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case.org

CASE Global Alumni Engagement Metrics (AEM) Survey

Guidance Documentation

TAKING PART IN THE AEM SURVEY

There is no charge for institutions to submit data using CASE's survey tool. All CASE members, as a benefit of membership, will have complimentary access to survey results using CASE's online reporting tool, AMAtlas Data Miner. This reporting tool will allow you to see your own institution's data, to see any other submitting institution's data, and to select and save a group of peers and/or aspirational peers in order to see your data aligned with others'. Institutions who have never been CASE members who take part in the survey will be provided with complimentary trial access to Data Miner (and other CASE member benefits) for a 6-month period.

All participating institutions, thereby, are agreeing to share their data with other institutions; the data will not be anonymized when shared. Participating institutions agree not to share any other institution's data with third parties or in the public domain. CASE will only share aggregate anonymized information in the public domain.

In addition to access to the results via Data Miner, members will also receive a customized Graphical Program Summary (GPS) Report, which depicts your results visually compared to a specific set of peer institutions (which will be anonymized). Following analysis of the survey data by CASE staff, your institution's unique GPS report will be uploaded to Data Miner.

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INTRODUCTION TO THIS YEAR'S SURVEY

The CASE Global Alumni Engagement Metrics (AEM) Survey, 2020, marks the second year of data collection for CASE's alumni engagement metrics framework. This framework is laid out in a White Paper[1] drafted by a global task force of alumni relations professionals appointed by the CASE Commission on Alumni Relations. The White Paper defines engagement as: *"Activities that are valued by alumni, build enduring and mutually beneficial relationships, inspire loyalty and financial support, strengthen the institution's reputation and involve alumni in meaningful activities to advance the institution's mission."*

Subsequently, a beta group of institutions was formed to refine the framework using input from representatives of CASE's global membership, including both alumni relations and advancement services professionals. That work resulted in the launch of this survey in 2019.

This is a global survey, and CASE has tried to frame language in this guidance document and in the survey tool in such a way to make it relevant and useful for programs representing our international membership. If you do not recognize a phrase, you might reasonably assume it is because it reflects language in a geographic region different from your own.

What's New

This year, CASE continued to engage with a global task force of volunteers, who prioritized revisions to increase transparency in understanding data captured and would enable a wider group of institutions to take part, even if capturing alumni engagement is relatively nascent. Specific enhancements for this data collection cycle include:

- Creation of a Minimal Version of the survey
- Addition of confidence level question
- Impact of virtual events on engagement
- Refinement of Communication Mode
- A new section on operations and technology resources

[1] Alumni Engagement Metrics White Paper, https://www.case.org/system/files/media/file/CASEWhitePaper_AlumniMetrics%20AUG18.pdf

Benefits of Taking Part

The AEM survey is designed to provide a simple way to capture various types of alumni engagement on an annual basis. These metrics can be applied across the broad range of CASE member institutions in more than 80 countries.

The survey results:

- Provide data to inform unified measures of alumni engagement, such as the percentage of alumni engaged in at least one mode. While CASE seeks to build a methodology for comparison, engagement may include indicators beyond what is included here as well as activities that may never be collected in your system. Therefore, measures of engagement are indicative rather than definitive.
- Provide longitudinal data sets as surveys continue.
- Enable participating institutions to measure and compare metrics across global peers and aspirational peers year-over-year.
- Provide data to inform initiatives supporting educational advancement.
- Help institutional leaders set goals, assess performance, build capacity, and make informed, strategic decisions regarding investments in advancement.

The primary goal is to provide a set of measures than can show us the impact of alumni engagement on our institutions. To do that, we must start here, by measuring engagement activities themselves. As this practice becomes embedded, we can take the next step to measure why these activities are important, and therefore assess whether we, as leaders at our institutions, are doing the right things to facilitate alumni support for our institutional goals.

AMAtlas Staff

Questions may be addressed to AMAtlas staff at aem@case.org.

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SURVEY INSTRUCTIONS

When you or a representative from your institution completes the *CASE Global Alumni Engagement Metrics s*urvey online through CASE's survey tool, the tool automatically will associate the individual completing the survey with their institution. CASE recommends that one person per institution be selected to enter data into that institution's survey. Contact aem@case.org to review and make changes to the AEM survey contact(s) for your institution.

Check the box that says, **"We will complete the survey this year"** to signal your intention to participate and activate your AEM survey for data input. When you are done entering data, you should check the box that says, **"We are done with the survey,"** to officially submit your completed survey.

Based on feedback from last year's survey, we have added a new, Minimal Version of the survey that is designed for institutions who do not *yet* have the level of detail to complete alumni categories, modes of engagement, and cross-tabulations of multiple modes of engagement in full. Please complete the Minimal Version only if you are not able to provide inputs both for alumni counts *and* complete the modes of engagement for each category of alumni. To schedule an appointment for an overview of the survey or to discuss which survey version would best suit your institution, contact us at aem@case.org.

The AEM survey consists of three sections:

Section 1 – Alumni Counts and Alumni Relations Inputs
The first section (Full and Minimal Versions) collects alumni counts in a variety of categories, alumni relations staffing and expenditures, and basic information about your alumni association, fiscal year, local currency, and any engagement software you use.

Section 2 – Modes of Engagement
The second section (Full and Minimal Versions) collects counts of alumni in the various modes of engagement and in combinations of modes. There are four modes of engagement as defined by the Alumni Engagement Metrics Task Force: Philanthropic; Volunteer; Experiential; and Communication. This guidance document provides definitions and descriptions of what to include in your institution's alumni counts for each of the above modes.

Section 3 – Operations and Technology
Section 3, new in 2020, collects information about your systems in place and operational resources at your institution. This section is identical for both the Full and Minimal Versions of the survey.

Note that we only are collecting data at the institutional level; for higher education institutions, for example, we are not gathering data for individual schools, colleges, or faculties.

Important: You cannot skip required questions. If you do not have alumni who meet the criteria, you must enter a "0" instead of a blank. For optional questions, leaving a field blank means you are skipping the question; if you enter a "zero," that is interpreted to be an answer of "0" to the question.

For all submitted data, we are collecting data as of the end of your **institution's most recently completed fiscal year.**

SECTION 1: ALUMNI COUNTS AND ALUMNI RELATIONS INPUTS

There are three questions in the Alumni Counts and Alumni Relations Inputs portion of the survey:

- Question 1. Alumni Counts - REQUIRED
- Question 2. Alumni Relations Inputs - OPTIONAL
- Question 3. Alumni Relations Additional Details - REQUIRED

Guidance for completing these survey questions is provided in Sections 1.1 through 1.3 below.

1.1 ALUMNI CATEGORY DEFINITIONS

In all sections of the survey, alumni are defined and numbered as described as:

Former students of the institution. This population includes current students who previously received a credential but are currently engaged in further study—for example, an individual who received an undergraduate degree and who is currently working on a graduate degree.

Each individual should be counted in only one category – the last level completed or achieved at your institution. Counts provided should be as of the end of your most recent completed fiscal year. These categories include alumni who earned a credential on premise or online.

We recognize that these definitions are different than those currently used in other CASE surveys. Our goal is to ultimately consolidate these definitions so that we have only one set of definitions across all CASE survey instruments.

We do not expect every institution to provide a count in every one of the degree categories. Only provide counts for those that are relevant for your institution. For example, if your school primarily offers undergraduate degrees, you may only have counts for Categories 3, 6, and 8 on the Full Version of the survey, listed below. If you are at an independent school, you will only have counts for Categories 1, 5, and 8 on the Full Version (make sure to review the categories specific to independent schools). As you review, note the addition of several auto-totals. You do not need to fill in these columns, as they will auto-complete as you fill out the survey. Review Appendix A (Higher Education) or Appendix B (Independent Schools) for a visual representation of alumni categories.

1.1.1 FULL VERSION

Alumni Categories: Higher Education

If you are completing this survey for an independent school, skip to Alumni Categories: Independent Schools

Category Number	Category Name	Description
2	Associate Degreed	For geographies that award Associate's Degrees, Technical Diplomas and/or Diploma Programs (e.g., Australia, Canada, Hong Kong, the Netherlands, and the US, among others) and

		for geographies that award Diplomas and Certificates (e.g., the UK, among others) or a Higher National Diploma (e.g., the UK among others): Individuals who hold one or more of these types of qualifications, but no other type of qualification. Include alumni meeting the requirements of an Associate's Degree, whether or not the student has elected to be awarded the degree.
3	Undergraduate Degreed	Individuals who hold one or more undergraduate degrees, but no other type of degree, diploma, or certificate. Please count only the individuals who received a Bachelor's degree(s) at your institution. If the individual received any additional degree or certification in another category from your institution, count them in Category 5, "Multiple-Degreed."
4	Postgraduate Degreed	Individuals who hold one or more professional or graduate degrees (e.g., MBA, PhD, etc.) and/or a post-graduate Diploma or Certificate, but no other type of degree or certificate. Please count only the individuals who received Postgraduate degree(s) at your institution. If the individual received any additional degree or certification in another category from your institution, count them in Category 5, "Multiple-Degreed."
5	Multiple Degreed	Count any individual who meets the criteria of more than one category as Multiple-Degreed.
6	Certificate or Award	Individuals who received an award or credential and who are not counted in any of the preceding categories. Included in this category would be those who received any professional certifications and industry-recognized credentials.
7	Total Degreed or Diploma-Holding	A sum of individuals in Categories 1-6 that auto-totals in the survey for the Full Version.
8	Non-Graduates	Individuals who completed at least one term or one semester or at least one degree-credit course in a degree-granting program with passing grades, but who are not counted in any of the preceding categories. Includes students who transferred to another institution prior to meeting degree requirements.
9	Other	This can include honorary graduates (e.g., the only degree from your institution is an honorary one), post-docs, visiting students—such as study abroad students—and any other individual your institution considers an alumnus/a not already counted in another category. *It is highly unlikely that the majority (or all) of your alumni fall into the "other"*

		category. If so, please check with aem@case.org to confirm placement.
10	Total Non-Degreed	A sum of individuals in Categories 8 and 9 that auto-totals in the Full Version of the survey.
11	Total All Alumni	A sum of individuals in Categories 7 and 10 (Total Degreed and Total Non-Degreed) that auto-totals in both the Full and Minimal Versions of the survey.

Alumni Categories: Independent Schools Only If you are completing this survey for a Higher Educational Institution, skip to the next section.

For independent schools completing the Full Version of the AEM survey, some questions may arise regarding which category applies to an alumnus/a. Independent schools that offer primary and/or secondary education generally operate under a division structure (i.e., Lower School, Middle School, and Upper School). The table below provides guidance on how to assign independent school alumni to the appropriate Alumni Category based on: (1) the school's educational offerings (i.e., primary, secondary, or both) and (2) the alumnus/a's achievements during the period enrolled.

For reference, the terminal grade is defined as the highest-level education offered by a school.

Category Number	Category Name	Description
1	Secondary Diploma or Certificate	Includes individuals who earned one credential, the highest level available at the school. The following outlines who should be counted in this category: ○ If a secondary diploma is earned upon completion of the terminal grade of the school (i.e., the school operates an Upper School), include anyone who received a secondary diploma, but did not complete the requirements for any other division operated by the school (i.e. Lower and/or Middle School). If the alumnus/a also completed the requirements for any other divisions operated by the school, count them in Category 5 (Multiple Degreed). ○ If a secondary diploma is NOT earned upon completion of the terminal grade of the school (i.e., the school does not operate an Upper School): ▪ And your school operates a Lower School division only: include anyone who completed the requirements for the terminal grade of the Lower School division.

		▪ And your school operates Lower and Middle School divisions, include anyone who completed the requirements for the terminal grade of the Middle School division. If the alumnus/a also completed the requirements of the Lower School division, count them in Category 5 (Multiple Degreed).
5	Multiple Degreed	Includes individuals who earned multiple credentials at your institution. The following outlines who should be counted in this category: ○ If a secondary diploma is earned upon completion of the terminal grade of the school (i.e., the school operates an Upper School), include any alumnus/a who received a secondary diploma and completed the requirements for any other division operated by the school (i.e. Lower and/or Middle School) ○ If a secondary diploma is NOT earned upon completion of the terminal grade of the school (i.e., the school does not operate an Upper School), include any alumnus/a who completed the requirements of both the Lower and Middle School divisions.
7	Total Degreed or Diploma-Holding	A sum of individuals in Categories 1 and 5 auto-totals in the Full Version of the survey.

8	Non-Graduates	Individuals who completed at least one term or one semester, but did not earn a credential:
		○ If a secondary diploma is earned upon completion of the terminal grade of the school (i.e., the school operates an Upper School) and the school operates two (Middle and Upper) or three (Lower, Middle, and Upper) divisions, include anyone who did NOT receive a secondary diploma and did not complete the requirements for any other divisions operated by the school.
		    ○ *Example*: For a Pre-K – grade 12 school, where the Lower School operates from Pre-K through grade 5 – alumnus/a enrolled from K through grade 4; did not complete grade 5.
		    ○ *Example*: For a grade 6 – 12 school, where the Middle School operates from grades 6 through 8 – alumnus/a enrolled only for grades 6 and 7; did not complete grade 8.

		○ A secondary diploma is earned upon completion of the terminal grade of the school (i.e., the school operates an Upper School) and the school operates an Upper School division only, include anyone enrolled in any grade (i.e., 9, 10, 11, or 12), but did not receive a secondary diploma. ○ A secondary diploma is NOT earned upon completion of the terminal grade of the school (i.e., the school does not operate an Upper School): ○ If the school operates a Lower School division only, include anyone who did not complete the requirements for the terminal grade of the Lower School division. ▪ Example: For a Pre-K – grade 12 school, where the Lower School operates from Pre-K through grade 5 – alumnus/a enrolled from K through grade 4; did not complete grade 5. ○ If the school operations Lower and Middle School division, include anyone who enrolled, but did not complete the requirements for the terminal grade of either division. ▪ *Example*: For a grade 6 – 12 school, where the Middle School operates from grades 6 through 8 – alumnus/a enrolled only for grades 6 and 7; did not complete grade 8.
10	Total Non-Degreed	A sum of individuals in Categories 8 and 9 that auto-totals in the Full Version of the survey. (note that independent schools will not have data in Category 9 so this will show the same amounts as Category 8)
11	Total All Alumni	A sum of individuals in Categories 7 and 10 (Total Degreed and Total Non-Degreed) that auto-totals for both the Full and Minimal Versions of the survey.

1.1.2 MINIMAL VERSION

The Minimal Version asks for an aggregate of the categories outlined above. This is ideal if your institution cannot disaggregate alumni categories overall or by mode of engagement.

Category Number	Category Name	Description
1	Degree or Diploma-Holding	An aggregate count of Individuals who are defined in Categories 1, 2, 3, 4, 5, and 6 as noted in the Full Version of the survey above.
2	Non-degreed or Diploma-Holding	An aggregate count of Individuals who are defined in Categories 8 and 9 as noted in the Full Version of the survey above.
3	Total All Alumni	A sum of individuals in Categories 1 and 2 of the Minimal Version that auto-totals.

1.2 ALUMNI COUNTS

(Required for both versions of the survey)

In this section of the survey, enter the number of Living Alumni, Opted Out, and Legally Contactable reflected in each alumni category.

This applies to Question 1 of the Alumni Counts Inputs portion of the survey.

1.2.1 LIVING ALUMNI

An individual who is not marked as deceased on your files, whether or not you have contact information, as of the close of your most recent fiscal year.

1.2.2 OPTED OUT

An individual who is not marked as deceased, and for whom you have contact information (email, postal mail, or telephone number), but who has asked not to be contacted for any purpose, by any method. If the institution has opted-out a constituent, that individual should also be included here. Opted out counts should be as of the close of your most recent fiscal year. Please do not include individuals in this category who are major donors/prospects and have opted out of mass solicitation. These alumni should be included in your Legally Contactable counts.

1.2.3 LEGALLY CONTACTABLE

An individual who is not marked as deceased, for whom you have a means of contact, and who does not have a total (for all purposes and by all means) no contact status. Because of privacy laws that differ by country, individuals may specifically need to provide opt-in consent to allow the institution to be in touch with them. In those cases, only individuals who provided such consent should be counted here as Legally

Contactable. Another way to interpret this definition is that there is nothing that restricts you from legally contacting this person because a) you have at least one of the three means of contact, b) the person is not marked as fully opted-out, and/or c) the institution would be compliant with applicable law should it contact the individual.

Note About Legally Contactable: Please limit your count of Legally Contactable alumni to individuals for whom you have one or more of the following means of contact: email, postal mail, or telephone number. For the purposes of this survey the ability to contact via social media (Twitter, Facebook, Instagram, etc.) without another method of contact is not sufficient to meet the definition of Legally Contactable.

Alumni Counts and Inputs - Question 1. (Required) - Full Version example from Survey

Enter valid data for each row of alumni appropriate to your institution. If your institution does not have alumni within a specific category, enter "0" for that row(s).

Alumni Counts				
Row	**Category**	**Living Count**	**Opted-Out Count**	**Legally Contactable Count**
1	Secondary Diploma Degreed			
2	Associate Degreed			
3	Undergraduate Degreed			
4	Postgraduate Degreed			
5	Multiple Degreed			
6	Certificate or Award			
7	Total Degreed or Diploma-Holding	*Survey will auto-total*	*Survey will auto-total*	*Survey will auto-total*
8	Non-Graduates			
9	Other			
10	**Total Non-Degreed**	*Survey will auto-total*	*Survey will auto-total*	*Survey will auto-total*
11	**Total All Alumni**	*Survey will auto-total*	*Survey will auto-total*	*Survey will auto-total*

Alumni Counts and Inputs - Question 1. (Required) - Minimal Version example from Survey (NEW in 2020)

Alumni Counts				
Row	**Category**	**Living Count**	**Opted-Out Count**	**Legally Contactable Count**
1	Degreed or Diploma-Holding Alumni			
2	Non Degreed/Non Diploma			
3	**Total All Alumni**	*Survey will auto-total*	*Survey will auto-total*	*Survey will auto-total*

1.3 ALUMNI RELATIONS INPUTS

Alumni Relations Inputs seek to identify the staff size and expenditures specific to the Alumni Relations function(s) at your institution (Question 2) and some additional details about your school's alumni association, fiscal year, and reporting currency (Question 3). The questions are the same for both versions of the survey.

This applies to Question 2 of the Alumni Counts and Inputs portion of the survey.

1.3.1 STAFF

We are seeking a count of full-time equivalents (FTEs), including both salaried and hourly employees. Staff specifically identified as advancement staff (regardless of where they report) should be allocated to alumni relations on a percentage basis, based upon the work they do. For example, someone who is a full-time alumni relations staff-person should be counted as 1. Alternatively, if someone works in advancement and is split 50/50 between alumni relations and fundraising; that individual should be allocated as 0.5 in this calculation, regardless of whether the person actually reports to alumni relations, the central advancement office, president or vice-chancellor, dean, foundation, career services, or association. Individuals who are not considered advancement staff, but who may spend some time on alumni relations (such as a faculty member) should not be counted in this total. Temporary staff or volunteers such as student callers, individuals who help with mailings, or those who work at fundraising/alumni events should not be included.

As you calculate staff FTE, please include partial percentages. For example, a person who works for one month out of a full twelve months in alumni relations, would be counted here as 8.3% of an FTE.

1.3.2 EXPENDITURES

The measurement of alumni relations expenditures should only include the staff and non-staff direct costs involved in alumni relations activities. Thus, the costs to be included here should be the costs of staff expenditures, and other programming and operational costs that comprise the alumni relations function.

Report the actual expenditures incurred for the fiscal year, not the original budget. For the purposes of these expenditure questions, costs **exclude** the indirect costs associated with alumni relations. For example, exclude academic staff and administrative staff who may sometimes play a role in alumni relations and who are NOT included in the staff FTE calculation, the costs associated with the recruitment of students, or the promotion of the research activities of your institution.

Please use your institution's domestic currency when submitting financial information. The input fields are numeric in format and will not have a currency symbol. You will be separately asked for the three-digit abbreviation for your domestic currency. Contact aem@case.org if you do not know the three-digit abbreviation for your currency.

Alumni Counts Inputs - Question 2. (Optional for both versions of the survey) - Alumni Relations Staff and Expenditures Inputs

A. Alumni Relations Staff FTEs	B. Alumni Relations Staff Cost	C. Alumni Relations Staff Benefit	D. Alumni Relations Technology Cost	E. Alumni Magazine Cost	F. Non-Technology Cost

A. **Alumni Relations Staff FTEs:** Report the number of alumni relations staff FTEs as described in Section 1.3.1.

B. **Alumni Relations Staff FTE Salary Expenditures:** Allocate to the FTEs reported the amount paid in salary, in proportion to the time the person spends on alumni relations.

C. **Alumni Relations Staff FTE Benefits Expenditures. (NEW in 2020!)** Report the benefits paid by the institution for the Alumni Relations Salary Expenditures in the previous question. These benefits usually include social security; medical, disability, and life insurance; and/or retirement plan contributions (likely applicable in the US. If outside of the US you may not have any additional benefit information). Professional staff benefits may also include car allowances, housing subsidies, memberships, and other perquisites.

D. **Technology Expenditures**: These costs should include those for which alumni relations is directly responsible, whether they are paid directly to a vendor or paid internally to another institutional department by alumni relations for the use of a technology product. Technology costs might include CRM platforms, mobile applications, career mentoring platforms, email marketing, or website hosting, among other things. Do not calculate your own technology allocations if you do not actually incur the expense. For example:
   - if alumni relations pays vendor "x" directly for an email marketing platform, those costs should be included in this technology bucket.
   - if the advancement department pays vendor "x" for an email marketing platform, and 50% of that fee is paid out of the alumni relations budget, that 50% should be included in this bucket
   - if the advancement department pays vendor "x" for an email marketing platform, and no portion of it is paid for out of the alumni relations budget, you would NOT include any of the costs in this bucket.
   - If the cost of operating and maintaining an enterprise or alumni relations specific CRM or other system is paid by a central IT or advancement function and not charged back to the alumni relations budget those costs should not be included in this bucket.

E. **Alumni Magazine Expenditures:** Include direct costs associated with non-staff expenditures on designing, creating, digital or print publishing, and mailing alumni magazines if the alumni magazine expenses come out of the alumni relations budget. Do not include newsletters in this category (these should be captured under Program and Non-Technology). If your magazine is done in-house you may have $0 reported in this category, particularly if material costs do not come out of your budget.
F. **Program and Non-Technology Expenditures:** All program and non-technology costs include newsletters, graphic design fees, outside/external consulting services, events expenses, staff travel and other operating expenses, and printing and mailing expenses (excluding those relating to alumni magazines). Do not include any fees that are paid by for rent for use of office space.

1.3.3 ALUMNI RELATIONS ADDITIONAL DETAILS

(Required for both versions of the survey)

This applies to Question 3 of the Alumni Counts and Inputs portion of the survey.

Dues-paying Alumni Association: Is your Alumni Association dues-paying? Only respond Yes if there is an over-arching, institutional alumni association. The count of participants in the association will be included in the Experiential Mode of engagement. Do not respond Yes if you only have school/college/regionally/special interest-based dues-paying associations.

Fiscal Year End: In what month does the fiscal year on which you are reporting end? The online survey will ask that you spell out the full name of the month.

Currency: What is the currency you are using for reporting purposes? The online survey will ask for the three-letter abbreviation of that currency (e.g., AUD, CAD, EUR, USD, etc.). Contact aem@case.org if you do not know the abbreviation for your currency.

SECTION 2: MODES OF ENGAGEMENT

There are four questions in the Modes of Engagement portion of the survey:

- Question 1. Summary of Alumni Engagement – REQUIRED
- Question 2. Combinations of Engagement - OPTIONAL
- Question 3. Confidence Levels - REQUIRED
- Question 4. Engagement through Virtual Events - OPTIONAL

Guidance for completing these survey questions is provided in Sections 2.1 through 2.4 below.

2.1 MODES OF ENGAGEMENT DEFINITIONS

Section 2 asks for counts of alumni across four modes of engagement: philanthropic, volunteer, experiential, and communication. The definitions provided for each mode of engagement are from the Alumni Engagement Metrics White Paper, August 2018. We recommend taking part in the survey, even if you do not capture extensive data for each of these modes. A new question has been added to this section that speaks to the comprehensiveness of the data captured at your institution for Volunteer, Experiential, and Communication Modes. Unlike simply counting gifts, data collected is an approximation of activities overall. As you review definitions, you may have questions about other programs you have at your institution that are not specifically referenced here. Use your best judgement as to where to include them or, if you are not sure, contact aem@case.org.

- Data in all four modes is required for the Full Version of this survey.

- The Minimal Version does not require data for the Communication Mode.

For each of the four modes, provide a count of alumni who engaged at any point within the most recent completed fiscal year.

2.1.1 PHILANTHROPIC

"Financial support that is meaningful to the donor and supports the institution's mission and strategic goals."

This should be an unduplicated count of individuals in each alumni category who received either a legal credit, hard credit, direct contribution credit, soft credit, or recognition credit, inclusive of outright gifts and pledge payments. You may also include gifts-in-kind or gifts of real or tangible property, as well as the following planned gifts: gifts of life insurance or premiums paid to support those, when the institution is the owner and beneficiary of the plan; the tax deduction allowed for newly established charitable remainder trusts, charitable gift annuities, and pooled-income funds. Also count gifts from IRAs. Bequest/legacy intentions and/or realized bequests/legacies should NOT be counted (see the note below).

Soft or recognition credit for philanthropic support might include a gift jointly made with someone else, or a gift made through a family foundation, a privately-held corporation, or a donor advised fund. In summary, if, in your advancement system of record, you have given an individual soft or recognition credit for a transaction, that individual should be counted here.

Each individual should be counted only once. If a single individual received legal, hard, or direct contribution credit for more than one philanthropic contribution and/or received more than one recognition or soft credit, they would be counted only once. The counts are regardless of the size and/or purpose of the philanthropic gift(s).

Specifically excluded from these counts would be:

- An individual who only made a pledge (including bequest and/or legacy pledges) in the reporting year
- Individuals whose matching gift company made a gift or for whom a Gift Aid gift was received in the reporting year against a gift made by the individual in a preceding year, unless the individual made or received separate credit contributions in the reporting year
- Deceased individuals from whose estate legacy cash has been received
- The individual sponsors of a collecting donor individual undertaking a sponsored activity such as a marathon if the money for a sponsored activity is not paid directly to the institution.

2.1.2 VOLUNTEER

"Formally defined and rewarding volunteer roles that are endorsed by and valued by the institution."

This should be a unique count of individuals in each alumni category who participated in one or more volunteer activities. Count each person only once, even if an individual participated in more than one volunteer activity.

Specifically included in this count would be individuals who participated in any of the following activities as examples:

- governing or advisory board members
- volunteer fundraisers, such as class agents/gift officers, major gift solicitation volunteers, online ambassadors
- officers (e.g., chair, deputy chair, treasurer, secretary) in a group that is endorsed by the institution
- activity/event host or organizer

- student recruitment activities
- career mentors
- public advocates
- classroom and/or commencement speakers (that are unpaid)
- interviewed for an alumni profile, regardless of whether that profile ultimately was published
- social media (blog, Instagram, Twitter, etc.) 'take-over' volunteers
- Other volunteer roles that meet the Alumni Engagement Metrics White Paper definition as noted above.

If you have volunteer programs but have not been capturing the start and end date of when someone is a volunteer in a specific program, make your best estimate of the count for the current year for the purpose of this Mode. We suggest you begin tracking start and end dates.

You may have staff who also are alumni volunteers and that, sometimes, it is unclear as to whether a specific role they are playing is in the staff or volunteer capacity; we leave it to you to best determine how and when to count these individuals as fulfilling volunteer roles.

2.1.3 EXPERIENTIAL

"Meaningful experiences that inspire alumni, are valued by the institution, promote its mission, celebrate its achievements and strengthen its reputation."

This should be a unique count of individuals in each alumni category who participated in at least one of the following examples of experiential activities. Count each person only once, even if an individual participated in more than one experiential activity. Currently, we are not interested in the number of events being conducted, only the number of alumni who are engaged in such events. The experiential mode is based on attendance at events. You will have an opportunity to include alumni who registered but did not ultimately attend as Communication Engagement.

- Fee-Based or Free Events, such as homecoming, reunion, campus-based events, regional/club/chapter/affinity-group events, community-focused events, lecture series (whether in-person or virtual), career services programming (whether in-person or virtual), alumni travel programs, athletics/sports-related events (see guidance below for attending athletic contests), donor recognition/stewardship events, campaign-related events (such as kickoffs or celebrations). This also includes any new categories of virtual programming that your institution may have implemented to engage with alumni this fiscal year as a result of COVID-19.
- Virtual Communities of the type that might be considered alumni benefits. These would include career communities, affinity group communities, book clubs, or similar. Do not include any LinkedIn or Facebook groups with non-specific/generic content
- Season Ticket Holders, such as for athletics/sport or cultural programming. Do not count individuals who had partial-season tickets or single-event tickets

- Dues-Paying Alumni Association Memberships, for which an individual must pay dues to a centrally managed alumni association in order to be a member. Do not count if all alumni are automatically considered members without making a dues payment. If you answered Yes to the Inputs question about having a dues-paying Alumni Association, you should count members in this Mode. Life members should be included. If there is a joint and/or family membership, count each of the included individuals who are alumni. If the membership transaction is only considered a philanthropic contribution to the institution, count the individual in philanthropic engagement, not here.
- Signing up for access to the libraries and lending privileges through paid or unpaid membership
- Meaningful, Substantive Contact includes those alumni who have participated in meaningful or substantive calls or in-person meetings for which a contact report has been captured and recorded. Count all purposes of contact, including cultivation, solicitation, or stewardship

Individuals who are counted as volunteers and who also participate in event roles specifically associated with those volunteer activities, should be counted in both the Volunteer Mode and the Experiential Mode. An example of this might be a career mentoring volunteer who also participated in an event related to career services programming.

Individuals who participated in more than one event or hold season tickets for more than one sport or cultural program should only be counted once. That is, if an individual has participated in two Fee-based Events or two Club/Chapter/Affinity Group Events, they are counted once.

While your institution may have many other Experiential programs that an individual took advantage of, only count those individuals involved in the programs articulated in this document. Over time, we expect this category to become inclusive and complex.

2.1.4 COMMUNICATION

"Interactive, meaningful and informative communication that supports the institution's mission, strategic goals and reputation."

This should be a unique count of individuals in each alumni category who have had some type of engagement via one of the following types of communication. Count each person only once, even if an individual participated in more than one communication engagement activity. This is likely the most difficult category for most institutions to report about. We recognize that your institution may not be tracking all these types of activities. We are still interested in your institution's information. Provide the counts you do have for alumni engaged in this Mode based upon these examples.

- Submitted class notes (regardless of whether they are submitted via postal mail or digitally)
- Submitted a form with, or some other provision of, data updates, such as address or employment information
- Responded to an alumni survey, such as for Net Promotor Score, or one that is attitudinal or demographic
- Submitted event evaluation

- Wrote one or more letters to the editor of alumni magazines, newsletters, and the like
- Email responses, direct messages, social media direct messages, or phone contact that are meaningful
- Responded to a call for nominations, awards, and the like
- Made likes or comments on owned digital content (e.g., content originally posted by the institution)
- Made likes or comments on original digital content (e.g., content originally posted by someone outside the institution)
- Posted to digital groups/forums (e.g., LinkedIn, Facebook, YouTube channels, closed communities), regardless of whether such content is positive or negative
- Re-Tweeted "owned" content (e.g., content originally posted by the institution)
- Tweeted or re-Tweeted original tweets in which the institution is mentioned or referenced, regardless of whether such content is positive or negative
- Posted original other social media content and/or reposted original other social media content in which the institution is mentioned or referenced, regardless of whether such content is positive or negative
- Clicking through on an email link **(NEW for inclusion in 2020)**
- Subscribing to a digital group/forum (e.g., LinkedIn, Facebook, YouTube, closed communities). Please note that this does not include alumni who simply belong to a digital group/forum but only the alumni who joined during the fiscal year. **(NEW for inclusion in 2020)**
- Registering, but not attending, an event. **(NEW for inclusion in 2020)**
- Downloading a podcast produced by your institution. **(NEW for inclusion in 2020)**

The Alumni Engagement Metrics survey does not consider the following as examples of 'interactive, meaningful and informative communication that supports the institution's mission, strategic goals and reputation.' As such, do not count these as types of communication engagement.

- Simply subscribing to an email list or opting-in for certain content
- Simply being on a list of those who were sent an email
- Simply opening an email
- Simply belonging to a digital group/forum (e.g., LinkedIn, Facebook, YouTube, closed communities)
- Simply having a printed publication mailed to an alumnus/a

While your institution may have many other communication touchpoints, the Alumni Engagement Metrics survey currently only qualifies those individuals involved in the programs articulated here. Over time, we expect this category to become inclusive and complex.

2.2 MODES OF ENGAGEMENT INPUTS

The Full Version requires data in all four modes of engagement.
*If your institution is completing the Minimal Version of the survey**, skip to Section 2.2.2: Minimal Version.*

2.2.1 FULL VERSION

The Full Version is a grid with the rows representing each of the alumni categories and the columns representing the four individual Modes of Engagement and combinations of engagement (some are required, others are optional). If you are unable to complete the level of detail requested on this section, CASE staff can set you up with the Minimal Version of the survey.

For each column, count the individual only once, even if they took part in multiple activities within each mode.

Modes of Engagement - Question 1. (Required) - Summary of Alumni Engagement

Columns A-D seek the number of individuals in each of the indicated Modes of Engagement. Treat each column as an individual question – for example, to provide the unduplicated count of volunteers, count all volunteers, regardless of whether they are engaged or not in the other three modes.

Column E seeks the number of individuals in ALL four of the Modes.

Finally, in **Column F**, count individuals who engaged in ANY of the four Modes—one or more than one. Count each person only once. This column will yield the total unduplicated number of alumni who were engaged in at least one Mode. Even if someone engaged in more than one Mode, count an individual just once in Column F.

Someone can be counted in more than one column. For example, if someone engaged in all four Modes, they would be counted in every column of the row for his or her alumni category. The survey also has error checks built in that will warn you if your columns are larger or smaller than expected, based on your inputs for each Mode. The error checks run automatically when you try to mark your survey done and can also be run manually from a link on the survey menu.

Modes of Engagement - Question 2. (Optional) - Combinations of Engagement

Columns A-F seek the number of individuals engaged in the two Modes indicated. Someone must have been engaged in both the Modes in the column to be counted. For example, in Column A, count individuals who engaged both in Philanthropic and Volunteer activities, not one or the other.

Columns G-J seek the number of individuals engaged in all three of the indicated Modes.

While Question 2 is optional, it provides opportunities to analyze and benchmark deeply engaged alumni.

Refer to Appendix C for a Sample for the Full Version (sample numbers filled in for reference).

2.2.2 MINIMAL VERSION

If your institution is taking part in the Full Version of the survey, skip to Confidence Levels, Section 2.3

Section 2 on the Minimal Version of the survey is a basic grid, with the rows representing the two rolled-up alumni categories, Degreed or Diploma and Non-Degreed/Non-Diploma, and the columns representing the four individual Modes of Engagement and combinations of engagement (some are required, others are optional).

For each column, count the individual only once, even if they took part in multiple activities within each mode.

Modes of Engagement - Question 1. (Required, except Column D, Communication) - Summary of Alumni Engagement

Columns A-C seek the unduplicated number of individuals engaged in each of the indicated Modes of Engagement (Philanthropic, Volunteer, and Experiential). Treat each column as an individual question – for example, to provide the unduplicated count of volunteers, count all volunteers, regardless of whether they are engaged or not in the other three modes.

Column D seeks the unduplicated number of individuals engaged via Communication and **is optional**.

Column E seeks the number of individuals who engaged in all four of the modes (P+V+E+C). If you do not capture data for the Communications Mode, this column should include anyone engaged in P+V+E.

Column F counts individuals who engaged in ANY of the four Modes—one or more than one (P or V or E or C). Count each person only once. This column will yield the total unduplicated number of alumni who were engaged in at least one Mode. Even if someone engaged in more than one Mode, count an individual just once in Column F.

Someone can be counted in more than one column. For example, if someone engaged in all four basic Modes, they would be counted in every column of the row for his or her alumni category. The survey also has error checks built in that will warn you if your columns are larger or smaller than expected, based on your basic inputs for each mode. The error checks run automatically when you try to mark your survey done and can also be run manually from a link on the survey menu.

Modes of Engagement - Question 2. (Optional) - Summary of Type of Engagement

This question seeks:

- the number of alumni who are engaged as donors, but not in other ways (Column A)
- the number of alumni who engaged in other ways, but not as donors (Column B)

For this question, Optional Column A (Question 2) will be a subset of Required Column A (Question 1).

Optional Column B asks for alumni engaged as Volunteers, Experientially, or through Communications but NOT as Donors and is also a subset of Required Column B (Question 1).

These two data points can be very useful in determining strategies for two alumni groups behaving and engaging in very different ways.

Refer to Appendix D for a Sample for the Minimal Version (sample numbers filled in for reference).

2.3 CONFIDENCE LEVELS (new!)

(Required for both versions of the survey)

This applies to Question 3 of the Modes of Engagement portion of the survey.
This year's survey includes a new question that measures how confident you are that the counts you provided are a comprehensive representation of alumni activities. This added information provides transparency and context to your counts by Mode. Here are some scenarios for guidance:

- If your institution captures minimal data for Volunteer, Experiential, and/or Communications Modes, you should enter Not Very Confident (3) in the respective Mode. Similarly, if you are completing the Minimal Version of the survey and leaving Communications blank, you should enter Not Very Confident (3) for the Communications Mode.
- If your institution collects volunteer information centrally, but you know that substantial activity happens through the units, faculties or colleges you would likely enter Somewhat Confident (2) to indicate your approximation of the activities you currently capture.
- If your institution hosts 400 events annually but you only have access to data for 200 of those events, you should enter Somewhat Confident (2) for the Experiential Mode.
- If you are able to capture *most* of the data points within any Mode, then enter Confident (1), understanding that you will likely never capture 100% of any one category.

Modes of Engagement - Question 3. (Required for both versions of the survey) – Confidence Levels

For each Mode, note how confident you are that the data captured is comprehensive and representative of your efforts. **1: Confident** **2: Somewhat Confident** **3. Not Very Confident**	
Volunteer	1, 2 or 3
Experiential	1, 2 or 3
Communications	1, 2 or 3

2.4 ENGAGEMENT THROUGH VIRTUAL EVENTS (new!)

(Optional for both versions of the survey)

This applies to Question 4 of the Modes of Engagement portion of the survey.

This year's survey includes a new question about virtual events. Digital engagement in itself is a channel that could be applied to all modes. However, Modes of Engagement

Question 4 is specific to virtual engagement through events, particularly in response to the number of institutions who transitioned in-person programming to virtual in response to the COVID-19 pandemic.
Categories are defined as:

- Attended at least one virtual event – count the number of individuals who took part in at least one event where all aspects of the event were virtual during the most recent fiscal year.
- Attended at least one in-person event – count the number of individuals who took part in at least one in-person event during the fiscal year. If an in-person event has a component of it that is virtual, that event is still considered in-person.
- Attended both an in-person and virtual event – count the number of individuals who engaged through event attendance both online and in-person. By definition, individuals in this category engaged in at least two or more events with your institution during the most recent fiscal year.

Modes of Engagement – Question 4. (Optional for both versions of the survey) – Virtual Engagement through Events

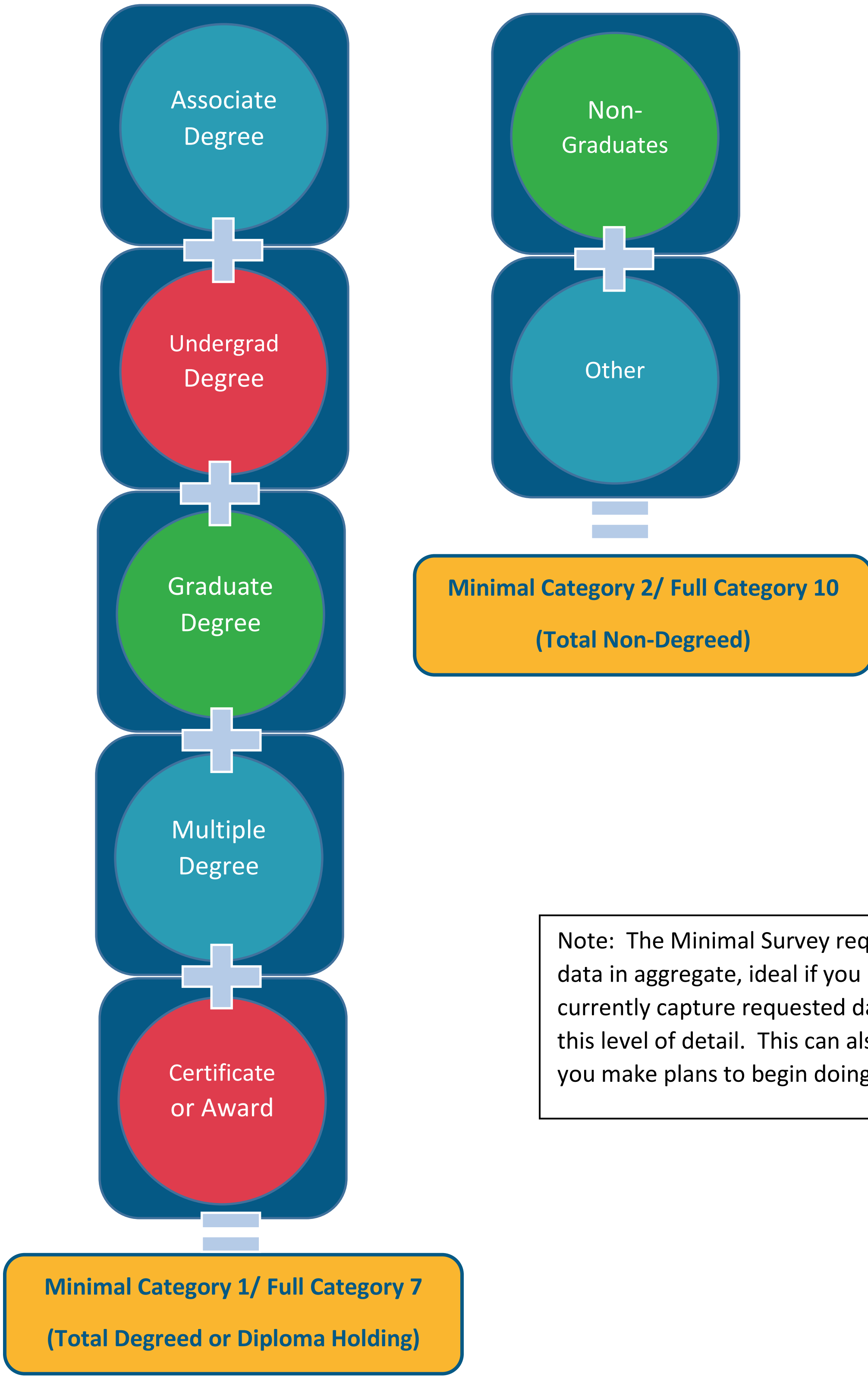
Virtual Engagement through Events	Attended at least one virtual event	Attended at least one in-person event	Attended both an in-person and virtual event
In each column, provide a count of the number of alumni who were engaged in events throughout the fiscal year in each of the three categories			

SECTION 3: OPERATIONS AND TECHNOLOGY (new!)

Section 3 is identical for both the Full and Minimal Versions of the survey. The following questions provide insight and context to your institution's ability to capture, track, report, and analyze Alumni Engagement as well as what resources from a staffing perspective are available operationally. For software, please list all products used to capture and track Alumni Engagement, manage events, social monitoring, communications platforms, business intelligence solutions and your CRM or database of record. If you use a homegrown platform in lieu of a vendor-provided solution, please note that as well and indicate that it is homegrown. When listing your products, please provide the Product Name without the version or release.

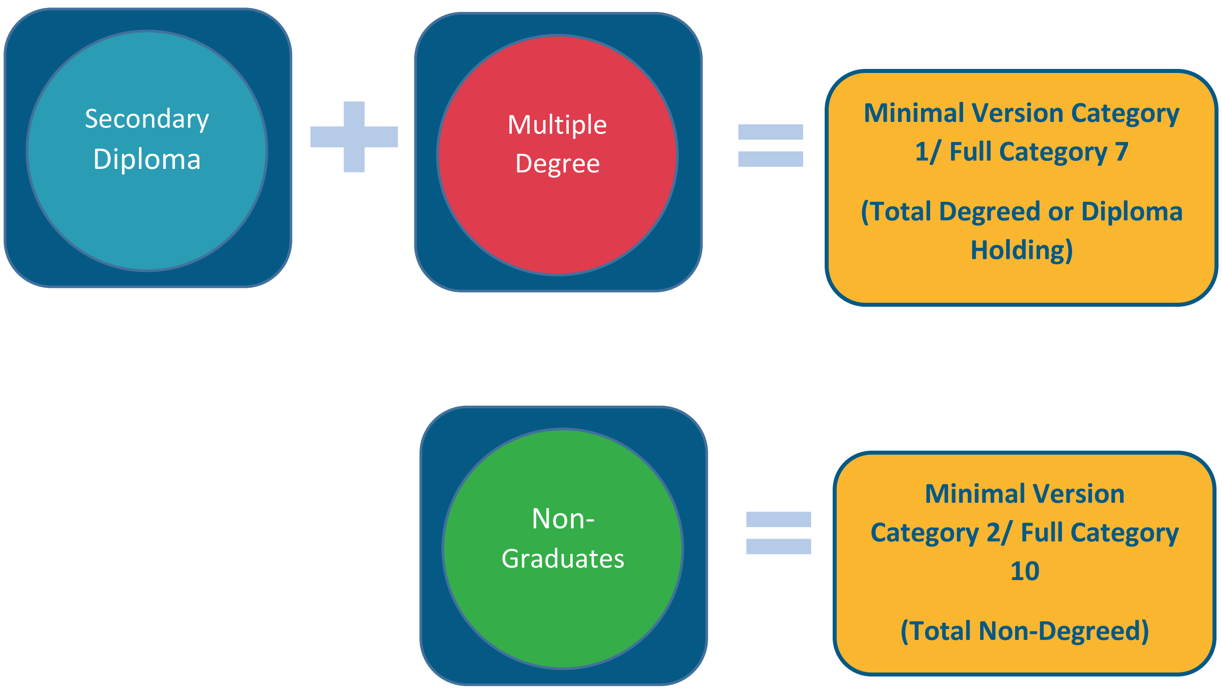
Operations and Technology	
Does your institution have a dedicated data manager or data management team that oversees the collection, reporting, and analysis of alumni engagement activity?	Y/N
Which software platform(s) does your organization use to track, report on, and understand/analyze Alumni Engagement? This includes software used to administer events, social monitoring, communications platforms, business intelligence, and CRM.	Please provide the Product Name for all that apply.

APPENDIX A: RELATIONSHIP BETWEEN FULL AND MINIMAL VERSION CATEGORIES – Higher Education



Note: The Minimal Survey requests data in aggregate, ideal if you do not currently capture requested data in this level of detail. This can also help you make plans to begin doing so.

APPENDIX B: RELATIONSHIP BETWEEN FULL AND MINIMAL VERSION CATEGORIES – Independent Schools



Note: The Minimal Survey requests data in aggregate, ideal if you do not currently capture requested data in this level of detail. This can also help you make plans to begin doing so.

APPENDIX C: FULL VERSION EXAMPLE

The Sample Institution has the following counts by mode:

- Philanthropic: 2,500
- Volunteer: 100
- Experiential: 3,000
- Communication: 4,000

The sample below shows how this data would be entered in Section 2. Modes of Engagement. All total columns (shaded) auto-total when data is entered in the survey.

Question 1. Summary of Engagement: Columns A-D: Categorize each mode by Alumni Category.

Rows	Alumni Category	Column A	Column B	Column C	Column D
		Philanthropic (Phil.)	Volunteer (Vol.)	Experiential (Exp.)	Communication (Com.)
1	Secondary Diploma-Degreed	-	-	-	-
2	Associate-Degreed	200	15	500	600
3	Undergraduate-Degreed	1000	40	1500	2000
4	Graduate-Degreed	750	15	250	1000
5	Multiple-Degreed	300	10	100	250
6	Certificate or Award	90	10	50	50
7	Total Degreed or Diploma-holding Alumni (auto)	2,340	90	2,400	3,900
8	Non-degreed	70	0	100	50
9	Other	90	10	500	50
10	Total Non-Degreed	160	10	600	100
11	Total Alumni	2,500	100	3,000	4,000

Column E: ALL Four Modes

The next column asks for a count of the number of alumni engaged in all four modes. This is should be less than or equal the smallest number in columns A-D. If you also complete the Optional Question 2, Column E will also be less than or equal to columns within that grid.

Rows	Alumni Category	Column E
		Phi. And Vol. and Exp. And Com.
1	Secondary Diploma-Degreed	-
2	Associate-Degreed	5
3	Undergraduate-Degreed	14
4	Graduate-Degreed	1
5	Multiple-Degreed	0
6	Certificate or Award	1
7	Total Degreed or Diploma-holding Alumni (auto)	21
8	Non-degreed	0
9	Other	1
10	Total Non-Degreed (auto)	1
11	Total Alumni (auto)	22

Column F: *This column is used for the numerator to calculate Alumni Engagement.*

The final column asks for alumni engaged in ANY of the four modes. That means they may only engage in one mode, or all four. It is also an unduplicated count, meaning that if someone is engaged in all four modes, they are still only counted one time. Do not add Columns A-D to complete this column as presumably those columns will not have unduplicated counts.

Rows	**Alumni Category**	**Column F**
		P or V or E or C
1	Secondary Diploma-Degreed	-
2	Associate-Degreed	704
3	Undergraduate-Degreed	3732
4	Graduate-Degreed	1301
5	Multiple-Degreed	375
6	Certificate or Award	130
7	Total Degreed or Diploma-holding Alumni (auto)	6,242
8	Non-degreed	176
9	Other	520
10	Total Non-Degreed (auto)	696
11	Total Alumni (auto)	6,938

2. Combinations of Engagement – Optional

Columns A-F:
The following columns ask for those engaged in *at least two*, but not limited to two modes. The count must be less than or equal to the smallest number of the data in Question 1, Columns A-D. For example, Column B in Question 1 (above) indicates there are 15 volunteers with an Associate's Degree. Therefore, cell A2 for Associate (below) must be less than or equal to 15. (It would only be 15 if all 15 volunteers - Question 1, B2 in chart above - were also giving).

Rows		Column A	Column B	Column C	Column D	Column E	Column F
	Alumni Category	**Phil. And Vol.**	**Phil. And Exp.**	**Phil. And Com.**	**Vol. and Exp.**	**Vol. and Com.**	**Exp. And Com.**
1	Secondary Diploma-Degreed	-	-	-	-	-	-
2	Associate-Degreed	10	110	140	14	15	315
3	Undergraduate-Degreed	30	732	723	25	36	1245
4	Graduate-Degreed	12	110	251	10	8	174
5	Multiple-Degreed	4	75	154	7	3	36
6	Certificate or Award	2	30	32	6	2	24
	Total Degreed or Diploma-holding Alumni (auto)	58	1,057	1,300	62	64	1,794
7	Non-degreed	0	23	40	0	0	30
8	Other	11	65	30	5	17	42
	Total Non-Degreed	11	88	70	5	17	72
9	Total Alumni	69	1,145	1,370	67	81	1,866

Columns G-J:
The following columns ask for those engaged in *at least* three, but not limited to three modes. These must now be less than or equal to the smallest corresponding data in Columns A-F (two modes). For example, above, there were 10 Associate-Degreed Alumni who engaged both Philanthropically and as Volunteers (cell A2 above). To see who engaged Philanthropically, as

Rows		Column G	Column H	Column I	Column J
	Alumni Category	**Phil. And Vol. and Exp.**	**Phil. And Vol. and Com.**	**Phil. And Exp. And Com.**	**Vol. and Exp. And Com.**
1	Secondary Diploma-Degreed	-	-	-	-
2	Associate-Degreed	6	7	60	15
3	Undergraduate-Degreed	14	28	514	36
4	Graduate-Degreed	1	3	47	8
5	Multiple-Degreed	0	1	20	3
6	Certificate or Award	1	2	12	2
7	Total Degreed or Diploma-holding Alumni (auto)	22	41	653	64
8	Non-degreed	0	0	8	0
9	Other	2	3	21	17
10	Total Non-Degreed	2	3	29	17
11	Total Alumni	24	44	682	81

Volunteers AND Experientially (cell G2 below) this number must be less than or equal to 10.

APPENDIX D: MINIMAL VERSION EXAMPLE

Question 1 – Summary of Alumni Engagement

The Sample Institution has the following counts by mode:

- Philanthropic: 2,500
- Volunteer: 100
- Experiential: 3,000
- Communication: 4,000

The sample below shows how this data would be entered in Section 2. Modes of Engagement. All total columns (shaded) auto-total when data is entered in the survey.

Columns A-D: Categorize each mode by Degreed or non-Degreed Alumni.

Row	Alumni Category	Column A	Column B	Column C	Column D
		Philanthropic (Phil.)	**Volunteer (Vol.)**	**Experiential (Exp.)**	**Communication (Com.)**
1	Degreed or Diploma	2340	90	2400	3900
2	Non-Degreed/Non-Diploma	160	10	600	100
3	Total Alumni (auto)	2,500	100	3,000	4,000

Column E:

The next column asks for a count of alumni engaged in all four Modes. This is a subset of all previous columns and therefore should also be less than or equal to the smallest measure in the previous columns.

Row	Alumni Category	Column E
		Phil. AND Vol. and Exp. And Com.
1	Degreed or Diploma	21
2	Non-Degreed/Non-Diploma	1
3	Total (auto)	22

Following the logic above, there are 90 Degreed or Diploma alumni who are Volunteers (cell B1 above). Therefore, at a minimum E1 (below) would be less than or equal to 90. Inputting 90

here would mean that all 90 of the volunteers were also donors, event attendees, and engaged in communication.

Column F:

The final column asks for alumni engaged in ANY of the four modes. That means they may engage in one Mode, any combination or two or three Modes, or all four. It is also an unduplicated count, meaning that if someone is engaged in all four modes, they are still only counted one time. Do not add Columns A-D to complete this column as presumably those columns will not have unduplicated counts. *This column is required as this is used for the numerator to calculate Alumni Engagement.*

Row	Alumni Category	Column F
		Phil. OR Vol. OR Exp. OR Com.
1	Degreed or Diploma	6242
2	Non-Degreed/Non-Diploma	696
3	Total (auto)	6,938

Question 2. Summary of Type of Engagement

Column A is a subset of Question 1, Column A above. Values in Question 2, Column A should be less than or equal to Values in Question 1., Column A. Question 2, Column B is also a subset of Question 1, Column F. above. Values in Question 2, Column B, should be less than or equal to values in Question 1, Column F.

Row	Alumni Category	Column A	Column B
		Donors not Engaged in Other Modes (Only P)	**Engaged Alumni Not Giving (V,E, or C but NOT P)**
1	Degreed or Diploma	1250	3000
2	Non-Degreed/Non-Diploma	80	550
3	Total (auto)	1330	3550

APPENDIX E: DEFINITIONS

Alumni Graduates of the institution and others with a prior academic relationship, including non-graduates, certificate and credential holders, distance learners, lifelong learners, residents, post-docs, honorary degree recipients and honorary alumni.

Alumni Engagement Activities that are valued by alumni, build enduring and mutually beneficial relationships, inspire loyalty and financial support, strengthen the institution's reputation and involve alumni in meaningful activities to advance the institution's mission.

AMAtlas A new global resource for educational advancement-related metrics, benchmarks, and analytics. This new initiative serves as a comprehensive, data-rich resource for schools, universities and colleges that are eager to use data to inform their work in alumni relations, communications, fundraising, marketing and allied areas of advancement. The data collected will be used to help inform thought leadership, best practices, and curriculum for conferences, webinars, articles and advocacy efforts.

AMAtlas Data Miner CASE's longitudinal and comparative metrics on-line reporting solution with data on charitable giving to U.S. educational institutions collected through the Voluntary Support of Education (VSE) survey. AMAtlas Data Miner's functionality also enables users to create groups of institutions to study—called comparison groups. These can be designed manually, by listing institutions, or they can be designed by querying the system for like features, such as location, control, type of institution, and more.

Communication Engagement Interactive, meaningful and informative communication that supports the institution's mission, strategic goals and reputation.

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

Facilitated Cohorts A new fee-based service that brings together similar institutions to discuss the stories behind the data for the philanthropy, alumni relations, and communications and marketing practice areas. Participants receive Made-to-Order GPS Reports and an invitation for three seats at the practice-area benchmarking meetings. Contact jsmith@case.org for more information.

Graphical Program Summary (GPS) Report A report that provides a visual representation of your year-over-year trends in comparison with your AMAtlas peers and all higher education institutions that complete the Alumni Engagement Metrics (AEM) Survey.

Legally Contactable An individual who is not marked as deceased, for whom you have a means of contact, and who does not have a total (for all purposes and by all means) no contact status.

Living Alumni An individual who is not marked as deceased on your files, whether or not you have contact information, as of the close of your most recent fiscal year.

Made to Order GPS Report A fee-based version of the GPS report where institutions can select up to 20 peers for specific, visual analysis. The static HTML file provides interactive dashboards for all four modes of engagement as well as analysis on deeply engaged alumni (though engaged in multiple ways at your institution). Purchase of the analysis includes a review session with CASE consulting staff. Contact jsmith@case.org for more information.

Opted Out An individual who is not marked as deceased, and for whom you have contact information (email, postal mail, or telephone number), but who has asked not to be contacted for any purpose, by any method.

Philanthropic Engagement Financial support that is meaningful to the donor and supports the institution's mission and strategic goals.

Volunteer Engagement Formally defined and rewarding volunteer roles that are endorsed by and valued by the institution.