Alumni Engagement Metrics Guide

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Updated: May 2021

ALUMNI ENGAGEMENT METRICS RESULTS

In 2019, CASE conducted the inaugural Global Alumni Engagement Metrics (AEM) Survey, the data collection for CASE's alumni engagement metrics framework. A task force of global alumni relations professionals was created in 2016 by the CASE Commission on Alumni Relations to establish an industry-wide framework for measuring alumni engagement. A White Paper[1] with the task force's framework recommendations was published in August 2018. Following the White Paper, 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, resulting in this new survey.

The AEM survey is designed to provide a simple and basic way of capturing 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. Institutions include independent schools serving the primary and secondary sectors and colleges and universities of varying sizes and types.

In 2020, CASE introduced a shorter version of the survey, called the minimal version, while the longer version, called the full version, remained available to institutions with sufficient data to complete it. With advice from the global volunteer taskforce, the minimal version was created to identify a subset of questions that institutions must be able to answer to benchmark and measure engagement. Participants must provide counts for three of the four modes, with the Communication mode considered optional. Additionally, the minimal survey only requires counts by degreed and non-degreed alumni, as opposed to the eight unique alumni categories outlined in the full version. A question rating the participant's confidence level in their data for the volunteer, experiential, and communication modes was added to both versions of the survey, as well as an optional section on data management operations and software platforms used to track, report on, and analyze alumni engagement

All CASE members have access to survey results in AMAtlas Data Miner, CASE's longitudinal and comparative metrics online reporting solution, even if you did not complete the survey. This guide provides you with information about how to access data specific to this survey within the online application. It will also point you to online tutorials that provide additional instructions on using the Data Miner application.

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

ACCESSING AMATLAS DATA MINER

Go to: *https://amatlasdata.case.org*

Contact the CASE AMAtlas team at dataminer@case.org to request an account.

We will email you an invitation, active for two weeks, to set up an account on the AMAtlas Data Miner site. If you miss the two-week window, contact us, and we will send another invitation.

Follow the link in the email to set up your account. If you already have an account on the CASE AMAtlas Surveys website (the site that hosts the VSE and AEM surveys), enter the same username and password into the setup form. If you create a different password in Data Miner, your AMAtlas Surveys account password will also change. Your CASE member account is separate and will not be affected.

If you forget your password, go to the Data Miner login page and click the **Forgot your password** link. Enter your email address. You will be emailed a link to reset your password. The new password will be applied to your Data Miner account and your AMAtlas Surveys account, if you have one. Contact us if you have forgotten your username. In most cases, it is your institutional email address.

AMATLAS DATA MINER TRAINING AND ASSISTANCE

This guide is focused specifically on accessing AEM results in Data Miner. If you need assistance getting started using Data Miner:

- Consult the Data Miner Quick Start Guide and Data Miner Visual Guide. These and other training materials and videos are also available within Data Miner from the **Help** link on the main menu.
- Contact the CASE AMAtlas team at dataminer@case.org for assistance or to schedule a complimentary individual or group training session.

ALUMNI ENGAGEMENT METRICS – SUMMARY REPORT

The CASE AMAtlas Team has created an AEM summary report. It includes:

- Number of alumni engaged in each of the four basic modes of engagement and in any mode

- Number of alumni engaged in different combinations of the modes of engagement

- Total counts for living, opted-out, and legally contactable alumni

- Alumni per staff ratio

- Percent engaged in each of the four basic modes of engagement and in any mode

- Total degreed and non-degreed alumni who participated philanthropically only and who participated in other modes but not philanthropically

- Participant confidence levels in reported data for the Volunteer, Experiential, and Communication modes.

See more information about modes in the Appendix.

To access the AEM summary report, go to the **Recommended Reports** widget on the Data Miner home page, and click the Open icon. When you open the report, you can:

- Toggle the tabs to view the detail and summary reports.

- View and work with the report onscreen, including sorting and hiding columns (click the arrow to the right of the column heading to see the options) and showing hidden columns (click the three horizontal lines on the right to show all the available columns to show/hide).

- Download the report as a CSV file.

- Copy the report and edit the inputs.

CREATING AEM REPORTS

[For more detailed information about creating reports and comparison groups in Data Miner, please see the Data Miner Quick Start Guide or Data Miner Visual Guide. Contact dataminer@case.org to request assistance or schedule a training session.]

To create your own AEM report, on the main menu, select **Reports > New Report** or select **Create New Report** from the Quick Links on the right side of the home page.

You must select at least one comparison group or institution, one variable, and one year. Make your selections on the **Report Inputs** screen.

- **Comparison Groups or Institutions:** To include all institutions that participated in the AEM Survey, search for the comparison group **AEM Survey Participants - 2020** and use the **+** to add it to the report.
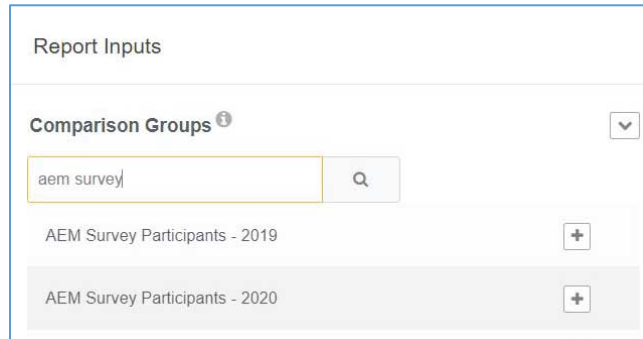
You can also browse or search for other comparison groups or institutions by name and click **+** to add them to the report. Data Miner has many comparison groups created by the CASE AMAtlas team. You can also create your own custom groups of institutions.

- **Variable Families:** Search for the term **AEM** to find all variable families related to the AEM survey.
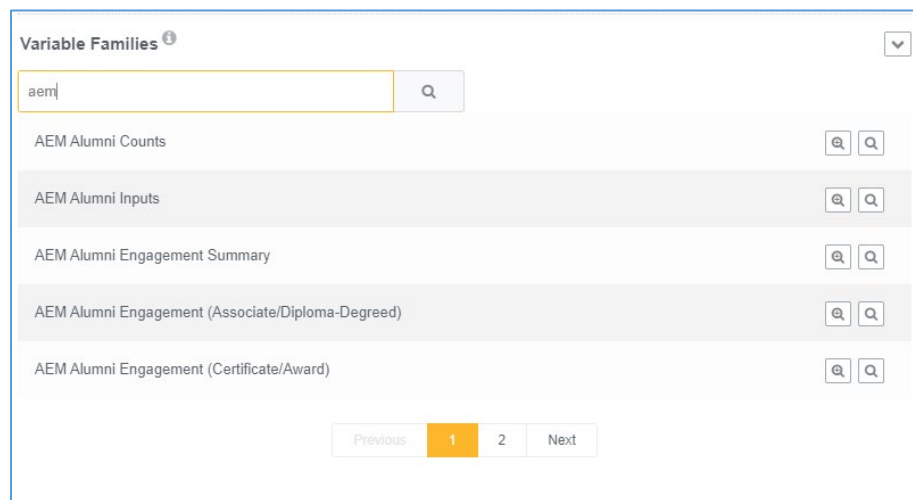
Each family contains several AEM data variables.

- To add all the variables in the family to the report at once, click the **Add** button, which is the magnifying glass with the **+** symbol inside it.

- To open a list of all the variables in the family and select variables individually to add to the report Click the **Search** button, the plain magnifying glass. The Variable Families section will collapse, and the Variables list will open.

- o The **AEM Alumni Engagement Summary** family includes several calculated variables across the eight alumni categories (e.g., secondary/independent school diploma, associate-degreed, undergraduate-degreed, graduate-degreed, etc.) included in the AEM survey.

  - o You can also skip Variable Families and search for individual variables by name in the Variables section.

- **Variables:** If you chose to search a list of variables from a variable family, those variables will display here. You can browse them and add them to the report by using the **+** button.

- If you did not search a variable family, all the variables in AMAtlas Data Miner for all surveys in the database will display. You can search for a word in their names. Click **+** to add variables to the report.

- **Note:** In addition to the AEM survey, Data Miner includes variables and variable families related to the Voluntary Support of Education (VSE) survey. CASE surveys (e.g., CASE-Ross, CASE-CCAE) whose data reside in the CASE Benchmarking Toolkit, are not currently included in Data Miner. This will change in the future.

- **Years:** Click **+** to add years to the report. The AEM survey launched in 2019. There are no AEM data prior to that year.

After you select all your report inputs, click the yellow **Run Report** button that appears below the report inputs on the right.

The report will open. Click the report title, which defaults to Untitled, or the Save button on the right to save the report. Give the report a title, an optional description, and select the Active status. (Inactive status is rare.) If you are a unit administrator, also choose whether to share the report with others at your institution.

CONTACT THE CASE AMATLAS TEAM

The CASE AMAtlas team provides AMAtlas Data Miner support and complimentary training sessions for new or veteran users. Our regular office hours are 9:00 a.m.–5:00 p.m. Eastern.

Email: dataminer@case.org

Phone: +1 (917) 336-4023

APPENDIX

DEFAULT COLUMNS INCLUDED IN DATA MINER REPORTS

The following columns, primarily institutional characteristics, are currently included in Data Miner reports by default. The **AEM Summary Report** is customized and does not include all the default columns in the onscreen display. The columns are included in CSV downloads.

- **Year:** Fiscal year of the data
- **Comparison Group:** The group of institutions selected
- **Institution Id:** The institution's unique CASE identifier
- **State:** For U.S. institutions only
- **Institution Country**: Country of the reporting institution
- **IPEDS No.**: Unique identifier from the Integrated Postsecondary Education Data System (U.S. only)
- **Founding Year:** This is collected in the VSE survey so will only populate for U.S. or Canadian institutions that participate in the VSE survey and provided the data.
- **Control:** Form of control and management of the institution by either a governmental agency or body (Public) or a non-governmental entity (Private)
- **Carnegie Classification (2015):** Classifications for U.S. higher education institutions generally based on predominant type of degree awarded. Updates are released periodically, and classifications may change as schools add/remove programs. These classifications are as of the 2015 release.
- **Carnegie Classification (2018):** Same as above but as of the 2018 release
- **Institution**: Name of institution that submitted the data

AEM SURVEY VARIABLES OVERVIEW

The information below provides a brief overview of AEM Survey data fields in Data Miner, grouped by the variable family in which they reside. For full definitions of what is included in each field on the full and minimal versions of the survey, please visit the CASE Global Alumni Engagement Metrics Survey webpage. Scroll down to the section titled **Key Alumni Engagement Metrics Documentation** to download the AEM survey Guidance Document and sample grids for both survey versions.

AEM ALUMNI COUNTS

Enrollment on First Day of Classes (Required, both survey versions)

This is the total number of students (total headcount, not full-time equivalent) who were enrolled at the beginning of the academic year in the reporting period. It is not a rolling headcount for the whole year or only the number of new students registering.

Alumni Counts— (Required, both survey versions)

Not all alumni categories apply to all institutions, so institutions may not have data in all fields. In year one (2019), no field was required so there will be institutions with blanks throughout. Beginning in 2020, all fields are required with zero (0) indicating no alumni in a particular category. The Legally Contactable field serves as the denominator in the calculation for a measurement of engagement.

Full Version Variables:

Counts of Living Alumni, Opted Out Alumni, and Legally Contactable Alumni in the following categories where applicable:

1. Secondary/Independent School Diploma
2. Associate-Degreed
3. Undergraduate-Degreed
4. Postgraduate-Degreed
5. Multiple-Degreed
6. Certificate or Award
7. Total Degree or Diploma-Holding Alumni (Auto-total of categories 1-6)
8. Non-Graduates
9. Other
10. Total Non-Graduates (Auto-total of categories 8-9)
11. Total All Alumni (Auto-total of categories 1-6, 8-9)

Minimal Version Variables:

Counts of Living Alumni, Opted Out Alumni, and Legally Contactable Alumni in the following categories:

1. Total Degree or Diploma-Holding Alumni
2. Total Non-Graduates
3. Total All Alumni (Auto-total of categories 1-2)

AEM ALUMNI INPUTS

Alumni Relations Inputs—(Optional, both survey versions)

This variable family includes basic data about the institution's alumni relations staffing and expenditures. Expenditures are entered in the institution's domestic currency.

- Alumni Relations Staff FTE: Count of total institutional AR staff full-time equivalent
- Alumni Relations FTE Staff Salary Expenditures
- Alumni Relations FTE Staff Benefits Expenditures
- Alumni Relations Technology Expenditures
- Alumni Magazine Expenditures
- Alumni Relations Non-Technology Expenditures

Alumni Relations Additional Details— (Required, both versions)

- Alumni Association - Dues paying or not? 1 = Yes; Blank = No
- In what month does your fiscal year end? Name of month spelled out in full (no numerals)
- Reporting currency: Use three-letter currency abbreviation (ISO 4217 standard)

AEM ALUMNI ENGAGEMENT SUMMARY

All variables in this family are calculated from data fields in the survey.

Total Engagement in the Four Basic Modes

- Philanthropic
- Volunteer
- Experiential
- Communication (Note: This mode is optional on the minimal survey version)

Total Engagement in All Four Modes

*Excludes the Communication mode if the respondent opted out of that basic mode on the minimal version of the survey.

Total Engagement in Any Mode

*Excludes the Communication mode if the respondent opted out of that basic mode on the minimal version of the survey.

Total Engagement in Multiple Modes

Note: The question on multiple modes is optional on the full version of the survey. It is not included on the minimal version.

- Total Philanthropic & Volunteer Engagement
- Total Philanthropic & Experiential Engagement
- Total Philanthropic & Communication Engagement
- Total Volunteer & Experiential Engagement
- Total Volunteer & Communication Engagement
- Total Experiential & Communication Engagement
- Total Philanthropic, Volunteer, & Experiential Engagement
- Total Philanthropic, Volunteer, & Communication Engagement
- Total Philanthropic, Experiential, & Communication Engagement
- Total Volunteer, Experiential, & Communication Engagement

Total Alumni Counts

- Total Living Alumni
- Total Opted-Out Alumni
- Total Legally Contactable Alumni

Alumni per Staff Ratio

- Alumni per Staff Ratio: Total Legally Contactable Alumni/Total AR Staff FTE.

Percentage of Alumni Engaged in each of the Four Basic Modes

- Percentage Philanthropic Engagement – Total Philanthropic Engagement/Total Legally Contactable Alumni
- Percentage Volunteer Engagement – Total Volunteer Engagement/Total Legally Contactable Alumni
- Percentage Experiential Engagement – Total Experiential Engagement/Total Legally Contactable Alumni
- Percentage Communication Engaged – Total Communication Engagement/Total Legally Contactable Alumni
- Percentage Engaged in Any Mode – Total Engaged in Any Mode/Total Legally Contactable Alumni

Note: Not all institutions currently capture data across all four modes. In the first year of the survey, 2019, no mode was required. In 2020, participants completing the minimal version of the survey could opt out of the Communication mode; the other three modes were required. Therefore, the calculation could be misleading in instances where not all modes were reported. If you export the data into a CSV file, you may wish to identify institutions that reported the same modes as your institution in a given year. (Example: If you reported only Philanthropic, Volunteer, and Experiential data you may wish to compare your institution against other institutions that also only reported those three modes.)

AEM ALUMNI ENGAGEMENT (BY DEGREE CATEGORY)

Each variable family includes the number of alumni in that category that engaged in each of the four basic modes of engagement (philanthropic, volunteer, experiential, and communication), combinations of the modes, in all four of the modes, and in any mode.

- AEM Alumni Engagement (Associate-Degreed) – Full survey version only
- AEM Alumni Engagement (Certificate/Award) – Full survey version only
- AEM Alumni Engagement (Graduate-Degreed) – Full survey version only
- AEM Alumni Engagement (Multiple-Degreed) – Full survey version only
- AEM Alumni Engagement (Non-Degreed) – Full survey version only
- AEM Alumni Engagement (Other Alumni) – Full survey version only
- AEM Alumni Engagement (Undergraduate-Degreed) – Full survey version only
- AEM Alumni Engagement (Secondary/Independent School) – Full survey version only
- AEM Degreed Alumni Engagement Summary – Total degreed alumni; both survey versions
- AEM Non-Degreed Alumni Engagement Summary – Total non-degreed alumni; both survey versions

AEM CONFIDENCE LEVELS

Required, both survey versions

1= Confident; 2 = Somewhat Confident; 3 = Not Very Confident

- Volunteer Confidence Level
- Experiential Confidence Level
- Communications Confidence Level

AEM VIRTUAL AND IN-PERSON EVENTS

Optional, both survey versions

- Count of alumni who attended at least one virtual event (all aspects of the event were virtual)
- Count of alumni who attended at least one in-person event
- Count of alumni who attended both an in-person and a virtual event

AEM OPERATIONS AND TECHNOLOGY

Optional, both survey versions

- Data Manager or Management Team

  Does your institution have a dedicated data manager or data management team that oversees the collection, reporting, and analysis of alumni engagement activity?

  1=Yes; 0=No

- Software Platforms

  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.

  Enter product names (max. 20)