Outcomes and Benefits: AEM

Create an industry standard using unified measures of alumni engagement, with an understanding that unlike simply counting gifts, data collected will be an overall approximation of activities.

Provide longitudinal data sets as surveys continue, enabling participating institutions to compare metrics across global peers year-over-year.

Use results to inform initiatives supporting educational advancement, with CASE as a trusted resource.

Help institutional leaders set goals, assess performance, build capacity, and make informed, strategic decisions regarding investments in advancement.
Inaugural Alumni Engagement Metrics Survey

- Institutions from 19 countries
- 360 Initial Respondents
- Clean Data from 310 Colleges, Universities, and Schools
Participation by Institutional Type

<table>
<thead>
<tr>
<th>Region/Region</th>
<th>N=24</th>
<th>N=14</th>
<th>N=32</th>
<th>N=225</th>
<th>N=15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia/New Zealand</td>
<td>96%</td>
<td>86%</td>
<td>88%</td>
<td>60%</td>
<td>67%</td>
</tr>
<tr>
<td>Canada</td>
<td>4%</td>
<td>14%</td>
<td>9%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>United Kingdom Region</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>20%</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Professional Schools
- Graduate
- Undergraduate
- Community College
- Independent Schools
Inputs:
Alumni Populations, Expenditures, & Staff
Alumni Populations

- Asked for counts of alumni in 7 different categories
- Accommodates different definitions of alumni and provides transparency
- Collected results for Living, Legally Contactable and Opted Out

### Average Number of Alumni by Type - All Countries

<table>
<thead>
<tr>
<th>Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate/Diploma Alumni Living (Legally Contactable)</td>
<td>5,134</td>
</tr>
<tr>
<td>Undergraduate-Degreed Alumni (Legally Contactable)</td>
<td>75,160</td>
</tr>
<tr>
<td>Graduate-Degreed Alumni (Legally Contactable)</td>
<td>30,154</td>
</tr>
<tr>
<td>Multiple-Degreed Alumni (Legally Contactable)</td>
<td>13,221</td>
</tr>
<tr>
<td>Certificate or Award Alumni (Legally Contactable)</td>
<td>3,623</td>
</tr>
<tr>
<td>Non-Degreed Alumni (Legally Contactable)</td>
<td>11,482</td>
</tr>
<tr>
<td>Other Alumni (Legally Contactable)</td>
<td>3,904</td>
</tr>
</tbody>
</table>
Institution Type

This presentation includes breakouts by Institution Type:

• Independent Schools – primary or secondary institutions
• Community Colleges – includes both Community Colleges and Colleges of Further Education
• Undergraduate – College of University offering primarily Undergraduate Degrees
• Graduate – University offering Graduate/Doctoral Degrees in addition to Undergraduate Degrees
• Professional School – Institution offering only Professional Degrees
Alumni Per AR Staff FTE
(Legally Contactable Alumni/AR Staff FTE)
Alumni Relations Expenditures*

Total Reported Alumni Relations Expenditures

<table>
<thead>
<tr>
<th>Region</th>
<th>Alumni Relations Staff Salary (N=231)</th>
<th>Alumni Relations Tech Cost (N=216)</th>
<th>Alumni Magazine Cost (N=216)</th>
<th>Alumni Relations Non-Tech Cost (N=224)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia/New Zealand</td>
<td>67%</td>
<td>2%</td>
<td>8%</td>
<td>23%</td>
</tr>
<tr>
<td>Canada</td>
<td>62%</td>
<td>2%</td>
<td>7%</td>
<td>29%</td>
</tr>
<tr>
<td>United Kingdom/Ireland</td>
<td>60%</td>
<td>3%</td>
<td>16%</td>
<td>22%</td>
</tr>
<tr>
<td>United States</td>
<td>52%</td>
<td>3%</td>
<td>10%</td>
<td>36%</td>
</tr>
<tr>
<td>Independent Schools</td>
<td>46%</td>
<td>4%</td>
<td>7%</td>
<td>43%</td>
</tr>
</tbody>
</table>

*Expenditures reflect Alumni Relations specifically, and do not include programmatic or technology costs paid for by a central advancement office.
Modes of Engagement: Philanthropic, Volunteer, Experiential, Communication
AEM Framework – Four Categories

**Inputs**
- Number of Legally Contactable Alumni
- AR Staff FTE
- AR Staff Salary Budget
- AR Program Budget(s)

**Philanthropic**
- Financial support that is meaningful to the donor and supports the institution’s mission and strategic goals

**Volunteer**
- Formally defined and rewarding volunteer roles that are endorsed by and valued by the institution

**Experiential**
- Meaningful experiences that inspire alumni, are valued by the institution, promote its mission, celebrate its achievements and strengthen its reputation

**Communication**
- Interactive, meaningful and informative communication that supports the institution’s mission, strategic goals and reputation

Alumni Engagement Metrics White Paper, August 2018
Philanthropic Engagement Rates
(number of donors/legally contactable alumni)

Median Percent Engaged by Institution Type – Philanthropically

- Independent Schools: 16.7%
- Community College: 0.7%
- Undergraduate: 19.7%
- Graduate: 4.6%
- Professional Schools: 6.6%
Volunteer Engagement Rates (number of volunteers/legally contactable alumni)

Median Percent Engaged by Institution Type – Volunteer

- Independent Schools: 3.0%
- Community College: 0.1%
- Undergraduate: 4.1%
- Graduate: 0.6%
- Professional Schools: 1.5%
Experiential Engagement Rates

number engaged experientially/legally contactable alumni

Median Percent Engaged by Institution Type – Experiential

<table>
<thead>
<tr>
<th>Institution Type</th>
<th>Median Percent Engaged</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Schools</td>
<td>12.2%</td>
</tr>
<tr>
<td>Community College</td>
<td>0.6%</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>10.8%</td>
</tr>
<tr>
<td>Graduate</td>
<td>4.6%</td>
</tr>
<tr>
<td>Professional Schools</td>
<td>4.3%</td>
</tr>
</tbody>
</table>
Communications Engagement Rates

number engaged through communications/legally contactable alumni

Median Percent Engaged by Institution Type – Communications

- Independent Schools: 12.8%
- Community College: 0.8%
- Undergraduate: 9.1%
- Graduate: 4.1%
- Professional Schools: 5.4%

CASE
AMAtlas
Advancement Metrics and Research for Education
In Data Miner you may want to analyze alumni who engaged in any of the four modes as well as understand the intersection of alumni who engage in multiple modes. As we collect additional data in Year 2, this will be added to the output. Additionally, through a pilot project we will begin collecting measures on newly engaged and loyal engaged alumni (2+ years).
Imagine a one-stop data shop:

Advancement data will be collected via multiple surveys but stored in a single database available free of charge to all CASE members via Data Miner.

To the degree possible, similar variables from different surveys will be brought together to allow for benchmarking across regions/surveys.

Friendly PSA – please make plans to take part in these surveys for increased future benchmarking!
Coming Soon: Alumni Engagement Metrics GPS Report

- Will show comparisons for pre-determined peers (algorithm to find those most like your institution), region/country, world
- Visuals for:
  - Program Size and Expenditures
  - Counts of Alumni across seven categories (see survey site for lots of details!)
  - Capturing Modes of Engagement (Philanthropic, Volunteer, Experiential, Communication)
  - Engagement by Mode
  - Alumni engaged by ANY mode
- Available in Data Miner (next month) for any CASE member institution who participated in Year 1.