

Benchmarking the Alumni Relations Program

Rae Goldsmith

Vice President of Advancement Resources, CASE
and

Paul Heaton, Director
CASE Center for Community College Advancement

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Community College Advancement

Our Agenda

- About benchmarking
- About the survey
- The alumni relations office
- Funding alumni relations
- Data collection and management
- Communications and strategy
- Alumni relations and fundraising
- Successful practices
- Take-aways and discussion

About Benchmarking

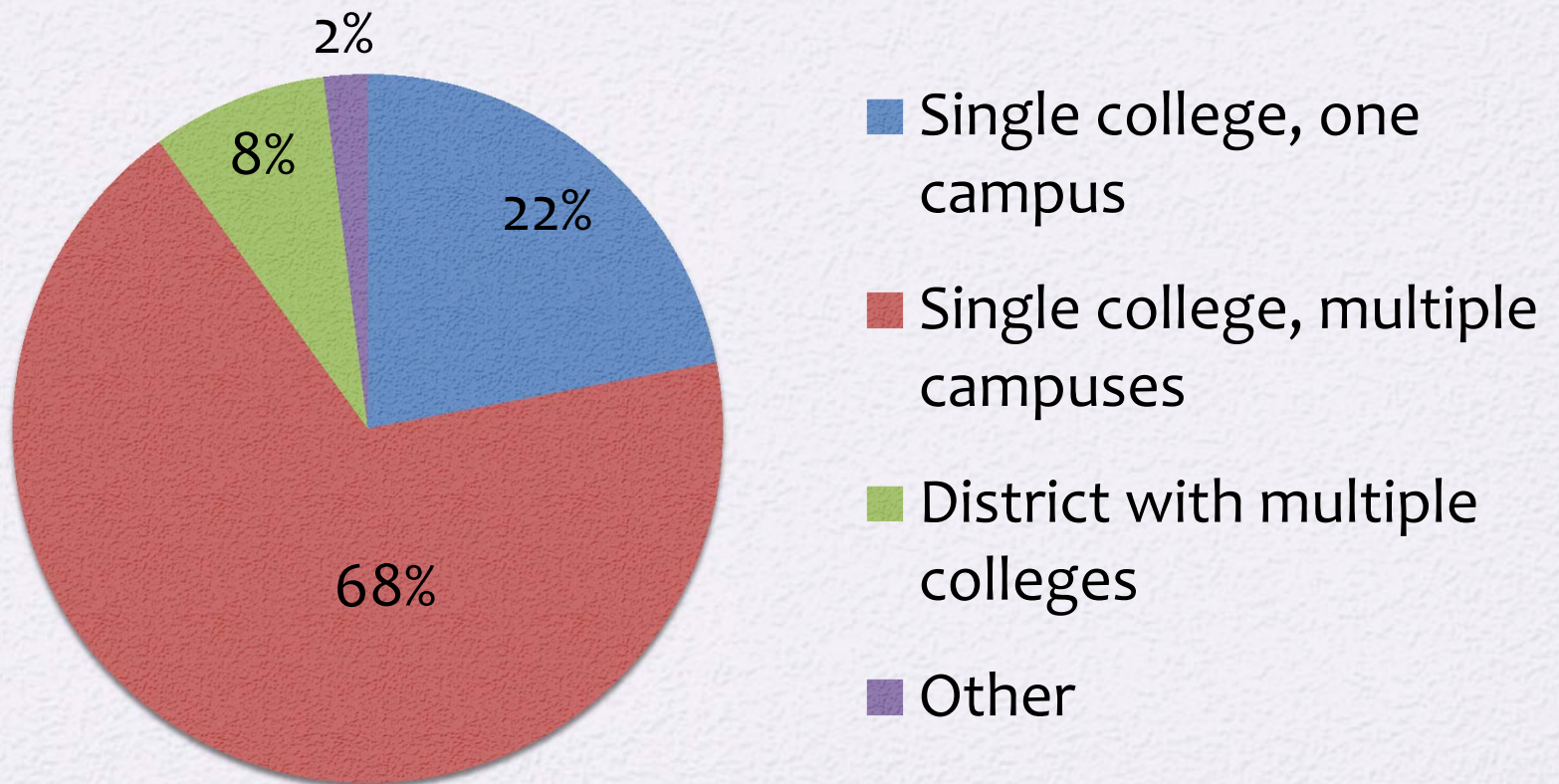
- The collection and review of common data among peer institutions for the purpose of understanding the range of performance and practice among those institutions
- Allows institutions to assess programs, gain context for their work, set internal goals for improvement
- Is not about competing, ranking

About the Survey

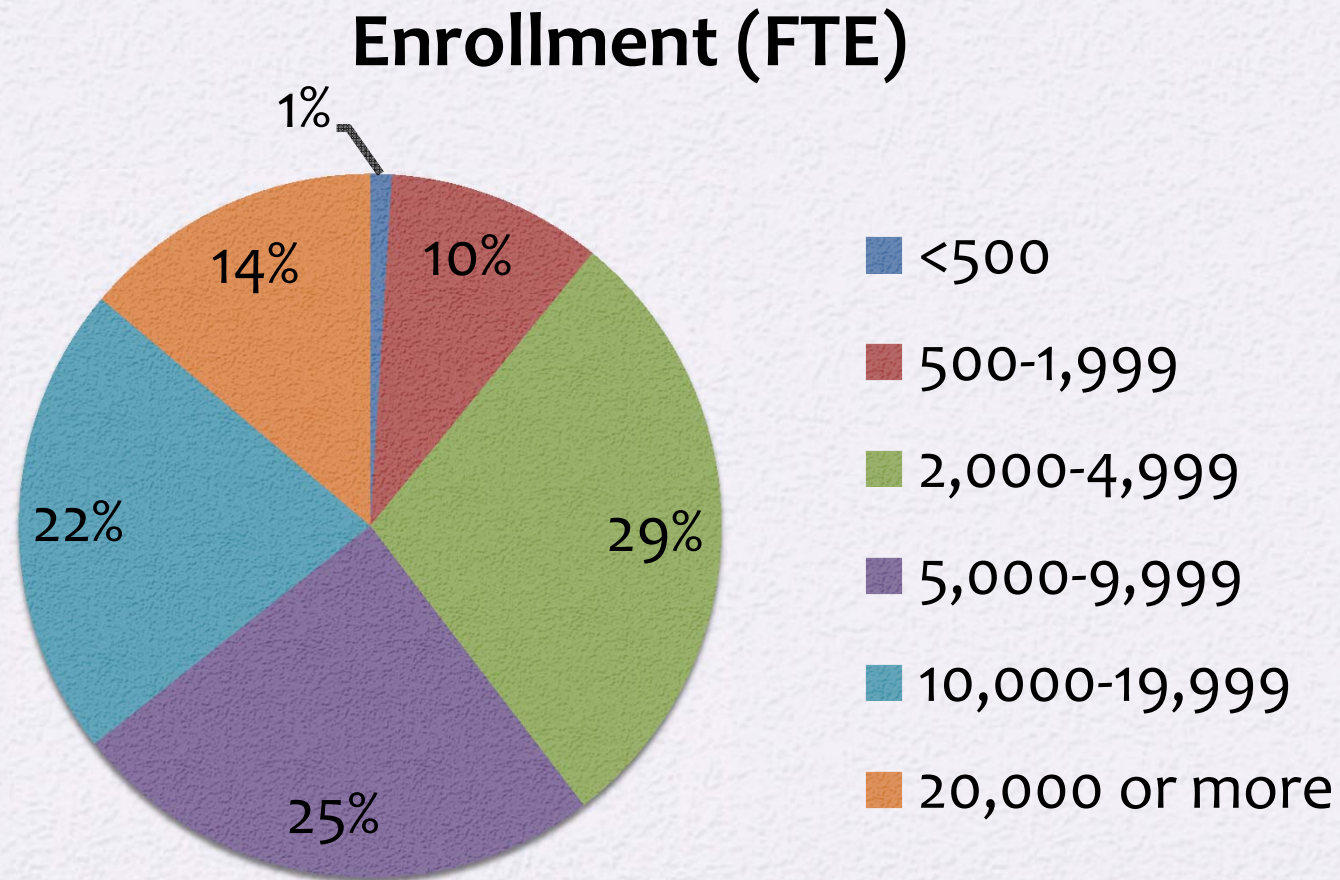
- Developed by CASE and volunteers
- Online survey
- Fielded from July 10 to August 6, 2012
- 133 responding institutions
- Statistically valid response rate
- Percentages rounded

Demographics

Institution Type

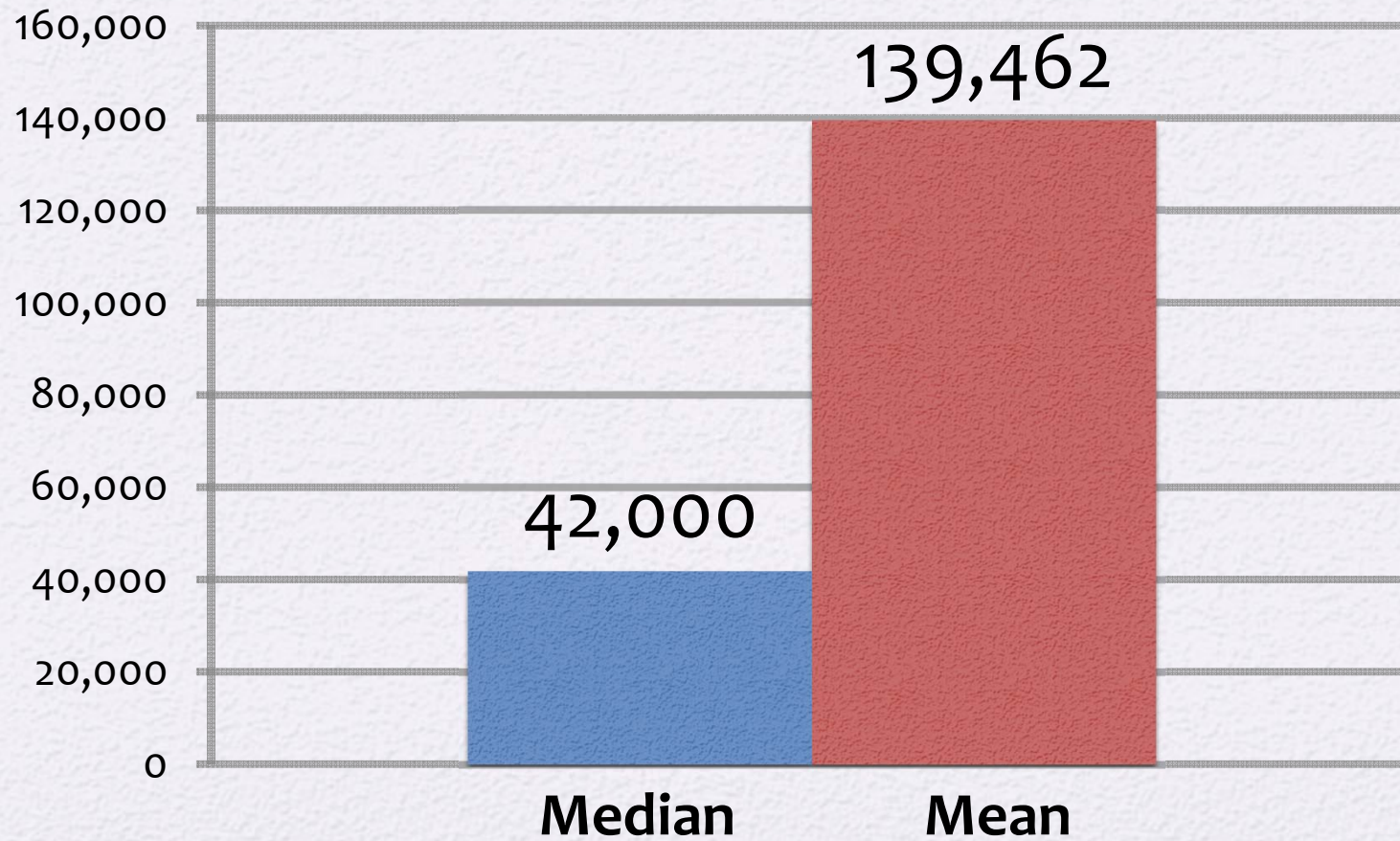


Demographics



Demographics

Number of Alumni



Demographics

Definition of Alumni

	%
Anyone who has taken 1+ classes	42%
Degree/certificate holders	37%
Anyone who has completed a certain # of hours /units	30%
No formal definition	11%
Other	5%

Note: Sums to more than 100% because multiple responses were possible.

Demographics

CASE Definition of Alumni

Alumni are former students who have earned at least some credit toward one of the degrees, certificates or diplomas offered by the reporting institution.

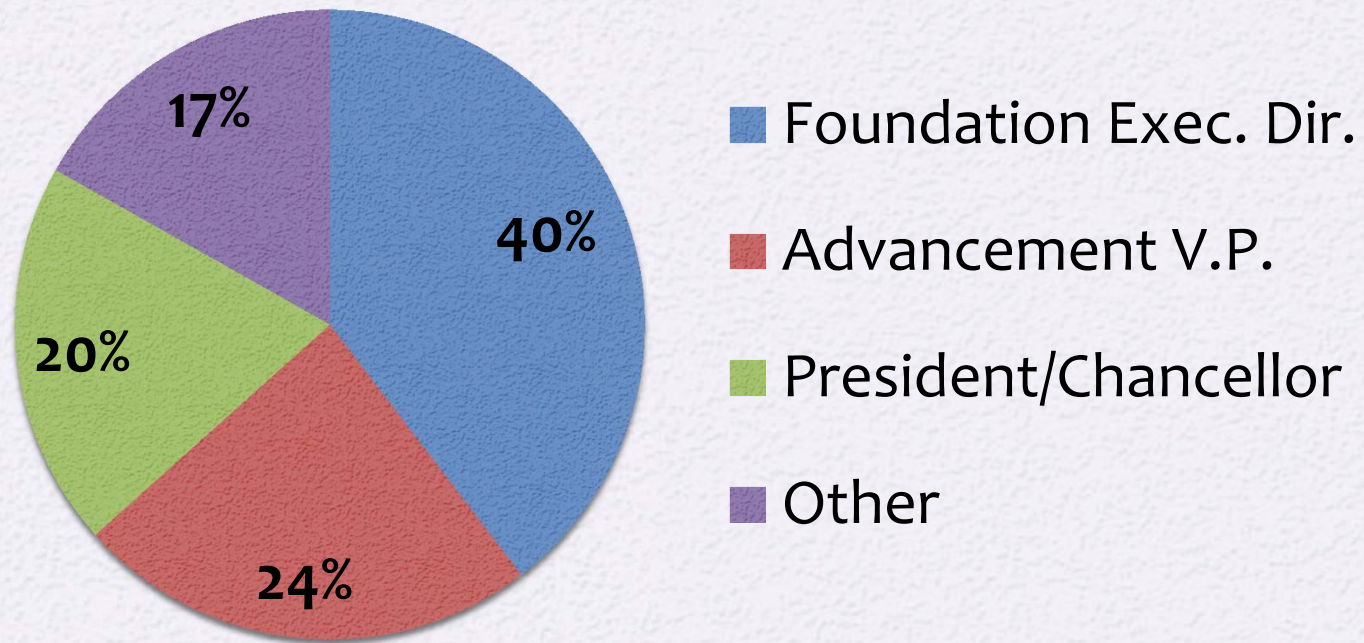
*CASE Reporting Standards and Management
Guidelines, 4th edition*

The Alumni Relations Office

Multi-tasking

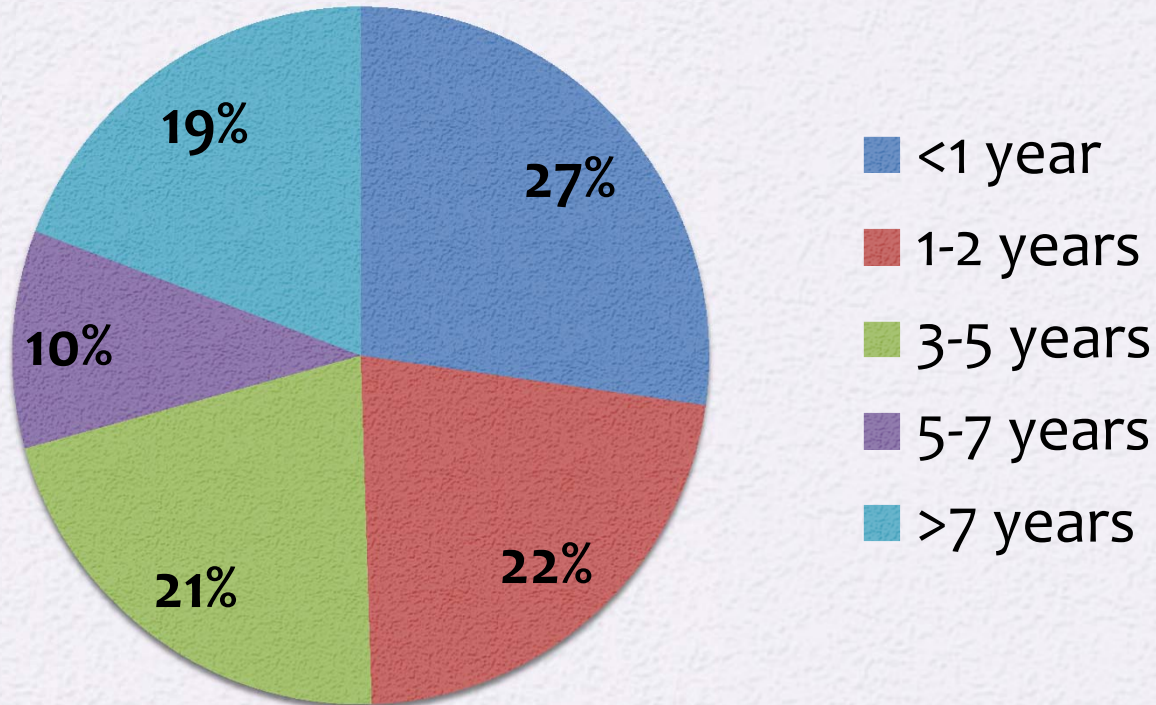
The Alumni Relations Office

Chief AR Officer Reporting Structure



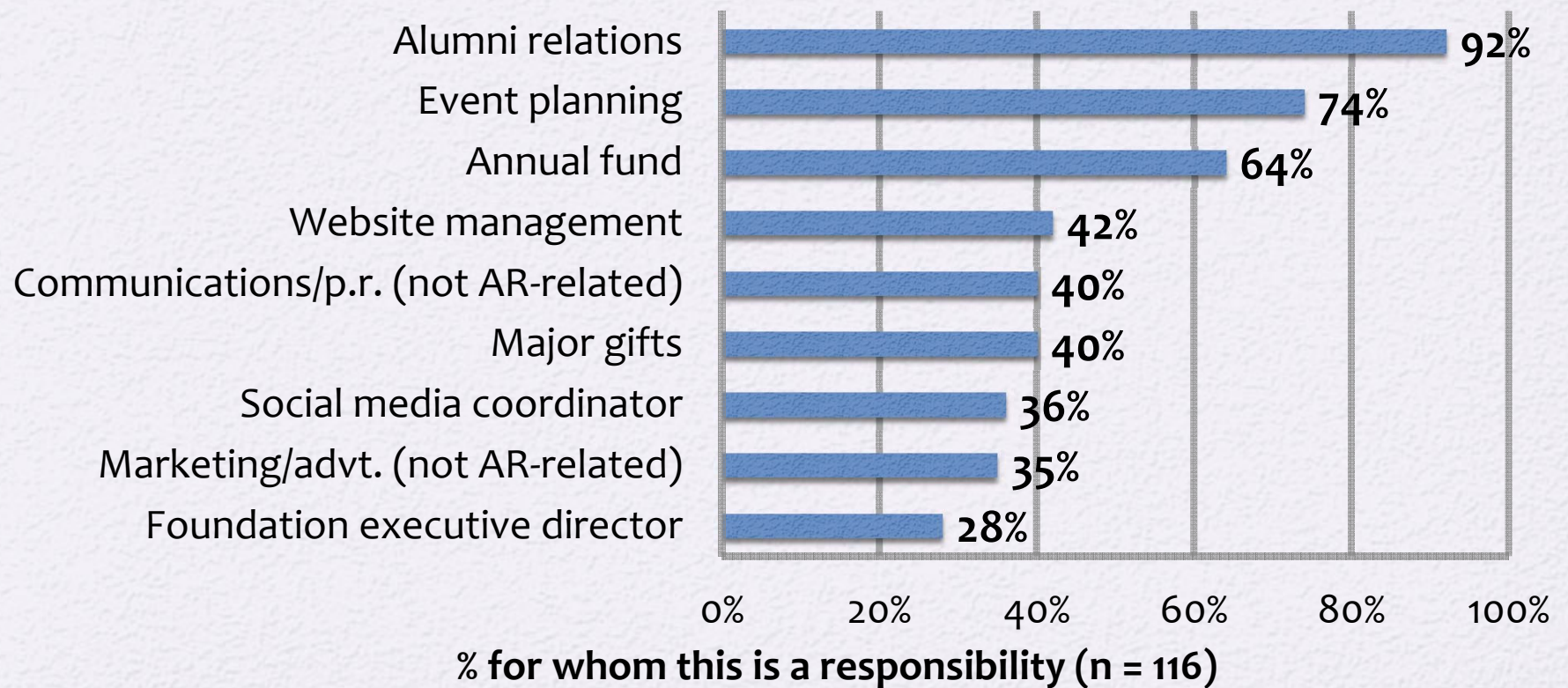
The Alumni Relations Office

Chief AR Officer's Years in Current Role



The Alumni Relations Office

Responsibilities of Chief AR Officer



The Alumni Relations Office

% of Time Spent on Responsibility

Responsibility	Mean
Alumni relations	30%
Event planning	14%
Annual fund	13%
Foundation exec. dir.	13%

The Alumni Relations Office

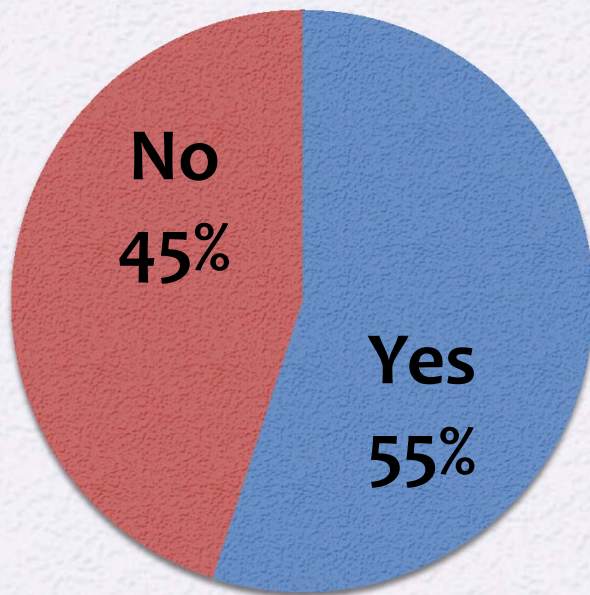
of Staff Dedicated to Alumni Relations (n = 118)

	Full-time	Part-time
Median	1.0	0.0
Mean	0.7	0.5
Minimum	0.0	0.0
Maximum	4.0	5.0
% reporting any staff	53%	34%

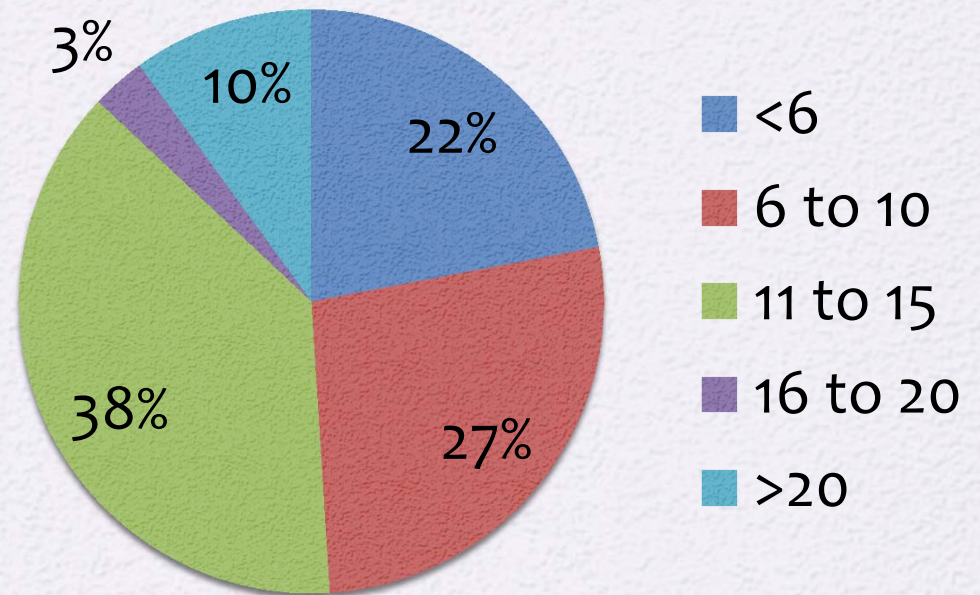
Note: 27 institutions (23%) reported no staff; 28 reported only part-time staff; 12 respondents (10%) reported both part-time and full-time staff.

The Alumni Relations Office

Board/Council?

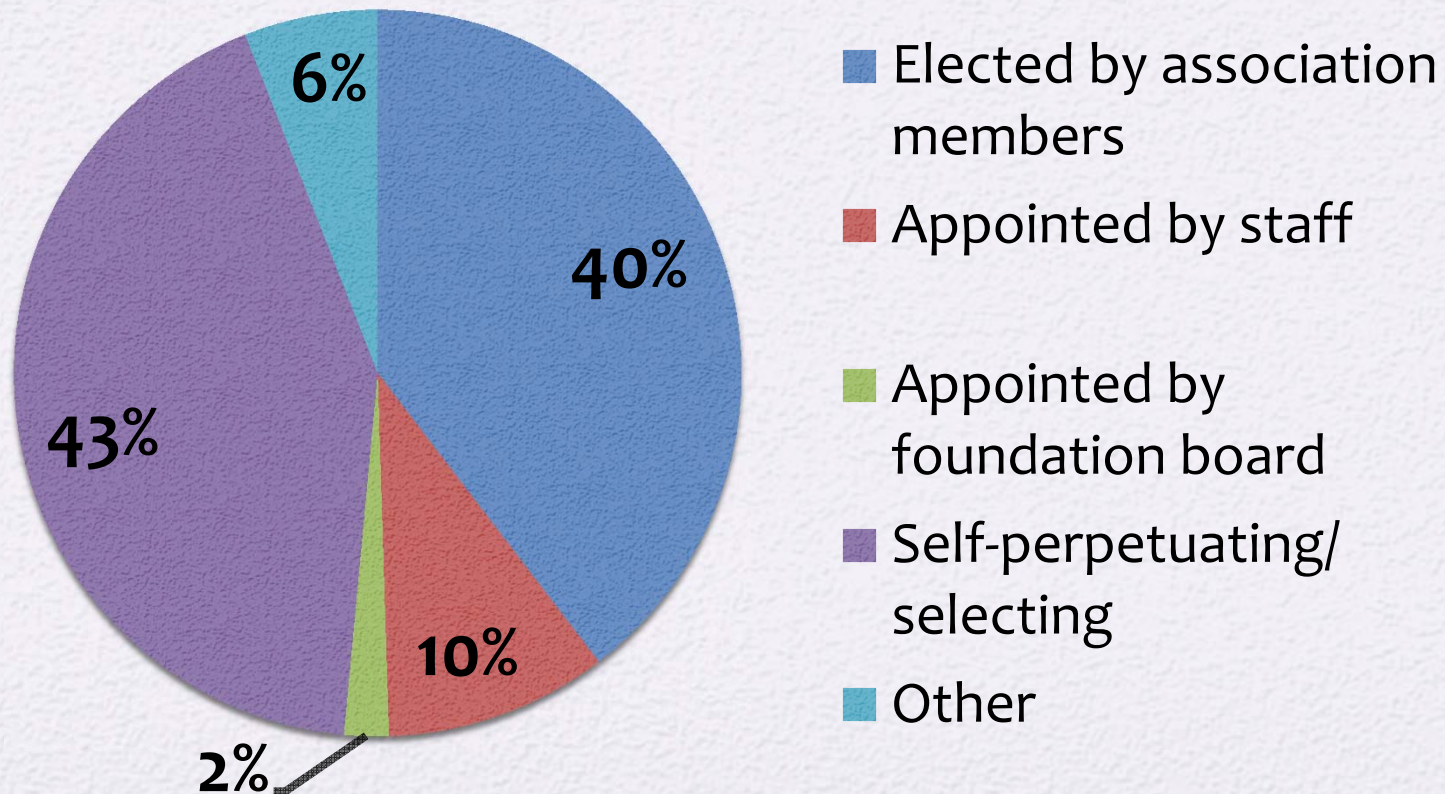


Size of Council



The Alumni Relations Office

Selection of Board

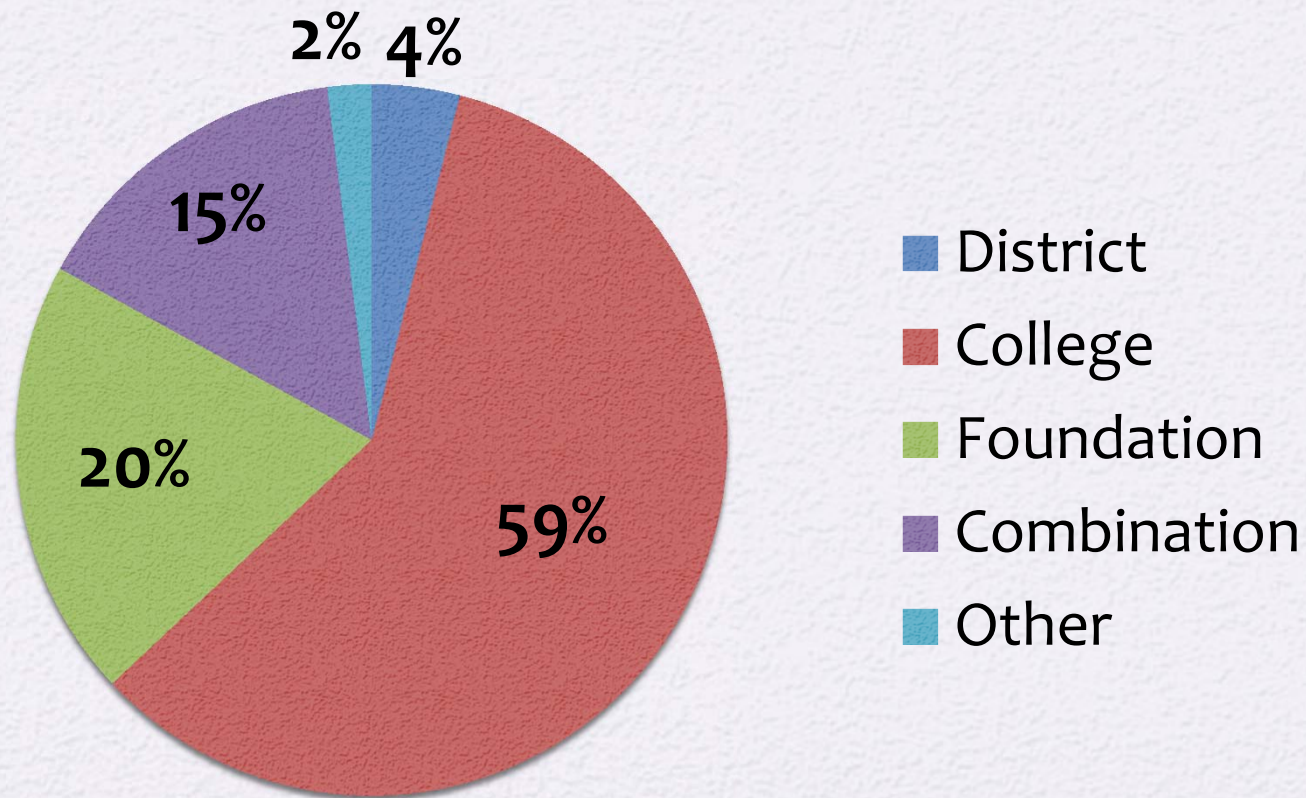


Funding Alumni Relations

Dues and don'ts

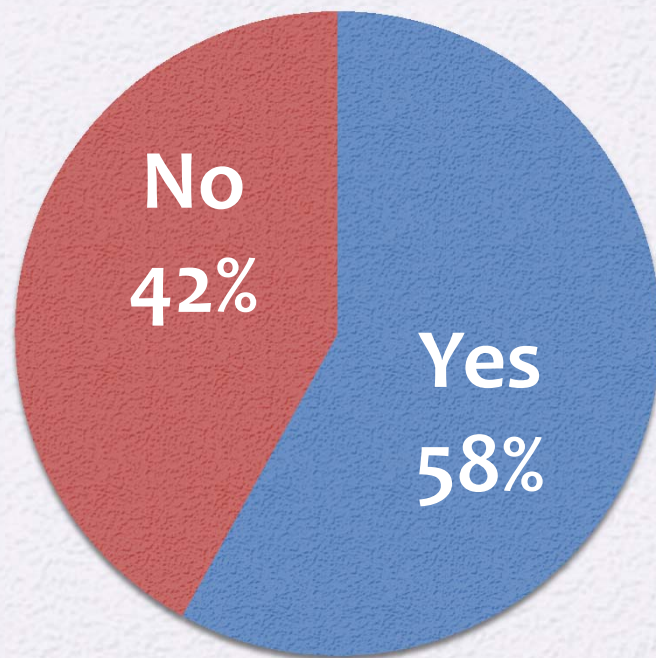
Funding Alumni Relations

Source of Budget for AR Salaries

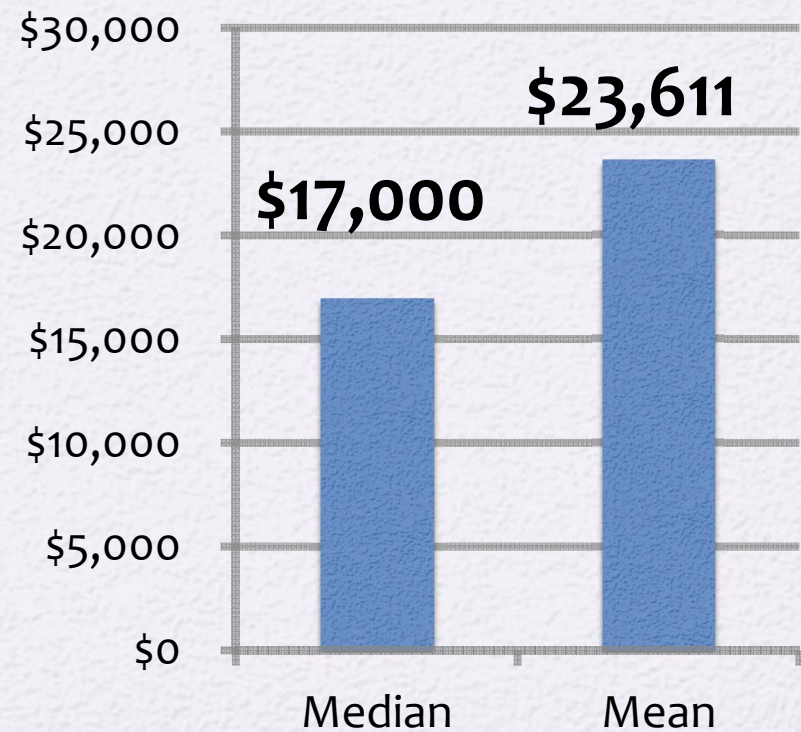


Funding Alumni Relations

Dedicated Budget?



Size of Budget



Note: Excludes compensation

Funding Alumni Relations

Sources of Operating Budget (mean)

Source	% of total
College	56%
Foundation annual unrestricted gifts	24%
Special events/fundraisers	7%
Foundation endowment	5%
Alumni organization dues	3%
District	2%
Affinity programs	1%
External grants	1%
Other	3%

Funding Alumni Relations

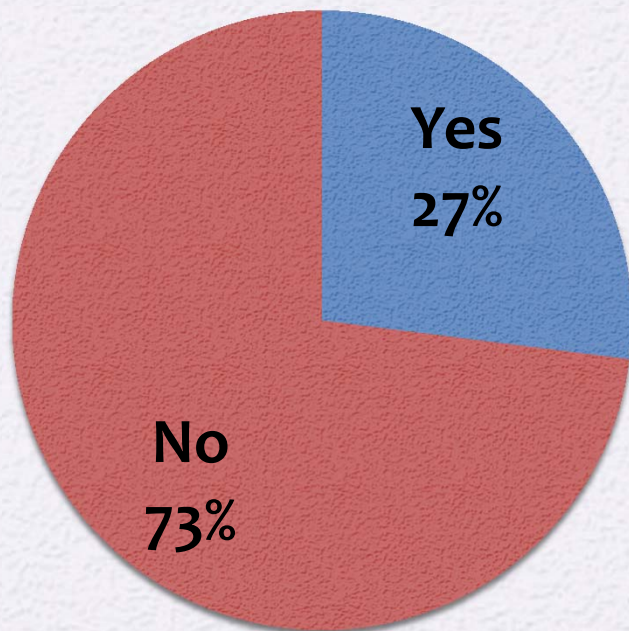
Sources of Operating Budget

Source	One source	Only source	% of Budget*
College	66%	40%	56%
Found. annual unrestricted gifts	32%	14%	24%
Special events/fundraisers	20%	0%	7%
Foundation endowment	8%	2%	5%
Alumni organization dues	14%	0%	3%
District	2%	2%	2%
Affinity programs	6%	0%	1%
External grants	2%	0%	1%
Other	10%	0%	3%

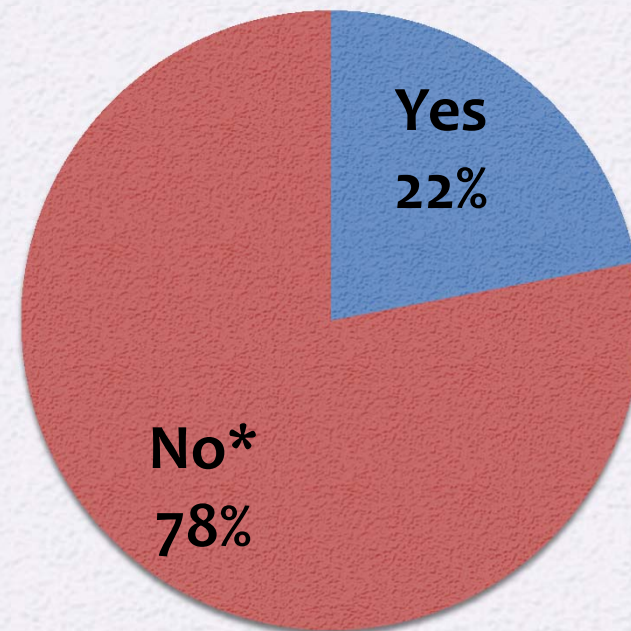
* mean

Funding Alumni Relations

Annual Membership Dues?



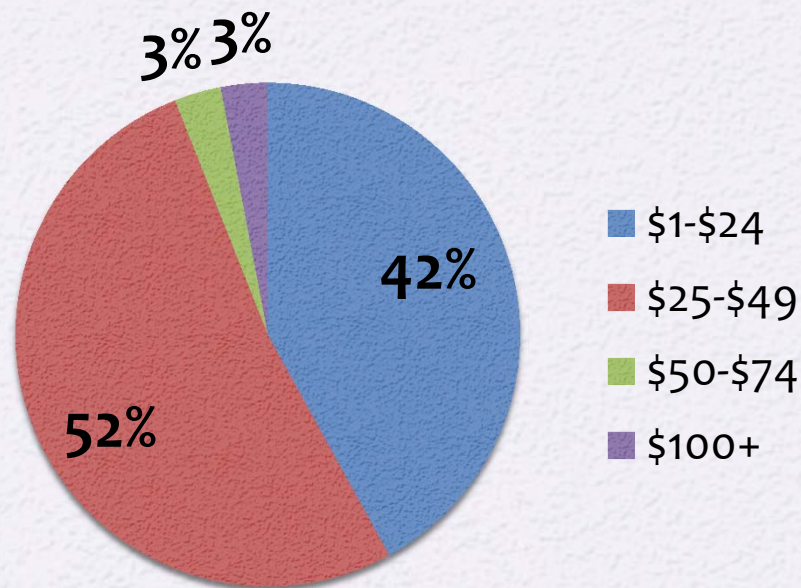
One-time Lifetime Membership Dues?



*"No" includes 9% of institutions that charge dues but do not have a lifetime option

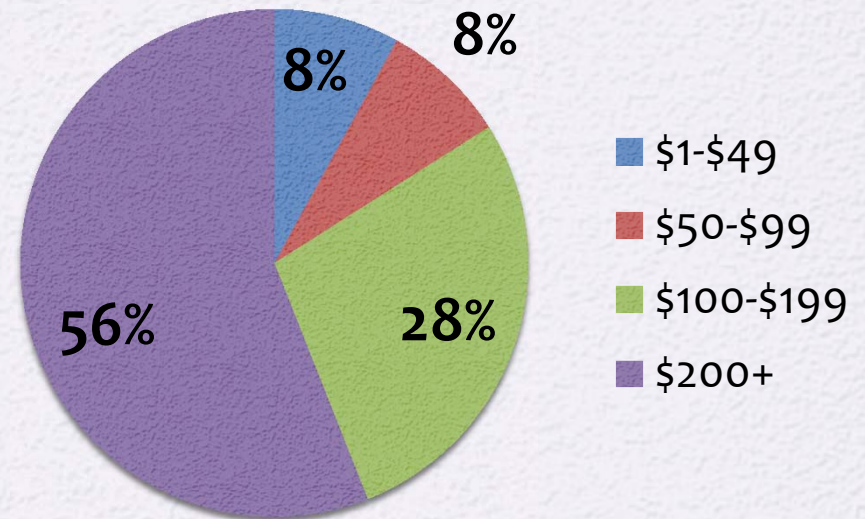
Funding Alumni Relations

Annual Dues



N = 31

Lifetime Dues



N = 25

Note: Includes only institutions that charge dues

Funding Alumni Relations

Uses of Operating Budget

Use	% of Total (mean)	% Using
Printing	18%	82%
Dinners, lunches, receptions	12%	65%
Postage for mailings	11%	64%
Special events (galas, etc.)	10%	55%
Data services (email appending, etc.)	8%	45%
Advertising and promotion	6%	52%
Awards and recognition	6%	45%
Fundraising expenses	6%	45%
Gifts, giveaways, “swag”	6%	6%

Funding Alumni Relations

Uses of Operating Budget

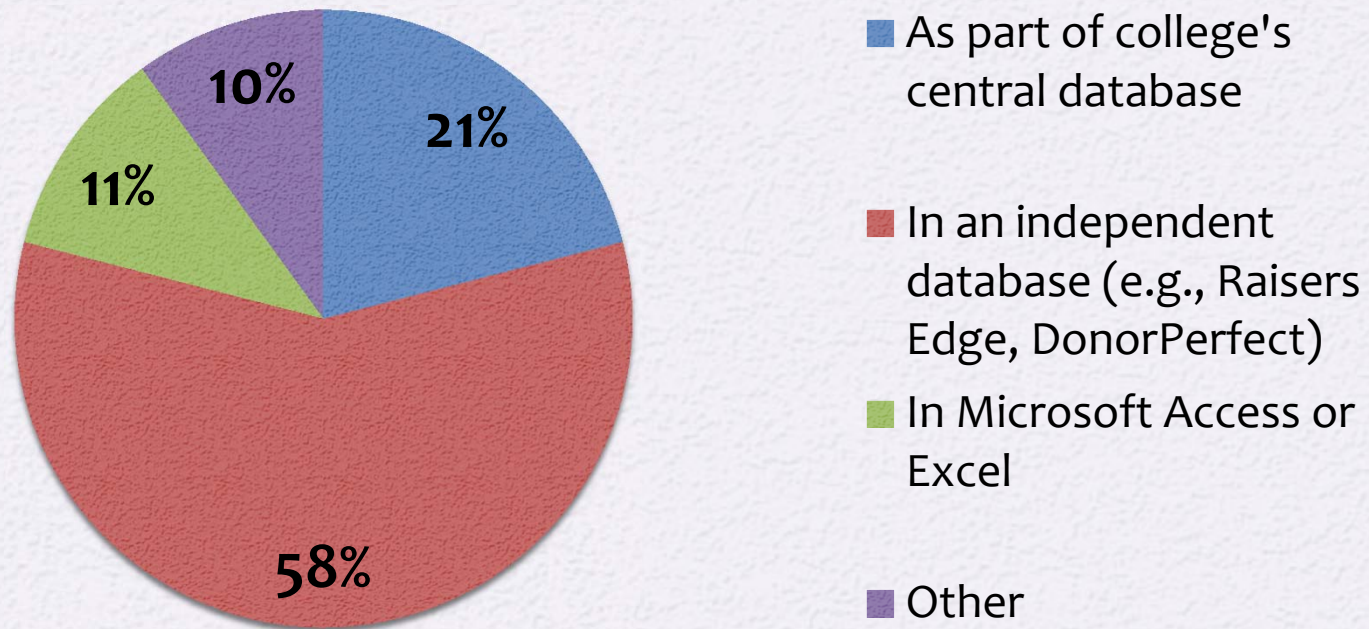
Use	% of Total (mean)	% Using
Alumni board expenses (meetings, etc.)	4%	51%
Reunions	3%	25%
Support for internal programs and activities	3%	23%
Professional development	2%	35%
Other	6%	31%

Data Collection and Management

It's all about the data

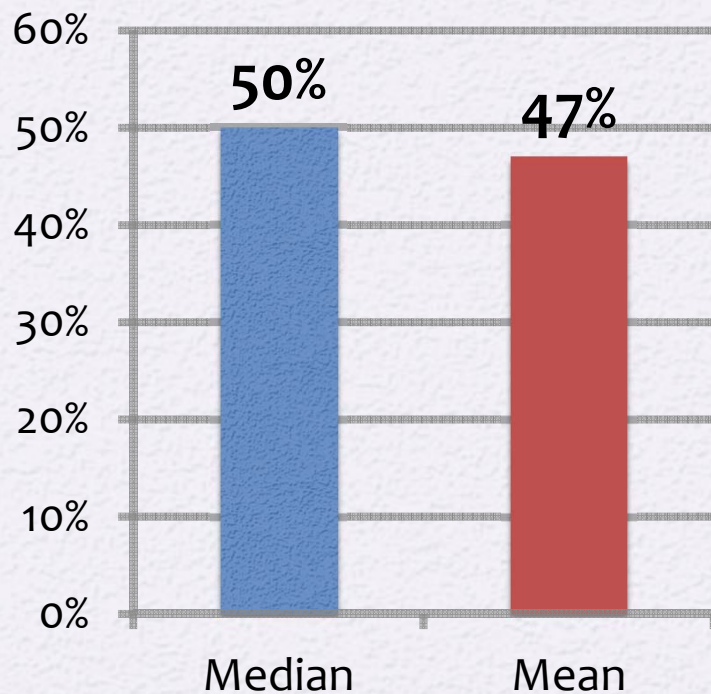
Data Collection and Mgmt.

Maintenance of Alumni Data

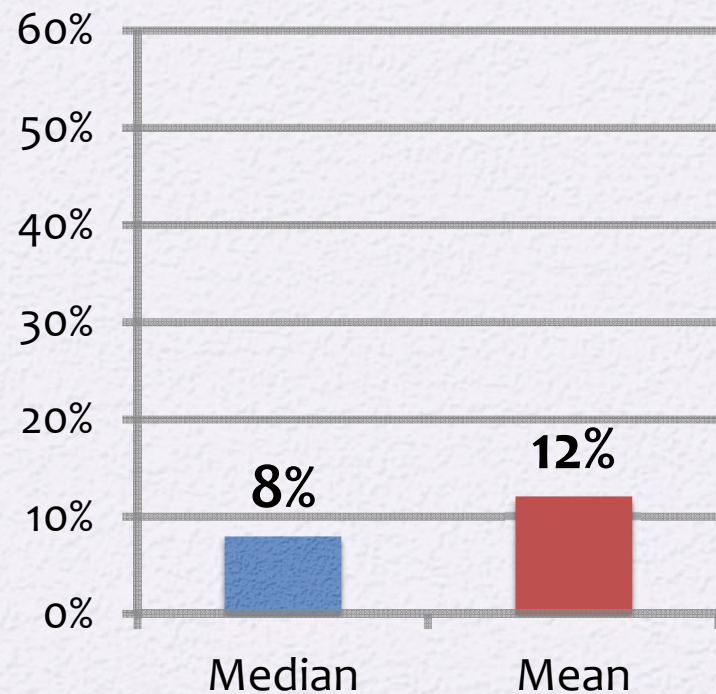


Data Collection and Mgmt.

% valid mailing addresses



% valid email addresses



Data Collection and Mgmt.

Records Maintenance Tasks

Task	Do this	Plan to do this	Don't do this
Receive electronic student records from registrar for AR	78%	7%	16%
Run NCOA (National Change of Address) on alumni records	60%	16%	23%
Engage a vendor to update address or find "lost" alumni	53%	15%	32%
Engage vendor to append phone numbers	37%	13%	50%
Engage vendor to append email addresses to alumni records	39%	15%	46%
Engage vendor to conduct wealth screening of alumni	34%	22%	45%

Data Collection and Mgmt.

Frequency of Records Maintenance (among doers)

Task	Qrtly	Annually	Every 2-3 years	Every 4-5 years
Receive electronic student records from registrar for AR	20%	74%	2%	3%
Run NCOA (National Change of Address) on alumni records	23%	53%	11%	13%
Engage a vendor to update address or find “lost” alumni	2%	18%	29%	52%
Engage vendor to append phone numbers	0%	16%	28%	56%
Engage vendor to append email addresses to alumni records	0%	16%	29%	56%
Engage vendor to conduct wealth screening of alumni	3%	15%	36%	46%

Communications and Strategy

Prepare to engage

Communications & Strategy

How AR Office Communicates with Alumni

Method	Do this	Never do this
Bulk email/email newsletter	83%	17%
Posting to college website	81%	19%
Posting to Facebook	81%	19%
Direct mail	75%	25%
Print newsletter/magazine	65%	35%
Individual emails	60%	40%
Individual phone calls	45%	55%
Posting to LinkedIn	42%	58%
Posting to Twitter	26%	74%

Communications & Strategy

How AR Office Communicates with Alumni

Method	Do this	Never do this
Phone bank/call center	25%	75%
Via a college-administered online community	20%	80%
Other	8%	92%
Posting to Pinterest	6%	94%
Posting to Google+	3%	97%
Sending text messages	2%	98%

Communications & Strategy

Frequency of Comms. with Alumni (among doers)

Method	Daily	Weekly	Monthly	Qrtly	Annually
Bulk email/email newsletter	0%	3%	27%	42%	27%
Posting to college website	6%	17%	36%	27%	14%
Posting to Facebook	16%	47%	26%	10%	1%
Direct mail	0%	0%	3%	30%	67%
Print newsletter/magazine	0%	0%	3%	54%	43%
Individual emails	10%	23%	19%	31%	18%
Individual phone calls	11%	24%	9%	24%	33%
Posting to LinkedIn	11%	23%	39%	23%	5%
Posting to Twitter	22%	41%	22%	15%	0%

Communications & Strategy

Frequency of Comms. with Alumni (among doers)

Method	Daily	Weekly	Monthly	Qrtly	Annually
Phone bank/call center	0%	0%	4%	8%	88%
Via a college-administered online community	20%	20%	30%	15%	15%
Other	0%	50%	0%	50%	0%
Posting to Pinterest	33%	17%	17%	17%	17%
Posting to Google+	33%	0%	0%	33%	33%
Sending text messages	0%	0%	0%	50%	50%

Communications & Strategy

Ways in Which the College Engages Alumni

Event or Activity	Do this	Never do this
Invitations to college events	84%	16%
Alumni board meetings	61%	39%
Free alumni social gatherings	59%	41%
College volunteer opportunities	59%	41%
Invitations to student activities	54%	46%
Meetings or events of alumni based on affinity/prog.	46%	54%
College career services	42%	58%
Paid alumni social gatherings	41%	59%
Campus advisory committee service	41%	59%

Note: Includes the top 9 of 19 possible events/activities.

Communications & Strategy

Frequency of Alumni Engagement (among doers)

Event or Activity	Daily	Weekly	Monthly	Qtrly	Ann.
Invitations to college events	0%	2%	12%	52%	33%
Alumni board meetings	0%	0%	27%	58%	15%
Free alumni social gatherings	0%	0%	6%	27%	67%
College volunteer opportunities	0%	2%	2%	39%	57%
Invitations to student activities	0%	4%	12%	47%	37%
Meetings or events of alumni based on affinity/program	0%	0%	4%	25%	71%
College career services	0%	0%	5%	35%	60%
Paid alumni social gatherings	0%	0%	5%	21%	74%
Campus advisory comm. service	0%	0%	2%	44%	54%

Note: Includes the top 9 of 19 possible events/activities.

Alumni Relations and Fundraising

The buck starts here

Alumni Relations & Fundraising

How AR Office Solicits Alumni

Method	Do this	Never do this
Direct mail	79%	21%
Gala fundraiser	56%	44%
Email	52%	48%
Alumni magazine or newsletter	51%	49%
Golf tournament	49%	51%
Facebook	25%	75%
Phone bank	23%	77%
Other	23%	77%
Twitter	3%	97%

Note: No respondent uses Google+ to solicit alumni.

Alumni Relations & Fundraising

Frequency of Alumni Solicitations (among doers)

Method	Daily	Weekly	Monthly	Qrtly	Annually
Direct mail	0%	0%	1%	16%	83%
Gala fundraiser	0%	0%	0%	0%	100%
Email	0%	2%	12%	46%	40%
Alumni magazine or newsletter	0%	0%	9%	42%	49%
Golf tournament	0%	0%	0%	2%	98%
Facebook	0%	7%	11%	41%	41%
Phone bank	0%	0%	4%	4%	92%
Other	0%	0%	33%	22%	44%
Twitter	0%	0%	0%	67%	33%

Alumni Relations & Fundraising

Alumni Gifts in Most Recent Year

	Median	Mean
Alumni who gave	0.2%	0.5%
Total alumni gifts	\$19,474	\$50,846
Total private giving	\$581,658	\$1,037,371
Alumni portion of total giving	2.8%	6.5%

Successful Practices

What works?

Successful Practices

Data. Data. Data.

- The larger the % of viable mailing addresses, the more positive financial outcomes.
- The larger the % of viable email addresses, the greater the % of alumni donors.
- The more frequently you run NCOA, the more positive financial outcomes.

Successful Practices

“Gift” by association?

- The larger the % of paid alumni association members, the greater the average gift.
- The higher the alumni association annual (or lifetime) dues, the greater the average alumni gift.

Successful Practices

Communications

- Text messaging
- Print newsletter/magazine
- Direct mail
- Phone bank/call center
- Individual phone calls

Successful Practices

For example:

How often do you communicate via print newsletter/magazine	Percent of alumni who are donors*	Mean gift per alumnus*
Quarterly	0.7%	\$1.10
Annually	0.5%	\$0.72
Never	0.2%	\$0.49

* Mean

Successful Practices

Engagement

- Reunions
- Helping with student recruitment

Successful Practices

Solicitation

- Email
- Direct mail
- Phone bank/call center
- Alumni magazine or newsletter

Successful Practices

For example:

How often do you solicit using direct mail?	Percent of alumni who are donors*	Mean gift per alumnus*
Quarterly	0.6%	\$1.03
Annually	0.6%	\$0.79
Never	0.1%	\$0.49

* Mean

Successful Practices

For example:

How often do you solicit using a phone bank/call center?	Percent of alumni who are donors*	Mean gift per alumnus*
Annually	0.8%	\$1.33
Never	0.4%	\$0.65

* Mean

Successful Practices

For example:

How often do you solicit using an alumni magazine or newsletter?	Percent of alumni who are donors*	Mean gift per alumnus*
Monthly	0.3%	\$1.25
Quarterly	1.0%	\$1.25
Annually	0.7%	\$0.72
Never	0.2%	\$0.57

* Mean

Successful Practices

You said...

- Alumni Hall of Fame, awards
- Career fairs and networking
- Dinners, events with students and faculty
- Reunions
- Mailings/emails

Successful Practices

You said...

- “We are in the process of revamping”
- “We just started working on alumni engagement.”
- “Just beginning to launch”
- “Looking to start in FY13”
- “The alumni relations effort is relatively new.”
- “We are just starting out.”
- “We are in the very early stages.”

Successful Practices

Performance Metrics Regularly Monitored by AR Program

	%
Number of alumni donors	56%
Number of alumni attending special events	47%
Number of alumni association members	42%
Number of alumni submitting address/info updates	30%
Number of alumni volunteers	21%
Posts to alumni discussion lists or social media sites	21%
Other	7%
Number of participants in affinity programs	5%

Note: Sums to more than 100% because multiple responses were possible.

Take-aways

Getting there from here

Take-aways

- Alumni definitions vary greatly
- Most programs are small and/or nascent
- The better the data, the higher the donor rate
- Regular communication increases likelihood of giving

Discussion

Thank you!

goldsmith@case.org

heaton@case.org