



What Does “Successful” Alumni Relations Look Like?

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The International CASE Alumni Relations Survey, now in its eighth year and with questions developed by senior alumni relations professionals, has been instrumental in documenting the evolving alumni relations landscape in Europe and sharing best practices of successful programmes.

The assessment of the 2013 survey builds on the analytical framework developed for the 2008 survey, which created a statistical picture of what success in alumni relations looks like, i.e., which alumni services and activities are statistically associated with greater success and what successful alumni relations programmes do *more* of than less successful programmes.

Here are some of the findings using data collected in the eighth survey (2013).

The evolving alumni relations landscape in Europe

This picture of alumni relations in Europe is drawn from 79 respondents to the 2013 survey. These respondents are with institutions in 12 countries. More than three-fourths (76 percent) of respondents are from the United Kingdom and 24 percent are from other European countries. Altogether, these 79 institutions served 6.8 million constituents, employed 299 alumni relations staff and had an aggregate budget of 9.1 million GBP (British pounds) in 2013. Altogether, these 79 institutions staged 2,951 alumni events, which attracted nearly 79,000 attendees. They have clearly been busy.

What is benchmarking?

Benchmarking involves collecting multiple institutions' data on an issue of common interest, viewing your own institution's performance over time and from the perspectives of what your peers and industry leaders do, and then using the perspective gained for internal continuous improvement. What it is not about are rankings, arms races and beauty contests.

On average, they each

- Offered nine different types of alumni programmes (events, websites, career support, etc.)
- Offered 11 different types of member benefits (library access, social networks, discount offers, etc.).
- Served 83,317 constituents
- Had a staff size of 3.0 full-time equivalents (FTEs)
- Had a budget of 1.30 GBP per constituent
- Ran 29 events, which attracted 756 attendees.

Forty-five institutions are survey repeaters from 2012. They give us an added perspective on change over time (Table 1). For the group as a whole (the sum), the number of constituents is up 5.6 percent; budgets, excluding salaries, have fallen by 1.5 percent; and staffing has increased by 16.7 percent. Relative to constituents served, however, the growth in staffing resources is not quite as strong—median staff per 10,000 constituents grew by 7.5 percent.

One year's change does not make a trend. However, if alumni growth and stable or declining resources continue, we may see increasing economies of scale to alumni services. In other words, we could see that an operational shift toward less labour-intensive services may be necessary to cope with a greater constituent-to-staff ratio paired with a lower constituent-to-budget ratio.

What are the benchmarking questions?

- How do we compare to the whole population/our peer group/industry leaders/individual institutions-of-interest?
- How “different” are we? Are we different for the “right” reasons?
- What things are the others doing that we are not? Are they doing the same things but doing them better?
- Who do we look at for best practices?
- How have *we* changed over time?

Table 1. Changes in key variables from 2012 to 2013 for 45 core institutions*(non-zero cases in both years)*

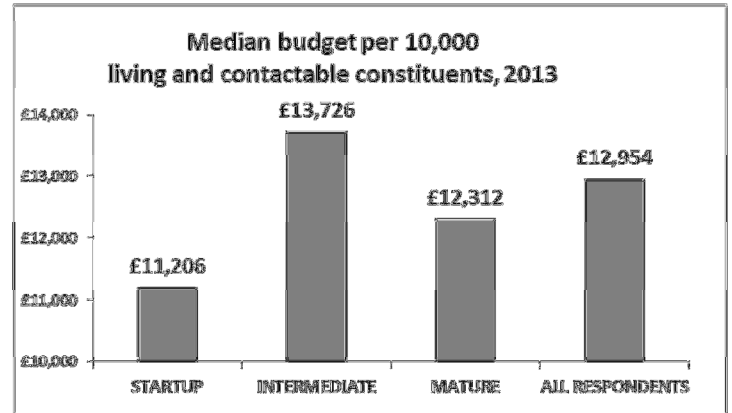
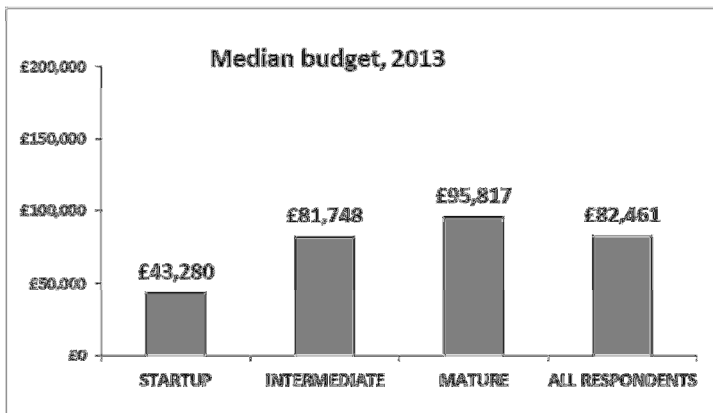
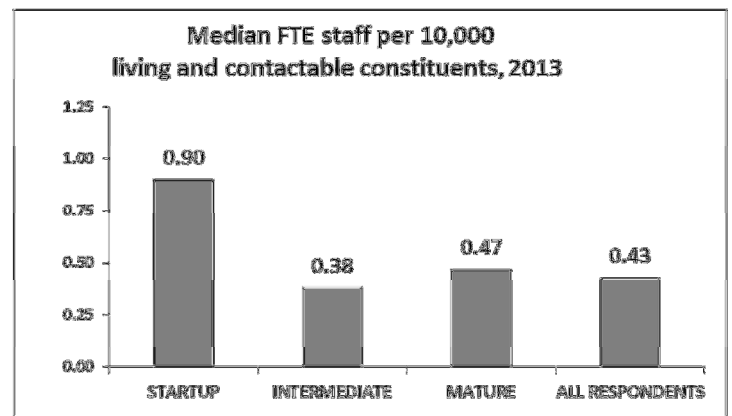
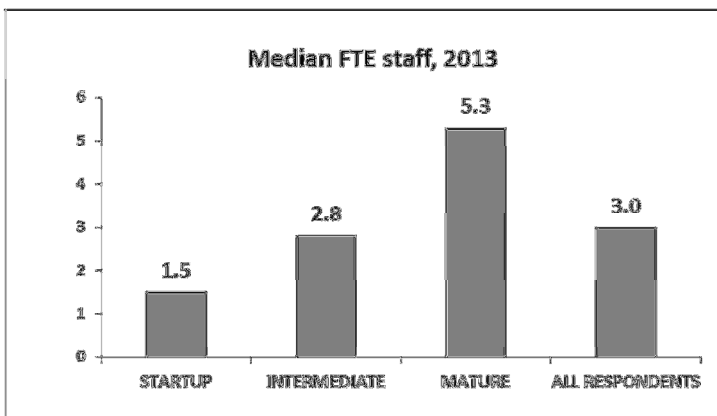
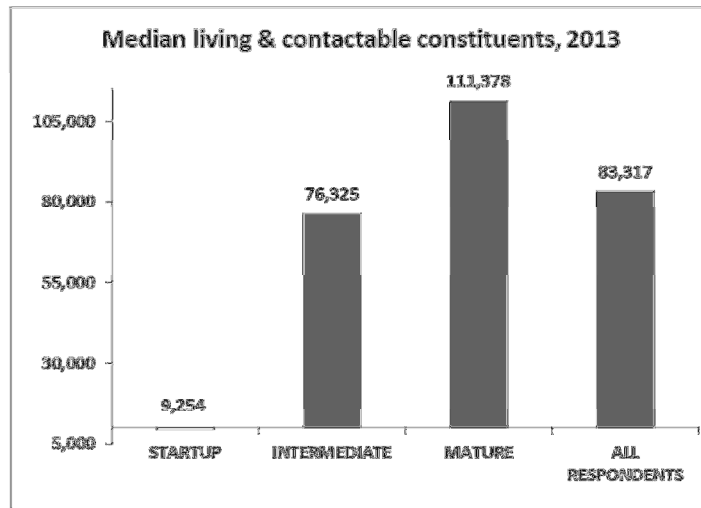
	NUMBER	MEDIAN	MEAN	SUM
CONSTITUENTS *				
2013	45	87,316	90,453	4,070,392
2012	45	82,655	84,083	3,783,742
CHANGE (no.)		4,661	6,370	286,650
(%)		5.6%	7.6%	7.6%
STAFF				
2013	45	3.5	4.0	178.3
2012	45	3.0	3.8	172.6
CHANGE (no.)		0.5	0.2	5.7
(%)		16.7%	5.3%	3.3%
STAFF PER 10,000 CONSTITUENTS*				
2013	45	0.43	0.63	
2012	45	0.40	0.64	
CHANGE (no.)		0.03	-0.01	
(%)		7.5%	-1.6%	
BUDGET				
2013	45	£81,772	£126,631	£5,698,415
2012	45	£83,000	£109,039	£4,906,734
CHANGE (no.)		-£1,228	£17,592	£791,681
(%)		-1.5%	16.1%	16.1%
BUDGET PER 10,000 CONSTITUENTS*				
2013	45	£12,598	£15,728	
2012	45	£12,885	£17,446	
CHANGE (no.)		-£287	-£1,718	
(%)		-2.2%	-9.8%	

*living and contactable constituents

The 79 respondents are at different stages of programme maturity, which affects their capabilities and offerings. The survey let respondents self-assess whether their alumni relations programme is a “startup” (in the first year or two of operations and still at the ground-level stage of building staff and services), in an “intermediate” stage (in operation between two and 10 years, now gaining recognition but still growing staff and services and experimenting with directions) or “mature” (has been up and running for several years with a portfolio of repeated events and services albeit still striving for further improvement and efficiencies in line with good business practices). Respondents are asked to make their choice with a holistic view of their alumni programme, and not just on the basis of the longest-offered individual service.

Of the 79, 8 percent are startups, 59 percent are intermediate and 33 percent are mature. The operational differences between these groups are shown in the charts below. Staff and budget do grow in absolute terms with maturity, but because increased activities are also associated with even more constituents over time, staff and budget appear to decrease relative to constituents as alumni relations programmes mature.

Charts of key variables by stage of maturity, 2013



What does successful alumni relations look like?

We now know from these statistics how the size and shape of alumni relations programmes at institutions in Europe are evolving, but what makes a successful alumni relations programme? If we want to identify what factors contribute to a successful programme, we first have to define what constitutes success and then be able to measure that. The survey's advisory group of seasoned AR professionals decided on three measures of success: the number of *attendees*,

Alum stats 101: What you need to know about the "r" statistic

- Full name of the r statistic is the Pearson bivariate product-moment correlation coefficient
- Measures the statistical covariation (strength of relationship) between two variables, i.e., the extent to which one variable changes in value as the other variable changes
- Can vary between -1.0 (indicating perfect negative correlation), through 0.0 (no correlation at all) to +1.0 (perfect positive correlation): higher is better, subject to the relationship being statistically significant, i.e., has a low probability the number was obtained by chance when there is no real relationship
- Significance at the 0.01 means that there is a 1 percent chance that the result was obtained by chance; and at the 0.05 level, there is a 5 percent chance
- Measures association, not causation, and there is no direction of influence to the relationship

volunteers and *donors* in the last 12 months (variables G7, J11 and K3; all expressed per 10,000 constituents, to standardize for size). The group was interested in identifying links between the activities under their control and these three measures of success.

In years prior to 2010, we measured event attendees per 10,000 constituents in the last 12 months but volunteers and donors per 10,000 constituents over time. The survey analysis changed in 2010 to show each variable per 10,000 constituents during the past 12 months. This should give organizations a clearer picture of their own performance in the current year and will allow organizations to compare their own results (as well as compare themselves against other institutions) year-on-year going forward.

We looked at a list of 26 individual variables associated with constituent databases, programmes offered, resources, communications, events and member benefits for their degrees of correlation with each of the three success measures. Our statistical indicator of any association is the r value (see sidebar), and Table 2 shows which alumni relations variables are significantly associated with success.

Table 2. Correlations Between Alumni Relations Operations and Success Measures, 2013, All 79 Respondents

POTENTIALLY RELATED VARIABLES		MEASURES OF SUCCESS		
		Attendees per 10,000 constituents G7 / (C11/10,000)	Volunteers per 10,000 constituents J11 / (C11/10,000)	Donors per 10,000 constituents K3 / (C11/10,000)
Database:				
With phone numbers per 10,000 cons.	C13 / (C11/10,000)	.155	.135	.008
With mobile/cell numbers per 10,000 cons.	C14 / (C11/10,000)	.024	-.020	-.134
With postal addresses per 10,000 cons.	C15 / (C11/10,000)	.025	.087	-.022
With email addresses per 10,000 cons.	C17 / (C11/10,000)	.323**	.226	.174
Programmes:				
Number of different programmes	D1 + ... + D13	.098	.190	.300*
Resources:				
Budget per 10,000 cons.	E2 / (C11/10,000)	.520**	.312*	.179
FTE staff per 10,000 cons.	E1 / (C11/10,000)	.499**	.592**	.297*
Communications:				
Issues of magazine a year	F1	.282*	.053	.202
Percent of constituents receiving magazine by post	F2 / C11	.070	-.043	.174
Percent of constituents receiving magazine electronically	F3/C11	-.040	.289	-.113
Years offered dedicated e-newsletters	A9	.201	.368**	.395**
Frequency of e-newsletter sent each year	F5	.265*	.175	.696**
Percent of cons. recvg. e-newsletter	F6 / C11	.313*	.214	.076
Years offered dedicated website	A10	-.016	.206	.148
Events:				
Years offered dedicated events	A8	-.054	-.008	.329**
Number of events per 10,000 cons.	(G1 + G2 + G3) / (C11/10,000)	.482**	.429**	.103
Total expenditures per event	G12 / (G1 + G2 + G3)	-.037	-.111	.165
Percent of cons. invited to events/reunions	G5 / C11	.388**	.299*	.187
Percent of cons. attending events/reunions	G7 / C11	1.000**	.671**	.271*
Reunions org'd globally by alumni, per 10,000 cons.	G8 / (C11/10,000)	.140	.170	.146
Prof. devpt./career networking events, per 10,000 cons.	G9 / (C11/10,000)	.680**	.304*	-.036
Personal interest/hobby-based events, per 10,000 cons.	G10 / (C11/10,000)	.186	.247	.135
Holiday/excursion events, per 10,000 cons.	G11 / (C11/10,000)	.767**	.447	.398
Benefits:				
Number of member benefits offered	I1 + ... + I18	-.120	.117	.022
Opportunities offered:				
*** Years offered volunteering opportunities	A11	.046	-.003	.337**
Years members asked to support fundraising	A12	-.121	.198	.285*

* significant at 0.05 level; ** significant at 0.01 level.

***excludes case with over 100 years

Not surprisingly, staff and budget are positively correlated with number of attendees and volunteers as alumni relations programmes with more resources can support more events and engage more volunteers. And staff but not budget is correlated with donors. It should be emphasized that we are talking about alumni relations staff here, not fundraising staff. Although some alumni relations staff work on cultivating current and prospective donors, this is not their principal charge.

Some communications variables—years of offering e-newsletters and their frequency—seem to have a stronger relationship with volunteers and donors than they do with attendees.

Certain types of events, such as professional development and career networking events, are correlated with both attendees and volunteers while holiday/excursion events are correlated with attendees alone.

The number of benefits is not associated with any of the three success measures, although the number of events are correlated with both attendees and volunteers. Completeness of the constituent database with regard to postal addresses also seems to have no relationship either; however, the completeness of email addresses is significantly related to the number of attendees.

The main messages in Table 2 seem to be:

- (1) To increase the number of attendees, instead of increasing the size of the same existing events, you need to have sufficient staff and budget to put on more events and be able to connect with potential attendees via email and e-newsletters;
- (2) To increase the number of volunteers, you need to be able to connect with them via e-newsletters, and have sufficient staff and budget to offer more events and a range of events to engage volunteers; and
- (3) To increase the number of donors, you need to have the staff, frequent e-newsletters and years of offering them, and years of offering volunteer opportunities and asking for fundraising support.

Do not expect your benefits or events to provide the magic bullet. Be prepared for a long haul. Years of having frequent, dedicated e-newsletters and offering events, volunteer opportunities and asking for financial support are correlated with the number of donors.

So what's happening with donors?

The general lack of correlations within this survey between much of what alumni relations does and the number of donors to an institution is puzzling and surely problematic for any senior alumni relations professional hoping to justify budget requests with a direct or indirect payoff in terms of donors. There are several possible explanations.

First, the way that alumni relations works with fundraising/development at European institutions is highly varied and often unclear. In many cases, fundraising is not directly part of AR's mission, which focuses more on making and keeping relationships and on alumni engagement. In some institutions, fundraising is not even indirectly expected of alumni relations. And the history

of fundraising at these institutions is likely to be much shorter and less systematized than that of alumni relations. So it is not surprising that there is little correlation to be found. Second, giving is a highly personal decision often influenced more by the individual donor's condition and relationship with key individuals at an institution than by institutional events or programmes. Third, it is important to recognize that the number of donors is not the same as the value of donations.

But if alumni relations departments can more easily attract attendees and volunteers through activities, could it be that those types of individuals are also more likely to become donors? The lack of statistically significant correlations with donors found above may be because we are comparing variables all in the same year. If we look instead at relationships over several years, as in Table 3, we do see statistically significant relationships. The long-term links between attendance, volunteering and donations display an interesting pattern. According to the correlation results across three years of data (2011, 2012 and 2013) for the 38 repeating respondents, attendance seems to predict future attendance, and to a more limited extent, an increase in volunteers from 2012 to 2013. The number of attendees in 2011 was positively linked to the number of attendees in both 2012 and 2013. These relationships suggest that attendance, as a form of engagement with minimal investment, has an enduring quality.

Simply attending events, however, does not appear to foster a path of ascension to other philanthropic activities. The correlations between the number of attendees at events in 2011 was not significant with the number of donors in future years. On the other hand, engaging alumni who make the progression into volunteering or gift-giving tends to remain at that level, at least for the immediate future. The number of volunteers in 2011 was highly correlated with the number of volunteers in 2012 and the number of volunteers in 2012 to those in 2013. In addition, the number of donors was significantly related to the number of donors in the year following for 2011-2012 and for 2012-2013. Although the data does not suggest a long-term connection for donors, both volunteering and philanthropy seem to have more positive impact in the near-term. The message here: alumni relations operations do pay off in terms of donors over time—but not immediately.

Table 3. Correlations Between the Measures of "Success" Themselves Over Time (2011 to 2013)							
		2012	2012	2012	2013	2013	2013
		Attendees	Volunteers	Donors	Attendees	Volunteers	Donors
2011	r	.676**	.231	.051	.752**	.320	.074
Attendees	N	31	23	29	32	23	30
2011	r	.087	.865**	.039	.025	.241	.068
Volunteers	N	25	21	24	25	23	24
2011	r	-.078	.340	.887**	-.203	.324	.899**
Donors	N	31	23	32	32	24	33
2012					.900**	.411*	.195
Attendees	N				35	25	32
2012	r				.101	.466*	.280
Volunteers	N				25	21	23
2012	r				.072	.336	.918**
Donors	N				32	25	33
** correlation is significant at the 0.01 level (2-tailed).							
* correlation is significant at the 0.05 level (2-tailed).							

What are successful alumni relations programmes doing more of?

Another way of asking about success is to identify institutions with successful alumni relations programmes and then to examine what they are doing more than anyone else. The survey group defines a successful AR programme as one in the top one-third of the distribution of survey results on a given success measure. The absolute numbers for these cutoffs are shown in the sidebar. Institutions recording higher numbers than those shown are in the top one-third for that measure and are successful.

Forty-two of the 79 respondents are among the top-third (successful) on at least one of the three measures (attendees, volunteers and donors) with 22 of the 42 being successful on just one measure. Clearly, different institutions emphasize different aspects of success, and there is hope that most institutions can be successful at something.

Of note:

- Fourteen of the 79 institutions were successful on two of the three measures; six institutions were successful on all three (Table 5).
- Fifty-seven percent of those successful on two of the three measures were at the intermediate stage of maturity and 36 percent were mature.
- Four of the six that that were successful on all three variables were mature.

Your alumni relations operation would be in the top third of each measure of success if you have more than:

- 146 attendees
- 31 volunteers
- 134 donors

- per 10,000 constituents. See Table 4.

The recurring message: staff, budget and time spent developing programmes and hosting events build relationships (attendees, volunteers and donors) that lead to success.

Table 4. Three Measures of Success, 2013 (non-zero responses only)

Measures of Success	From Questions	N	Median	Mean	Min	Max	33rd %ile Value	66th %ile Value
Attendees per 10,000 constituents	G7 / (C11/10,000)	69	98.3	169.8	11.8	1,347.7	65.2	146.2
Volunteers per 10,000 constituents	J11 / (C11/10,000)	56	13.0	28.7	0.5	300.8	8.1	31.4
Donors per 10,000 constituents	K3 / (C11/10,000)	70	105.9	130.4	0.7	1,143.4	42.0	133.9

Table 5. Successful Respondents (i.e., in top one-third of distribution of a success measure) by Maturity Stage, 2013

Maturity stage	Respondents in survey		Attendees per 10,000 constituents		Volunteers per 10,000 constituents		Donors per 10,000 constituents		Any two of the three success measures		All three success measures	
	(N)	%	(N)	(%)	(N)	(%)	(N)	(%)	(N)	(%)	(N)	(%)
Startup	6	7.6%	1	4.2%	1	5.0%	0	0.0%	1	7.1%	0	0.0%
Intermediate	47	59.5%	14	58.3%	9	45.0%	12	50.0%	8	57.1%	2	33.3%
Mature	26	32.9%	9	37.5%	10	50.0%	12	50.0%	5	35.7%	4	66.7%
Total	79	100.0%	24	100.0%	20	100.0%	24	100.0%	14	100.0%	6	100.0%

The facets of greatest difference in the operations already listed in the correlations table (Table 2), between successful institutions and the rest, are generally the same for all three success measures. Table 6 presents, for 29 of the survey variables, the median values for the top-third institutions on the three measures of success versus the other respondents.

As can be seen in Table 6, the top one-third of institutions put on more events and invited a higher percentage of constituents per event than other institutions. They also have larger budgets and more staff. In addition, more of their constituents receive invitations to reunions/events and attend them. They organize more reunions globally.

In general, the top one-third of successful institutions provide somewhat more programmes and benefits and have been offering a dedicated website and dedicated events longer than the other institutions. Notably, relative to the others, the top one-third of successful institutions, as measured by volunteers and donors, have half again as many years (13 versus 9) of offering volunteer opportunities and asking for financial support (Table 6). Again, time spent developing events and cultivating volunteers and donors leads to success; the long haul pays off.

Putting it all in perspective

Statistics can provide powerful support for our beliefs about how different phenomena relate to each other in the world, but they also need to be accompanied by some cautions over interpretation. The *r* values used here measure strength of association, which is not necessarily the same as a direct causal relationship: other intervening and unmeasured variables may explain some of the relationships found. A more complex statistical technique, like multiple regression analysis, might give a better picture of other relationships.

Many of the measures here are taken at the aggregate or group scale, and that is not the same as the individual mind of the alumnus or donor. We have uncovered “average relationships,” but the results of individual institutions may vary, and there is no deterministic outcome in the sense of a reunion automatically generating donors. We have also measured things that are easily measurable on a quantitative scale—number of emails, events, attendees, etc. Aspects like quality, satisfaction and personal experience are intangible factors that are just as important in determining future connectivity and engagement.

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- Join the stakeholder group to plan future surveys and network.

Contact: Carolee Summers-Sparks of CASE Europe, at summers-sparks@case.org for more information.

Table 6. Median Values on Key Variables for the Top Third and Others, 2013, All 79 Respondents

		MEASURES OF SUCCESS					
POTENTIALLY RELATED VARIABLES		Attendees per 10,000 constituents		Volunteers per 10,000 constituents		Donors per 10,000 constituents	
		G7 / (C11/10,000)		J11 / (C11/10,000)		K3 / (C11/10,000)	
		Top Third	Others	Top Third	Others	Top Third	Others
Database:							
With phone numbers per 10,000 cons.	C12 / (C11/10,000)	7,587	7,438	7,478	7,513	7,515	7,512
With mobile/cell numbers per 10,000 cons.	C13 / (C11/10,000)	2,772	2,819	2,535	2,828	2,737	2,800
With postal addresses per 10,000 cons.	C14 / (C11/10,000)	9,455	9,509	9,382	9,604	9,570	9,486
With email addresses per 10,000 cons.	C16 / (C11/10,000)	4,812	4,999	5,028	4,996	5,332	4,712
Programmes:							
Number of different programmes	D1 + ... + D13	9	9	10	9	10	9
Resources:							
Total operating budget	E4	£92,657	£76,250	£89,600	£80,061	£102,864	£74,224
Budget per 10,000 cons.	E4 / (C11/10,000)	£19,441	£10,357	£13,653	£11,206	£16,250	£10,727
FTE staff	E1	4.0	3.0	4.0	3.0	4.6	3.0
FTE staff per 10,000 cons.	E1 / (C11/10,000)	0.72	0.42	0.52	0.42	0.52	0.40
Communications:							
Issues of magazine a year	F1	2	1	2	1	2	1
Percent of constituents receiving magazine by post	F2 / C11	76%	80%	73%	80%	76%	78%
Percent of constituents receiving magazine electronically	F3/C11	1.3%	1.0%	0.3%	1.3%	1.2%	1.1%
Years offered dedicated e-newsletters	A6	5	6	6	6	7	5
Frequency of e-newsletter sent each year	F5	6	5	10	6	6	5
Pct of cons. recvg. e-newsletter	F6 / C11	43%	45%	43%	45%	49%	44%
Years offered dedicated website	A7	11	10	12	10	11	10
Events:							
* Years offering dedicated events	A5	12	13	16	13	17	12
Number of events	(G1 + G2 + G3)	49	24	37	25	38	26
Number of events per 10,000 cons.	(G1 + G2 + G3) / (C11/10,000)	6.5	3.2	6.1	3.5	4.5	3.4
Total expenditures per event	G12 / (G1 + G2 + G3)	£875	£556	£613	£556	£1,035	£486
Percent of cons. invited to events/reunions	G5 / C11	44%	24%	39%	24%	44%	22%
Percent of cons. attending events/reunions	G7 / C11	2.3%	0.6%	1.2%	1.0%	1.6%	0.9%
Reunions org'd globally by alumni, per 10,000 cons.	G8 / (C11/10,000)	2.10	0.63	2.26	0.60	2.09	0.60
Prof. devpt./career networking events, per 10,000 cons.	G9 / (C11/10,000)	0.28	0.35	0.36	0.31	0.42	0.26
Personal interest/hobby-based events, per 10,000 cons.	G10 / (C11/10,000)	0.90	0.16	0.71	0.17	0.43	0.24
Holiday/excursion events, per 10,000 cons.	G11 / (C11/10,000)	0.14	0.00	0.65	0.00	0.06	0.00
Benefits:							
Number of member benefits offered	I1 + ... + I19	12	11	12	11	12	11
Opportunities Offered:							
* Years offered volunteering opportunities	A8	12	9	11	9	12	7
Years members asked to support fundraising	A9	10	10	13	9	13	9
* Exclude case with 100 years or more							

How to Use This Table: Another way of asking about success is to identify institutions with successful alumni relations programmes and then to examine what they are doing more than anyone else. The survey group defines a successful AR programme as one in the top one-third of the distribution of survey results on one or more of the three success measures – number of attendees, number of volunteer and number of donors. This table presents, for 29 of the survey variables, the median values for the top-third institutions on those three measures of success versus the other respondents. For example, looking at successful programmes as measured by number of attendees, the top one-third have more mobile/cell numbers recorded in their databases than do the other programmes.