EAB

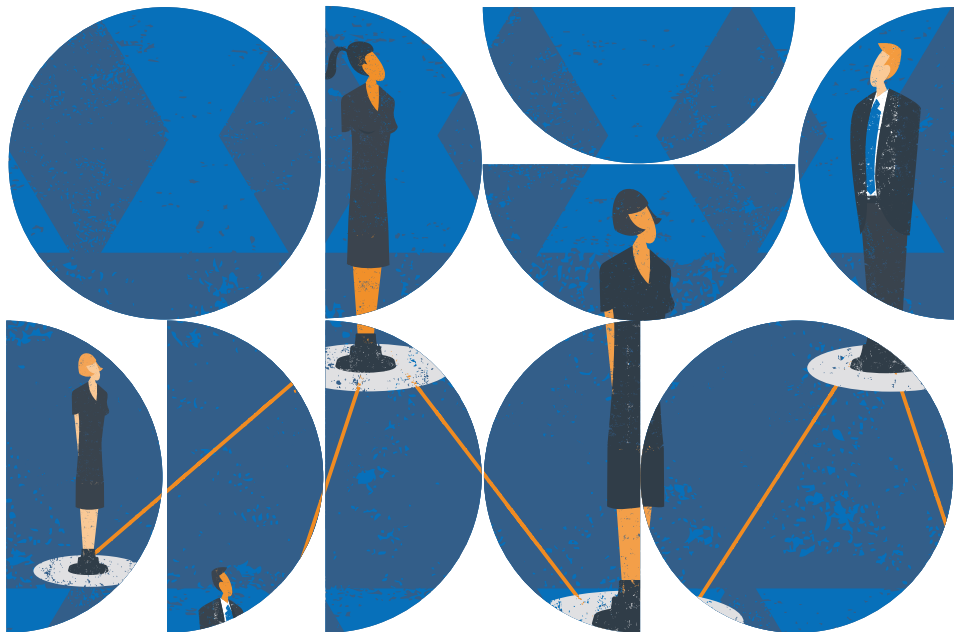# The New Rules of **Engagement**

Building the Next Generation of Alumni Leaders and Volunteers

Advancement
Forum

The New Rules of Engagement

Building the Next Generation of Alumni Leaders and Volunteers

Advancement Forum

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Supporting Members in Best Practice Implementation

Resources Available Within Your Membership

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 among key constituencies, and to save implementation time.

Six-Part New Rules of Engagement Webconference Series

On-demand webconferences that explore in-depth practices associated with each section and each rule are available on our website. Forum experts are also available to conduct private webconferences with your team.

Applying the New Rules of Engagement to Campaign Leadership Committees

This webconference explores the implications of changing constituent preferences for campaign volunteer structures, with tactics detailed to reduce role intensity and burden, and to organize more effective models that provide the institution and volunteers with greater value.

Applying the New Rules of Engagement to Advisory Boards and Councils

This webconference discusses how central advancement can inflect higher-quality experiences across groups in decentralized units, create new kinds of more scalable and appealing boards, and set more successful giving expectations.

The Strategic Alumni Relations Enterprise

To read our first research foray into the study of alumni engagement, access *The Strategic Alumni Relations Enterprise* online, which includes practices to enhance the relevance of alumni relations events and activities and to hardwire greater collaboration with development.

Facilitated Onsite Presentations

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

Unlimited Expert Troubleshooting

Members may contact the consultants who worked on any report to discuss the research, troubleshoot obstacles to implementation, or run deep on unique issues. Our staff conducts hundreds of telephone consultations every year.

All Advancement Forum publications are available to members in unlimited quantity. To order additional copies of this book, obtain an electronic version of this publication, or access the above services, please visit our website **eab.com/advancementforum**, contact your dedicated advisor, or email **research@eab.com** with "Advancement Forum 'New Rules of Engagement' Request" in the subject line.

Alumni Leadership and Volunteerism Resource Center

This publication belongs to a larger suite of content produced from this research initiative on alumni leadership and volunteerism. To access the Advancement Forum's full repository of practice briefs and strategy snapshots, ranging from new leadership roles to smarter volunteer management practices, please access the Alumni Leadership and Volunteerism Resource Center at eab.com/Research-and-Insights/Advancement-Forum/Resources/2016/Alumni-Leadership-Volunteerism-Resource-Center

A Sampling of Resources Available on the Alumni Leadership and Volunteerism Resource Center

▶ **Identifying Alumni Leaders and Developing Volunteer Pipelines**

- "Top 100" Leaders Roster
- Junior Feeder Boards
- Data-Driven Alumni Strategy Development
- Affinity Detectors
- Alumni Leadership Academy

▶ **Activating Alumni to Enhance Student Career Development and Industry Engagement**

- Corporate Chapters
- Industry-Segmented Career Dialogues
- 30-Minute Mentors
- Professional Networking Roundtables

▶ **Exploring Next-Generation Opportunities for Volunteer Deployment**

- Volunteer Strikeforces
- Faculty-Friendly Academic Volunteer Roles
- Social Media Ambassadors
- Digital Content Creators

▶ **Fostering Involvement and Connectivity Across Campus**

- Alumni Involvement Grants Competition
- "Ghost Volunteer" Surfacing Protocol
- Enterprise Volunteer Engagement and Management Functions
- Volunteer-to-Donor Conversion Campaigns
- Repackaged Board and Council Giving Expectations

▶ **Demonstrating Two-Way Volunteer Value**

- Social Cause Volunteer Communities
- Scalable Volunteer Impact Communication
- Insider Access Summit

Alumni Leadership and Volunteerism Resource Center

Throughout this study, this box will prompt you to explore one of several best practice briefs available on the Alumni Leadership and Volunteerism Resource Center that align with the lessons of that particular section.

Executive Summary

Building the Next Generation of Alumni Leaders and Volunteers

Higher education advancement is approaching a sector-wide inflection point, when colleges and universities will either sustain momentum and cast off into a decade of record-breaking fundraising returns, or run aground due to a shallow prospect pool, resulting in lost progress to replenish an aging supporter pipeline. The key to success is securing the loyalties of the alumni and prospects of today, who will become tomorrow's major gift donors and institutional champions. Senior advancement leaders must act with urgency to capitalize on a window of opportunity in which the largest addressable segment of the alumni base is both underengaged and at the optimal age to be receptive to volunteer opportunities.

Unfortunately, institutions have historically struggled to engage alumni in their 30s and 40s due to what some interviewees call the three c's: career, children, and commute. Moreover, millennial and generation X alumni, leaders, and volunteers bring new expectations: today's constituents seek greater levels of personalization, customization, and convenience than ever before, and are interested in deploying their skills and expertise, not just their time.

Through our conversations with over 200 senior advancement and alumni relations officers, the Advancement Forum has developed The New Rules of Engagement: five rules to help members recruit and retain this critical segment of alumni. Through the application of these rules, institutions can offer an attractive array of new involvement opportunities and build a strategic pipeline of high-potential leaders.

The Case for Investment

ESSAY

The Best of Times, the Worst of Times

Higher education advancement has taken on a distinctly Dickensian tenor: it appears to be the best of times and the worst of times.
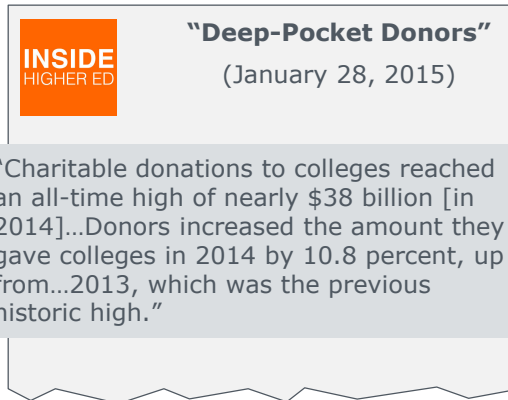
A casual observer of university fundraising would note an array of positive indicators. A record number of institutions are conducting or completing $1 billion campaigns, the number of major gift prospects is strong and surging, and charitable donations to higher education have reached an all-time high. And yet, a sense of unease pervades the profession. Gift pyramids are narrowing, making colleges ever more reliant on a few wealthy and generous families at the top. Alumni participation rates continue to tumble, due to both real decreases in donor counts as well as exploding alumni populations. And the 80 million millennials who development officers pray will become the next great generation of philanthropists seem distinctly uninterested in large institutions, preferring instead to give to causes with smaller overhead and clearer impact.

What accounts for such starkly distinct worldviews between optimistic and pessimistic leaders comes down to engagement and how well or badly institutions believe they are doing at cultivating a pipeline of future supporters.

If This Is The Golden Age of Higher Ed Philanthropy…

52 Number of $1B higher ed campaigns in 2014-2015

7M Number of millionaire households in the U.S. in 2014

INSIDE HIGHER ED
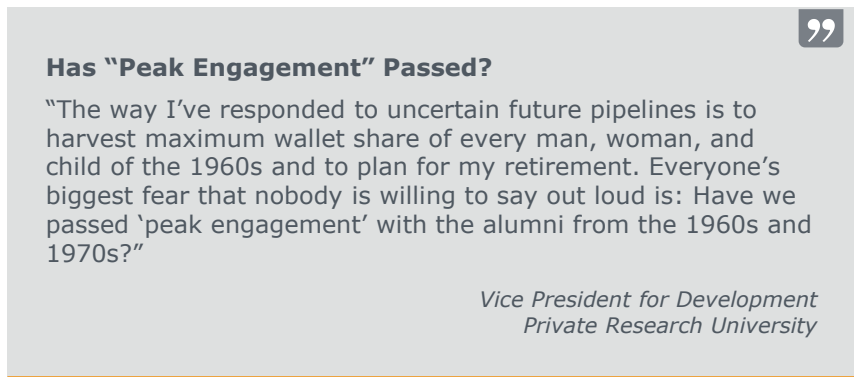
"Deep-Pocket Donors"
(January 28, 2015)

"Charitable donations to colleges reached an all-time high of nearly $38 billion [in 2014]…Donors increased the amount they gave colleges in 2014 by 10.8 percent, up from…2013, which was the previous historic high."

…Why the Sense of Unease Across the Profession?

8.3% 2014 alumni participation rate, down from **8.7%** in 2013 and from **14%** in 2001

75% Of millennials are more likely to donate to favorite charity than to alma mater

"

Has "Peak Engagement" Passed?

"The way I've responded to uncertain future pipelines is to harvest maximum wallet share of every man, woman, and child of the 1960s and to plan for my retirement. Everyone's biggest fear that nobody is willing to say out loud is: Have we passed 'peak engagement' with the alumni from the 1960s and 1970s?"

Vice President for Development
Private Research University

Source: Mulhere, K, "Deep Pocket Donors," Inside Higher Ed, Jan 28, 2015, https://www.insidehighered.com/news/2015/01/28/2014-record-year-higher-ed-donations; "Global Wealth 2015: Winning the Growth Game." *BCG Perspectives*, Boston Consulting Group, 2015, https://www.bcgperspectives.com/content/articles/financial-institutions-growth-global-wealth-2015-winning-the-growth-game/?chapter=2; "2014 Millennial Alumni Report." Achieve and the Chronicle of Philanthropy, 2014, http://fi.fudwaca.com/ac/files/2015/04/MAR_Infographic-v4.pdf; EAB interviews and analysis.

Engaging the Next Generation

Put simply, the under-engagement of future prospects constitutes an existential threat to higher education fundraising. Such a sector-wide challenge on the horizon would seemingly inspire a call to action to the very profession that exists to maintain the machinery of affinity, but the alumni relations function at most institutions appears woefully unprepared for its newfound relevance. It is thus unsurprising that the topic of engaging the next generation of leaders and volunteers was the #1 vote-getter on EAB's annual topic poll, claiming the top spot across large privates, small publics, urban Canadian universities, rural American colleges, and members in between.

Too often, alumni relations and development are like two ships passing in the night, the former failing to leverage its privileged position and relationship capital in support of the latter. Moreover, technology and social media have disrupted the alumni association's historic monopoly on intermediating between graduates. As a result, chief advancement officers are increasingly willing to question long-standing norms about the optimal structure and activities of the engagement enterprise as they seek best practices to leverage leadership and volunteer activities to meet institutional and divisional goals.

Top of Mind for Member CAOs

2015 EAB Advancement Forum Topic Poll Results

n=56

Engaging the Next Generation of Alumni Leaders and Volunteers	Leveraging Engagement Data in Prospect Strategies	Beyond Governing or Foundation Board Service: Scaling High-Impact Alternatives for Volunteer Engagement
70%	52%	52%
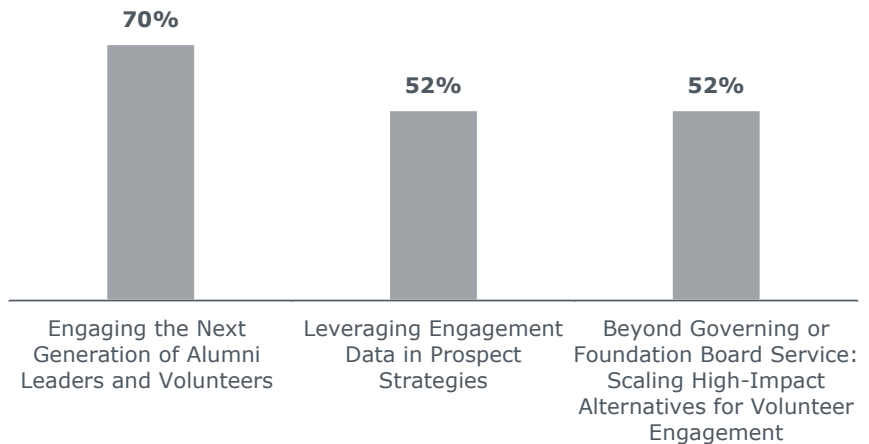
Why Focus on Alumni Leaders and Volunteers?

Heard Across the Membership

Building a Relationship
"Young alumni don't want to come to reunions or make fundraising calls, but they will help a student…how do we do more of *that*?"

Deepening Affinity and Winning Loyalty
"I fear that if I don't engage mid-career alumni as volunteers now, I'll lose them to another organization in their local community."

Seeing ROI
"My top donors are also engaged volunteers. They get to see the impact of their gifts and become connected. How do I scale that?"

Realizing Strategic Priorities
"Our new president unveiled a set of ambitious goals. We're going to need alumni help to achieve them, especially around career development and enrollment."

Source: EAB interviews and analysis.

The Concept of Volunteering in Flux

Among the many areas of alumni relations ripe for reinvention, leadership and volunteerism stands out as a stronghold of dated practices and a storehouse of unchallenged assumptions about preferences for engagement. In fact, many institutions feature the same leadership and volunteer roles and opportunities they did a quarter-century ago.

Our research surfaced immense skepticism about the viability of these roles for the current environment, let alone the future. Many advancement leaders believe they are providing inadequate channels for their alumni's time and talents and feel they are offering sub-standard experiences to the subset of alumni who do engage with their institutions.

In particular, many advancement leaders shared their concerns that boards and councils as a primary means of engaging high-level constituents were a relic of a bygone era. Today's prospects, donors, and volunteers want more dynamic, hands-on and impact-oriented opportunities. It is imperative that advancement offerings evolve beyond all-talk-and-no-action committee meetings, make-work activities, and traditional roles like regional chapter leads and reunion planners to a new paradigm for engagement.

20th Century Roles for 21st Century Volunteers

The Traditional Volunteer Pyramid

Governing, Fiduciary, or
Advisory Board Member

Regional or Affinity
Club Leaders

Annual Fund
Volunteer

Reunion
Planner

Career
Mentor

Admissions
Interviewer
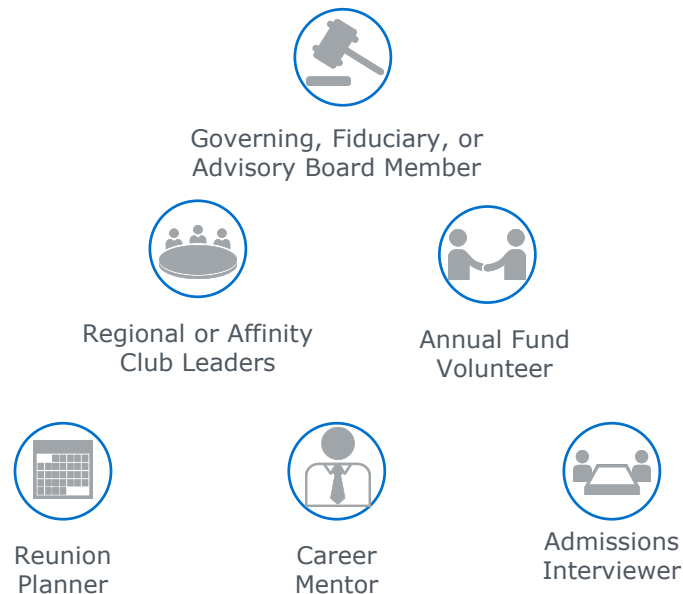
Board Service No Longer Appeals

> "We [as a profession] used to believe that in order for alumni to understand and own the direction of the organization, and to give gifts at their highest potential, they had to be on a board…But it is increasingly clear to me that the next generation of big donors—now in their 40s and 50s—have very little tolerance for traditional boards. The terms are too long, it's too much process, and most boards are not appealing to an intellectually curious and successful person who can't commit to show up to meetings for a multi-year period. They appeal to the civic leaders of yesterday, not tomorrow. Donors will tell me: 'Tell me what you want me to do and I will do it. But please don't make me come to a meeting.' "
>
> *Nevin Kessler*
> *President, Rutgers University Foundation*

Source: EAB interviews and analysis.

eab.com

It's Not Them, It's Us

Dissatisfaction with status quo volunteer and leadership roles and experiences extends beyond participants to emanate from senior advancement leaders and frontline program managers as well.

First, staff struggle to track the horizontal or historical experiences of volunteers across the institution, presenting an uncoordinated front to alumni who assume every function at the university collaborates smoothly. Second, changing attitudes regarding volunteer management have stigmatized this work as a fool's errand, with many major gift officers showing little interest in helping with volunteer events. Third, greater professionalization of advancement and the evolution of digital capabilities have simply left colleges with fewer needs for extra sets of human hands to carry a message, screen peer wealth, or staff an event.

Finally, exasperation abounds at the limited penetration of volunteer and leadership beyond the already-engaged usual suspects, which ultimately provokes questions about value and return on investment for such resource-intensive and thankless activities.

A Moment of Candor

Not Well-Structured to Manage Volunteer Ecosystem

- Silos endure between volunteer activity across decentralized hubs
- No clear pipeline or connection between mass volunteer roles and leadership opportunities

"I was hired to build an institution-wide volunteer program. But admissions doesn't report to me, and the career center director won't talk to me. Now the principal gifts VP is angry at me because her prospect had a poor mentorship experience on a dean's advisory board that I didn't even know existed."

Volunteer Management Widely Regarded as a Time Sink

- Volunteer involvement in fundraising increasingly considered "lost art"
- Volunteer management a less emphasized or evaluated aspect of MGO skill set today

"Managing volunteers was a core success factor in my first fundraising job 20 years ago. But in today's metricized environment where anything other than a visit is considered a distraction, we train MGOs to treat advisory boards like a chore."

Technology and Professional Staff Reduce Need

- Institutions previously relied on volunteers to carry out bulk of advancement functions
- Today, technological capabilities, larger staffs, and more advanced fundraising disciplines seemingly reduce need for volunteers

"I used to need alumni to plan events, handle the logistics, and man the registration tables. But now I have full-time event planners on staff and the volunteers just kind of get in the way. Alumni relations is a profession now, not a volunteer's hobby."

Largely Failing to Engage "the Murky Middle"

- Volunteering "skips a generation," engaging recent grads and senior alumni, but not the next decade of the major gift pipeline
- Alumni in their in 30s and 40s struggle to find reasons and roles to engage

"As a volunteer manager in alumni relations, I'm like a nurse: I work with the old and the young. Half my volunteers are 20-somethings who go-go-go until they burn out and pass the regional club treasurership to the next recent grad. The other half are loyalists who met their significant other here in 1968."

Source: EAB interviews and analysis.

Two Sides of the Same Coin

Despite contentions to the contrary, volunteering remains critical to the long-term success of the advancement enterprise. Even if volunteers did not build the university brand through advocacy or recruit and mentor students, the incredibly rich interplay between giving and volunteering would be sufficient to justify investment. Volunteering is a powerful form of cultivation and stewardship that creates a base of loyal givers, which at a time of slackening pipelines of alumni leaders is imperative for the success of future campaigns.

Research shows, for example, that donors who volunteer give more than donors who do not, and they are more loyal to the organizations for which they also give of their time.

Figures from Cornell University[1] help to further illustrate this pattern. Not only are Cornell's donor volunteers more likely to give and to give more than non-volunteers — even moreso than event attendees — but of Cornell's top donors, over 4 in 5 are volunteers. Moreover, even many years after their volunteer role ends, the average Cornell leadership volunteer is still giving 28% more than they were before stepping into that position.

Giving and Volunteering Inextricably Linked, Especially at the Top

Unpacking the Connection

What Does Volunteering Do?

- Enfranchises donor as stakeholder
- Exposes donor to cause, personalizing and sparking emotional connection
- Fosters sense of distinctive package of contributions
- Wraps donor in positively reinforcing relationships and welcomes them to "inner circle"
- Allows monitoring for impact and accountability

Especially Important to Young Donors

"I've learned to be very actively involved in those organizations I give to. I want to see financials, know the staff and know the board. There is no substitute for direct involvement. Without it, without your time and energy, you cannot give responsibly."

Respondent to #NextGenPhilanthropy Survey of High-Net-Worth Donors Under 40

Close-Up on the 1%

50%

Of donors with donor-advised fund accounts reserve most financial support for organizations they volunteer for

73%

More donated by high-net-worth donors who volunteer versus those that do not; **$76,572** annually versus **$44,137**

A Snapshot of One University

Cornell University, FY 2011-2012

57% Giving rate amongst volunteers, compared to **36%** from event attendees and **3%** from alumni who are neither

10x Average differential in median gift size between alumni donors[2] who volunteer versus those who do not[3]

83% Of top 320 donors who give >$1M are volunteers

Upgrades That Endure

The annual giving of average leadership volunteer: **$916** in decade before term, $**3,517** during term, **$2,250** in four years after term ends, and **$1,148** in decade after.

1) While Cornell is not a peer to most universities, it has gone the furthest in elucidating the volunteer-donor connection. Many institutions can provide partial correlations about this topic, but few have as exhaustively quantified it.
2) The average differential in median gift size between *non-alumni* donors who volunteer versus those who do not is 20x.
3) The differential increases as alumni donors age: 3.5x for those under 40, 17x for donors 40-59, and 31x for donors 60 or older.

Source: Cornell University: Office of Volunteer Programs, "Trustee Task Force on Volunteer Leadership," http://www.alumni.cornell.edu/volunteerold/documents/Trustee TaskForceonVolunteerLeadership Report.pdf; "The 2014 U.S. Trust Study of High Net Worth Philanthropy," Lilly Family School of Philanthropy, Indiana University, 2014, http://www.philanthropy.iupui.edu/files/research/2014ustrustfinalreport.pdf; "#NextGenDonors: Respecting Legacy, Revolutionizing Philanthropy," Johnson Center for Philanthropy, Grand Valley State University, 2013, http://www.nextgendonors.org/wp-nextgendonors/wp-content/uploads/next-gen-donor-report-updated.pdf; "Volunteerism and Charitable Giving in 2009," Fidelity® Charitable Gift Fund, 2013, http://www.fidelitycharitable.org/docs/ Volunteerism-Charitable-Giving-2009-Executive-Summary.pdf; EAB interviews and analysis.

What I Want (and When and How I Want It)

Institutions will reap the benefits of involvement only if they can recruit and retain volunteers. A clear obstacle to this end is the lack of appealing opportunities. As consumers in the 21st century, alumni have come to anticipate a greater level of personalization, customization, and convenience from the organizations which they spend their disposable resources and to which they give their time. These expectations surpass what most institutions provide.

Colleges and universities will never exceed the marketing savvy and user interfaces of leading technology firms like Netflix and Amazon, but the high-touch service these companies have taught alumni to expect makes it difficult to meet their expectations. Today's alumni want to work on projects that pique *their* interests, on timetables that meet *their* needs, and for an area of the university that aligns with *their* own idiosyncratic and niche passions.

One-Size-Fits-All Doesn't Fit All Any Longer

Expectations of Today's Consumer

Made-to-order customized dining experience

Order items online and have them delivered anywhere, anytime

Homepage personalized with targeted recommendations based on previous choices

Boxes of lifestyle products curated to personal tastes

Today's Alumni Volunteer Experience

✖ Available opportunities focus on university interests and affinity areas as predefined by staff

✖ Volunteers must be available on the university's schedule and gather at locations that work best for institutional staff

✖ Difficult to compare opportunities side-by-side as many roles have undetermined scope and time frames

✖ Every institutional touchpoint requires a new introduction; limited historical information on volunteer involvement and affinity

Source: EAB interviews and analysis.

eab.com

Skills-Based Volunteering Movement Takes Hold

Other nonprofits are further ahead with the skills-based volunteering approach that incoming generations clearly desire. Research indicates that millennials say they would enjoy using their skills, talents, and expertise to volunteer for their alma mater—but according to 43% of millennials, their alma mater has never asked. Most opportunities that colleges and universities feature ask only for the commodity of time.

But the reality is that alumni have many choices about where they spend their time; and nonprofits like Taproot, which serve as a broker between skilled volunteers and nonprofits that need help with specific projects, are more than happy to accommodate the desire for skills-based and tailored roles.

In this ever-more competitive philanthropic marketplace, if higher education institutions do not take action, they risk losing their potential volunteers to more nimble charities that can more easily show impact. Research shows that as their time and talents flow, so too will donors' funds.

Volunteers Increasingly Want to Use Their Expertise

Resonating with Millennials

86%

Percent of Millennials who would enjoy using their skills, talents, or expertise to volunteer for their alma mater

72%

Of the 4M LinkedIn users who check interest in "joining a nonprofit board" and/or "skills-based volunteering" are Millennials – and top issue area is education

Online Marketplaces Match Skilled Volunteers with Nonprofit Projects

Landing on Development's Doorstep

Many colleges and universities experienced an enrollment boom in the mid-90s and early 2000s, such that alumni in their 30s and 40s are now the largest addressable segment on most campuses. In fact, millennials will constitute 75% of the workforce by 2025. Moreover, data from Giving USA shows that 35 to 45 is the optimal age to acquire a volunteer. This signifies the perfect moment in time to acquire mid-career generation Xers and millennials who research shows wants to engage in their preferred causes as both donors and volunteers.

The reality is that these alumni are now coming into their own wealth and workplace success just as we lack volunteer roles they will find valuable or intriguing. The mid-career segment is the least penetrated part of our alumni base due to what some interviewees call the three c's: career, children, and commute. Moreover, while the sector has moved to enhance its engagement of graduates of the last decade, institutions have not sought to engage *this* cohort as a whole, and the pipeline for supporters from the late 1980s, 1990s, and early 2000s remains weak.

Incoming Generations Inclined to Give Where They Volunteer Makes For a Perfect Moment in Time

The Rise of Generation X and Millennials

University Enrollment, Among 18- to 24-Year Olds, Select Years (in Thousands)

Year	Enrollment
1970	5,933
1980	7,194
1990	7,571
2000	8,862
2010	11,915
2014	12,567

Cultivate

35-45

Optimal age group to acquire volunteers

Solicit

45-55

Average age for first major gift
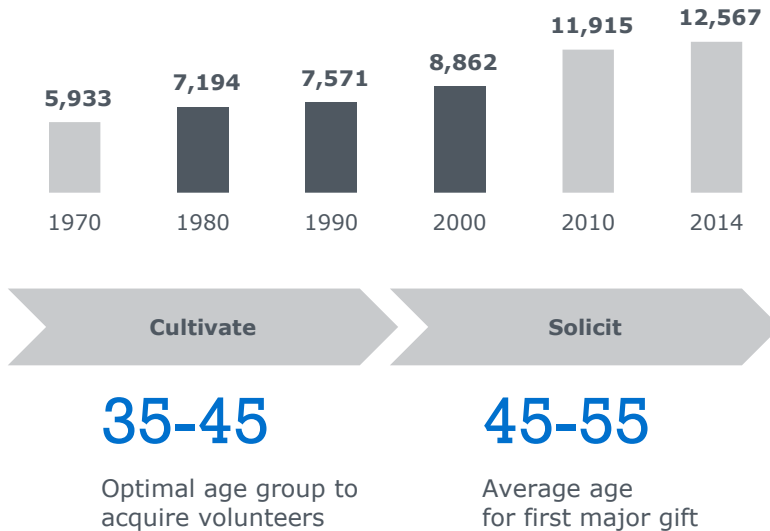
> "Generation X is now entering its peak earning years and the millennials are not far behind. Engaging people under 45 now…as volunteers, using methods that appeal to their giving nature, truly makes sense."
>
> *Edith Falk*
> *Chair, Giving USA Foundation*

A Window of Opportunity

Alumni Association Membership by Graduation Decade
Representative Midwestern Public University, 2012

Less engagement among younger and mid-career alumni

Decade	Membership
1970s	7637
1980s	4998
1990s	3576
2000s	3934
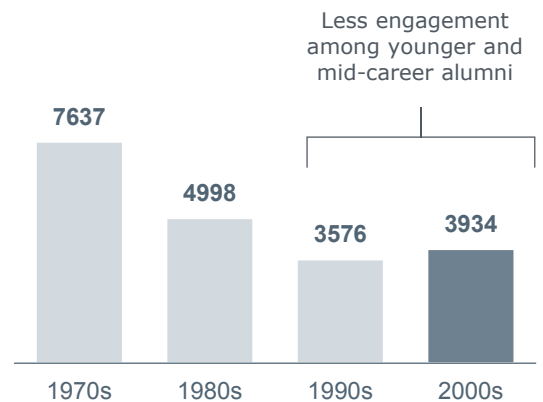
Source: "Study Says Time to Engage Younger Generation is Now," CASE Currents, January 2011, https://www.case.org/Publications_and_Products/January_2011/Research_and_News_of_Note/Study_Says_Time_to_Engage_Younger _Generation_is_Now.html; "New Study Highlights Differences Between Generations and Their Attitudes Toward Giving to Charity," Giving USA Foundation and Center on Philanthropy at Indiana University, http://www.philanthropy.iupui.edu/news/article/new-study-highlights-differences-between-generations-and-their-attitudes-toward-giving-to-charity; "Reinventing Aging: Baby Boomers and Civic Engagement," Harvard School of Public Health–MetLife Foundation, Initiative on Retirement and Civic Engagement, Center for Health Communication, 2004, http://assets.aarp.org/rgcenter/general/boomers_engagement.pdf; "Total Fall Enrollment in Degree-Granting Postsecondary Institutions, by Attendance Status, Sex, and Age: Selected Years, 1970 through 2023," *Digest of Education Statistics*, National Center for Education Statistics, 2015; EAB interviews and analysis.

The New Rules in Brief

Based on conversations with over 200 senior development and alumni engagement officers as well as exhaustive secondary research, the Advancement Forum presents the New Rules of Engagement. These are five imperatives for crafting engaging involvement opportunities and engineering cohorts of emerging institutional champions.

Your Playbook for Activating the Next Generation of Alumni Leaders and Volunteers

Rule 1: Make It Easy to Say Yes

Shift from long-term, fixed-term, or open-ended roles to one-time, short-term, or episodic engagement opportunities with limited duration, tightly scoped and clearly communicated parameters, and a defined end point.

Rule 2: Meet Them Where They Are

Create convenient and accessible volunteer roles that allow alumni to participate in their regions, workplaces, or online.

Rule 3: Broker Smarter Matches

Develop mass-customizable, skills-based roles and make proactive asks of highest-potential alumni to engage in them.

Rule 4: Embrace the "Me" Factor

Emphasize the two-way value proposition for volunteers, including high-level networking, insider access, recognition, and communication of their impact.

Rule 5: Cultivate Campus Allies

Deepen relationships with other campus stakeholders to position advancement as the clearinghouse, but not sole provider, of leadership and volunteer roles, and partner with those stakeholders to develop substantive and segmented experiences.

Source: EAB interviews and analysis.

EAB

Make It Easy to Say Yes

1

Rule in Brief

Shift from long-term, fixed-term, or open-ended roles to one-time, short-term, or episodic engagement opportunities with limited duration, tightly scoped and clearly communicated parameters, and defined end point

🔧

Alumni Leadership and Volunteerism Resource Center

30 Minute Mentors

Learn how the University of Michigan took mentorship – typically a long-term volunteer role – and turned it into a one-time engagement.

Welcome to the On-Demand Economy

A variety of social, economic, and political forces are redefining the structure of the workplace. As a result, today's alumni are beginning to experience a new paradigm of employment.

Technology has allowed organizations to assemble networks of remote talent and to transmit necessary skills and knowledge on demand. Market emphasis on shareholder value, a decline in unionized and public-sector jobs, and the economic recession have softened employee-employer expectations of loyalty and lifetime employment. Now, geographically mobile millennials and generation Xers are empowered to pursue any career of their choice, weighing factors beyond compensation to include work-life balance and social purpose.

For example, programs like Americorps, Teach for America, and the Peace Corps, which promise intensive but term-limited opportunities for personal and professional development while advancing societal and global goals, continue to be among the most popular and competitive destinations for today's college graduates.

Long-Term Employment and Regimented Career Ladders Are Dissolving into "Experience Portfolios"

Today's Alumni Will Change Jobs, Companies, Industries, and Skillsets Regularly

Book by the founder of LinkedIn proposes new employer-employee paradigm: from assumption of ongoing employment to *"tours of duty" with specific mission and time frame*

2 Average years millennials spend with each employer, as compared to 5 for generation X and 7 for baby boomer

20% Of U.S. workforce will be self-employed by 2020, versus 15% today and 7% in 1995

From Positions to Project-Based Teams

"More of us will see our working lives structured around short--term, project-based teams rather than long-term, open-ended jobs…A project is identified; a team is assembled; it works together for precisely as long as is needed to complete the task; then the team disbands."

Adam Davidson
Founder of NPR Planet Money

One Gig at a Time, Just in Time

"Just as Uber is doing for taxis, new technologies have the potential to chop up a broad array of traditional jobs into discrete tasks that can be assigned to people just when they're needed."

Farhad Mangoo
New York Times Tech Columnist

Source: Davidson, A, "What Hollywood Can Teach Us About the Future of Work," *The New York Times*, May 5, 2015, http://www.nytimes .com/2015/05/ 10/magazine/what-hollywood-can-teach-us-about-the-future-of-work.html; Manjoo, F, "Uber's Business Model Could Change Your Work," *New York Times*, Jan 28, 2015, http://www.nytimes.com/2015/01/29/technology/personaltech/uber-a-rising-business-model.html?_r=0; Renaud, J, "Study Finds That Millennials Change Jobs Every Two Years," *Albuquerque Business First*, Aug 30, 2012, http://www.bizjournals.com/albuquerque/news/2012/08/30/study-finds-that-millennials-change.html; EAB interviews and analysis.

The End of Unbounded and Ambiguous Commitments

As alumni must work harder to get ahead, they guard their time more closely than ever before. But the steady dissolution of work into a series of short-term engagements only mirrors the way that today's alumni increasingly live their lives in short sprints and on their own schedule. Heightened by the accelerated rate at which they can access information and entertainment, their entire mind-set is increasingly characterized by a shift to on-demand access.

Ultimately, these changes force colleges and universities to confront the structures of alumni involvement. Typical volunteer structures do not align with this new paradigm in which alumni are loath or unable to make long-term commitments and give themselves implicit permission to bail or flake on those that do not add value to their lives. As institutions compete to capture share of any and all discretionary time that their constituents have to engage, they must develop a broader array of one-time offerings to pique alumni interest. In particular, institutions must work to transform long-term commitments into short-term or episodic ones that that the lives of today's alumni' can accommodate.

Mounting Evidence That Alumni Have Less Inclination for Long-Term and All-Consuming Involvement

Today's Multitasking Alumni Prize Flexibility and Autonomy

Signs of the Times…

- TV viewers increasingly binge-watching programs on demand, not watching live on air at prescheduled time
- Volunteers increasingly opt for days of service and week-long mission retreats, not weekly recurring tutoring appointments

…Already Affecting Higher Ed

- Accelerated/weekend master's formats overtaking traditional MBA schedules in enrollment
- Colleges and universities more and more experimenting with self-paced, modularized, and competency-based coursework and boot camps

Roles Without Clear Scope and End Point No Longer Tenable

Typical Volunteer Advertising

Volunteers Needed!

We would like to invite you to serve on our university advisory council! Be an advocate and ambassador for your institution while connecting with your fellow alumni throughout the year.

- Vague description
- Unspecified location
- Unclear time commitment

80%

Of in-state alumni report lack of time as their biggest obstacle to engaging with alumni activities (and **70%** of out-of-state alumni agree)

> "Alumni want quick, one-touch opportunities to get in, have lunch with a student, sit on a panel, attend an event, and then get out. I find that when alumni say they want to 'get involved,' it's actually those short-term opportunities they are searching for."

Assistant Vice President for Alumni Relations
Private Research University

EAB

Meet Them Where They Are

2

Rule in Brief

Create convenient and accessible volunteer roles that allow alumni to participate in their regions, workplaces, or online.

Alumni Leadership and Volunteerism Resource Center

Corporate Chapters

Learn about how Temple University and the University of Seattle reimagined the concept of traditional affinity and regional chapters to consist of alumni who work for the same company at the same work site.

Overworked and Overconnected

Today's alumni, especially those donors and leaders who institutions most want to engage, are busy and want on-demand engagement. Specifically, they are spending more time than ever at work and on the web, staying connected to friends both online and via phone, often the same time!

Most institutions are asking: "How can we break through all this noise and clutter to get our constituents' attention?" The answer is to engage alumni through the channels and venues where they are already spending their time.

Today's Alumni Spend More Time at Work and Online

6⁺ Hours spent online daily

55 Minutes spent daily reading about or communicating with friends on social media

49 Minutes spent daily sharing, creating, or posting content on social media

9 Minutes a day spent watching weird YouTube videos sent by family members (*reports unconfirmed*)

Harvard Business Review **"Welcome to the 72-Hour Workweek"**

"…60% of those [executives, professionals, and managers] who carry smartphones for work are connected to their jobs 13.5 or more hours a day on weekdays and about five hours on weekends, for a total of about 72 hours…"

Center for American Progress **"The Three Faces of Work-Family Conflict"**

"…Americans work longer hours than workers in most other developed countries, including Japan, where there is a word, *karoshi*, for 'death by overwork.' The typical American middle-income family put in an average of 11 more hours a week in 2006 than it did in 1979."

Source: Deal, J, "Welcome to the 72-Hour Work Week," *Harvard Business Review*, Sept 12, 2013, https://hbr.org/2013/09/welcome-to-the-72-hour-work-we/; Williams, J and Bouchey, H, "The Three Faces of Work-Family Conflict: The Poor, the Professionals, and the Missing Middle," Center for American Progress, Jan 25, 2010, https://www.americanprogress.org/issues/labor/report/2010/01/25/7194/the-three-faces-of-work-family-conflict/; EAB interviews and analysis.

If You Can't Beat 'em, Join 'em

The workplace represents a largely untapped channel for engagement. Even as professional development and networking have become dominant themes in alumni programming, few institutions seek to connect with graduates through their places of employment. By creating volunteer roles in the workplace and/or opportunities where they can network with other alumni employees, universities make it both convenient and valuable for individuals to engage. However, the workplace is more than simply a captive audience of those elusive   mid-career constituents. This investment in workplace outreach creates champions who can later advocate for partnerships with career services, industry-sponsored research and technology transfer, executive and graduate education, and corporate philanthropy, among other issues.

On the whole, workplace programs attract higher-capacity constituents than traditional programming. Targeting companies or industries allows institutions to create relationships with potential prospects a decade before they reach the C-suite. And, in the near term, capitalize on the generous volunteer and matching-gift programs that amplify incremental gains in individual giving that result from greater engagement at the corporate level.

Following Them to Work

We Must "Go Where They Are" to Get in Alumni Line of Sight

Face to Face / on Campus

Regional

Workplace

Online / Mobile

Increased Convenience

Benefits of Workplace Engagement

Creates channels for career services, industry research, and corporate partnerships

Attracts higher-capacity constituents than traditional alumni programming

Amplifies individual giving with corporate match programs policies

Where Convenience Is King

"We're always saying to our alumni: 'Come to this happy hour,' 'Come to campus and see us,' 'Come to us and do all these things.' For once, we thought, we should go to them. It should be about them and about what the university can do for these companies and alumni in their own professional lives."

Mollie Repetto
Executive Director, Industry Partners Program
Temple University

Source: EAB interviews and analysis.

Taking a Page from Corporate Brand Managers

Research shows that millennials are more trusting of peer-created and crowdsourced content than they are of institutionally sponsored communications. Digital native alumni have built up many networks of connections and relationships that often the institution is not aware of.

Progressive institutions are beginning to leverage digital volunteers to serve as content validators and ambassadors, recognizing that alumni can achieve much higher interaction and authenticity online. Some are even going a step further and encouraging alumni to create content in response to institutional challenges—which may someday disrupt traditional class notes or even the alumni magazine. These volunteer roles are effective because they tap into things alumni are already doing: scanning social media, posting updates, and sharing content with their audience.

Leveraging Alumni Social Media Networks

Credibility in User-Generated Content and Peer Networks Is On the Rise

"Completely or Somewhat" in Response to "To What Extent Do You Trust the Following Forms of Advertising?"

	2013	2007
Recommendations from People I Know	84%	78%
Consumer Opinions Posted Online	68%	61%
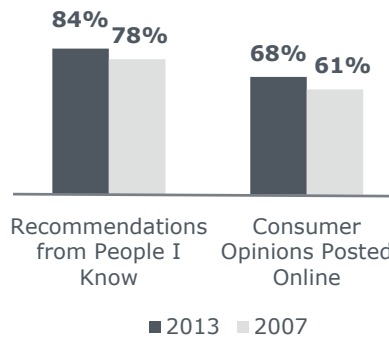
Positive Millennial Response to "Do You Trust Product Info from the Following Sources?"

Conversations with Friends	74%
Peer Reviews	68%
Social Networking	50%
Print Newspapers	44%
Radio	37%
TV	34%
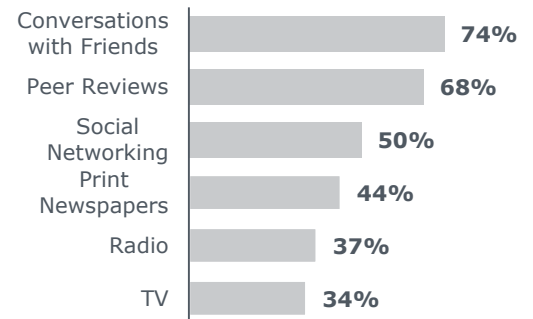
Universities Begin to Innovate with Social Media Ambassadors

Hashtag Testimonials
Promote event or initiative by tweeting university-approved hashtag

Giving Day Ambassadors
Help market one-day fundraising pushes to social networks

Alumni Event Content Curators
Crowdsource picture taking and tagging to social media volunteers after an event

Social Media Ambassadors
Ask alumni to post or share university-instructed content to maximize reach and impact across constituents' networks

> **The Next Frontier of Virtual Volunteering: Empowering Alumni to Create Repackag-able Content**
>
> "We can get so much more targeted when we don't have to worry about physical boundaries... We recently surprised everyone when we got a high-profile alumna to speak at an event – we let her do it at 7 pm from her own apartment. It's a game changer…Suddenly, that lets us produce amazing content we never could before. And after we produce this content, we can archive it and build up a repository of these for various industry niches."
>
> *Andrew Gossen*
> *Senior Director of Social Media Strategy*
> *Cornell University*

Source: Knoblauch, M, "Millennials Trust User-Generated Content 50% More Than Other Media," Mashable, Apr 2014, http://mashable.com/2014/04/09/millennials-user-generated-media/; "Under the Influence: Consumer Trust in Advertising," Nielsen Newswire, Sept 17, 2013, http://www.nielsen.com/us/en/insights/news/2013/under-the-influence-consumer-trust-in-advertising.html; EAB interviews and analysis.

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Broker Smarter Matches

3

Rule in Brief

Develop mass-customizable, skills-based roles and make proactive asks of highest-potential alumni to engage in them.

Alumni Leadership and Volunteerism Resource Center

Data-Driven Alumni Strategy Development

Learn how the University of Waterloo used analytics to identify and target the highest-potential alumni with engagement opportunities and to reorganize their alumni engagement function.

25

Paradigm Shifts to Broker Smart Matches

Colleges and universities are in competition with other organizations for the time and mindshare of alumni. To stand out from the pack, institutions must offer skills-based volunteer roles, make proactive asks of their alumni, and prioritize those highest-potential alumni for specific roles that match their preferences.

Three New Imperatives

Status Quo	*Roles require volunteers' time moreso than talents*	*Institutions market generic one-size-fits-all appeals and hope the "right" alumni opt in*	*Lowest-common-denominator messaging to all alumni does not attract highest-value segments*
New Imperative	**Create skills-based volunteer roles**	**Make proactive asks**	**Prioritize most promising individuals to match to specific roles**
Rationale For Change	Skills-based opportunities allow volunteers to make a distinctive contribution	Proactive asks help institutions better target and engage specific alumni and have higher invitation yield than mass advertising	Crafting distinct opportunities to fit individual strengths and preferences for high-value segments offers higher return on investment
Evidence for Support	**44%** Of volunteers say if their organization cannot use their skills, they will find another organization that can	**50%** Of high-net-worth volunteers engage because they were specifically asked by staff member	**1 in 4** Matching skills to assignments was 1 in 4 volunteer management practices that correlate with retention, according to study of 1,700 charities

Source: "Volunteerism and Charitable Giving in 2009," Fidelity® Charitable Gift Fund, 2013, http://www.fidelitycharitable.org/docs/ Volunteerism-Charitable-Giving-2009-Executive-Summary.pdf; "The 2014 U.S. Trust Study of High Net Worth Philanthropy," Lilly Family School of Philanthropy, Indiana University, 2014, http://www.philanthropy.iupui.edu /files/research/2014ustrustfinalreport.pdf; Hager, M and Brudney, JL, "Volunteer Management Practices and Retention of Volunteers," Urban Institute, 2004, http://webarchive.urban.org/publications/411005.html; EAB interviews and analysis.

eab.com

I'd Like to Thank the Academy

Creating skills-based roles seems easier said than done. Highly customized roles that capitalize on a volunteer's unique expertise can be impossible to scale and require a prohibitive amount of planning. Engaging with the teaching and research mission of the university is the best way to create skills-based opportunities.

Alumni love authentic and meaningful student and faculty interaction. Moreover, the vast array of sections and upper-level courses allows for a templatized program to scale dramatically while being slightly personalized to alumni interests and specializations. But any suggestion of fundraiser orchestration in curricular matters triggers faculty resistance.

Progressive institutions are creating academic volunteer roles where they truly can add value to the pedagogical experience. Volunteers can act as guest tutors, course assistants, and speakers who can lighten the load of the professor. Guest speakers are especially in well received fields where practitioner insight is highly valued such as business and public policy, and among early-adopter faculty willing to pilot new ideas.

Academically-Based Skills-Focused Roles Offer Highest Promise

Weighing Difficulty to Scale Against Opportunity for Impact
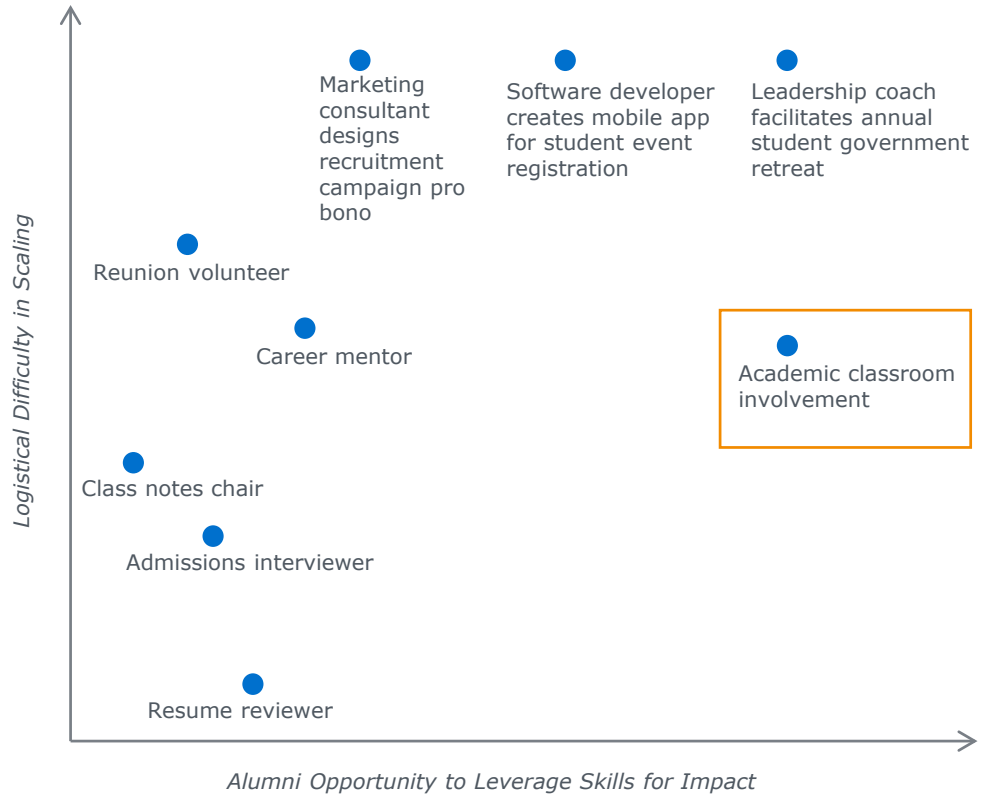
Use My Talent, Not My Time

"I really don't want to go out and volunteer a day to go feed people at a homeless shelter. It is just not where my skills are best used, it is not what I do best. That is not where I feel like I am making an impact…. I also don't want to sit in a board meeting for no apparent reason."

Respondent to #NextGenPhilanthropy Survey of High Net-Worth Donors Under 40

eab.com

Waiting for Constituents to Raise Their Hand

Alumni relations and volunteer program directors must abandon the status quo of advertising engagement opportunities and seeing who turns up. Today's alumni are inundated with social media notifications and electronic messages through multiple channels. To break through the noise, an ask must be personalized and customized.

Even beyond the challenges of invite yield effectiveness, mass market "help wanted" messages tend to overwhelmingly emphasize generic messages like duty, loyalty, or alumni pride. These fail to spark interest beyond an already-engaged subset of alumni and certainly do not penetrate the tier of high-level donors who expect a more tailored approach.

From a "Post and Pray" Mentality to an Executive-Recruiting Mind Set

Status Quo Approach to Volunteer Recruitment

Send generic "help wanted" message to all alumni with lowest-common-denominator appeal to duty

↓

Send three follow-up reminders asking that interested alumni go to website to sign up; some annoyed alumni unsubscribe from list or block sender

↓

Results in random sampling of alumni who already tend to engage or have little value to contribute; first-timers leave disappointed at having wasted time

↓

Optimal Approach to Volunteer Recruitment

Query database and source names from MGO portfolios to identify alumni with optimal background for assignment

↓

Choreograph invite from individual with preexisting relationship and with slightly personalized message

↓

Yields majority conversion of those contacted who are correct fit for the program and for whom this is a meaningful touch

↓

50%

Of high-net-worth donors who volunteer do so because they were personally asked to engage in a specific task by a staff member or volunteers

The New Normal

"Audiences today expect segmentation – they increasingly assume that the content you share with them will be targeted, personalized, relevant, and customized to them. If it's not, they get confused, think you made a mistake, and/or ignore it completely."

Andy Shaindlin
Vice President, Grenzebach Glier and Associates

Networking Engagements Gone Wrong

Colleges and universities are well-intentioned in their efforts to help students and alumni with career development, but they all-too-often demonstrate how a failure to make proactive asks limits program effectiveness. Many institutions fall prey to the overly-general approach of simply inviting constituents to assemble, with the hope that mutually-beneficial networking and mentorship will spontaneously occur.

Anecdotes abound regaling the comical tales of the poor results that follow this strategy. For example, an orthodontist attends a networking event ready to counsel pre-dentistry students, but finds only humanities PhD candidates; or a social work student doesn't find anyone to talk to and is sold a life insurance policy by an alum who is a financial services professional. Small steps such as simply segmenting events and involvement opportunities by industry or profession, or separately pursuing experienced professionals as hosts and early-career recent graduates cohorts as attendees, can dramatically increase the likelihood that valuable connections are brokered.

Failure to Make Proactive Asks Results in Low-Quality Volunteer and Attendee Experiences

Common Misfires Demonstrate the Importance of Asking

	Current Methods	Pitfalls
Career Center Database Request	Alumni receives one-time email invite to create a profile, but receives no follow-up for several years	• Too passive • Requires alumni to log in remember password, and update career and contact information regularly • Student overwhelmed by thousands of profiles—all out-of-date
"Please Help!" Emails	Alumni receive emails asking for their time to help with current students, but roles and tasks are unspecific—"Let us know what you can do."	• Vague asks are easy to ignore • Puts burden on alumni to come up with the way they can help • Alumnus assumes "They wouldn't want people like me" (i.e., they probably need more time than I can offer, they probably only want business types, my career hasn't been a straight line—I still don't really have a plan)
Generic Networking Invite	Alumni in particular city all invited to a networking event, bringing out a random group of individuals	• Unclear which alumni segments would be best fit • Results in disappointing conversation and sense that alumni have wasted their time when event is well-attended, but lacks enough commonalities across attendees to actually be useful

Source: EAB interviews and analysis.

eab.com

Needles in the Haystack

Lack of skills-based roles and proactive asks means that participants in status quo alumni relations programming , tend to be those of low influence and affluence. The busy and high-level donors and alumni that institutions most want to engage expect a more bespoke approach. Without a focused approach to suggest the right volunteer opportunities to the right donors and alumni, many volunteer programs produce an uncertain return on investment. Alumni relations staff at progressive institutions are behaving more like the annual fund: narrowing in on high-potential segments of volunteers and reaching out to these individuals to make personalized and customized asks, directed to their areas of interest. This includes identifying those mid-career alumni today who could someday be major donors and institutional leaders.

This concept can be anathema to the alumni relations professional with a democratic zeal for serving the base. But most alumni volunteer activities and events serve two purposes. They offer value to the volunteers, since they want to serve their alma mater. And they also benefit the institution by engaging alumni and fostering their future generosity. A targeted approach o soliciting alumni volunteers simply broadens the universe of alumni outreach to encompass those who have among the most to offer the university.

Focus on Building Relationships with High-Potential Alumni Who Can Move the Dial, Financially or Otherwise

Know Your Audience...

"Instead of programming for a mythical 'average alumnus'…alumni professionals are focusing more narrowly on two groups: the tiny fraction of alumni who are already loyal members, donors and volunteers, and the larger, more fickle group of alumni who are willing to engage with alma mater, but only if they see opportunities that speak to their personal and professional needs."

Andy Shaindlin
Vice President
Grenzebach Glier and Associates

...Target Highest-ROI Segments...

"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 alumni 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

...And Don't Waste Your Time

"Leveraging volunteer engagement as a cultivation strategy is a powerful tool. So if I decide that's an arrow in my quiver that I am going to use, I can't afford more than a few misses by focusing on the wrong person. You have to pair thoughtfulness and intentionality with a scaled back mind-set that uses this precious commodity on only your highest potential prospects—probably for someone already giving but who is high-capacity and far undercapitalized."

Vice President for Development
Large Public University

Source: Shaindlin, A, "Are Your Alumni Being Served?" *Alumni Futures*, Oct 2010, http://www.alumnifutures.com/2010/10/; EAB interviews and analysis.

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Embrace the "Me" Factor

4

Rule in Brief

Emphasize the two-way value proposition for volunteers, including high-level networking, insider access, recognition, and communication of their impact.

Alumni Leadership and Volunteerism Resource Center

Industry-Segmented Career Dialogues

Learn how DePaul University and Washington University in St. Louis handpicked donors from the same industry to host networking events together to enhance student career development and regional penetration of mid-career donors.

The Rise of the Self-Interested Volunteer

Volunteers have long engaged with organizations for reasons ranging from meting new people to building their leadership resume and having fun with friends. However, generation X and millennial alumni are more candid and forthright about their interest in not only what they can do for the institution, but what volunteering can do for them.

Leadership and volunteer activities have always offered benefits to those who engaged, but institutions rarely market or clarify those advantages to attract more volunteers. As today's alumni seek a two-way value proposition for engagement, the ability to provide high-level networking, insider access, and distinctive experiences to a broader group of alumni leaders and volunteers increasingly becomes a necessity for colleges and universities.

The Changing Tide: "What's in it For Me?"

> "Things are changing at our institution. Our older alumni used to show up and ask 'What do you want me to do?'
> But these days our alumni, especially our younger ones, are asking 'What can the university offer me through volunteering that I can't get on my own?' "
>
> *Chief Advancement Officer*
> *Public Master's University*

33%
Of those age 35 or younger who volunteer do so primarily for **networking**

47%
Of volunteers today are **more motivated by what the experience can give back to them** than by what they can do for others

49%
Of the variance in a volunteer's decision to persist in a role is explained by **the extent to which they felt recognized**

A Problem of Scale: The Need to Ration Benefits

What to Get for Someone Who Has Everything
Benefits for Potential Leaders

- Networking with elite peers
- Exposure to cutting-edge research, technology, and knowledge
- Personal interaction with deans, top thinkers, and senior leaders
- Access to "cream of the crop" students and young alumni leaders as talent for their organizations
- Insider access and information about upcoming plans
- High-level volunteer and leadership roles

Number of Events Required to Serve High-Level Volunteers vs. All Volunteers

Activity	Board Members (n=100)	All Volunteers (n=1,200)
Provost Dinner (10 attendees)	10 dinners	120 dinners
Faculty Research Q&A (5 attendees)	20 briefings	240 briefings
Private Lab Tour (3 attendees)	33 tours	400 tours

Source: Terry, B et al. "The Similarities Between Volunteer Behavior and Consumer Behavior: A Study of Volunteer Retention," *Journal of Extension*, no. 6 (2013), http://www.joe.org/joe/2013december/rb2.php; "Volunteerism and Charitable Giving in 2009," Fidelity® Charitable Gift Fund, 2013, http://www.fidelitycharitable.org/docs/ Volunteerism-Charitable-Giving-2009-Executive-Summary.pdf; EAB interviews and analysis.

'Kids These Days'

Millennials have been stereotyped as the "trophy generation." Many suggest they have become accustomed to recognition simply for participation! If this is true, it should come as no surprise that millennial volunteers have higher expectations for recognition. Even if this is an overgeneralization, experts suggest that millennials who were raised on electronic games are motivated by hitting goals and following explicit instructions that "unlock" the next task or level in a structure.

Institutions should leverage this gamification trend and desire for continuous feedback to scale recognition across their volunteer base and even to incentivize follow-through on volunteer duties with points and rewards systems.

The Trophy Generation Seeks Recognition and Rewards for Volunteering

"Everyone's a Winner"

IMAGE CREDIT : www.dreamstime.com.

> **Millenial Over Your Shoulder**
>
> "It's no secret that generation Y utterly bewilders most of us baby boomers. But you know what? I appreciate them. They push us to be more innovative and think beyond the same volunteer roles and alumni involvement opportunities that we have had since the 1960s."
>
> "And thanks to millennials, we communicate more sharply and clearly, we align incentives with the behavior we want to see, and we follow through on our commitments. They notice that stuff first, but these are things that everybody in the alumni community wants to see from us."
>
> *Executive Director of Alumni Relations*
> *Private Master's University*

Source: EAB interviews and analysis.

Stewardship—It's Not Just for Gifts

Volunteers are increasingly asking for better communication. They expect more information on the return on investment of their time, but most institutions do precious little to steward volunteers beyond a thank-you note. For example, at one small liberal arts college, a passionate young alumnus who volunteered with admissions helped generate 20 applications, ultimately yielding three enrollments who graduated in four years. In financial terms, this brought $240,000 in net revenue to the college. Had he written a check for this amount, he would have received immense attention, but as a volunteer, he was not given any incentive to continue his service.

Progressive institutions are creating "Volunteer Impact Reports." These reports are similar to endowment reports provided to donors that use stories and statistics to explain the impact of volunteering across the alumni base. Other institutions are working to tie volunteer work to social causes that alumni care about, explaining how the university is serving as a vehicle to impact society. While institutions are increasingly reframing themselves a social causes, volunteer roles are still largely packaged around "What you can do for us?" and not "What can we do for the world?"

Volunteers Are Motivated by Personal Impact

Return on Investment Matters

80% Of high-net-worth donors who monitor the impact of their giving say they do so by volunteering

33% Of volunteers want to see immediate results for their work

24% Of volunteers said that receiving data on their impact would make them repeat volunteers

73% Of volunteers say they do so to support a cause they care about

Tomorrow's Leaders Are Results-Driven

"[High-net-worth donors and volunteers ages 21 through 40] want impact they can see, and they want to know their own involvement contributes to that...As one survey respondent explains, unlike previous generations, they want to be 'more impact-based rather than who's-who-based.'...This desire for having an impact, and personally seeing that impact, cannot be underestimated as a key characteristic of these next-gen donors."

#NextGenDonors: Respecting Legacy, Revolutionizing Philanthropy

Volunteers Aspire to Activism and Advocacy

"Change-Making" Orientation of Modern Universities Not Reflected in Volunteer Roles

First-year seminar incorporates service-learning

Largest student organization focuses on global public health

Capstone course emphasizes multidisciplinary problem solving on societal issue

Comprehensive campaign slogan asks graduates to donate to change the world

Alumni volunteer roles available have no cause connection

Source: Finch, J, "Survey: What Motivates People to Become Repeat Volunteers?" The Able Altruist, 2014, http://able-altruist.softwareadvice.com/what-motivates-people-to-become-repeat-volunteers-0614/; "#NextGenDonors: Respecting Legacy, Revolutionizing Philanthropy." Johnson Center for Philanthropy, Grand Valley State University, 2013, http://www.nextgendonors.org/wp-nextgendonors/wp-content/uploads/next-gen-donor-report-updated.pdf; "Volunteerism and Charitable Giving in 2009," Fidelity® Charitable Gift Fund, 2013, http://www.fidelitycharitable.org/docs/ Volunteerism-Charitable-Giving-2009-Executive-Summary.pdf; "The 2014 U.S. Trust Study of High Net Worth Philanthropy," Lilly Family School of Philanthropy, Indiana University, 2014, http://www.philanthropy.iupui.edu /files/research/2014ustrustfinalreport.pdf.

Cultivate Campus Allies

5

Rule in Brief

Deepen relationships with other campus stakeholders to position advancement as the clearinghouse, but not sole provider, of leadership and volunteer roles, and partner with those stakeholders to develop substantive and segmented experiences.

Alumni Leadership and Volunteerism Resource Center

"Ghost Volunteer" Surfacing Protocol

Learn how the University of San Diego identified hundreds of volunteers across campus, who they were previously unaware of by offering a package of benefits to academic units and student affairs departments in exchange for better data reporting.

Myriad Forces Making Volunteerism Everyone's Job

Higher enrollments and larger class cohorts, growing student body diversity, greater complexity in academic and cocurricular offerings, declining trust in traditional institutions, and a host of other factors are catalyzing a shift in the way 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. Moreover, central advancement is typically not well positioned to deliver the highly segmented and niche roles that alumni seek.

As a result, academic units, student affairs, and other departments will in the near future come to 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. This transformation of alumni relations into a central clearinghouse for engagement will not be easy. This shift will require staff with different skill sets, redesigned processes, and buy-in for a new division of responsibility across campus. However, it will ultimately strengthen the strategic value proposition of the alumni relations function 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, cocurricular 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

Source: EAB interviews and analysis.

Haunted by Ghost Volunteers
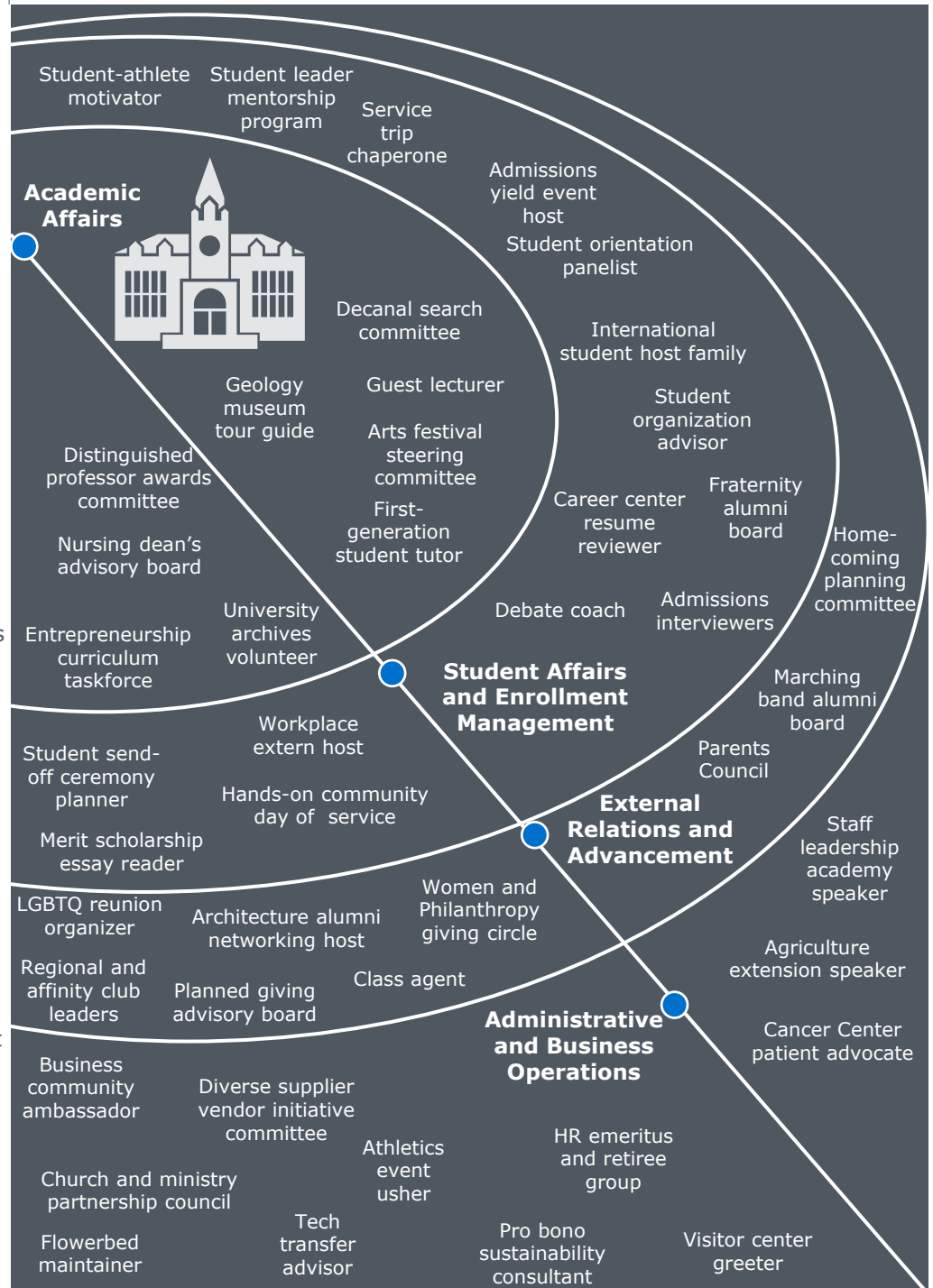
In fact, central alumni relations is already giving way to broader campus ownership of alumni engagement. Most campuses already feature a substantial contingent of "ghost volunteers" –alumni giving time and talent to academic schools, student affairs departments, or other units, especially as one-time speakers or panelists. The service of these individuals is largely unknown to alumni relations 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.

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 it may unwittingly be seen as a bottle-neck by those other units seeking to engage alumni, which can create an environment where campus stakeholders hoard their relationships lest they be "stolen" by central advancement or solicited for funds.

Alumni Volunteers Hiding in Plain Sight Across Campus

Most Institutions Host Poorly-Stewarded Volunteer Roles Outside Advancement Division

Student-athlete motivator
Student leader mentorship program
Service trip chaperone
Admissions yield event host
Student orientation panelist

Academic Affairs

Decanal search committee
International student host family

Geology museum tour guide
Guest lecturer
Student organization advisor

Distinguished professor awards committee
Arts festival steering committee
Fraternity alumni board
Home-coming planning committee

Nursing dean's advisory board
First-generation student tutor
Career center resume reviewer

Entrepreneurship curriculum taskforce
University archives volunteer
Debate coach
Admissions interviewers

Student Affairs and Enrollment Management

Workplace extern host
Marching band alumni board

Student send-off ceremony planner
Hands-on community day of service
Parents Council

Merit scholarship essay reader
External Relations and Advancement

LGBTQ reunion organizer
Architecture alumni networking host
Women and Philanthropy giving circle
Staff leadership academy speaker

Regional and affinity club leaders
Planned giving advisory board
Class agent
Agriculture extension speaker

Administrative and Business Operations
Cancer Center patient advocate

Business community ambassador
Diverse supplier vendor initiative committee
Athletics event usher
HR emeritus and retiree group

Church and ministry partnership council
Tech transfer advisor
Pro bono sustainability consultant
Visitor center greeter

Flowerbed maintainer

Source: EAB interviews and analysis.

The Future in Sight?

Where Do We Go from Here?

Alumni may no longer need their alma maters to connect with classmates, but institutions increasingly do need to engage alumni to advance philanthropic goals, student outcomes, and other strategic objectives. The decade ahead will constitute a watershed moment for alumni relations, but that is not to suggest that function, the staff, or even the key activities will be the same in 10 years.

A renewed focus on aggregating affinity intelligence across institutional silos and leveraging it to target particular alumni segments will compel a shift to a much more data-driven alumni affairs strategy. Similarly, the need for greater coordination among industry and employer-facing functions puts alumni affairs on a path toward greater integration with career services and other stakeholders. Crafting unit-to-unit partnerships must embed in the skill set of the alumni relations officer of the future. Finally, as the major gift constituency grows without a commensurate increase in high-quality cultivation and stewardship opportunities for donors, stronger collaborations between development and alumni relations will allow for agile deployment of leadership and volunteering to acquire, retain, and upgrade supporters.

The Implications of the New Rules of Engagement

Impact on Advancement

Greater intentionality and segmentation in targeting requires stronger data disciplines

Stronger collaborations among corporate, career, executive education, and workplace-facing staff members

Impact on Alumni Relations and Volunteer Managers

A departure from current skill sets (from execution-oriented to more consultative in nature) and greater professionalization

Enhanced connectivity among development, academic units, and other campus partners

More investment in alumni relations, not less, but catalyzing a shift in the alumni relations profession

The Roles 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; triage and coordinate 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: EAB interviews and analysis.

eab.com

Now Hiring the Alumni Relations Officer of 2025

Forecasting the future of the alumni relations field with certainty is impossible. But if aforementioned trends come to pass, a new breed of alumni engagement officer—or even several new personas—will have to emerge. To build a pipeline of mid-career supporters and sustain momentum into the next decade, the alumni relations function must master new disciplines to inflect and prove its impact.

Reimagining the Community and Constituency Management Enterprise

Potential New Archetypes for Tomorrow's Alumni Engagement Officer

Relationship Engineer

"MGO Who Doesn't Ask for Money"

- Skilled executive communicator building pipeline of warm leads and generating social capital
- Makes targeted and proactive asks of portfolios of prospects, volunteers, prominent alumni and community members to generate affinity

Cultivation Consultant

"Development Associate on Steroids"

- Hand-in-glove partner to MGOs and staffer of boards and councils
- Facilitates and designs volunteer engagement to systematically penetrate valuable networks
- Two-year tours of duty across academic and student affairs units to develop volunteer capacity

Community-Embedded Organizer

"Dedicating Staff Between and Across Units"

- Curator of alumni talent to execute on university strategic plan
- Activates alumni connections around interdisciplinary academic areas, multidisciplinary occupational clusters, cross-functional initiatives, social causes, and special populations that align with institutional priorities

Digital Engagement Director

"A Grounded Leadership Annual Giving Officer"

- Social media and communications guru
- Captures affinity intelligence from online media
- Designs opportunities for undercapitalized donors to engage remotely, including Google Hangout class speaking, Skype student discovery interviews, and invited content submissions

Source: EAB interviews and analysis.

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

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