Alumni Engagement Metrics Survey

FY2021

1. Alumni Counts and Inputs (Minimal Version)

If you are skipping an optional question, leave the cell BLANK. Only enter 0 if that is your answer.

There are two versions of this survey. You have the minimal version. Let us know if you want to see what the full version looks like by emailing us at aem@case.org.

1. ALUMNI COUNTS
REQUIRED

In the grid below, indicate the number of alumni in each category. Only count each alumnus one time. Definitions of each row and column can be viewed by clicking the underlined heading. Definitions are also found in the reporting standards PDF.

Open Alumni Engagement Metrics Instructions

Also note, that a social media (Twitter, Facebook, Instagram, etc.) contact without another method of contact is not sufficient to make someone contactable. Please limit your count of contactable to alumni for whom you have one or more of the following means of contact: Telephone, email, postal mail.

Total headcount (not FTE) of students enrolled at the beginning of the academic year	--

	A. Living Alumni Count	**B. Opted-Out**	**C. Legally Contactable**
1. Degreed or Diploma-Holding Alumni	--	--	--
2. Total Non-Degreed Alumni	--	--	--
3. Total All Alumni	--	--	7

2. ALUMNI RELATIONS INPUTS
OPTIONAL

Report here on alumni relations staff FTEs, salaries, and other costs.

Count both exempt and non-exempt employees. A person's time and salary should be allocated proportionally to his or her time committed to each aspect of Alumni Relations.

Only count advancement staff here. Do not count, for example, professors who do some alumni relations work. Temporary staff or volunteers such as student callers, envelope stuffers, or temporary staff who work at fundraising/alumni events should not be included. In the three columns for other expenditures, do NOT include staff costs.

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

3. ALUMNI RELATIONS ADDITIONAL DETAILS
REQUIRED

A. If your alumni association has dues-paying members, check here.

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B. Enter the number of alumni paying dues to an alumni association. If you do not have a dues-paying alumni association, enter zero.

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C. Select the numeral corresponding to the month in which your fiscal year ends.

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D. Select the 3-digit currency abbreviation you used to complete this survey

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2. Modes of Engagement (Minimal Version)

Do not leave any cells blank. If you do not have any alumni in a particular category, enter zero for that whole row.

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1. Summary of Alumni Engagement
REQUIRED(except Column D, which is optional)

In Column F, count alumni who engaged in ANY of the modes you reported on. Count each person only once in this column. This column will yield the total unduplicated number of alumni who were engaged in at least one mode.

In Column E, count any alumnus/a who engaged in ALL of the modes you reported on.

When counting philanthropic support, count either hard- or soft-credit participation.

Someone can be counted in more than one column. For example, if someone engaged in all four basic modes, he or she would be counted in every column of that single row, as long as there is an alumni count for that row.

	A. Philanthropic (Phil.)	B. Volunteer (Vol.)	C. Experiential (Exp.)	D. Communication (Com.)	E. Phil. AND Vol. AND Exp. and Com.	F. Phil. OR Vol. OR Exp. OR Com.
1. Total Degreed or Diploma-holding Alumni	--	--	--	--	--	--
2. Total Non-Graduate Alumni	--	--	--	--	--	--
3. Total Alumni	--	--	--	--	--	--

2. Summary of Type of Engagement
OPTIONAL

In this question, if you can, indicate the number of alumni who were engaged only via philanthropy and only via one or more of the other modes (volunteering, experience, or communications). Divide the alumni into degree or diploma holders and those who are not.

You may skip this question. If you are skipping it, leave all the cells empty. Do not use zero to mean not answering.

	A. Donors Not Engaged in Other Modes (Only P)	B. Engaged Alumni Not Giving (V, E, or C, but not P)
1. Degreed	--	--
2. Non-Degreed	--	--
3. Total Alumni	**--**	**--**

3. Confidence Levels REQUIRED

This question 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 select Not Very Confident (3) in the respective Mode. Also, if you are completing the Minimal Version of the survey and leaving Communications blank, you should select 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 select 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 select Somewhat Confident (2) for the Experiential Mode.

If you can capture most of the data points within any Mode, select Confident (1), understanding that you will likely never capture 100% of any category.

To summarize:
1=Confident
2=Somewhat Confident
3=Not Very Confident

Volunteer Data Confidence Level

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Experiential Data Confidence Level

--

Communications Data Confidence Level

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4. Count of In-Person, Virtual, and Hybrid Events Offered
OPTIONAL

Provide a count of the number of events your institution held in each category during the fiscal year. See guidance document for a list of events counted as experiential engagement.

Categories:

A. Virtual Only Events: Enter number of virtual events hosted by your institution in the fiscal year. (Do not include hybrid events that have a virtual component in this cell. Report those in cell C.)

B. In-person Only Events: Enter the number of in-person events hosted by your institution during the fiscal year. (Do not include hybrid events that have an in-person component in this cell. Report those in cell C.)

C. Hybrid Events: Enter the number of events with both an in-person and a virtual component.

D. Total: This cell automatically sums the counts in Columns A-C.

	A. Number of Virtual Events	B. Number of In-Person Events	C. Number of Hybrid Events	D. Total
Number of Events Held This Fiscal Year	--	--	--	--

5. Types of Attendees
OPTIONAL

Report below the way in which alumni participated in the events you summarized in Question 4. That is, Question 4 is about the nature of events. This question is about individual behavior related to the events you offered. Sort alumni who attended events into (only) one of the three cells.

Each individual had an "event type" in the past fiscal year. Someone was either a virtual event type (Cell A), an in-person event type (Cell B), or someone may have participated both ways at two or more events in this reporting cycle (Cell C). Each year, a person can only have one "event type."

Modes of Attendance:
A. Virtual: Enter the number of individuals who ONLY took part in events virtually during the most recent fiscal year.

B. In-person: Enter the number of individuals who ONLY attended events in person during the fiscal year.

C. Both Virtual and In-Person: Enter the number of individuals who attended events both online and in-person. Do not count these individuals in A or B.

Note: If someone attended a hybrid event as defined in question 4, categorize the person according to the manner in which the individual attended.

	A. ONLY Attended Virtually	**B. ONLY Attended In Person**	**C. Attended Both In Person & Virtually**
Number of Alumni Who Participated This Fiscal Year	--	--	--

3. Operations & Technology (Minimal Version)

OPTIONAL

Does your institution have a dedicated data manager or data management team that oversees the collection, reporting, and analysis of alumni engagement activity?
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Which software platform(s) does your organization use to track, report on, and understand/analyze Alumni Engagement? Check all that apply in each category. The options offered in this question include any product written in at least five times on last year*s survey.

There is a place to write in a product you use but that is not listed. You can also indicate that you do not use any by checking none.

PART I: Constituent Relationship Management (CRM) Software

Abila Millennium

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Agilon One

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Blackbaud CRM/Raiser*s Edge/RENXT

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Ellucian CRM Advance/Advance/Banner/Colleague/PowerCampus

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Homegrown CRM

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Jenzabar

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PeopleSoft

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Salesforce

--

Slate

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thankQ

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Veracross

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None

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**Other CRM Software
(Use semicolon between product names.)**

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PART II: Reporting and Data Visualization Tools

Advizor

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Cognos

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Drupal

--

Envisions Argos

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Microsoft Power BI

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Qlik

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SAP Business Objects

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SAS

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Tableau/Einstein Analytics

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None

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Other Data Visualization Software
(Use semicolons between each product name.)

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PART III: Multichannel Marketing and Communications Software

Blackbaud Luminate Online

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Campaigner

--

Campaign Monitor

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Constant Contact

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DotDigital

--

Emma

--

Finalsite

--

Gecko

--

Mail Chimp

--

Marketo

--

MobileCause

--

mongoose

--

Salesforce Marketing Cloud/Social Studio

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Signal Vine

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Switchboard

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Thankview

--

Thrutext

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None

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Other Mar/Comm Software
(Use semicolons between product names.)

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PART IV: Alumni Engagement and Career Platforms

Aluminati
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AlumniFire
--

AlumniQ
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Anthology Alumni and Advancement Solutions
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Brazen
--

BrightCrowd
--

Chronus
--

Firsthand/Vault
--

Graduway
--

Handshake
--

MobileUp
--

PBC Guru
--

PeopleGrove
--

Tassl
--

Xinspire
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None
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Other Engagement/Career Software
(Use semicolons between product names.)
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PART V: Research and Fundraising Management

Aluminate
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Blackbaud Fundraiser Performance Management

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Blackbaud Peer-to-Peer (formerly JustGiving)

--

Blackbaud ResearchPoint

--

Community Funded

--

Evertrue

--

GiveCampus

--

Hootsuite

--

LexisNexis

--

LinkedIn: Sales Navigator

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RNL

--

Social Studio

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Social Toaster

--

Sprout Social

--

Wealth Engine

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None

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**Other Research/Fundraising Mgmt. Software
(Use semicolons between product names.)**

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PART VI: Event Management & Ticketing Software

Attend

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Aventri

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Cvent

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EventBrite

--

Facebook Live/LinkedInLive/InstragramLive

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TicketMaster

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Zoom

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None

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Other Event Mgmt/Ticketing Software
(Use semicolons between product names.)

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