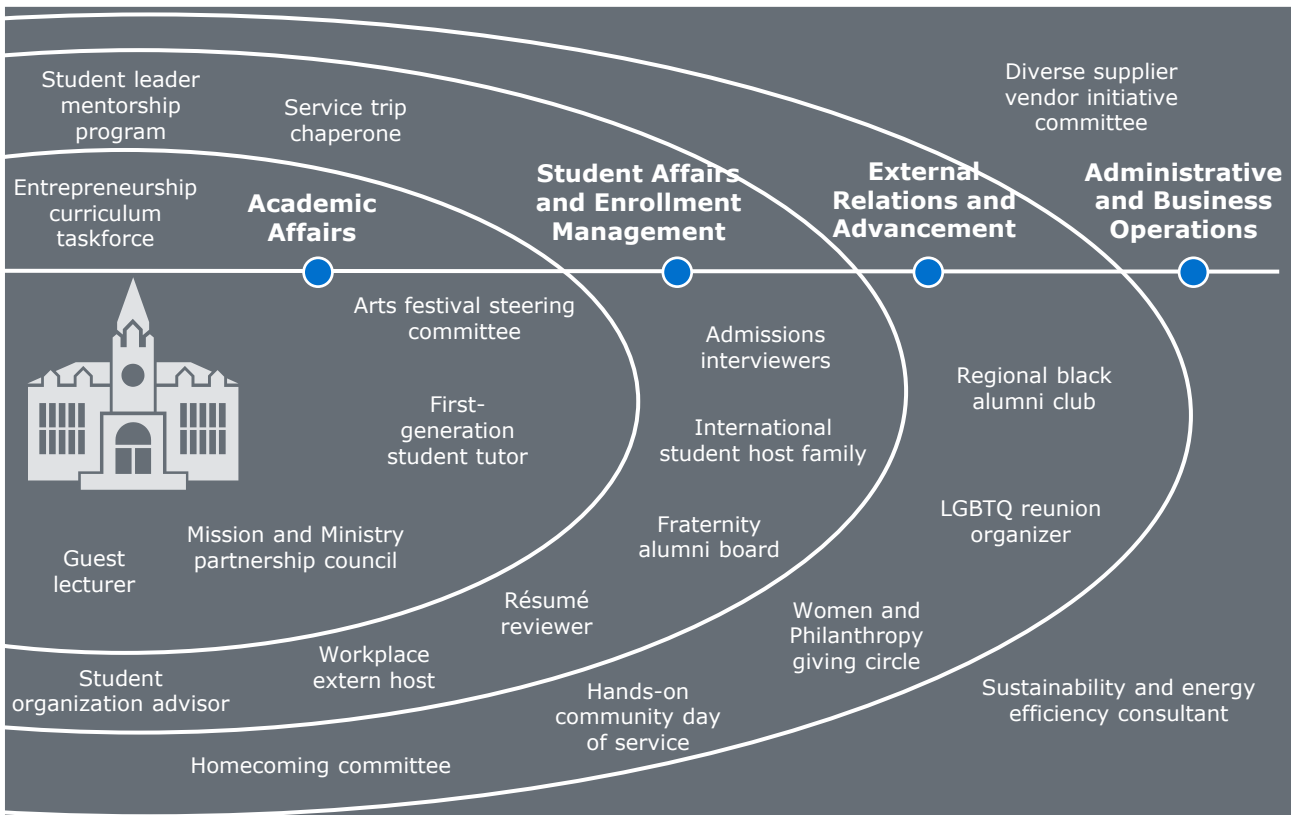
Catalog related memorabilia (e.g., newspaper articles) in the newly established LGBT Center archives

Whom Are We Missing?

Most Campuses Have 'Ghost Volunteers'

Most campuses feature a substantial contingent of “ghost volunteers,” alumni who are giving time and talent to academic divisions, student affairs departments, and other units as one-time speakers, panelists, or event assistants. The services of these individuals are largely unknown to alumni relations and development staff, causing their records to inaccurately reflect low engagement and leaving most of these volunteers stewarded inconsistently or not at all.

Hiding in Plain Sight



Source: Advancement Forum interviews and analysis.

Ensuring Everyone Is Counted and Recognized

University of San Diego's Campus Alumni Engagement Form

Seeking to identify "ghost volunteers," the University of San Diego Alumni Association created the Campus Alumni Engagement Form. Three times per year, after flagship University events that engage many alumni volunteers (e.g., Homecoming and Parent & Family Weekend), alumni staff email the form to the entire campus community. Mindful of potential protectiveness toward alumni contacts, the form thanks faculty and staff for their efforts in engaging alumni. It then highlights a slew of ways that the alumni association can support campus partners and their alumni volunteers, but only if they fill out the form.

Alumni Engagement Form

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



350

Number of alumni volunteers discovered in first three years

50%+

Percentage of submissions sent from faculty members

Helping Surface Diverse Alumni

EAB Analysis

- More inclined to engage with department and unit-level engagements
- Lasting connection with professors and campus partners (e.g., United Front Multicultural Center)
- Connectivity to student affairs and diverse student programming



We have so many volunteering opportunities across campus. I wish we knew all of them. **The reality is that our diverse alumni have stronger connections with individual units and clubs than they do with the central alumni staff,** and we need to leverage those connections."

*Vice President of Advancement
Public Research University*

This practice repositions the alumni association as a valuable resource to staff and faculty, a key component, because of their connections with diverse students and alumni. It also helps advancement teams build a more accurate and complete reflection of overall alumni engagement.

Ghost Volunteer Toolkit

Please access the Advancement Forum's toolkit on this topic for more information: eab.com/af/ghostvolunteers.

How Can We Enhance Our Efforts?

Three Steps to Conduct a Volunteer Gap Analysis

After conducting both a listening tour of diverse alumni desires and an inventory of preexisting efforts, identify programming needs that are not currently being met. Institutions who conduct a listening tour and audit will be better placed to make the case for investment in new alumni programs to meet unmet demand and invest limited resources more effectively.

1

Source Diverse Perspectives



Black Alumni Listening Tour



Stanford Needs Alumni Perspectives

2

Catalog Current State



Diversity Inventory



Alumni Engagement Form

3

Launch New Initiatives



Targeted Alumnae Mentoring



Stepped Student Alumni Programming

Connectivity to Students Is Key

Advancement-Led Female Mentorship Drives Engagement and Philanthropy

Stony Brook University conducted a listening tour with highly rated alumnae to understand how the University could deepen its engagement with this population. From the conversations, staff understood that alumnae wanted deeper connections with the institution, current students, and other alumnae. As a result, the University invested in the Women's Leadership Council. Each year, the Council has a membership of 10–12 alumnae who each provide an annual gift of \$10,000 to participate on the Council. This \$10,000 donation is supplemental to their other philanthropic support to the institution.



Women's Leadership Council



Program Purpose: To engage high-level female philanthropists with current students to deepen their connectivity to Stony Brook University

Key Elements



Mentor-Student Connection



Executive Coaching Session



Annual Fund Solicitation

Connecting Volunteer Mentors with Students

- Annual fall campus meeting for both mentees and mentors
- Annual spring trips for mentees and mentors (e.g., UN, Google, etc.)
- Individual meetings and calls between mentees and mentors (ongoing)
- Mentors provide connections for high-level summer internships
- Annual spring meeting for mentors only; high-level speaker and business meeting
- Philanthropy underwrites internships, conference travel to eliminate barriers to success

92% Percentage of female mentees who made a gift

The program includes opportunities for the alumnae mentors to support current students by assigning them a mentee, educating them on the philanthropic needs of the University, and networking with other high-powered alumnae. A sample listing of events has been profiled above.

Alumnae mentors are invited to participate based on propensity to give and interest expressed to assigned gift officers. Mentees are selected through an annual application process that seeks to highlight diverse female students at the University (e.g., first-generation, undocumented), to positively impact their lives, and to articulate the impact of a Stony Brook University education to alumnae mentors.

The program contains an annual ask of all student participants, and more than 92% of mentees have made a gift across the last three years. This builds in a philanthropic education component for current students participating in the program.

A Triple Win

Mentors' Tie to Diverse Students Critical to Program Success

Stony Brook University has seen tremendous success with this program to date. They note that it is a success for the University's advancement office because they are able to drive engagement with female mentees and increase giving, in addition to providing student participants with philanthropic education. It is successful among volunteer mentors, because they feel their time is valued, and they can connect with each other and current diverse students of the University. Finally, it is a success with the student participants because they gain access to powerful alumnae mentors and receive related career pathing advice.



Advancement Office

- Drive engagement from volunteer mentors
- Increase giving from mentors, students, and alumni
- Enhance culture of philanthropy and strengthen alumni network



Volunteer Mentors

- Provide intergenerational transmission of advantage, creating relationships that impact student experience and trajectory
- Develop and deepen relationships with like-minded women



Student Participants

- Receive career pathing advice from successful women
- Access to internships and other programs
- Part of a close-knit circle of high-achieving alumnae

Strengthening Female Engagement with Diverse Students

“These mentors, they are so busy they hardly have time to see their friends. We need to ensure that every moment our mentors spend with us is well used, that they feel valued and that they are having an impact. How do we do that? With our students. Our young women are high achieving strivers, but many are the first in their family to attend college and they need the social and cultural capital their mentors provide to succeed at the highest level. Helping these young women soar is a hugely gratifying experience for our mentors.”

*Deborah Lowen-Klein
Associate Vice President for Charitable Giving
Stony Brook University*

Building on a Strong Foundation

Adding Alumni to Iona College’s MOSAIC Mentorship Program

Iona College is expanding their diversity programs to develop a “MOSAIC Family” component. In reviewing their retention numbers, it became clear that first-year black male and Hispanic female students were having difficulty persisting on campus. Specifically, their retention rates were lower than those of their nondiverse peers. The program connects faculty and staff volunteer mentors with diverse students to increase persistence by providing assistance in navigating the college transition.

Related to alumni programming, the College is excited to add an alumni component to the program. The MOSAIC Family will consist of not only the student mentee and the faculty or staff volunteer but also an alumnus of Iona College. The alumni volunteer will help support the student mentee with career pathing guidance and alumni mentoring, in addition to related components highlighted below. The engagement will deepen the diverse alumnus’s engagement with the College, highlight the growing diversity efforts on campus, and help surface new diverse alumni volunteers for future leadership roles.



Current MOSAIC Program



Next Steps: Adding Alumni Voices

Logistics: Underrepresented students invited to apply to program and receive faculty or staff mentor

Activities: One-on-one mentoring, group activities, and service learning

Goal: Support diverse students in navigating college, building skills for first-year success, and connecting to the College

Logistics: Create a MOSAIC Family composed of a student, faculty, or staff mentor, and program alumni mentor

Activities: Alumni mentoring, group activities, and career networking

Goal: Match MOSAIC students with alumni volunteers for ongoing career guidance and support



“We are enrolling more and more diverse students at the college. This initiative is to help foster a sense of community and belonging between students, faculty, staff, and **the future alumni network.**”

*Marinel Martinez
Assistant Director for the Office of Student Development
Iona College*



Cultivating Diverse Volunteer Leadership

Recalibrating Volunteer Outreach

SECTION

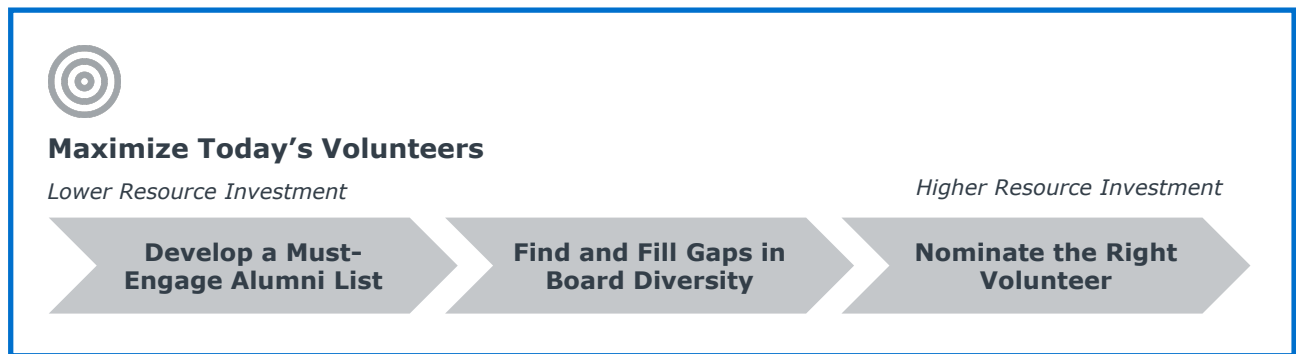
- Maximize Today's Volunteers
- Recruit Tomorrow's Leaders

3

Diversifying the Pipeline

Proactively Cultivate and Path Diverse Volunteers

Advancement leaders need not only to maximize their efforts with today's existing volunteer base but also to proactively recruit the volunteer leaders of tomorrow. This is especially true for diverse volunteer leaders who may not have had the same experience on campus as the default alumni volunteer perspective reflects. This section explores how advancement leaders can both maximize their efforts today and lay the groundwork to recruit tomorrow's alumni leaders.



Recruit Tomorrow's Leaders

Lower Resource Investment

Higher Resource Investment



Tried-and-True Outreach Fails to Resonate

Existing Efforts Overlook Underrepresented Segments

Advancement offices' current efforts to engage and recruit diverse alumni volunteer leaders have not met diverse alumni needs. Often, the communication inviting alumni to participate in or serve on alumni councils, networking events, or career panels does not highlight diverse alumni experiences or perspectives. Email and printed communications focus on static text that does little to engage diverse alumni experiences and build excitement. Communication often does not include images of diverse alumni or student participants or inconsistently highlights the impact volunteering can have on the current diverse student experience.

Volunteer Engagement Strategies...

...Accidentally Exclude Diverse Alumni



Generic Email Invitations

Invitations for alumni programming events sent via email



"The stories told in alumni emails don't resonate with my memories of campus."



Networking Events

Panel discussion for alumni based on career interests



"The people at networking events are nice, but they can't relate to the issues I face in my career."



'Bring a Friend' Campaign

Invitation to engaged alumni to bring alumni friends to events



"If events aren't sensitive to my experience, why would my friends come with me?"



Class Reunions

Invitation to participate in class reunion based on class year



"Does my alma mater host a black alumni weekend?"

Mine Institutional Networks to Surface Leads

Building a Roster of High-Potential Volunteers at McGill

While advancement professionals often lament that they know few diverse alumni leaders, they also acknowledge that institutional partners (e.g., professors, student affairs staff) have stronger connections to diverse students while they are on campus. Leverage those relationships to source prospective alumni volunteer leaders. Beyond institutional partners, existing diverse alumni volunteers serve as strong referral sources—while advancement staff might not know where high-potential diverse volunteer leaders reside, their fellow diverse alumni peers do. The reality is that diverse alumni had a different experience on campus and developed bonds that continue well beyond graduation.



Key Steps for Creating a Top 100 List

- 1 Identify criteria for adding individuals to the list, including desire to engage as future alumni leaders
- 2 Solicit nominations from faculty, staff, and volunteer leaders who are more likely to have personal connections to diverse alumni
- 3 Evaluate all names and cull the list to 100 alumni
- 4 Assign alumni to a "volunteer prospect manager" who crafts overall engagement plan

Purpose:

- To identify, track, and "career path" high-potential alumni to meaningful volunteer roles
- To offer a structured education in advocating for the institution

“

I often find it tough to identify diverse alumni for volunteer positions. I am simply not aware of who our diverse alumni volunteers are, but I know that our faculty are.”

*Assistant Vice President for Alumni Relations
Public Research University*

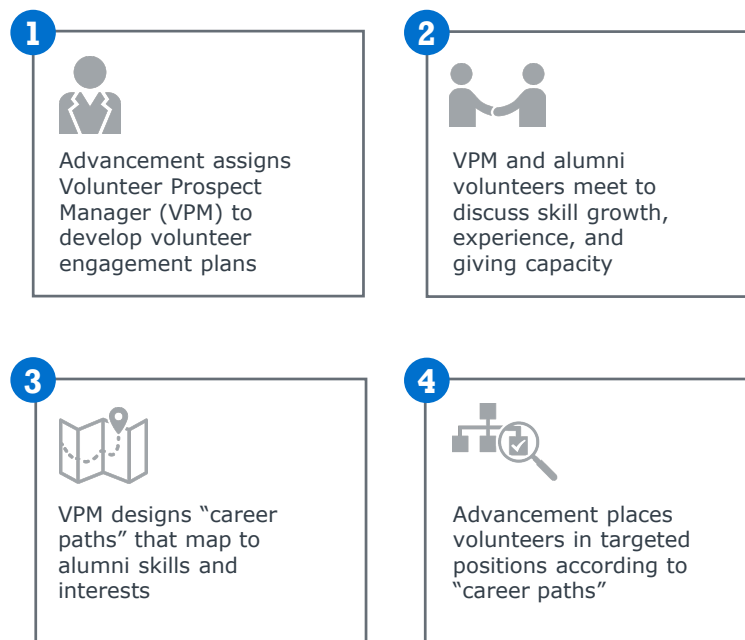
Developing a Top 100 Volunteers list is crucial to having a pool of alumni volunteers ready when opportunities arise. McGill University created the Top 100 Alumni Volunteers list through faculty, staff, and existing volunteer referrals, because they felt that those institutional partners were more likely to source diverse alumni leads than the advancement office could do on its own. The Excel-based list is a file of top alumni prospects the University would like to engage in the future. It is managed centrally in alumni relations and updated on an annual basis.

Creating a Qualified Volunteer Pipeline

Volunteer Management Plans Turn 'Top 100' into Trusted Advocates

The "Top 100" is only part of McGill's larger dedication to surfacing and engaging these prospective diverse alumni volunteers. Once an individual alumnus is placed on the list, he or she is assigned a Volunteer Prospect Manager (VPM), who finds time to sit down with the alumnus to learn more about him or her. They discuss their existing skills, new skills they would like to develop, relevant experience, and giving capacity. As a result of this time investment, the VPM is better able to place prospective leaders in meaningful and relevant programming when a vacancy arises.

Deploying Volunteer Prospect Managers



“Much like employee career development plans, Volunteer Management Plans provide for effective use of volunteers, ensuring that their particular talents are matched appropriately to openings as they arise.”

*Royal A. Govain
Former Managing Director of
Volunteer Partnerships
McGill University*

Ensuring alumni relations staff are assigned to individual volunteer prospects helps unearth valuable information from future alumni volunteers. This information is critical to success, because alumni relations staff are better equipped to know what existing alumni volunteer vacancies exist than an alumnus would be on his or her own. Furthermore, the alumni relations staff will have insight into relevant opportunities that may be upcoming.

The Risks of Recruiting by Network

Homogenous Boards Tend to Self-Perpetuate

One of the biggest challenges advancement leaders face in recruiting diverse alumni volunteers is what to do when a board vacancy arises. The status quo response to this challenge has been to ask remaining board members to provide a list of nominees to fill the vacancy. This networking approach all but ensures that new nominees to the board will look much like the existing board, due to implicit bias and social and professional networks that mirror board members' own worldviews. Advancement leaders need to consider new and innovative ways not only to source diverse alumni leaders but also to provide existing boards a way to onboard and welcome them.

Status Quo Recruitment Efforts...



Board vacancies open as terms expire



Advancement leaders seek nominations from existing board members



Final list of nominees closely resembles demographics of existing board

...Limit Access to Diversity



75%

Percentage of white Americans with no minority presence in personal networks



85%

Percentage of nonprofit staff who rank networks among the most popular and effective recruitment channels



"The old model of board member nomination was essentially a 7th grade popularity contest. We cannot keep doing that. It perpetuates the problem."

*Bill McCausland
Executive Director
University of South Florida Alumni Association*

Holistic Diversity Review

University of Rochester Digs Beneath Traditional Diversity Metrics

One way to increase diversity on boards and advisory councils is to develop a comprehensive listing of alumni being prepared for board- and advisory council-level positions. The University of Rochester completed this exercise and then captured diversity-related information to ensure they have a composite picture of the unique skills, capacity, and diversity an individual could bring to a board or council position. The metrics that the University considers include race and gender, as well as school or unit connections, and geographic diversity of the alumni volunteer prospect.

- 1 Capture diversity data from alumni database
- 2 Compare to demographic gaps in board composition
- 3 Prioritize nominations to address current gaps

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	
1	Alumni and Constituent Board Demographic Overview	Geographic Location						School / Unit						Volunteer Roles			Level of Engagement			Age			Gender Identity		Race/Ethnic Background								
2		Boston	Chicago	Metro NYC	Philadelphia	Rochester	Washington, DC	Other	Arts, Sciences & Engineering	Music	Medicine and Dentistry	Nursing	Oral Health	Business	Education	Committees	Activities	Event	High	Medium	Low	60 and over	45-59	30-44	29 and under	Female	Male	Asian/Pacific Islander	Black/African American	Hispanic/Latino	Native American	White/Caucasian	
3	Sample, Joe				X			X							2			X			X					X							X
4	Sample, Joanne						X			X							1			X				X	X			X					

“This is not a static document. It is a living document, **so when a vacancy hits, we are ready to go.** It’s an important tool in our alumni relations work.”

*Paul Lanzone
Assistant Vice President of Alumni & Constituent Engagement
University of Rochester*

The database is stored in an Excel file in the alumni relations office and is populated with data from both the advancement database and self-reported information from alumni surveys. It is updated on a quarterly basis, which ensures the information is current and refreshed. The quarterly update also ensures that when an alumni volunteer leadership vacancy occurs, the alumni relations and development staff are well equipped to have a holistic view of the diverse background and experience an individual can contribute to the board or advisory council with the vacancy.

Board Diversity Review

Please visit EAB’s Board Readiness Matrix template located on page 77.



Prioritizing Qualified, Diverse Volunteers

Marquette University’s Board Readiness Matrix Quantifies Value of Diversity

Another strategy to increase diversity on boards and advisory councils is to signal institutional commitment to diversity by applying a metrics-based approach to board candidacy. In preparing to fill a series of vacancies on their national alumni council, Marquette University established a board readiness matrix. The matrix seeks to prioritize possible candidates for board seats based on a combination of engagement, connections, prior volunteer commitments, and diversity. Each alumnus who was considered for the board could receive an additional point if he or she was a person of color or a known member of the LGBT community—two focus areas where the board sought additional diversity. If an individual represented neither of these demographics, he or she did not receive the associated point. If the individual represented both of these demographics, he or she received only a single diversity point.

Define Diversity Needs



Race

Board members disproportionately white



Gender Identity

No known LGBT board candidates

Scoring Strategy

+1

Point if alumni of color

+1

Point if LGBT

Board Readiness Matrix

Sample Candidate

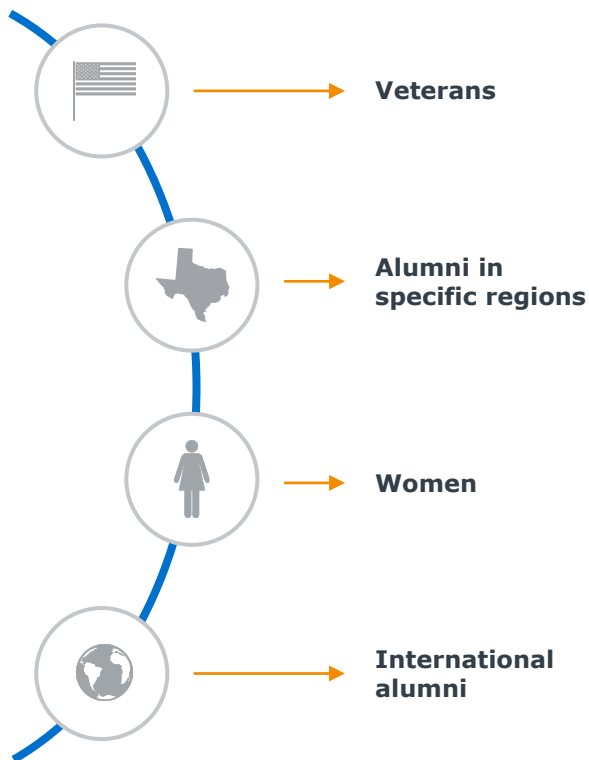
Qualification	Max Score	Candidate Score
Engagement Score	16	10
Prior Volunteer Experience	5	3
Connections	5	5
Endorsement of Board Members	5	3
Diversity	1	1
Total	32	22

The addition of the single diversity point signaled to internal advancement staff that diversity of perspectives and background was something the University valued and wanted on its national alumni council. The first time the matrix was employed, there were more than 50 alumni who were eligible for board membership. Applying the board readiness matrix helped the institution prioritize whom they should be focusing on as possible candidates in the immediate and whom to develop for the future. Names of individuals who met a critical threshold of points were sent to the board for further consideration. While only four alumni of color were in the candidacy listing, three of the four now serve on the national alumni board.

Applying the Matrix to Your Boards

Customize Matrix by Changing Populations and Points

While the board readiness matrix from Marquette University focused on increasing diverse representation of LGBT alumni and alumni of color on their national alumni association board, other institutions can adopt this practice to meet their nuanced needs. For example, advancement professionals who seek increased representation from women or alumni from a specific region could apply a supplemental diversity point(s) to increase representation from particular target populations. Key considerations for adapting this practice are outlined below.



Key Considerations

- Which populations have inadequate representation on the board?
- How do we collect diversity data from candidates?
- How many points are types of diversity worth in our matrix?
- How much preference should be given to diverse alumni relative to other qualifications?
- Should the matrix be used to qualify a broad pool of volunteers or make distinctions among a final group of candidates?

Diversifying the Pipeline

Proactively Cultivate and Path Diverse Volunteers

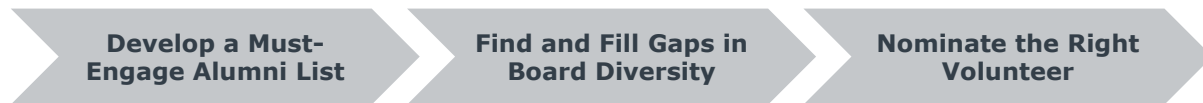
After investing in identifying and deploying diverse alumni volunteers for existing vacancies and soon-to-be-vacant volunteer roles, advancement leaders can signal an institutional commitment to diversity and inclusion by building a pipeline of future diverse alumni volunteer leaders. This section will focus on how we can signal that commitment to diversity and inclusion to surface and engage the volunteer alumni leaders of tomorrow.



Maximize Today's Volunteers

Lower Resource Investment

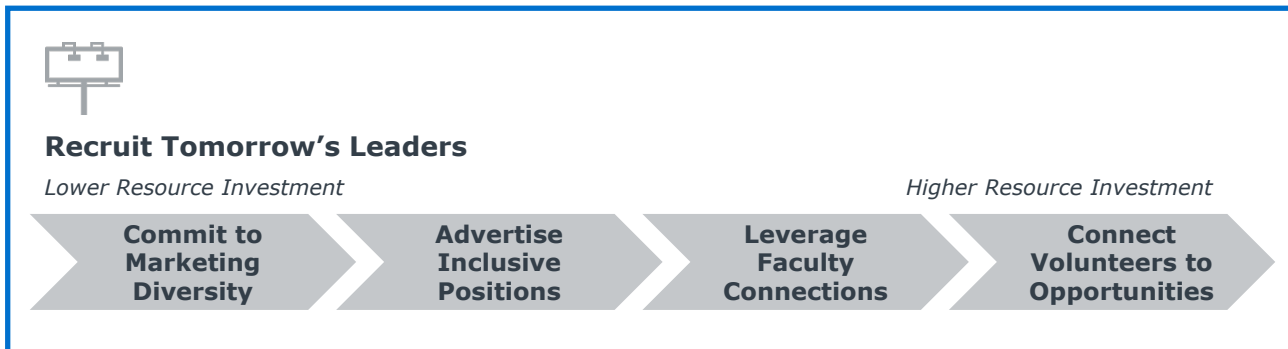
Higher Resource Investment



Recruit Tomorrow's Leaders

Lower Resource Investment

Higher Resource Investment



Showcasing a Range of Student Experiences

Making a Concerted Effort to Highlight Diverse Stories

The University of Michigan's Alumni Association conducted an audit of their print and web-based collateral and noticed that the publications did not highlight the strong diversity of the student and alumni population. At the same time, the Alumni Association was tasked with fundraising for the LEAD Scholars program, an initiative that provides funding for diverse students, because the University was no longer able to accept scholarship monies for race and gender-specific programs due to state legislation. The Alumni Association connected these two realities to highlight diverse faces and stories in their existing publications.



Alumni Magazine Spotlight

What to Publish

1. Underrepresented alumni success stories
2. Affinity group profiles and activities
3. Academic and professional updates from popular underrepresented faculty and other diverse VIPs
4. Calls to action to support affinity groups through volunteering and giving



Life After LEAD

WHEN I GRADUATED FROM U-M IN 2015, I was unsure of my long-term professional goals, but knew I wanted to be in Detroit. I now work as a development associate at The Platform, a real estate development firm founded in February 2016 with the goal of rebuilding Detroit. I wake up every morning excited that I can help my favorite city grow while also learning a tremendous amount about real estate. For that, I have the Alumni Association's LEAD Scholars Program to thank.

LEAD's financial assistance allowed me to graduate debt-free from the LSA Honors Program. That, in turn, allowed me to venture into the world of Detroit real estate. I am currently in the process of purchasing a duplex on the west side of the city with another U-M alumna. Obtaining a mortgage in the city is challenging, but obtaining a loan while burdened with student debt is nearly impossible. Though the home-buying process has taken longer and been far more complicated than I ever anticipated, it has also provided me with an invaluable experience. I now have firsthand knowledge of the marketplace. My own path to purchasing will be useful as I aspire to be a socially just real estate developer for others.

Steps to continue the conversation:

Learn more about the LEAD Scholarship program

Other potential next steps:

- Call prospective students
- Mentor a current LEAD Scholar
- Offer career advice or internship

Furthermore, communications staff were asked to include calls to action for related stories. The "Life After LEAD" series is now a staple in the Alumni Association's magazine publications. The series profiles success stories from LEAD Scholarship recipients, and the text provides the reader with a call to action, such as the opportunity to call prospective LEAD Scholar students and encourage them to consider the University of Michigan or to financially support the scholarship program.



Alumni Publication Collateral Audit

To audit your alumni publications for diversity-related content and images, use the audit template located on page 79.

Telling the Story of Diversity on and off Campus

University of Washington's *Viewpoint* on Diversity

Another approach to highlight diversity in alumni publications is to develop a stand-alone diversity-focused publication. *Viewpoint* is a dedicated diversity-specific publication at the University of Washington in partnership with the Office of Minority Affairs & Diversity and the UW Alumni Association. Published twice a year, *Viewpoint* tells stories and profiles UW students, faculty, and alumni who are making a difference with a focus on diversity. The stories are in-depth analyses and conversations around issues and questions about diversity on campus and the diverse student experience. There are embedded calls to action throughout each issue, and all issues can be accessed both in print and [online](#).



Engagement Highlights

5

Calls to action embedded in Spring 2017 issue:

- Serve as a volunteer
- Support equity trainings
- Attend university diversity conference
- Support professional development series
- Attend annual diversity celebration

25,000

Copies distributed twice annually

18

Issues published since 2007

Alumni Publication Collateral Audit

To audit your alumni publications for diversity-related content and images, use the audit template located on page 79.

Standardizing Word Choice

GWU's Standard Volunteer Job Descriptions Reduce Misunderstanding

The George Washington University launched an effort to inventory all centralized alumni volunteer positions. In conducting the inventory, however, they also created standardized job descriptions for all centrally administered alumni volunteer roles. The standardization of these competencies helps ensure a consistency of language to combat biases that certain words may unintentionally convey. The resulting job descriptions are stored in a centrally managed portal for alumni volunteer managers to refer to and update annually.

Job Descriptions Clarify Opportunity

Industry Leadership Council: Chairperson

Description

- Engage with Alumni Relations staff in the execution of industry-based programs
- Lead meetings among Council members

Required Skills and Competencies:

- *Leader*: Leads and supports a team to achieve results
- *Diversity-minded*: Values diversity and seeks to understand multiple perspectives

Time Commitment:

- Two-year term
- 10 hours per month

Standard Competencies Diminish Exclusionary Subtext



Diversity-minded: Values diversity and seeks to understand multiple perspectives



Influencer: Gains support and convinces others to advance the objectives of the organization



Initiator: Identifies and deals with issues proactively and persistently



“Standard descriptions and competencies help all alumni volunteers understand their scope, and engages a greater breadth of our alumni.”

Bonnie Graham
Director of Alumni Volunteer Programs
George Washington University

The alumni relations staff at The George Washington University created a self-service template to ensure compliance and consistency among all job descriptions. Alumni volunteer managers were encouraged to use the template to create job descriptions for each of the volunteer roles they manage. An excerpt of the tool is highlighted above. The template also included a comprehensive listing of related standard competencies that volunteer managers could use to populate their job descriptions, ensuring the process would be as easy as possible, while avoiding language that could unintentionally discourage diverse alumni from volunteering.



Volunteer Job Descriptions

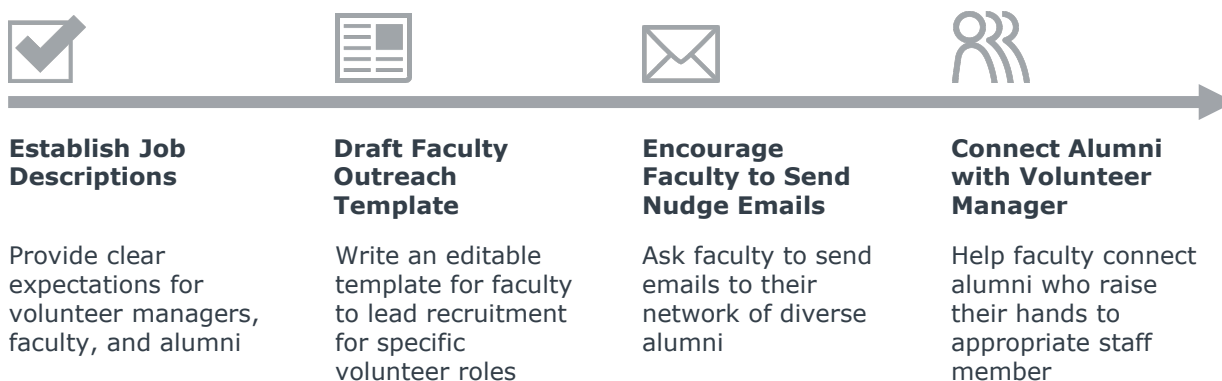
Please refer to page 72 for a toolkit on establishing volunteer job descriptions.

Source: Advancement Forum interviews and analysis.

It Takes a Village

Scaling Volunteer Recruitment Efforts Beyond Advancement

Once organizations develop standardized alumni volunteer job descriptions, think about how they will be communicated to future alumni volunteers. While it is important to place volunteer job descriptions on alumni volunteer leadership boards and relevant alumni-focused websites of the institution, that is not adequate to yield a diverse set of alumni applicants. Because diverse alumni have stronger relationships with existing alumni affinity leaders and faculty than they do with alumni relations staff, institutions need to work with faculty partners and peer-to-peer affinity champions to cultivate and capture a more diverse applicant pool.



“Our faculty are our greatest tool in recruiting diverse alumni volunteers and leaders. They love keeping in touch with their favorite graduates, but we in Alumni Relations need to make it easy, or else making appeals for us can seem like just another task added to their list.”

*Director of Alumni Relations
Private Baccalaureate Institution*

Alumni relations staff can encourage faculty and existing affinity champions to tap into their networks by preparing pre-scripted draft emails and acknowledging that the alumni relations team will manage, track, and follow up with alumni. By making outreach easy for faculty, staff, and affinity champions, alumni relations staff will encourage participation and have a greater likelihood of sourcing diverse alumni leaders.

Nudge Emails

Please refer to page 76 for a template and best practices on faculty-led outreach emails to diverse alumni populations.

Proactively Pushing Our Volunteer Roles

'CU Volunteer' Makes It Easy to Find Compelling Opportunities

A Volunteer Management System is the next frontier in alumni volunteerism and engagement. Cornell University uses a tool that enables staff to connect volunteers with relevant and interesting roles and volunteer engagements. The tool, hosted by GiveGab, allows alumni relations staff to upload all of their ongoing alumni volunteer job opportunities and tag them to specific interests or geographic locations. The tool can be accessed here: <https://givegab-cornell-alumni.herokuapp.com/opportunities/positions/>.

The image is a composite of three parts. On the left is a selection interface titled "Where are you most experienced?" with the instruction "Select up to five... just click on the picture." It features a 4x4 grid of 16 circular icons representing various fields: Agriculture, Animals: Animal Health & Conservation, Arts & Culture: Talent and Production, Consulting, Design/Planning, Education, Entrepreneurship, Finance: Banking, Government & Law, Hospitality: Recreation, Natural Resources: Energy, Nonprofit, Real Estate: Management & Sales, Research, Technology: Software and Services, and Transportation. An orange arrow points from this grid to the middle part, which is a screenshot of the Cornell University volunteer dashboard. The dashboard shows a welcome message for Laura Denbow, a "Recommended Position Search" bar, and a list of recommended positions: Admissions and Financial Aid (23), College of Agriculture and Life Sciences (4), and College of Engineering (1). A pop-up window displays a nomination for "Member at Large, Cornell University Council (CUC)" with a 67% match score and detailed information about the position. On the right is another screenshot of the dashboard showing "Your Communities" (CALs Community, OVP, Cornell Club of Long Island) and "Cornell Interests, Skills & Experience" with buttons for various categories like "College of Agriculture and Life Sciences" and "Admissions and Financial Aid".


Source: Advancement Forum interviews and analysis.

Brokering Smarter Matches

Demographic Data Links Cornell Alumni to Relevant Opportunities

When a prospective alumni volunteer accesses the site, he or she is asked questions about his or her interests, demographics, and geographic location. Those answers are then connected to that individual's volunteer record in the central database. The tool uses an algorithm to ensure that only the most appropriate, applicable, and relevant alumni volunteer opportunities appear on the first page of search results on the individual's personalized landing page. This ensures that a male alumnus living in Washington, D.C., is not seeing an alumni volunteer job posting to participate in the Cornell Alumnae Council of New York City, for example.

Alumni Personas

 **Maria**
• Female
• Hispanic



Matching Alumni Organizations

- Member, President's Council of Cornell Women
- External Relations Chair, Cornell Latino Alumni Association

Hispanic **Women**

 **Oliver**
• Gay Male
• Lives in London



- Volunteer, Cornell Alumni Admissions Ambassador
- Chapter Organizer, Gay and Lesbian Alumni Association

International **LGBT**

 **Melanie**
• Asian
• Law Graduate



- Mentor, Cornell Alumni Network of Asian Lawyers
- Treasurer, Cornell Asian Alumni Association

Lawyer **Asian** **Over 40**



Each volunteer opportunity suggests a "percent match" based on alumni interests



Major gift officers receive notification when assigned prospects register their interest

The tool can also posit what diversity-related programming could be of interest to a user by capturing data related to sex, ethnicity, race, or sexual orientation. As the platform has the ability to tag specific alumni leadership opportunities with associated diversity tags, the University can ensure that diverse alumni see the most relevant available alumni opportunities when they enter the portal, thus increasing the chances that the alumni will volunteer their skills and time with the University.

If the prospective alumni volunteer happens to be a major gift prospect, the gift officer assigned to the individual will receive an email from the system informing him or her of the alumni volunteer's interest, enabling just-in-time outreach with the prospective volunteer.



Making Diversity and Inclusion an Organizational Priority

SECTION

- Diversity and Inclusion Training
- Volunteer Diversity Portal
- Board Diversity Audit

4

Driving Systematic Change

Embedding Diversity and Inclusion Across Our Organization

The single largest challenge that advancement professionals face in supporting diversity and inclusion work is that it cannot be the job of just one person. Each and every individual in the university community (i.e., faculty, staff, administration, students, alumni, friends) has a role to play in advancing the cause and creating a more inclusive environment. This section expands beyond the immediate topic of diverse volunteer leaders and presents ways in which advancement leaders can signal a commitment to diversity and inclusion to their staff, alumni leaders, and board members.



Profiled Practices



Diversity and Inclusion Training



Online Volunteer Training Portal



Annual Diversity Dashboard



Target Metric 50/50

No Longer a 'Nice to Have'

Diversity and Inclusion Training Becomes a Business Imperative

The workforce of the 21st century is changing, and the desires and demands of both employees and employers are constantly shifting. As it relates to diversity, it has been made clear that employees do not think that their employers are doing enough. At the same time, over half of employers think that their employees should have stronger cultural competencies. Some institutions have begun to organize diversity and inclusion trainings, usually offered by central human resources staff. While a good first step, these trainings tend to be reactive and focus on policies and procedures. To be successful, advancement leaders need to invest in implicit bias trainings to meet staff demand and business needs.

What Employees Really Want...

Source: Harvard Business Review

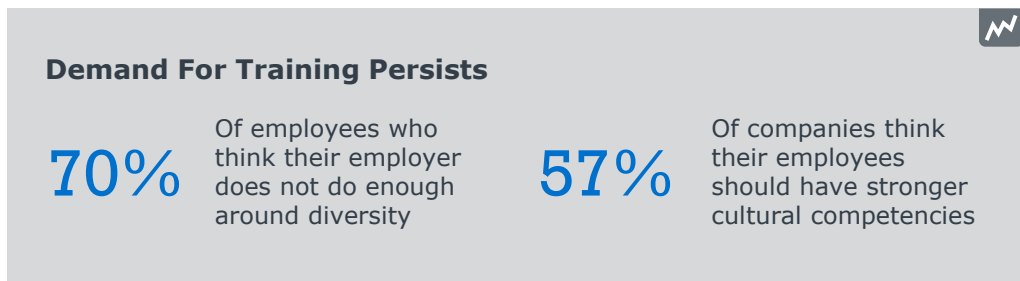
1. Trust
2. Enrichment
3. Responsibility
4. Community
5. Contribution



...Complicated by Diversity Lens

THE CHRONICLE OF PHILANTHROPY *It's Time to Either Put Up or Shut Up About Diversity*

NPO *Philanthropy Must Save Itself from Whiteness*



Sources: AdvanceSource: Thompson A, "The Intangible Things Employees Want from Employers," *Harvard Business Review*, Dec 3, 2015; Thurman R, "Nonprofits Don't Really Care About Diversity," *Stanford Social Innovation Review*, May 18, 2011; Glassdoor Team, "What Job Seekers Really Think of Your Diversity Stats," Nov 17, 2014, <https://www.glassdoor.com/employers/blog/diversity>; Smith C and Turner S, *The Radical Transformation of Diversity and Inclusion: The Millennial Influence*, Deloitte University, 2015, <https://www2.deloitte.com/content/dam/Deloitte/us/Documents/about-deloitte/us-inclus-millennial-influence-120215.pdf>; Advancement Forum interviews and analysis.

Building Current Staff Competencies

Implicit Bias Training for University of Washington Advancement Staff

Implicit bias is defined as the automatic associations people make between groups of people and stereotypes about those groups. We all have implicit bias, and the free web-based resource sponsored by [Project Implicit](#) is a good starting point to address it. Project Implicit is a nonprofit organization involved in research about implicit social cognition—thoughts and feelings outside of conscious awareness and control. Some advancement offices are beginning to offer implicit-bias trainings to their staff to deepen their understanding in order to combat it.



Supplementing Annual Implicit-Bias Training for All Advancement Staff:



Number of times each one-hour session is offered annually



Percentage of advancement staff who have voluntarily participated in training



"The session was mind-blowing. I am so glad we are doing this as a department."

"Sometimes I was uncomfortable, yes, but we need to lean into that discomfort and learn to grow together."



Forthcoming Training

The University of Washington is planning a **pronoun workshop** for advancement staff, offered by the LGBT resource center.

The University of Washington offers implicit-bias training to their staff four times annually. They also record the sessions and post them to the advancement intranet to assist in onboarding new staff when an in-person training session is not readily available. Beyond the implicit-bias training, the University has created a three-year supplemental training program that hosts external speakers to present on cultural competence, microaggressions, and institutional racism. The advancement division does not require staff to attend these trainings, but more than 80% of their staff have opted to participate. The director of training and development hopes to expand the program to include a pronoun workshop for advancement staff hosted by the University's LGBT resource center.

The New Frontier in Volunteer Training

Ithaca College's Online Volunteer Education Portal

Educating advancement staff is important, but diversity and inclusion trainings also need to meet the needs of alumni ambassadors, the single largest segment of our advancement workforce. Faced with a series of race protests on campus in the fall of 2015, Ithaca College invested in their [Inclusive Excellence](#) campaign. The institution-wide effort recognizes that a community or institution's success is dependent on how well it values, engages, and includes a rich diversity of students, staff, faculty, administrators, and alumni constituents.

Inclusive Excellence Goals

- 1 Develop educational programming for volunteers
- 2 Highlight strategies for creating diverse volunteer leadership
- 3 Communicate volunteer expectations related to diversity and inclusion
- 4 Establish online web portal with modules:
 1. Effective Listening
 2. Tough Conversations
 3. Managing Conflict



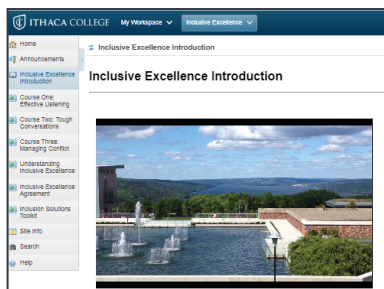
Board of Trustees



Alumni Association Board



Alumni Association Committee on Diversity



Inclusive Excellence On-Demand Training Webconferences

Making the Ithaca College Community a More Inclusive Space

60-Minute Sessions

- Introduction
- Pre-session quiz
- Research
- Related articles
- Related podcasts

The alumni relations team at Ithaca College uploaded their trainings to an online portal, making them accessible to volunteers around the world. Volunteers of the College are expected to demonstrate an ability to treat all people equitably—and with an awareness of cultural differences—and to show willingness to develop interpersonal and communication skills required to work in a multicultural and inclusive community. The effort resulted in three one-hour webconferences that are available on demand for all Ithaca College alumni volunteers. The sessions include pre-session quizzes, supplemental reading, and related podcasts on the topics highlighted above.

Sources: Ithaca College, "Inclusive Excellence"
<https://www.ithaca.edu/volunteering/resources/inclusiveexcellence>
and Advancement Forum interviews and analysis.

Scaling Our Reach

Ithaca's Dynamic Portal Supports Volunteer Training

The on-demand web-based training portal is new for Ithaca College volunteers, and the alumni relations team is excited to both signal the institution's commitment to inclusive excellence and to equip volunteer leaders with the skills required to do so in a tangible way. To ensure accountability, the portal asks all alumni volunteers who participate in the online training to sign an Inclusive Excellence agreement (excerpt below), signaling their support of the institution's commitment to inclusive excellence.

Inclusive Excellence Agreement

As stakeholders in Ithaca College, we ask that you agree to support the college's priorities around inclusive excellence. Please read the following statement and click below to indicate your support. Once you have indicated your support, please email the form to alumni@ithaca.edu.

Agreement

1. College Commitment
2. Diversity and Respect

I personally believe in and am committed to living these daily through my role with and in Ithaca College's Division of Institutional Advancement & Strategic Marketing and Communications and our affiliated volunteer organizations and committees.



By checking this box, I agree to support the college's commitment to diversity and respect.

52

Number of alumni volunteers who have signed the Inclusive Excellence Agreement



Volunteer Education Is Key

"Sure our staff have a role to play in this conversation, absolutely—but so do our alumni. The Ithaca College community is far-reaching and this is a way in which we can scale this education to reach more people."

*Carrie Brown
Executive Director of Alumni Relations
Ithaca College*

Additional Portal Resources



Diversity TED Talks



Active listening worksheets



Supplemental reading lists



Podcast links

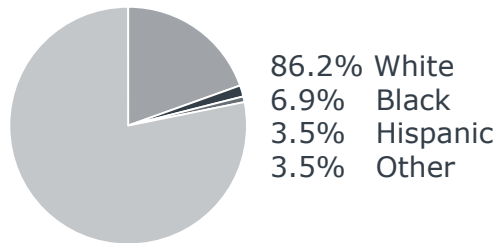
Long-Term Challenges Ahead

Board-Level Positions Remain Homogeneous

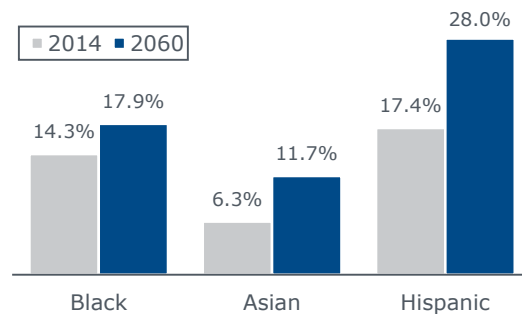
For institutions that want to signal their commitment to diversity and inclusion, one of the greatest long-term challenges is the composition of their governing boards. At private colleges and universities, more than 85% of trustees are white. However, in 2015, nearly 40% of all first-time student enrollments were individuals of color (i.e., black, Hispanic, biracial, or Asian-Pacific Islander). As the United States becomes a more diverse nation, these enrollment trends are going to continue, and board leadership should better reflect those changing demographics.

Board of Trustee Demographics

At Private Colleges and Universities, 2012



Projections of US Population Demographics



“We have had a hard time getting diverse members on our volunteer boards and councils. Nobody wants to be the token member, but we need somebody to step up and become the first.”

*Vice President for Advancement
Public Master's University*

57% First-time student enrollments who were female in 2015

39% First-time enrollments who were from historically underrepresented students in 2015

Sources: Colby S and Ortman J, "Projections of the Size and Composition of the U.S. Population: 2014 to 2060," US Census Bureau, March 2015; Bjorklund R and Green V, "University Trustee Board Member Diversity in America Today," *Journal of Management Research*, 2012; U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics; Advancement Forum interviews and analysis.

Right to the Top

Understanding Where Our Boards Are Now

To better understand where progress needs to be made in terms of board diversity, advancement offices should conduct an audit of existing board demographics. MIT's alumni association conducts an annual review of its board membership and all related advisory councils. Staff in the alumni association are responsible for populating the demographic snapshot (excerpt below), and they provide an alumni population demographic benchmark, which shows MIT graduates if there are gaps in representation between board composition and the demographics of the MIT alumni body. Once gaps have been identified, alumni relations staff can work to recruit a more representative board or council.



Staff-Led Efforts Uncover Diversity Baseline for Senior Volunteers



Annual review of Alumni Association Board establishes starting point for diversity and inclusion efforts



Demographic Snapshot					
NAME:	Age	Sex	Race	Ethnicity	School
John Doe...					
Jane Doe...					
Board Composition			Alumni Demographics		
• Male: 70%			• Male: 65%		
• Female: 30%			• Female: 35%		

Measuring Diversity

“As each committee is coming together, we use this type of spreadsheet to identify potential shortfalls in any area of diversity that we want to measure.”

*Christine Tempesta
Senior Director of Information Systems &
Volunteer Services
Massachusetts Institute of Technology
Alumni Association*

Provides total alumni demographic composition as benchmark

Board Diversity Review

Please visit EAB's Board Diversity Matrix template located on page 77.

Encouraging Self-Reflection

Demographic Self-Audit Hardwires Volunteer Accountability

Setting concrete goals for representation on boards and advisory councils can also signal an institution's commitment to diversity and inclusion. William & Mary asks each of the College's 18 affiliated boards and councils to conduct a self-audit of member gender, race, and ethnicity. The self-audit ensures that board members internalize the institution's commitment to increasing diversity and reduces the workload of advancement staff. The self-audits are reported to the chief advancement officer every year. The College has also set a numeric target for female representation on boards and councils by 2020 (i.e., 50%), further quantifying and signaling their commitment to a diverse and inclusive leadership board.



WILLIAM & MARY
CHARTERED 1693



Each affiliated board of the College conducts an annual gender, race, and ethnicity self-audit



Each board reports audit results to the office of the vice president of advancement



50%

A baseline of at least 50% female representation by 2020 across all affiliated boards



All of us—students, faculty, staff and alumni—have a role in shaping what William & Mary becomes.... It's vital that we continue to take steps crucial to the health and success of our community.

*Taylor Reveley III
President, William & Mary*

Diversifying our alumni volunteer structures can be difficult work, and it is work that is sensitive in both nature and practice. However, the advancement office is not solely responsible for its success. Institutional partners (e.g., administration, faculty, staff) have a role to play, as do students and alumni. As advancement professionals work together with institutions, students, and alumni partners, we will shape the future of alumni volunteer structures to better reflect the diversity of our student and alumni populations. Success is critical both for short-term alumni engagement efforts and for the long-term health of the development operation, ensuring a robust pipeline of alumni volunteers and donors at all levels to help advancement meet financial and strategic goals.



Toolkit

SECTION

5

- Institutional Partner Identification Worksheet
- Alumnae Listening Tour Worksheet
- LGBT Alumni Listening Tour Worksheet
- Alumni of Color Listening Tour Worksheet
- Diversity Programming Inventory Audit
- Alumni Volunteer Job Descriptions Worksheet
- Faculty-Led Diverse Alumni Outreach Email Templates
- Diversity Board Matrix
- Alumni Publication Collateral Audit
- LGBT Demographic Questions Best Practices

Institutional Partner Identification Worksheet

Instructions

Institutions often have many diversity-related programs across campus, but rarely is there a single location where all diversity-related projects that may involve alumni are catalogued.

Advancement staff should complete the form below to identify other departments, units, and individuals across campus who may conduct diversity-related programming. The left column should contain the department or unit's name, and the right column should include necessary program or project details and contact information.

Upon completion, pass completed leads to alumni relations professionals to encourage follow-up and identify alumni volunteers who may be interested in supporting relevant programs.

Department/Unit	Program Details
1. Example: LGBT Resource Center	Contact Name: <u>Dr. Smith, Director</u> Email: _____ Phone: _____ Related Projects: <ul style="list-style-type: none"> • LGBT Alumni Council • Alumni Speaker at Lavender Graduation Follow-Up Steps: <i>Connect with LGBT Alumni Leadership Group</i> _____ _____ Assigned to: <i>Alumni Relations Professional for Follow-Up</i>
2. _____ _____ _____	Contact: _____ Email: _____ Phone: _____ Related Projects: _____ _____ Follow-Up Steps: _____ _____ Assigned to: _____
3. _____ _____ _____	Contact: _____ Email: _____ Phone: _____ Related Projects: _____ _____ Follow-Up Steps: _____ _____ Assigned to: _____

Institutional Partner Identification Worksheet (cont.)

Department	
4. _____ _____ _____	Contact: _____ Email: _____ Phone: _____ Related Projects: _____ _____ _____ Follow-Up Steps: _____ _____ _____ Assigned to: _____
5. _____ _____ _____	Contact: _____ Email: _____ Phone: _____ Related Projects: _____ _____ _____ Follow-Up Steps: _____ _____ _____ Assigned to: _____
6. _____ _____ _____	Contact: _____ Email: _____ Phone: _____ Related Projects: _____ _____ _____ Follow-Up Steps: _____ _____ _____ Assigned to: _____
7. _____ _____ _____	Contact: _____ Contact: _____ Email: _____ Phone: _____ Related Projects: _____ _____ _____ Follow-Up Steps: _____ _____ _____ Assigned to: _____

Gathering Alumni Feedback

Instructions

Few advancement professionals know what it was like to be a diverse student on campus. As a result, advancement offices should establish avenues to collect feedback from diverse alumni on a regular basis to better understand their experiences and gather feedback to inform programming.

Step One: Identify Existing Diversity-focused Alumni Programming

There are two ways to go about gathering this feedback:

Option One: Reframe existing engagement opportunities and alumni gatherings to add an additional component to source alumni feedback. Existing programs that serve as strong candidates may include:

Possible Engagement Opportunities

- LGBT Alumni Tent (Homecoming Weekend)
- Black Alumni Society Anniversary
- Women's Giving Circle
- Diverse Student Scholarship Luncheons
- Diversity Council Meetings

Option Two: Create bespoke, stand-alone, targeted engagements for the express purpose of gathering feedback from diverse alumni.

Step Two: Equip Advancement Professionals with Talking Points

Use the talking points across the next few pages when gathering feedback from diverse alumni. These worksheets serve as launching points for potentially difficult and emotional conversations. Listen to the stories of their institutions' diverse alumni, and use those stories to inform programming. While circumstances may permit advancement professionals and institutional partners to take notes in the moment, it is advised to use the questions as a starting point and document feedback after the conversation occurs rather than in the moment.

Sample talking points and worksheets can be found on the following pages:

1. Female Alumnae Worksheet (Page 65)
2. LGBT Alumni Worksheet (Page 66)
3. Alumni of Color Worksheet (Page 67)

Alumnae Listening Tour Worksheet

Instructions

Equip your gift officers with the following worksheet when they meet with alumnae to better understand their experiences at your institution and how they wish to direct their philanthropy. Alternatively, use this worksheet to guide a facilitated discussion with a focus group of alumnae.

Alumnae Listening Tour/Focus Group Discussion Questions

1. Tell us about a high point during your time at ***Institution Name***. How did that influence your career or other life choices?

2. How did you develop your leadership skills?

3. What role should higher education provide to help women develop their leadership capabilities?

4. What can be done to encourage more women leaders to support ***Institution Name***?

5. Do you think that women are motivated to make charitable gifts differently than men? If so, how?

6. What was the catalyst for your most recent gift to ***Institution Name***?

7. What are some ways that ***Institution Name*** could do more to connect to you as a woman?

8. What other suggestions do you have about how ***Institution Name*** could increase financial support from women?

9. What do you think would inspire other alumnae to financially support ***Institution Name***?

10. What do you hope to accomplish through your giving?

LGBT Alumni Listening Tour Worksheet

Instructions

Equip your gift officers with the following worksheet when they meet with LGBT alumni to better understand their experiences at your institution and how they wish to direct their philanthropy. Alternatively, use this worksheet to guide a facilitated discussion with a focus group of LGBT alumni.

LGBT Alumni Listening Tour/Focus Group Discussion Questions

1. Tell us about a high point during your time at ***Institution Name***. How did that influence your career or other life choices?

2. How did you develop your leadership skills?

3. What role should higher education provide to help LGBT students develop their leadership capabilities?

4. What can be done to encourage more LGBT leaders to support ***Institution Name***?

5. Do you think that LGBT individuals are motivated to make charitable gifts differently than non-LGBT individuals? If so, how?

6. What was the catalyst for your most recent gift to ***Institution Name***?

7. What are some ways that ***Institution Name*** could do more to connect to you as an LGBT donor?

8. What other suggestions do you have about how ***Institution Name*** could increase financial support from LGBT alumni?

9. What do you think would inspire other alumni to financially support ***Institution Name***?

10. What do you hope to accomplish through your giving? _____

Alumni of Color Listening Tour Worksheet

Instructions

Equip your gift officers with the following worksheet when they meet with alumni of color to better understand their experiences at your institution and how they wish to direct their philanthropy. Alternatively, use this worksheet to guide a facilitated discussion with a focus group of alumni of color.

Alumni of Color Alumni Listening Tour/Focus Group Worksheet

1. Tell us about a high point during your time at ***Institution Name***. How did that influence your career or other life choices?

2. How did you develop your leadership skills?

3. What role should higher education provide to help students of color develop their leadership capabilities?

4. What can be done to encourage more alumni of color leaders to support ***Institution Name***?

5. Do you think that alumni of color are motivated to make charitable gifts differently? If so, how?

6. What was the catalyst for your most recent gift to ***Institution Name***?

7. What are some ways that ***Institution Name*** could do more to connect to you as an alumnus of color?

8. What other suggestions do you have about how ***Institution Name*** could increase financial support from alumni of color?

9. What do you think would inspire other alumni of color to financially support ***Institution Name***?

10. What do you hope to accomplish through your giving?

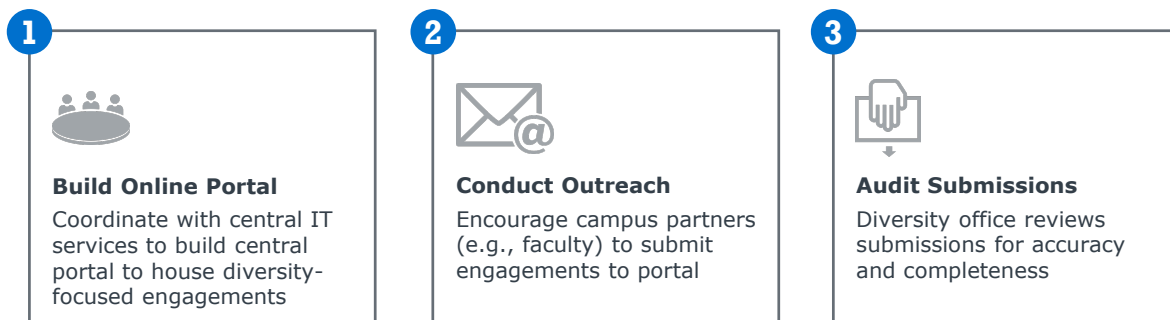
Diversity Programming Inventory Audit

Instructions

Institutions often have many diversity-related programs across campus. These programs can be housed in student affairs, academic units, or even as stand-alone centers (e.g., LGBT resource center). However, a single resource that provides advancement professionals with a complete inventory of related projects and contacts is rarely available.

Conduct an audit of your institution’s diversity-related engagements to ensure advancement staff are aware of the full depth and scope of diversity-related programs.

Key Steps to Build a Diversity Inventory System



Step One: Build Online Portal

Work with your central information technology (IT) services to build a central portal or website that will catalog all diversity-related programming at your institution. In the table below, identify liaisons in advancement and IT to manage the project. Use the check boxes to divide responsibilities among advancement and IT. Write in additional action steps in the blank rows as needed.

Action Steps	Advancement	IT
Team liaisons	_____	_____
Timeline development	<input type="checkbox"/>	<input type="checkbox"/>
Portal location	<input type="checkbox"/>	<input type="checkbox"/>
Submission form	<i>See next page</i>	
Website design	<input type="checkbox"/>	<input type="checkbox"/>
Website scripting	<input type="checkbox"/>	<input type="checkbox"/>
Website maintenance	<input type="checkbox"/>	<input type="checkbox"/>
Continue data collection	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

Source: Advancement Forum interviews and analysis.

Diversity Programming Inventory Audit (cont.)

Develop Online Template for Submissions

Share the template below with the IT liaison to help the team create an online submission form. This form can be housed on an institution's own system or placed on a third-party survey provider (e.g., Google Forms, Survey Monkey). The goal of the form will be to collect relevant programming and event details for campus partners.

Diversity Inventory Submission

Name Job Title:

Email: Phone Number:

Program Information

1. Program Title:

2. Supporting Unit(s):

3. Program Details:

3. Main Audience (check all that apply):

<input type="checkbox"/> Alumni community	<input type="checkbox"/> Research community	<input type="checkbox"/> Undergrad students
<input type="checkbox"/> Graduate students	<input type="checkbox"/> Faculty/Staff	<input type="checkbox"/> Other: _____

4. Type of Effort (check all that apply):

<input type="checkbox"/> Alumni Panel	<input type="checkbox"/> Award	<input type="checkbox"/> Committee
<input type="checkbox"/> Event	<input type="checkbox"/> Advisory Council	<input type="checkbox"/> _____

5. Date: Time and Frequency:

6. Location:

7. How can advancement help support your effort (e.g., branding, alumni volunteers, thank-you awards, campus tours)?

Diversity Programming Inventory Audit (cont.)

Step Two: Conduct Outreach

Indicate how you can encourage submissions by various stakeholders on campus. Use the sample email (below) to begin outreach by replacing italicized text with your institution's information. The survey from the previous page should be embedded in the email template and sent by a senior leader to unit-level leaders to elevate the status of the initiative.

Target groups	Web page	Social media	Newsletter	Email
Faculty/staff	<input type="checkbox"/> School <input type="checkbox"/> Department <input type="checkbox"/> Blogs	<input type="checkbox"/> Facebook <input type="checkbox"/> Instagram <input type="checkbox"/> Twitter	<input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly	<input type="checkbox"/> From provost <input type="checkbox"/> From student life
Student Leaders	<input type="checkbox"/> Student organizations <input type="checkbox"/> Student apps	<input type="checkbox"/> Facebook <input type="checkbox"/> Instagram <input type="checkbox"/> Twitter	<input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly	<input type="checkbox"/> From student affairs
Alumni	<input type="checkbox"/> Association page <input type="checkbox"/> Organizations	<input type="checkbox"/> Facebook <input type="checkbox"/> Instagram <input type="checkbox"/> Twitter	<input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly	<input type="checkbox"/> From alumni relations
Community	<input type="checkbox"/> Local government <input type="checkbox"/> Local organizations	<input type="checkbox"/> Facebook <input type="checkbox"/> Instagram <input type="checkbox"/> Twitter	<input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly	<input type="checkbox"/> From president <input type="checkbox"/> From community liaison

Sample Outreach Email

To: *Institutional Partner (e.g., unit and department leads)*

From: *Institutional Leader (e.g., provost)*

Subject: A Call for All Diversity-Related Engagements

Dear *faculty*,

XXX University is committed to supporting diversity and wants to create a Diversity Inventory Portal of programs, initiatives and events that promote diversity, equity, and inclusion! To make this program a success, please register relevant events, programs, or initiatives that you manage.

The submission form can be found here: *paste entry form website link here*. After completion, engagements will be reviewed and posted to an online database for our community to access.

Thank you so much for your support. Please feel free to contact our office at *XXX-XXX-XXXX* with further questions.

Best,
Institutional Leader

Diversity Programming Inventory Audit (cont.)

Step Three: Audit Submissions

Once institutional partners have submitted relevant diversity-focused programming through the online submission tool, ensure that each submission is concise and precise.

Complete the following checklist before posting individual programming opportunities to the central online portal. If a program does not meet these criteria, reach out to the program manager to make necessary changes.

Checklist

- | | | |
|---------------------------------------|-----------------------------------|--|
| <input type="checkbox"/> Completeness | <input type="checkbox"/> Grammar | <input type="checkbox"/> University-affiliated |
| <input type="checkbox"/> Accuracy | <input type="checkbox"/> Spelling | <input type="checkbox"/> Other: _____ |

Post-Audit Follow-Up

After the audit, work with the IT liaison to upload the diversity-related programming to the portal. Next, work with alumni relations professionals to ensure the institution is marketing and branding the portal to alumni who may be interested in diversity-related programming. Continue to audit relevant programs by using one of the following strategies.

1. Conduct outreach from step two on a semiannual basis, quarterly, or monthly basis to keep the portal updated.
2. Have a student worker in alumni relations or advancement research future events and identify undiscovered engagements.

Alumni Volunteer Job Descriptions Worksheet

Instructions

Job descriptions for volunteers communicate key position details to individuals interested in getting involved on campus. Providing volunteer job descriptions ensures alumni volunteers can fully understand their roles and the institution’s expectations of their commitments in the areas of time and philanthropic commitment.

Use this form to develop or refine volunteer job descriptions for relevant volunteer opportunities at your institution.

Step One: Identify Volunteer Opportunities

Alumni relations volunteer managers should complete the form below for the alumni volunteer roles they manage. In the left column, they should list the volunteer positions they supervise, and in the center column they should write the name of the staff member responsible for the program. In the right column, they should indicate whether or not there is an existing job description for the alumni volunteer role identified in the first column. If there is not, use the templates across the next few pages to create one.

Volunteer Position/Role	Volunteer Manager	Volunteer Job Description?
<i>Chair, Young Alumni Council</i>	<i>Alumni Relations Staff Person</i>	Yes or <input checked="" type="radio"/> No

Source: Advancement Forum interviews and analysis.

Alumni Volunteer Job Descriptions Worksheet (cont.)

Instructions

Use the template below to create or update volunteer job descriptions for volunteer engagements on campus. Proposed key categories are defined below. Consider adding additional requirements or supplemental language (e.g., division diversity statement) in order to better attract diverse alumni candidates.

Provide the institution's mission or vision statements for volunteerism

Volunteer Job Description Template

Sample Components

• Mission:

Position purpose:

Major duties and responsibilities:

Desired skills, attributes, and competencies:

• Reports to: _____

Abilities to be acquired: _____

Training provided: _____

Estimated time commitment: _____ Frequency: _____

• Annual philanthropic obligation: _____

Benefits: _____

Define "abilities to be acquired" so alumni volunteers understand what skills they can gain in the role

Define time and philanthropic expectations to align expectations about the volunteer role

Alumni Volunteer Job Descriptions Worksheet (cont.)

Instructions

Use the sample volunteer job descriptions on the next two pages to create or refine your own job descriptions.

Sample One: Council Members

Position: Member, Ambassador Program Committee, University Council

Location: Non-geographically based

Eligible Constituent(s): Alumni, Parents, Friends

Summary of Position: Members of the Ambassador Program Committee help deliver the university message to alumni, parents, and friends. They work closely with the Chair and Vice-Chair to increase participation of the number of ambassadors who facilitate the university message conversations. As members of the committee, they share the university message (formally, informally, or through social media) at least once per year.

Skills: Speaking to groups, leading groups, managing projects, representing Cornell

Responsibilities:

- Speak to groups.
- Share the University's message (formally, informally, or through social media) at least once per year.
- Implement the goals of the work plan. Complete assignments in a timely, thorough manner. Attend and actively participate in meetings.
- As an ambassador, share the University message (formally, informally, or through social media) at least once per year.

Required Experience: None

Source: "Cornell University Council Ambassador Program Committee," *Cornell Volunteer Communities*, <https://givegab-cornell-alumni.herokuapp.com/communities/cornell-university-council-cuc-ambassador-program-committee/positions/member-ambassador-program-committee-cornell-university-council-cuc>.

Alumni Volunteer Job Descriptions Worksheet (cont.)

Sample Two: Council Chairperson *Abridged from The George Washington University*

Position: Industry Leadership Council, Chairperson

Position Summary: The chairperson of the Industry Leadership Council (ILC) for an Alumni Industry Network will actively engage with, and advise, the staff of the Office of Alumni Relations (OAR) in the creation and execution of industry-based programs, both in-person and online, around the globe.

- The chairperson of an ILC will take a hands-on role in organizing meetings, creating agendas, and facilitating discussion amongst members of an ILC, and all other facets of industry-based programming that strengthens and promotes an invested alumni community.
- Each ILC is composed of 6-8 industry professionals, including the chairperson.

Major Duties:

- Serve as the primary ambassador on behalf of the Industry Leadership Council (ILC).
- Lead the ILC in determining an annual Industry Network strategy and ideal allocation of their Network's budget each fiscal year (July 1-June 30).
- Facilitate ILC meetings.
- Work with ILC members to ensure any assigned tasks are completed on time.
- Hold frequent meetings/phone calls with the OAR staff liaison to ensure close and continuous communication about Network priorities and events, including 2 in-person meetings a year.
- Oversee all Industry Network operations in the event of professional staff transition.

Skills & Competencies to Be Acquired:

- Interpersonal skills
- Project management experience
- Event planning experience
- Volunteer board experience
- Volunteer management experience

Expectations:

- Attend (if available) and participate in any scheduled meetings/calls with the ILC and/or your OAR staff liaison. These meetings will all be facilitated by the ILC chairperson and/or the OAR staff liaison; therefore, the ILC chairperson is expected to attend all meetings unless prior arrangements have been made.
- Actively communicate with fellow ILC members and the OAR staff liaison.
- Represent the university and the Network in a professional manner.

Terms of Office & Time Commitment:

- The chairperson of an Industry Leadership Council (ILC) is expected to serve a two-year term, renewable for an additional two-year, term which will be approved by the OAR staff liaison. Service as an ILC chairperson occurs concurrently with two years of ILC membership.
- Members of an ILC are expected to attend (if available) and participate in any scheduled meetings/calls with the ILC and/or your OAR staff liaison. These meetings/calls range between 30 and 90 minutes and average about 2 meetings in person/year and 2 phone calls/year. The chairperson often leads these calls/meetings, so there is an expectation to attend and participate.
- In the best interest of the success of the Network, any ILC member or chairperson who does not meet the expectations and fulfill the requirements of membership will be deemed to have resigned at the discretion of the OAR staff liaison.

Annual Philanthropic Obligation: The chairperson (and all members) of an Industry Leadership Council (ILC) is required to make an annual gift each fiscal year. The fiscal year runs July 1 – June 30. Gifts may be designated to any office, program, or fund of the donor's discretion.

- \$250 (1-5 Years Post-Graduation)
- \$500 (6-9 Years Post-Graduation)
- \$1,000 - \$4,999 (9+ Years Post-Graduation)

Faculty-Led Diverse Alumni Outreach Email Template

Instructions

Diverse students have strong connections with faculty and staff at your institution. Use this form to identify units on campus that can send emails to diverse alumni encouraging them to volunteer. Be sure to use these “nudge” emails alongside relevant and scoped volunteer job descriptions (see pages 72-75).

Step One: Identify Campus Partners to Conduct Outreach

<input type="checkbox"/> LGBT Resource Center	<input type="checkbox"/> Latino/a Studies Program	<input type="checkbox"/> Black Men’s Alliance
<input type="checkbox"/> LGBT Health Center	<input type="checkbox"/> VP Student Affairs	<input type="checkbox"/> Destination Higher Education
<input type="checkbox"/> Women’s Studies Program	<input type="checkbox"/> Vice Provost for Diversity and Inclusion	<input type="checkbox"/> Women’s Center
<input type="checkbox"/> Gender Studies Program	<input type="checkbox"/> Chief Diversity Officer	<input type="checkbox"/> Asian Cultural Center
<input type="checkbox"/> LGBT Student Group	<input type="checkbox"/> Asian Students Association	<input type="checkbox"/> Hispanic Cultural Center
<input type="checkbox"/> Black Business Leaders of Tomorrow	<input type="checkbox"/> National Black Student Union	<input type="checkbox"/> Asian Studies Department
<input type="checkbox"/> Black Student Union	<input type="checkbox"/> African American Cultural Center	<input type="checkbox"/> Hispanic Student Groups
<input type="checkbox"/> Other: _____		<input type="checkbox"/> Africana Studies Department
		<input type="checkbox"/> Other: _____

Step Two: Provide Email Template for Outreach

Sample Faculty Nudge Email

Dear *Alumnus*,

Hi! I hope everything is going well since we last spoke. I wanted to touch base with you because *Institution Name* is making a concerted effort to better engage its diverse alumni! I immediately thought of you, based on your involvement with *Student Group Name* while you were on campus.

Also, the Office of Alumni Relations has created great volunteer job descriptions for relevant diversity-focused volunteer leadership roles for alumni. I’ve attached them to this email; I figured you may be interested. If so, I’ll make sure the folks from alumni affairs are made aware so that they can reach out. They have been a big help in putting together this effort.

I look forward to hearing from you soon.

Best,

Name

Diversity Board Matrix

Conducting a Diversity Audit

Instructions

Use this worksheet to conduct diversity audits or demographic snapshots of advancement-affiliated boards and councils. Step one seeks to identify relevant affiliated boards and councils, step two provides advancement staff the template and workbook to conduct the audit, and steps three and four encourage advancement leaders to identify places where they have opportunities to increase board diversity and inclusion.

Step One: Identify Relevant Boards and Councils

- | | | |
|---|---|---|
| <input type="checkbox"/> Board of Trustees | <input type="checkbox"/> Campaign Council | <input type="checkbox"/> LGBT Alumni Boards |
| <input type="checkbox"/> Board of Regents | <input type="checkbox"/> Campaign Cabinet | <input type="checkbox"/> Alumnae Councils |
| <input type="checkbox"/> Board of Governors | <input type="checkbox"/> Regional Boards and Councils | <input type="checkbox"/> Alumni of Color Boards |
| <input type="checkbox"/> Alumni Association Board | <input type="checkbox"/> Diversity Subcommittees | <input type="checkbox"/> Multicultural Alumni Association Board |
| <input type="checkbox"/> Board of Visitors | <input type="checkbox"/> Nominating Subcommittees | |

Step Two: Conduct Demographic Audits of Relevant Boards

Advancement leaders need to understand their existing diversity landscape for current boards. Refer to the next page (Board Diversity Audit Template) to conduct an analysis of each board and council identified in step one. Conduct a separate audit for each board and council.

Step Three: Benchmark Board Composition Against Total Alumni Population

Review overall alumni benchmark data to better understand any gaps in representation on the affiliated boards and councils. Report this data in the bottom right portion of the template on the following page.

Step Four: Identify Boards in Need of Greater Diversity

Review the data from each board and council audit to identify boards and councils who are successfully diversifying themselves and boards in need of greater diversity. Invest staff time and resource allocation accordingly.

Diversity Board Matrix (cont.)

Conducting a Diversity Audit

Board Diversity Audit Template

Name of affiliated board or council: _____

Completed by: _____ Date: _____

Board Member	Sex	Black	Hispanic	White	Biracial	LGBT	Other
Jane Doe	M or <input checked="" type="radio"/> F	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	
	M or F						
	M or F						
	M or F						
	M or F						
	M or F						
	M or F						
	M or F						
	M or F						
	M or F						

Board Composition Totals

Male: _____% Female: _____%

Black: _____%

Hispanic: _____%

White: _____%

Biracial: _____%

Other: _____%

LGBT: _____%

Alumni Population Benchmarks

Male: _____% Female: _____%

Black: _____%

Hispanic: _____%

White: _____%

Biracial: _____%

Other: _____%

LGBT: _____%

Alumni Publication Collateral Audit

Instructions

Alumni-facing advancement publications (e.g., alumni magazines) rarely do a robust job of highlighting diverse constituencies in article content or in images. This audit equips advancement staff with a tool to analyze existing publications to understand where additional investments in diversity-focused content and imaging should be made. Separate audits should be conducted for each alumni-facing publication (e.g., alumni magazine, campaign committee update).

Step One: Identification

Identify all alumni-facing publications that are sponsored by advancement.

Step Two: Conduct a Collateral Diversity Review

Use the template below to identify articles or images that reflect strong diversity. These articles and images may be related to recent programming on campus (e.g., LGBT Pride) or may chronicle key milestones in the institution's history (e.g., anniversary of desegregation).

Advancement Publication Collateral Diversity Audit			
Name of advancement publication: _____			
Intended alumni audience: _____			
Completed by: _____		Date: _____	
Total Page Count	<input type="text"/>		
Total Short Content Count	<input type="text"/>	Total Diversity-related Short Content Count	<input type="text"/>
Total Extended Content Count	<input type="text"/>	Total Diversity-related Extended Content Count	<input type="text"/>
Total Images Count	<input type="text"/>	Total Diverse Images Count	<input type="text"/>
<hr/>			
Percent Short Content Diversity-Related	<input type="text"/>	Percent Images Diversity-Related	<input type="text"/>
Percent Extended Content Diversity-Related	<input type="text"/>	Percent Overall Pagination with Diversity-Related Content or Images	<input type="text"/>

Step Three: Future Planning

Identify ways to further highlight diverse programming and constituencies in all publications identified.

LGBT Demographic Questions Best Practices

Instructions

Gender, gender identity, and sexual orientation can be sensitive, personal, and complicated data to capture. Use this worksheet to help ensure that your institution is as inclusive and comprehensive as possible when and if you seek this data from students and alumni. These questions should always be optional and never mandatory.

Because sexual orientation and gender identity are separate aspects of identity, institutions should never combine them into one question.

Suggested Best Practices for Collecting Sexual Orientation and Gender-Related Data

Suggested Wording

- This information is used for _____.
- Only (name of office) will have access to this information.
- Your responses will be kept private and secure.
- The information will not be used for a discriminatory purpose.
- You can change this information in the future by _____.

Sexual Orientation (optional; choose all that apply):

- | | |
|--|--|
| <input type="checkbox"/> Asexual | <input type="checkbox"/> Queer |
| <input type="checkbox"/> Bisexual | <input type="checkbox"/> Questioning or unsure |
| <input type="checkbox"/> Gay | <input type="checkbox"/> Same-gender loving |
| <input type="checkbox"/> Straight (heterosexual) | <input type="checkbox"/> An identity not listed: please specify
_____ |
| <input type="checkbox"/> Lesbian | <input type="checkbox"/> Prefer not to disclose |
| <input type="checkbox"/> Pansexual | |

Gender Identity (optional; choose all that apply):

- | | |
|--|--|
| <input type="checkbox"/> Agender | <input type="checkbox"/> Trans man |
| <input type="checkbox"/> Androgyne | <input type="checkbox"/> Trans woman |
| <input type="checkbox"/> Demigender | <input type="checkbox"/> Woman |
| <input type="checkbox"/> Genderqueer or gender fluid | <input type="checkbox"/> Additional gender category/identity:
please specify
_____ |
| <input type="checkbox"/> Man | |
| <input type="checkbox"/> Questioning or unsure | <input type="checkbox"/> Prefer not to disclose |



Advisors to Our Work

Advisors to Our Work

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Agnes Scott College

Robiaun Charles
Vice President for College
Advancement

Arizona State University

Josh Friedman
Chief Development Officer

Auburn University

Jane DiFolco Parker
President, Auburn University
Foundation

Baylor University

Dave Rosselli
Vice President for University
Development

California State University, Fullerton

Greg Saks
Vice President for University
Advancement

California State University, Northridge

Shellie Hadvina
Assistant Vice President, Alumni
Relations and Annual Funds

Colgate University

Darcie Loveless
Associate Director of Stewardship

Colorado State University

Brett Anderson
Vice President for Advancement

Oscar Felix
Associate Vice President for
Diversity and
Enrollment Access

Alexis Kanda-Olmstead
Managing Director of Talent
Management and Development

Kim Tobin
Vice President for University
Advancement

Cornell University

Laura Denbow
Senior Director,
Volunteer Programs

Dalhousie University

Sheila Blair-Reid
Executive Director, Alumni
Engagement

Steve Harding
Assistant Vice President,
Development

Suzanne Huett
Executive Director, Advancement
Operations & Planning

Julia Watt
Executive Director, Advancement
Marketing & Donor Relations

Emory University

Benjamin Tompkins
Associate Vice President,
Development

Georgia College and State University

Monica Delisa
Vice President for University
Advancement

Harvard University

Susan Atkins
Senior Employment Manager

Siovhan O'Connor
Executive Director,
Finance and Administration

Iona College

Marinel Martinez
Assistant Director, Student
Development

Ithaca College

Christopher Biehn
Vice President, College Relations
and Advancement

Carrie Brown
Executive Director,
Alumni Relations

Johns Hopkins University

Fiona Newton
Director of Donor and Volunteer
Engagement

Marquette University

Sarah Burkhart
Engagement Director

Jean Dole
Associate Vice President, Planned
Giving and Corporate &
Foundation Relations

Holly Hamilton
Director, Process Analytics

Stacy Mitz
Assistant Vice President,
Engagement

Michael VanDerhoef
Former Vice President for
University Advancement

Massachusetts Institute of Technology

Moana Bentin
Community Manager, Affinity
Groups

Katie Galan
Strategic Talent Management
Administrator

Christine Tempesta
Senior Director, Information
Systems & Volunteer Services

Edith Wun
Senior Research Analyst,
Principal Gifts

Advisors to Our Work (cont.)

McGill University

Royal Govain
Senior Development Officer &
Managing Director, Volunteer
Partnerships

Lynn Mark
Volunteer Relations Officer

Miami University

Brad Bundy
Senior Associate Vice President
and Campaign Director

Michigan State University

Robert Groves
Vice President for University
Advancement

Princeton University

Matthew Nowlin
Business &
Operations Manager

Queen's University

Tom Hewitt
Chief Development Officer

Carla Ferreira Rodrigues
Human Resources Manager

Roger Williams University

Lisa Raiola
Vice President of Institutional
Advancement

Rutgers, The State University of New Jersey

Tahsin Alam
Director of Talent Management

Nevin Kessler
Executive Vice President for
Development and Alumni
Relations

Samford University

Chris Blazer
Senior Director, Alumni Programs
and Annual Giving

Randy Pittman
Vice President for University
Advancement

South Dakota School of Mines and Technology

Joel Kincart
President, South Dakota Mines
Foundation

South Dakota State University

Arian Bunde
Director of
Leadership Initiatives

Steve Erpenbach
President & CEO, SD
State Foundation

Stanford University

Katherine Toy
Associate Director, Alumni
Volunteer Engagement

Stony Brook University

Dexter Bailey
Senior Vice President
for Advancement

Deborah Lowen-Klein
Associate Vice President for
Charitable Giving

Texas Tech University

Lisa Calvert
Vice Chancellor, Institutional
Advancement

The George Washington University

Bonnie Graham
Director of Alumni Volunteer
Programs & Professional
Development

Alexandra Hire
Assistant Director, Alumni
Volunteer Programs &
Professional Development

Matthew Manfra
Associate Vice President for
Alumni Relations

University of Alabama at Birmingham

Thomas Brannan
Vice President for Development
and Alumni Affairs

Rebecca Gordon
Associate Vice President
for Development

University of California, Davis

Shaun Keister
Vice Chancellor for Development
and Alumni Relations

University of California, Los Angeles

Carol Pfister
Senior Executive Director, Human
Resources and Training

University of California, Riverside

Peter Hayashida
Vice Chancellor for University
Advancement

Advisors to Our Work (cont.)

University of Connecticut

Joshua Newton
President & CEO,
UConn Foundation

University of Delaware

Beth Brand
Senior Associate Vice President
for Advancement

University of Louisville

Keith Inman
Former Vice President, University
Advancement

University of Michigan

Dondi Cupp
Associate Vice President
for Development

Elizabeth Jackman
Executive Director,
Talent Management

Amy Lavi
Director, Recruitment and
Human Resources

Ayanna McConnell
Director of University Relations
and Student Engagement

Katy Wallander
Associate Director of Student
Philanthropy

Kat Walsh
Director, Diversity, Equity, and
Inclusion Initiatives and Student
Engagement

University of North Carolina System

Timothy Minor
Vice President for University
Advancement

University of North Dakota

Dan Muus
Chief Development Officer, UND
Alumni Association & Foundation

DeAnna Carlson Zink
Chief Executive Officer, UND
Alumni Association & Foundation

University of Pennsylvania

Matthew Geraghty
Director of Boards for
Recruitment and
External Relations

University of Rochester

Paul Lanzone
Assistant Vice President of Alumni
Relations & Constituent
Engagement

Lea Nordhaus
Senior Associate Director,
Volunteer Engagement

University of South Florida

William McCausland
Executive Director, USF Alumni
Association

University of Southern California

Tracey Vranich
Vice President for Advancement
Services

University of Texas at San Antonio

Marjie French
Vice President for
External Relations

University of Texas Rio Grande Valley

Kelly Scrivner Cronin
Vice President for Advancement

University of the Pacific

Burnham Atterbury
Vice President for University
Development and Alumni
Relations

University of Washington

Christina Chang
Assistant Vice President, Finance
& Administration

Terri Hiroshima
Senior Director, Marketing &
Communications

Wayne State University

Michael Mirto
Associate Vice President,
Individual Gifts

William & Mary

Matthew Lambert
Vice President for University
Advancement

Susan Warner
Director of Volunteer
Management



Washington DC | Richmond | Birmingham | Minneapolis

P 202.266.6400 | F 202.266.5700 | eab.com