



“Ghost Volunteer” Surfacing Protocol

Incenting Campus Colleagues to Share Decentralized Volunteer Data

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“Ghost Volunteer” Surfacing Protocol

Incenting Campus Colleagues to Share Decentralized Volunteer Data

Practice in Brief

This process aids in the identification of alumni volunteers working across campus. Alumni relations staff offer central services to support decentralized units with alumni programming. In exchange, staff report the names of alumni they engaged to access these benefits.

Rationale

Most institutions lack adequate protocols to track the involvement and service of alumni who are engaged as volunteers and leaders across decentralized divisions, such as academic schools, student affairs departments, and other campus units. As a result, alumni relations leaders often lament failure to present a united and coordinated front to alumni, and advancement CRM systems lack valuable intelligence on engagement and affinity. This practice helps central alumni staff discover colleagues across campus who are engaging alumni and build relationships to enhance their work. Stakeholders range from individual faculty members who invite alumni into their classrooms to student affairs staff to unit-based engagement staff.

Implementation Considerations

This practice consists of three components:

#1: Creation of the Campus Alumni Engagement Form

#2: A communication plan that comprises regular e-mail updates after events with high alumni attendance

#3: Design and delivery of incentives to encourage partnership with central alumni relations staff, including a package of helpful benefits and high-quality customer service

Resource Considerations

The first and second components together take about five hours a year to implement, including working with web staff to create an online form to collect data and executing on a communications plan.

The third component is an ongoing process that will vary by campus, based on the complexity of benefits offerings and the size of your institution. In most cases, however, these simple manual tasks can be delegated to student-workers or clerical staff; at a small liberal arts college like the University of San Diego, this consists of as little as mailing a dozen thank-you cards on university stationery each month.

Profiled Institution:

University of San Diego in San Diego, CA

Haunted by Ghost Volunteers

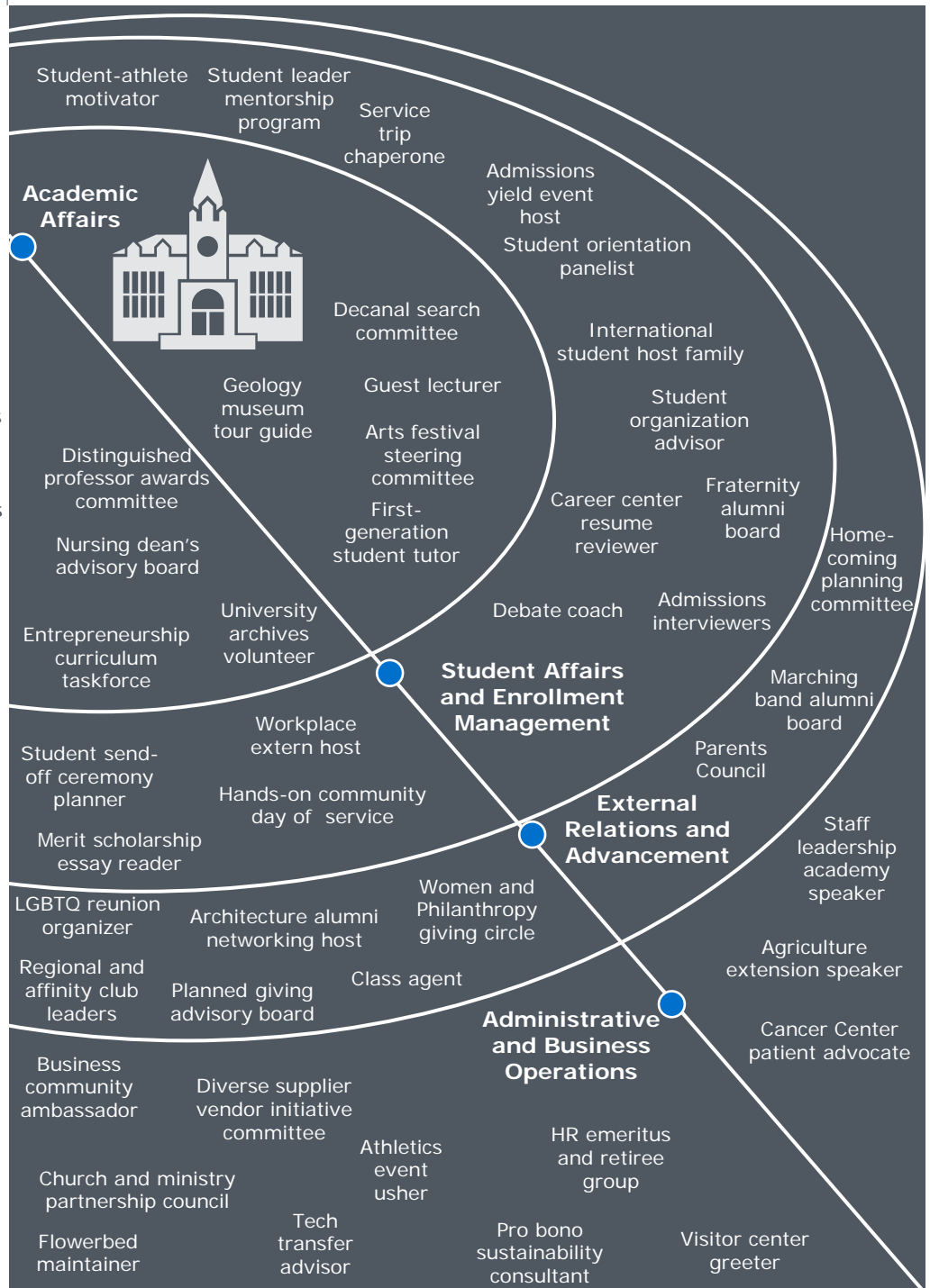
Most campuses feature a substantial contingent of “ghost volunteers”, alumni giving time and talent to academic schools, student affairs departments, and other units, especially as one-time speakers, panelists, or event assistants. The service of these individuals is largely unknown to alumni relation and development staff, causing their records to reflect inaccurately low engagement (and consequently depressing affinity ratings), and leaving most of these volunteers stewarded inconsistently or not at all.

Moreover, many institutions struggle with rivalrous tension between central alumni relations or alumni associations and decentralized units, over a perception that the former seeks to tightly control access to alumni by the latter. In most cases, alumni relations seeks to promote high-quality volunteer experiences, but may unwittingly gain the reputation as a bottle-neck from those units seeking to collaborate to engage alumni, while campus stakeholders hoard their relationships lest they be “stolen” by central advancement or solicited for funds.

This challenge will only grow as alumni seek increasingly segmented volunteer and leadership opportunities that pertain to their particular area of affinity.

Alumni Volunteers Hiding in Plain Sight Across Campus

Most Institutions Host Poorly-Stewarded Volunteer Roles Outside Advancement Division



Source: EAB interviews and analysis.

Incentivizing Campus Partners to Name Names

Seeking to identify “ghost volunteers” and to foster a positive ethic of collaboration between the alumni association and the rest of the institution, the University of San Diego Alumni Association created the Campus Alumni Engagement Form. Three times a year, after flagship university events that engage many alumni volunteers (like Homecoming and Parent & Family Weekend), alumni staff e-mail the form to the entire campus community.

Mindful of the potential protectiveness towards alumni, they thank faculty and staff for their efforts in engaging alumni. They then highlight a slew of ways that the alumni association can support their efforts and their alumni volunteers, but can only access if they fill out the form.

For example, alumni association staff will send the volunteer a thank-you note on behalf of the university, deliver a year-end gift, and validate parking. If unit-based staff fill out the form in advance of the event, they will even arrange free parking for the volunteers. By highlighting these incentives, units want to fill out the form to ensure their volunteers get recognized and to take care of these tasks for them.

Trading Information for Recognition and Scaling Stewardship for Decentralized Volunteer Managers

University of San Diego’s Process to Identify Volunteers

Key Components

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

Key Information Collected

- 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

Source: EAB interviews and analysis.

Just the First Step of a Larger Cultural Change

This practice effectively repositions the alumni association as a valuable resource to staff and faculty. In effect, it becomes a single-source “shared service” for volunteer recognition for the rest of campus.

This approach, in which the form is perceived as a means to secure benefits rather than as an effort to gather data or tread on unit autonomy, has been critical in getting campus partners to respond.

In the three years since implementation, the form has helped to uncover many “ghost volunteers.” This service is now logged in alumni records. When alumni relations staff notice frequent submissions and discover a recurring volunteer role, they will contact that unit leader and offer to help with the volunteer experience, in some cases even offering funds or staff support to improve it.

This strategy has inflected the perceived credibility of the Alumni Association on campus; many units now proactively reach out to the Alumni Association when they need help or assistance.

Fostering a More Clear Division of Responsibility

Results From the Campus Engagement Form

350

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

94

Unique submissions from campus units, over half from individual faculty members



The Form is Just The Beginning

“Years ago, we had a reputation as not being a collaborative and collegial partner to the rest of campus. The attitude was that if other people told us about the alumni they were engaging, then we would – God forbid – ask them for money...

With the Campus Alumni Engagement Form and all that it has led to, we’ve really broken those barriers. The message is we don’t want to own and control all of alumni relations on campus. We see ourselves as a resource and a connector and a partner. There’s not 10 alumni relations staff – there’s 2000. Every staff and faculty member is an alumni relations representative.”

*Charles Bass
Senior Director of Alumni Relations*

Source: EAB interviews and analysis.

Sample Documentation

Engagement Tracking Form Template

To see the University of San Diego's form online, click [here](#). Below is an adapted form for your campus. Be sure to determine staff workflow for processing this data and fulfilling volunteer benefits before publishing the form.

Sample Campus Alumni Engagement Form

Campus Partner Information

Name	<input type="text"/>	E-mail	<input type="text"/>
Title	<input type="text"/>	Phone	<input type="text"/>
Department/Unit	<input type="text"/>	Location	<input type="text"/>
<i>(e.g., office, classroom)</i>			
Your Role on Campus	<input type="checkbox"/> Faculty Member	<input type="checkbox"/> Staff or Administrator	<input type="checkbox"/> Volunteer Leader
	<input type="checkbox"/> Student-Leader or Student Worker	<input type="checkbox"/> Other (please describe: _____)	

Program/Event Information

Program Date	<input type="text" value="-- Select --"/>	In what capacity are alumni volunteering? Select most applicable option <input type="checkbox"/> Speaking opportunity/presentation <input type="checkbox"/> Mentorship or networking <input type="checkbox"/> Fundraising <input type="checkbox"/> Event assistance <input type="checkbox"/> Other (please describe: _____)
Program Location	<input type="text"/>	
Program Time	<input type="text" value="-- Select --"/>	
Total Number of Anticipated Attendees. <i>Include students, alumni, faculty/staff, etc.</i>	<input type="text"/>	

Alumni Information

Please list first and last names of alumni participating in your program. Please include class year and e-mail address if available.

Prefer to upload an existing spreadsheet or document listing alumni information? Click here →

Campus Partner Benefits

Please select the benefits you would like to access. In the box below, detail any special requests or notes for particular alumni. We will be in touch if we have any questions or are not able to accommodate.

<input type="checkbox"/> End-of-year gift	<input type="checkbox"/> Thank-you note	<input type="checkbox"/> Inclusion in campus volunteer honor roll	<input type="checkbox"/> Parking-related (please allow two weeks notice)
-------------------------------------------	-----------------------------------------	-------------------------------------------------------------------	--------------------------------------------------------------------------

Source: Adapted from form used by the University of San Diego; EAB interviews and analysis.

Sample E-mail Message to Distribute Form

Alumni relations leaders send the following e-mail to the entire campus community several times a year after events with high alumni frequency.

Consider the appropriate sender for your campus. While the senior alumni relations officer is the most logical choice, asking the university president or even a senior volunteer leader (i.e., chair of the board of trustees) to send this e-mail demonstrates alumni engagement as a campus wide priority and may inspire more e-mail open-rates and follow-through on submission.

Sample E-mail Content

From: John Doe, Senior Alumni Relations Officer <johndoe@XYZState.edu>
Date: Tuesday, October 14, 2014 10:00 AM
Subject: Alumni Engagement on Campus Last weekend

Dear [university nickname or mascot] community,

This past weekend, the campus was alive! In addition to parents, families, and friends, the XYZ State University community welcomed home hundreds of alumni for Homecoming and Family Weekend.

Thank you for your part in engaging our alumni by inviting them into your classrooms, providing networking opportunities with current students, and bringing them back to campus in other capacities. We value your willingness to strengthen these bonds, help all graduates remain an integral part of the community we all cherish, and enrich our global network. Through your efforts, you are ensuring that today's students see role-models of the kind of engaged alumni we hope they will become.

To support your efforts to involve alumni in the life of the university, the Office of Alumni Relations is happy to send a year-end thank you note from the Alumni Association to all alumni volunteers, include their names on our campuswide volunteer honor roll that will be published in the alumni magazine, and provide an appreciation gift for alumni speakers/presenters. **To take 5 minutes to ensure your volunteers receive these benefits, please use our [Campus Alumni Engagement Form](#).**

In the future, feel free to use this form to access other benefits in advance of volunteers' arrival, such as providing for free parking.

Have an idea to engage alumni in your department's work, but not sure where to start, or if we can help? Try us. We are here to support you. Please contact our office if you have any questions.

The Alumni Relations Team

Making It Work On Your Campus

Further Considerations for Program Administration



Brainstorm Most Persuasive Benefits For Your Campus

- While campus partners at the University of San Diego find value in volunteer recognition and parking assistance, faculty and staff across your university might respond most to other benefits, such as arrangement of student-led tours of new buildings and or accommodations at a nearby hotel with discounted pricing.
- Consider meeting with trusted partners across campus to ask them the 1-3 things that would make them more willing to host programs that feature alumni as volunteers and ask how the Alumni Association staff could help.
- You might even consider conducting a focus group or survey once you gather ideas, asking staff to rank-order benefits that might interest them. Of course, ensure the alumni office has appropriate capacity to support and follow-through on offerings!

Consider Incorporate Development Component Into Campus Alumni Engagement Form Process

To generate trust, the form on the last page and the above e-mail are free of any content suggesting the information will be used to further fundraising or philanthropic goals.

However, depending on your campus culture, you may add in these components:



- Consider creating a workflow whereby prospect management staff automatically check wealth ratings or conduct a quick wealth screen of individuals as they are entered, to identify quick-win opportunities for development officer visits, touches, or follow-ups.
- Addition to the form: "Do you believe any of these alumni would be willing to donate to your unit's programs or get involved with another university initiative? Let us know and we'll get in touch."
- Addition to the e-mail: "P.S. – Our development officers tell us that volunteers are the best benefactors of their home department's programs. If you're curious how to turn your volunteers into supporters, let us know and we'll work with you."
- At campuses with mature fundraising culture, the form could even include questions pertaining to each alumnus (i.e., asking for updated contact or employment information), check-the-box indicators of affinity (i.e., current children in attendance) or even wealth qualifiers (i.e., executive-level job title, second home, discussion of expensive vacations).



Campus Alumni Engagement Form Should Not Substitute for Robust Alumni Reporting Protocols for Units with Large Volunteer Programs

This process is most effective at streamlining processes for departments that use alumni or volunteers occasionally, or for individual faculty members unfamiliar with the administrative infrastructure to support advancement. It is *not* an effective way to collect data from departments that regularly use hundreds of alumni as volunteers in standardized capacities, such as an admissions representative or interviewing program. In those cases, alumni relations should establish a separate relationship with the unit's leader and agree to a formal protocol for data and information-sharing.

Source: 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*.

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.



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