Alumni Involvement Grants Competition

Seeding Innovative Volunteer Roles Across Campus

Advancement Forum

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Practice in Brief

A seed fund is established to subsidize the creation of innovative volunteer opportunities. Campus units and organizations respond to a request for proposals from the Alumni Association. Successful concepts receive grants to pilot their ideas.

Rationale

Millennial and Generation X alumni seek substantive and skills-based volunteer opportunities that pertain to their specific areas of interest, rather than generic university-wide roles. However, central alumni relations and advancement are typically not well-poised to identify or execute these niche opportunities. One-time funding unlocks the creativity, relationships, and assets of unit-based staff to develop or expand high-risk, high-reward roles and opportunities. After demonstrating initial outcomes, units can make a successful case to secure permanent funding in their budgets. In the long-term, the constant experimentation and evaluation of new alumni roles enriches campus life and grows alumni engagement.

Implementation Considerations

There are five steps to implementing this practice:

Step 1: Develop and announce the venture fund

Step 2: Determine grant criteria, exemptions, and priorities

Step 3: Issue call for proposals to eligible recipients

Step 4: Select award finalists

Step 5: Task alumni relations staff to support grant recipients

This practice is especially effective at large institutions with more decentralized cultures and budgetary processes.

Resource Considerations

Stanford University relies on a volunteer leadership recognition society to sponsor the competition; about $50,000 is allocated from annual unrestricted member donations to support the program. However, the formal support or involvement of a volunteer organization is not necessary to replicate this program, the core of which is a grants competition to finance new or expanded volunteer roles. To replicate this program, institutions can allocate any amount of money (even just a few thousand dollars) and rely on staff to market and evaluate proposals, instead of an elaborate volunteer structure.

Profiled Institution:

Stanford University in Palo Alto, CA

Source: EAB interviews and analysis.

A New Era For Alumni Engagement

Larger class cohorts, growing student body diversity, greater complexity in academic and co-curricular offerings, combined with declining trust in traditional institutions, and a host of other factors are catalyzing a shift in the way that alumni prefer to engage with their alma mater. These changes challenge the status-quo model of one-size-fits-all mass engagement activities, which fail to penetrate beyond an already-engaged subset of alumni. Increasingly, central advancement is not well-positioned to deliver the highly-segmented roles that alumni seek. As a result, in the future, academic units, student affairs, and other departments will likely provide the majority of campus volunteer roles. This will transform the role of the alumni relations function from a provider of volunteer experiences to the keeper of campus-wide infrastructure, change agent, and volunteer management coach. Ultimately, this transformation of alumni relations into a central clearinghouse for engagement will enhance its strategic value proposition to development, to alumni, and to campus partners.

Increasingly Granular Loci of Affinity Challenges "One-Size-Fits-All" Alumni Engagement Model

Changing Preferences in Alumni Engagement...

Past ⟶ **Present**

Past	Present
Alumni affinity for *class year and institution as a whole*	Alumni affinity increasingly tied to *academic area, identity group, co-curricular activity, etc.*
Alumni interested in learning about *university programs and activities*	Alumni interested in learning about *university's role in address of social and global problems*
Alumni content to respect *university's organizational structure*	Alumni interested in *multidisciplinary and cross-functional projects*
Alumni want *socially-focused* opportunities	Alumni want *more substantive* opportunities
Alumni happy to *learn about* work of students and faculty	Alumni want to *interact directly with* faculty and students

...Catalyze Shifts in the Role of the Alumni Relations Profession

The Role of Tomorrow's Alumni Engagement Officer?

Alumni Concierge

Serve as main point of contact and on-ramp for alumni interested in engaging with the university, but not sure where time is best utilized, triaging and coordinating talent deployment across campus

Campus Partner Consultant and Change Agent

Coach decentralized units to craft engaging alumni experiences and employ best practices in volunteer management

Data Integrity Champion

Maintain data collection and tracking infrastructure, generating valuable affinity intelligence for development officers from prospect involvement in unit-based activities

Source: Education Advisory Board interviews and analysis.

Venture Philanthropy, For Volunteers, By Volunteers

Stanford University operates an annual grants competition to subsidize innovative volunteer roles. Staff across academic schools, administrative departments, and campus organizations submit proposals for consideration that involve alumni as volunteers in the work of their units. Staff can request funds to underwrite or defray entirely new roles, or to subsidize one-time enhancements or expansions to existing ones.

The competition is organized and funded by a volunteer leadership recognition society called the Stanford Associates, organized by the Alumni Association.

Financing Innovations in Alumni Leadership: For Volunteers, By Volunteers

"Stanford Associates" Grant Program

Organized Under Auspices of Volunteer Recognition Society

- Stanford Associates inducts alumni and friends with at least ten years of history volunteering for the university and recipients of meritorious service awards

- Approximately 2,600 members as of 2015

Portion of Gifts Set Aside to Constitute Venture Fund for Innovative Volunteering Opportunities

- Annual fund ask of members subsidizes program reserves, of which about $50,000 is appropriated annually for grants competition

- Proposals invited for new projects, or enhancements to existing ones, that engage alumni in leadership and volunteer roles

Call for Proposals Distributed to Stanford Staff Annually

- About 15 proposals submitted annually; between two and five proposals typically receive funding

- Maximum award is $10,000 for between one and three years

- Stanford Associates Board of Governors review proposals and contribute to decision-making

Creating a Win-Win-Win

The Stanford Associates grants program has existed for over 30 years and funded over 150 proposals. In that time, it has incubated valuable partnerships between central alumni relations and decentralized staff and has created many new programs that have involved alumni in the life of the university. Moreover, the grants allow pilots to demonstrate proof of concept and generate initial results, which has allowed many of the trial roles to grow into ongoing programs with permanent funding from their home units.

The program helps to develop niche volunteer opportunities that pertain to the specialized and substantive work of departments. In that sense, the program incentivizes staff across campus to deploy their time and resources in support of programs that both further their own unit's goals as well as that of alumni engagement.

Program Benefits Alumni, Staff, and Grant Recipients

Recently Funded Projects

- Admissions volunteer program expansion to include alumni interviewing component
- Creation of specialized mentorship and networking programs for international students by international alumni (developed by international student and scholar services office) and for female student leaders by alumnae (developed by women's center)
- Development of specialized residency and fellowship programs that bring alumni to campus for short periods of collaboration with students, including one for alumni artists and another for alumni in public service
- Oral history projects encompassing LGBTQ community, student social life in 1950s, and others conducted and contributed by volunteers in conjunction with university library and archives
- Development of materials for alumni association's global day of community service, including training videos for project leaders
- Volunteer-reviewed literary awards program
- Social media campaign to profile Stanford volunteers through photography
- Program in which alumni can volunteer as participants in psychology and economics research projects and surveys

150+

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

> **Enfranchising Allies Across Campus**
>
> "The majority of grants go to units beyond the alumni and development division, in the research, academic, and student affairs sides…We always encourage our colleagues to incorporate alumni volunteers in their work, but this grant program shows support in a tangible and meaningful way."
>
> *Ana Moreno VanDiver*
> *Senior Manager for Alumni Volunteer Engagement*

Source: EAB interviews and analysis.

Considerations for Program Administration

Rightsizing the Program to Meet Your Institution's Needs

To enact a volunteer role seed funding program, follow the five steps below. The first column includes questions to answer to understand how best to tailor the program to your institutional context and resources, while the second column includes further ideas and options for your review.

Implementation Questions	Considerations And Recommendations
Step One: Develop and Announce Venture Fund	
• Will the program be sponsored by staff leadership (e.g., Vice President for Advancement, University President) or by a volunteer organization (e.g., Alumni Association Board of Directors, Foundation Board of Directors)? • How will it be funded and how much money will be available for funding?	• Institutionally-related foundations or alumni associations may be willing to disburse funds for this kind of long-term capacity building activity. Consider asking senior volunteers or longtime donors to make a matching gift to support central funding. A special endowment with annual interest may also be an appropriate vehicle. • Consider positioning the program itself as a one-time innovation rather than a recurring offering, to generate urgency to apply.
Step Two: Determine Grant Criteria and Identify Any Funding Exemptions or Special Priorities	
• On what bases will we evaluate the program proposals that we receive? • Are certain types of expenses (e.g., food, travel expenses, honoraria) not eligible for funding, either due to financial policies or effective resource stewardship? • Can units apply to funding disbursed over a multi-year period, or only for a one-time need?	• Some institutions prohibit the use of one-time grant money to fund new staff positions, but it could supplement other budget allocations or finance a graduate student assistantship or the wages of student-workers. • Consider formalizing favorable consideration of proposals that with certain foci or themes that align with advancement-wide or university-wide goals.
Step Three: Issue Call for Proposals to Eligible Recipients	
• How will we market and publicize the opportunity? • Will volunteers and alumni themselves be eligible (e.g., chapter leaders), or only campus employees? • Can alumni relations staff apply on behalf of volunteers and organizations they manage? • Are faculty members eligible?	• Consider offering the competition each semester instead of annually to generate more interest and applications.. • Alumni relations staff should serve as a sounding board for potential applicants to help them strengthen their proposals, estimate their budget, etc.
Step Four: Select Award Finalists	
• Where and how will we announce the finalists in a way that recognizes all who applied (e.g., alumni awards ceremony, advancement-wide e-mail)? • How will staff and alumni leaders be asked to evaluate the proposals, select the winners, and allocate the monies? • If we do not receive quality proposals, will we select any?	• Involve a diverse array of current alumni leaders and volunteers in the selection process. They are the best judges of what kinds of opportunities alumni may find attractive. However, remember that the niche and segmented roles that this process develops are not ones meant to appeal to the "average" alumnus. • Alumni relations staff should meet with applicants who were not selected to explain why their proposal was not selected and coach them on how they might improve it.
Step Five: Task Alumni Relations Staff to Support Grant Recipients	
• What should be the division of responsibility between the grant recipient's unit and the central alumni relations for the program's operation? • How will we ensure that information from alumni and volunteers is captured (i.e., for affinity ratings, prospecting, wealth screening)? • How can we steward and cultivate the relationships we develop with unit leaders?	• Alumni relations staff offer support and consultation to the unit seeking to implement the new volunteer opportunity. They may assist with recruitment, marketing, volunteer management, or other tasks. • As a condition of the receipt of funds, units must provide names of volunteers to the advancement office and must participate in an evaluation plan. Some institutions may ask unit leaders to sign a memorandum of understanding detailing two-way responsibilities in order to access funds.

Source: EAB interviews and analysis.

Sample Grant Application

Directions: Applicants to the grant program must complete the following form. The items on this part of the form are fairly standard and will apply to any institution seeking to implement this program.

Sample Grant Proposal Submission Form (Part One)

Name

Date

Title

E-mail

Department/Unit

Phone

Project Title

Describe the project's goals, either current status or proposed start date, and all project activities, dates, and locations. If possible, please include draft project timeline.

Funding Request $_ _ , _ _ _ . _ _

Describe the cost of the entire project, including a preliminary draft budget, all funding from other sources, and estimated staff time. (We will no longer fund volunteer honoraria or travel expenses.)

Has your unit received funding from this program in the past? If no, skip, but if yes, please describe the project title, date of award, amount of award, and affix the attached evaluation form from previously funded project.

Source: Adapted from form used by Stanford University; EAB interviews and analysis.

Applicants to the grant program must complete the following form. The items on this part of the form should be customized to each institution seeking to implement this program.

Sample Grant Proposal Submission Form (Part Two)

Please explain how your project meets each criterion. Your project will be approved based on how well it meets these criteria.

#1. Engages alumni through volunteerism, participation, and/or involvement. Describe the numbers of the above that you expect, and how you arrived at those figures.

#2. Is especially unique, impactful, or innovative. (Explain how it differs from existing offerings.)

#3. Requires funding because budgeted or typical source of funds are unavailable.

#4. Is a one-time project or shows potential for growth to become an ongoing program.

#5. *Optional but will receive preferred consideration*: How does this project support any of the Alumni Association's 2016 focus areas: career development, networking, and entrepreneurship; involvement with current students or faculty; graduate school alumni; and alumni in STEM fields.

By submitting this form, you acknowledge and agree to the following:

1. My supervisor, _____, is aware and supportive of this submission.

2. Receipt of funds will require the submission of information on all participants and approval of an evaluation plan designed in consultation with Alumni Association staff.

3. The tagline, "This program is brought to you in part through funding from the Alumni Association" and associated logo will be included on all program, web, and marketing materials.

Want to Learn More?

This practice brief is part of the EAB Advancement Forum's research initiative, entitled: *The New Rules of Engagement: Building the Next Generation of Alumni Leaders and Volunteers.*

To learn more about this research and to find other resources, access the Alumni Leadership and Volunteerism Resource Center. If you have any trouble accessing this page, please consult your Dedicated Advisor.