



Data-Driven Alumni Strategy Development

Prioritizing the Engagement of High-Value Constituents

Advancement Forum

The New Rules of Engagement: Building the Next
Generation of Alumni Leaders and Volunteers

Advancement Forum

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Data-Driven Alumni Strategy Development

Prioritizing the Engagement of High-Value Constituents

Practice in Brief

This process synthesizes quantitative indicators of each alumnus' potential impact on the university and their current level of engagement. This analysis is then consolidated into a taxonomy that formally categorizes the alumni with the highest means and/or talents to positively impact the university. Finally, alumni relations staff are reorganized to deploy staff bandwidth to proactively engage these highest-potential segments.

Rationale

Most alumni affairs programs are often broad-based in nature, marketing generic programs and messages to the largest possible base and hoping that the “right” alumni opt-in and pursue leadership roles. Moreover, alumni affairs programs across the university tend to duplicate one another and fail to penetrate beyond the same subset of already-engaged supporters, who tend not to be those with the resources to most positively impact the institution. As a result, the return-on-investment or goal achievement of mass engagement is inconsistent or unclear.

Implementation Considerations

This practice has two key components:

1. Analysis of alumni current engagement and potential impact, leading to formal designation of alumni who can move the dial for the institution, financially or otherwise; and
2. Assignment of responsibility to unit-based alumni relations staff to cultivate potential constituents.

Resource Considerations

The implementation of the first component will vary based on the quality of existing data in alumni records. Those with robust data will need only staff time for analysis and classification, consuming 10 to 30 percent of a prospect research or development analytics professional over a six month period. Those without might choose to purchase external data, partner with vendors, or commission wealth screenings, which together might cost between \$25,000 and \$50,000, depending on institution size.

The second component requires political capital and willingness to execute a staff reorganization and develop an accompanying communications plan. This component is best understood as an ongoing strategy shift over the course of at least two years rather than a one-and-done project.

Profiled Institution:

University of Waterloo in Waterloo, Ontario, Canada

Needles in the Haystack

Senior leaders at the University of Waterloo sought to optimize the effectiveness of their alumni affairs function by prioritizing the engagement of supporters with the greatest potential impact on the institution. To identify the target constituents of this new outcomes-focused program, they needed to identify the alumni segments that offer the most return-on-investment in philanthropy and volunteerism.

First, Waterloo calculated each alum's current level of engagement and potential level of impact on the institution. These calculations included synthesis of existing data in alumni records, data collected using surveys that identified the respondent, and wealth screening. They also created a predictive model to extrapolate these factors on alumni for whom they were missing data.

The result was a conceptual four-quadrant taxonomy consisting of four archetypes: Sleepers, Champions, Leaders, and Potential Leaders. This process allowed Waterloo to clearly visualize their target segment: Potential Leaders, or alumni who have high potential for impact but low current engagement. With 64 percent of Potential Leaders having given before, staff were confident that they did not lack openness to philanthropy, they simply had not been engaged sufficiently. As such, this quadrant could be maximized to substantial positive ROI if efforts were made to engage them.

Impact and Engagement Matrix Reveals Highest Return-on-Investment Constituents

Analysis Gives Clarity to Size and Shape of Alumni Segments

	Potential Leaders	Leaders
High Potential for Impact	3,346 alumni (3% of total) Percentage of total annual dollars raised (2%) Average lifetime giving (\$737) Proportion that ever donated (64%) <ul style="list-style-type: none"> Little or bad data on file, with low rate of event attendance or participation Predominantly graduated from professional programs Predominantly over 50 with executive job titles 	1,248 alumni (< 1% of total) Percentage of total annual dollars raised (78%) Average lifetime giving (\$94,897) Proportion that ever donated (96%) <ul style="list-style-type: none"> Generally up-to-date records with a consistent pattern of giving or volunteering Predominantly graduated from professional programs Predominantly over 50 with executive job titles Tended to live within 3 hours of campus
Low Potential for Impact	Sleepers 128,823 alumni (87% of total) Percentage of total annual dollars raised (13%) Average lifetime giving (\$158) Proportion that ever donated (30%) <ul style="list-style-type: none"> Little or bad data on file, with low rate of event attendance or participation Occur across all demographic groups 	Champions 12,481 alumni (9% of total) Percentage of total annual dollars raised (7%) Average lifetime giving (\$819) Proportion that ever donated (48%) <ul style="list-style-type: none"> Generally up-to-date records with a consistent pattern of giving or volunteering Occur across all demographic groups
	Low Current Engagement	High Current Engagement

How Waterloo Did the Math

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

Source: Coolman, Jason. "Narrowing the Field." *CASE Currents*, March, 2013; Coolman, Jason. "The Science Behind Alumni Engagement." *CASE Currents*, April, 2011; EAB interviews and analysis.

What To Get For Someone Who Has Everything

Conversations with Potential Leaders elucidated their motivations and preferences for engaging with the University of Waterloo. What emerged was the understanding that Potential Leaders need to realize personal value in exchange for involvement with the institution. This would include the opportunity to develop useful professional connections or to enjoy distinctive and intellectually-stimulating experiences.

Potential Leaders were not interested in traditional alumni relations fare like organizing reunions or serving as regional chapter officers. They also sought higher levels of personalization and customization. For example, generic messaging and all-call events do not appeal to them. Potential leaders would be happy to engage with a celebrity or thought leader, but in an intimate pre- or post-reception, not at the standing-room-only main event.

Even traditional board and council opportunities were found wanting: too process-focused and too heavy on presentations without much opportunity for meaningful input. They wanted to use their skills, such as advising a dean on strategy or management. And while executives may desire the prestige, networking, and access of being on the board, they did not want long-term commitment.

Appeal to Potential Leaders with Two-Way Value Proposition, Rather than Nostalgia or Loyalty Fulfillment

The Challenges of Contacting Potential Leaders

Staff conducted research interviews with a sample of Leaders and Potential Leaders to better understand the similarities and differences in the way they engage. 92% of "Leaders" solicited agreed to participate in interviews after only one e-mail solicitation, but only 31% of "Potential Leaders" solicited agreed to be interviewed – and only after multiple e-mail reminders and in most cases, a follow-up phone call.

In retrospect, staff report that solicitations should have come from senior administrators, deans, or even the president. Individuals that Potential Leaders considered peers would likely have resulted in higher response rate.



Appealing to Their Altruism Through Self-Interest

"When we asked Potential Leaders how to get them involved, they explained the importance of two-way relationships. They would be willing to participate as long as they could see personal value in doing so, through:

- networking with elite peers;
- exposure to cutting-edge research, technology, and knowledge;
- personal interaction with deans, top thinkers, and senior leaders; and
- access to 'cream of the crop' students and young alumni leaders as talent for their organizations; and
- high-level volunteer and leadership roles."

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

What Got Us Here Won't Get Us There

This analysis led to the realization that the “mass engagement” strategies of typical alumni relations programs were too haphazard and random to guarantee penetration of the Potential Leader segment at Waterloo. Not only were their offerings overly general, but the lowest-common-denominator approach with which they marketed their programs failed to generate attention and capture mindshare among the Potential Leader segment. To spark their interest and offer them value, senior leaders at the University of Waterloo recognized that they needed to create organizational capacity for bespoke programs and tailored outreach.

Retasking Alumni Relations to Engage “Potential Leaders” at Waterloo

A Challenge to the Status-Quo

“Some of the best alumni programs have 30% alumni engagement. When analyzing who these engaged alumni are, it’s highly likely that they are younger, live close to your campus and are not able to do much for you.

If we continue to add resources to the traditional engagement strategies we’ll engage more alumni who are replicas of the folks we’ve already engaged, or we’ll offer redundant additional events, services and communications for those already engaged.

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

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

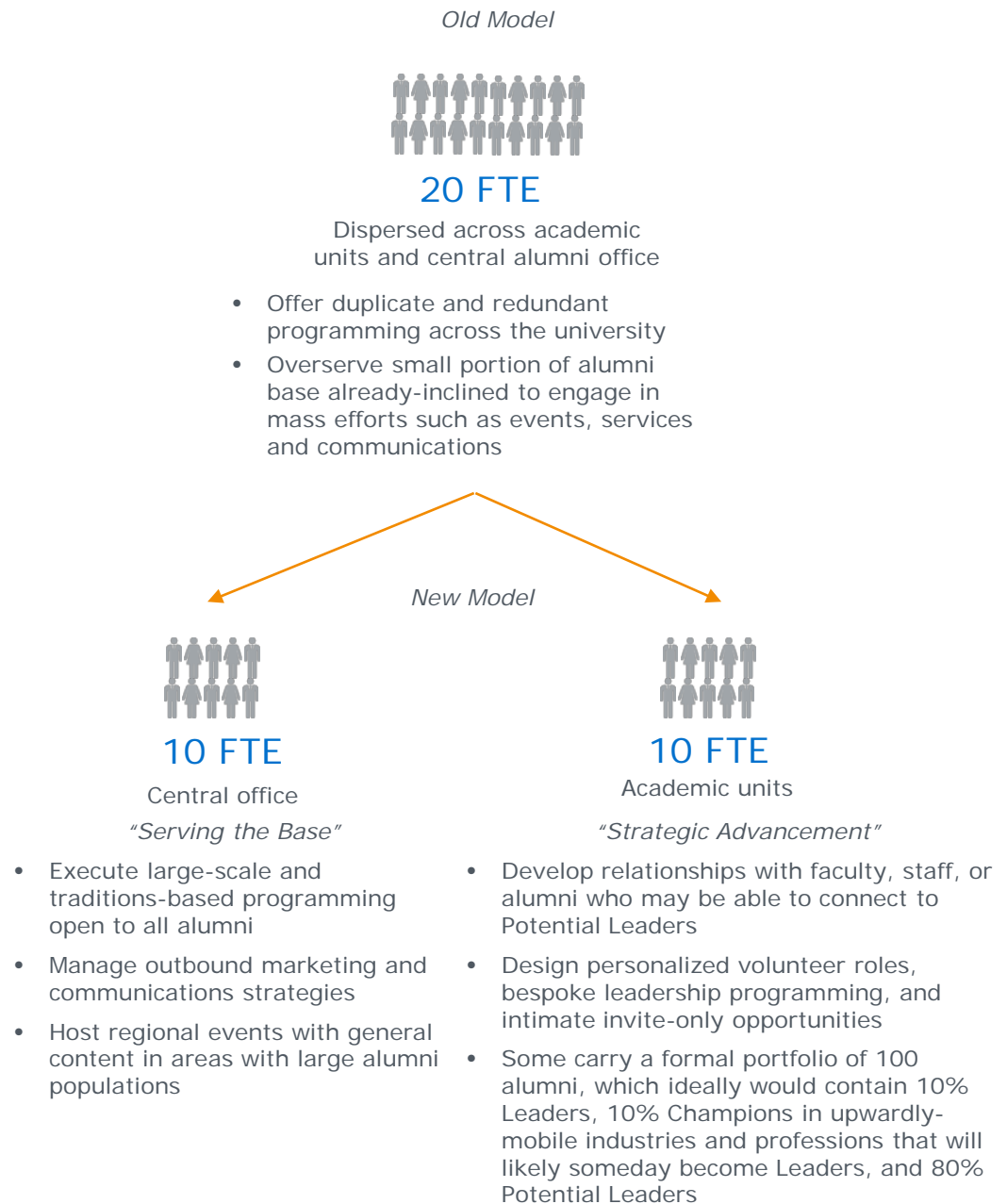
Reinventing the Alumni Engagement Playbook

To implement this new strategy, the University of Waterloo enforced a division of responsibility between unit-based and central alumni relations.

Under this new model, central alumni relations continues to offer a baseline of events, services, and communications to all alumni. In contrast, unit-based alumni relations officers serve as relationship managers that work to engage Potential Leaders through customized engagement plans designed to better match with them volunteer and leadership opportunities that align with their interests. Alumni relations staff in some academic units even manage a formal portfolio of Potential Leaders flagged in the CRM.

The long-term vision is that unit-based alumni relations staff members partner with fellow unit-based MGOs, to whom they pass prospects once they've been engaged. Once fully implemented, gift officer portfolios should contain denser concentrations of near-solicitation-ready prospects. In effect, this redefines the division of responsibility between alumni relations and major gift officers, with the former owning the early stages of the donor lifecycle: discovery, qualification, and engagement. MGOs would then focus on cultivating warm prospects towards a gift instead of spending 18 to 36 months in cultivation.

Central Office Offers Baseline Programming While Unit-Based Alumni Relationship Managers Cultivate Potential Leaders



Source: Coolman, Jason. "Narrowing the Field." *CASE Currents*, March, 2013; Coolman, Jason. "The Science Behind Alumni Engagement." *CASE Currents*, April, 2011; EAB interviews and analysis.

Proof of Concept

Because of the decentralized nature of the University of Waterloo's advancement operation, senior leaders are continuing to develop protocols to quantify the impact of new strategy, including number of Potential Leaders converted to Leaders. However, several intermediate signs of success demonstrate the viability of the initiative, such as the closure of major and transformational gifts from Potential Leaders they likely would not have engaged if not for this initiative.

Senior leaders at Waterloo have faced some challenges to this initiative that they are still working to overcome. Many academic deans fail to understand the sophisticated nature of this strategy, while many rank-and-file alumni relations staff lack the skills to succeed in executive-profile engagement.

Because five years have elapsed since the initial analysis, staff are now planning to repeat their work to see how many Potential Leaders have since moved into the Leader category.

Successes and Challenges in Implementation Over the Medium-Term



Closure of many major gifts and two multi-million-dollar transformational gifts from Potential Leaders they would not have engaged if not for this effort



Engagement with hundreds of Potential Leaders through events, volunteer roles, and communications



Successful international admissions recruitment partnerships with Potential Leaders in Singapore, Bermuda, and elsewhere

50%

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



Ancillary Benefits of Individually Identifiable Survey Data

In addition to the above gains associated with this strategy shift, mere conduct of the individually identifiable survey also uncovered valuable intelligence for development. For example, 300 individuals indicated interest in making a planned gift, the majority of whom are under 40 years of age.

The survey also uncovered items of interest for other campus partners. About 1,300 alumni expressed interest in executive education programs through Waterloo, but follow-up interviews revealed that existing curricula did not meet their needs. Continuing education administrators are now studying this opportunity to realize a new potential revenue stream.

Replicating Waterloo's Analysis

Part One: Calculating Engagement

1 Execute a survey to capture and record individual data, not averages

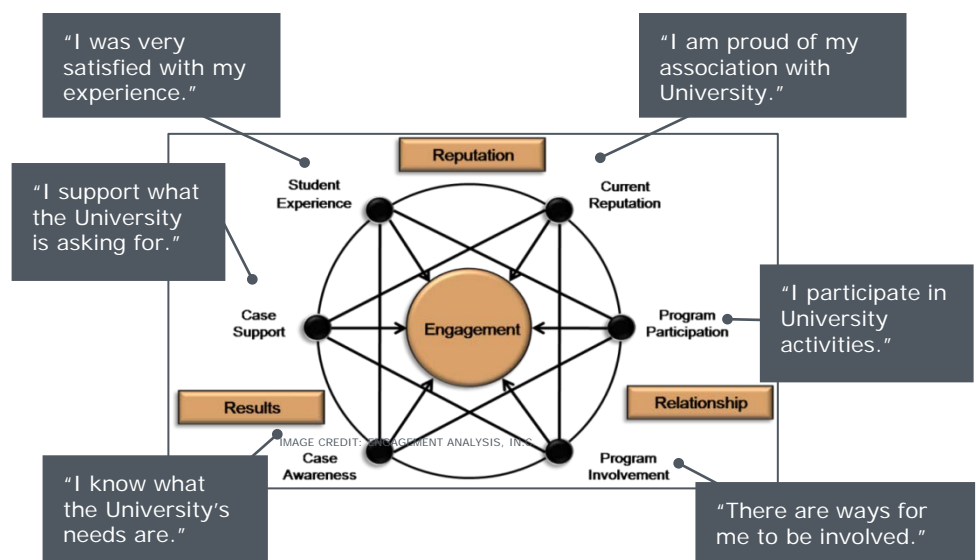
Most universities conduct large-scale anonymous surveys of their alumni. Where Waterloo differed was deciding to tie survey responses back to individual records in their database in order to discover how they could act upon the feelings and intentions that specific alums indicated in the survey. Each survey email contained a unique link.

Of Waterloo's 150,000 total alumni, 120,000 are considered contactable, half by email and half by postal address. A survey was emailed to all alumni for whom they had an email, with a follow-up email reminder two weeks later. The other half of contactable alumni received a postcard with a survey link. The survey was also advertised in the alumni magazine. About 90 percent of all total responses came in via the emailed links, within a day of either the initial email blast and the reminder email. Their total response rate from the alumni base was about 10%.

2 Isolate most engaged segment and determine correlates of engagement

Next, examine the top quartile of individuals who rank high in engagement as determined by level of agreement with the types of questions shown on the diagram to the right. Then, analyze the other survey responses and existing alumni data points to determine which most recur with these engagement indicators. Waterloo found that within their survey, 24 survey items indicated an inclination towards engagement (e.g., giving history, job title on file, have children attending the institution or family that attended the institution previously, participate in events, etc.) while 5 survey items indicate a disinclination towards engagement (e.g. have a bad address on file, or have listed themselves as "do not solicit").

Template of Engagement Analysis, Inc.'s Theory of Engagement¹



3 Leverage predictive modeling to calculate engagement for all alumni, even for those who did not complete the survey, based on engagement correlates

To quantify engagement, Waterloo created a 100-point scale and determined that an alum with a score of at least 75 was considered moderate to high engagement. Generalizing from survey items that correlated with engagement within their 10% sample, staff use the data to model the level of engagement of the remaining 90% of entire alumni database using the existing data available in their CRM system.

¹ The University of Waterloo collaborated with third-party vendor Engagement Analysis on this project. These statements are ones commonly used by Engagement Analysis, but are not necessarily the ones used by Waterloo during this project. We are grateful to Ray Satterthwaite, President of Engagement Analysis, Incorporated, for his contributions to our work. For more information, please visit <http://www.eanalysis.org>.

Source: Coolman, Jason. "Narrowing the Field." *CASE Currents*, March, 2013; Coolman, Jason. "The Science Behind Alumni Engagement." *CASE Currents*, April, 2011; EAB interviews and analysis.

Frequently Asked Question: “Does My Institution Need to Conduct a Survey?”

Waterloo’s survey, and other institutional initiatives observed by EAB that have operated similar to Waterloo’s, tend to find fairly similar engagement correlates: event attendance, volunteer involvement, giving history, up-to-date job title and address, and institutional attendance by parents or children, etc. Other institutions observed by EAB have found correlations between engagement and factors like satisfaction with undergraduate experience or graduation from a professional program such as business or engineering with smaller class cohorts. This suggests that institutions with a robust database that already contains much of the above information could skip conduct of a survey and rely on existing indicators.

Ultimately, the decision to launch an alumni survey versus rely on existing data for general engagement correlates depends on available resources. Analysis that relies on generalizable behaviors that pertain to alumni engagement may marginally exclude some alumni or erroneously include some alumni that institution-specific cultural or programmatic correlates might have better understood.



Engagement and Activity Correlation Loosens With Age

Research contacts at several institutions report that correlation between underlying affinity and the activities that signal that engagement – such as event attendance – tends to lessen as alumni age. These activities become less predictive, and their utility as indicators decline. In other words, while lack of alumni involvement may indicate lack of affinity in younger generations, it does not necessarily signal the same with older generations. It is unclear and too soon to know for certain if this data pattern applies to individuals as they age, or applies to whole generations that will be consistent about them over their lifetimes. However, this suggests that individually identifiable surveys asking constituents to agree with various statements about the university will uncover “false negatives”, or actually engaged constituents that a mere analysis of existing database variables might have missed.

Replicating Waterloo's Analysis

Part Two: Calculating Potential Impact

1 Calculate wealth and capacity

Much of an alum's potential for impact was based on wealth and financial capacity. However, staff at Waterloo were concerned that some of their own data on these factors was out of date. To correct for any bad data, they based 50% of this portion of the impact score on their own internal data on wealth ratings and 50% on external data that they purchased through a wealth screening, which included estimated annual salary data and zip code that could extrapolate home value.

2 Broaden impact metric to encompass variables beyond financial capacity

The notion of determining which alumni to engage based solely on capacity may rankle alumni relations staff and other stakeholders. Moreover, while philanthropy helps to move an institution towards its goal, volunteers with other qualifications and experience can do the same through offer valuable service. To meet specific university-wide objectives, Waterloo included the following as impact factors:

- Executive-level job title (to assist with student hiring, career development, and industry partnerships)
- Government employment (to assist in political advocacy and support government relations efforts)
- Employment as a high school teacher (to assist in domestic recruitment initiatives)
- Address in an international medium-sized city (to assist in international recruitment initiatives)

However, every institution will need to determine which factors are most relevant to their needs. These are some of the other impact factors that an institution might include:

- Demographic criteria, such as gender or race (to build pipelines of diverse alumni leaders and volunteers)
- Regional or geographic considerations (to penetrate a disproportionately under-engaged region or to support the growth of a new regional advancement program)
- Profession or industry considerations (to identify leaders and donors with interest in particular high-priority initiatives, like development of a new medical school, or for a campus or academic unit that struggles to identify benefactors)

3 Consolidate various factors of impact rating to determine score

A prospect researcher synthesized this data on financial capacity and other holistic indicators to create a single score for potential impact. In particular, they weighted executive-level job title and previous giving history as the two most powerful indicators. An alum with a score of at least 50 on their 100-point impact scale was considered moderate to high impact.

Ongoing Change Management Challenges

Three Pitfalls to Avoid

Contacts at Waterloo University identify three ongoing cultural challenges that more advance planning could have partially mitigated:



1. Buy-in and Support from Senior Leadership and Deans

- Senior leaders, especially deans, often lack a sophisticated understanding of advancement. They primarily understand alumni relations productivity as number of events or number of attendees, rather than strategic outcomes. As a result, many senior campus stakeholders at Waterloo expressed concern when they noticed a decrease in mass events and communications, especially for their particular school or unit, which they attributed to underperforming staff rather than a different strategic direction.
- In retrospect, advancement leadership should have communicated more proactively and repeatedly with senior leaders and deans across the institution about the rationale for this strategy change. They also should have spent more time teaching deans how to identify opportunities to engage Potential Leaders and explaining how this shift will affect the nature of their interactions with advancement (i.e., fewer happy hours and large-scale speaking engagements, more intimate events and one-on-one conversations – which, as one interviewee explained, likely better suit the often-introverted nature of academic leaders).



2. Continued Need to Build “Storehouse” of Engagement Opportunities

- Having now identified many Potential Leaders and working to engage them, the University of Waterloo is finding that it lacks a sufficient number of volunteer and leadership roles and other scalable opportunities for them.
- They are currently revisiting a number of advisory boards and councils, industry networking offerings, and regional alumni programs to determine how to shape them to incorporate Potential Leaders. They are also working to better track speaking and guest-lecture opportunities across campus for Potential Leaders.
- Finally, they are endeavoring to standardize a small “pre-” and/or “post-” event reception or dinner for as many large-scale alumni events as possible, to accommodate Potential Leaders.



3. Comprehension and Compliance from Alumni Relations Staff

- The University of Waterloo’s analysis and resulting decision-making – and that of institutions that have launched similar initiatives – can spur healthy debates about the proper focus of an alumni relations program. While development professionals have long focused their work on individuals of high influence or affluence, the alumni relations field has traditionally enjoyed a more democratic orientation that seeks to engage all alumni (in vain).
- Moreover, many alumni relations staff – especially those that are more junior – simply lack the skillset or gravitas to engage in individual cultivation and executive-profile outreach, having been hired more with an event planning and volunteer management skillset in mind.

Source: Coolman, Jason. “Narrowing the Field.” *CASE Currents*, March, 2013; Coolman, Jason. “The Science Behind Alumni Engagement.” *CASE Currents*, April, 2011; EAB interviews and analysis.

Talking Points for Alumni Relations Staff

This strategy may cause some concern for alumni relations staff as they encounter this paradigm shift in the practice of the profession. Consider the following approaches to explain the value of this strategy:

Motivational Lever	Explanation
Maximize benefits to individuals to maximize support for the university	Most alumni relations staff would not contest that alumni relations exists to offer lifetime value to constituents and in the process to derive benefits for the institution as a result of their engagement and resulting generosity. However, traditional engagement strategies fail to engage the Potential Leaders that can most benefit our institution.
Expand alumni engagement efforts to new and underserved segments	To truly serve everyone, special efforts must be made to penetrate the hard-to-reach. Treating all alumni “fairly” does not mean treating them each “equally.” Moreover, given higher education’s increased reliance on generating its own resources, it is justifiable to pursue a more targeted engagement strategy that converts our most influential alumni into volunteers and champions that can support our ability to serve students, alumni, and the population more broadly. (Indeed, given that Waterloo’s donor pyramid is already so narrowed that 1% of alumni provide 80% of giving, finding another 3% slice of the database that looks like this workhorse segment means broadening the base!)
Enhance resource stewardship through elimination of duplication	Approaches in which every unit-based alumni relations staff member acts completely autonomously in engaging their school or college’s base is tremendously wasteful, as we continue to engage the same individuals repeatedly or execute similar programs without scale across institutional silos. Moreover, it results in a confusing and uncoordinated strategy to alumni, who likely receive a slew of decentralized communications and conflicting event invites.
Ensure personal and professional development	This paradigm shift revitalizes the value of the alumni relations professional for the new century, which has been struggling to identify its purpose since the rise of social networks made classmate tracking services and reunions obsolete. Moreover, it allows unit-based officers engaging Potential Leaders to develop a valuable new skillset, allowing them to transition to development work if that is of interest.



Throwing Good Money After Bad?

“Traditional alumni relations programs are about prompting graduates to do something—anything— for or with the institution. I propose something different: an outcome-oriented alumni relations programming model—I call it strategic advancement— that focuses on smaller, targeted sets of graduates that can best help the institution achieve organizational outcomes, such as financial support, student recruitment, internationalization, internships, and jobs for graduates.

Skeptics may worry that such an approach will alienate too much of the alumni base. Let me be clear: I am not advocating discontinuing mass alumni engagement strategies, such as email, social media, and reunions. However, these traditional approaches, on their own, deliver small returns on large investments. The harsh truth is that a very small percentage of a university’s alumni base can do everything that is needed to advance the institution in any facet. But these alumni do not find traditional alumni programming attractive because it doesn’t offer any tangible benefits. Allocating resources to a smaller group, then, gives alumni professionals the opportunity to better engage a population that can truly advance the institution.”

Excerpted from CASE Currents (2013)
Narrowing the Field by Jason Coolman

Source: Coolman, Jason. “Narrowing the Field.” *CASE Currents*, March, 2013; Coolman, Jason. “The Science Behind Alumni Engagement.” *CASE Currents*, April, 2011; EAB interviews and analysis.



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*.

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