Alumni Engagement Metrics Survey

FY2023

1. Alumni Counts and Inputs (Full Version)

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

There are two versions of this survey. You have the full version. If you do not have enough data to complete this version, email aem@CASE.org. We will set you up with the shorter version. You can switch between versions in different years.

The first three questions establish characteristics of your institution.

They are REQUIRED

Total headcount (not FTE) of students enrolled at the beginning of the academic year	--
If your institution completed the Voluntary Support of Education survey, enrollment on both surveys should be the same. Your VSE figure is:	--

What type of institution are you reporting about?
--

Is your institution private or public?
--

1. ALUMNI COUNTS
REQUIRED

In the grid below, indicate the number of alumni in each category. 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.

	A. Living Alumni Count	B. Opted-Out	C. Legally Contactable
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	--	--	--
8. Non-Graduates	--	--	--
9. Other	--	--	--
10. Total Non-Graduates	--	--	--
11. Total All Alumni	--	--	--

2. ALUMNI RELATIONS INPUTS
Report here on alumni relations staff FTEs, salaries, and other costs.

OPTIONAL

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 Salaries	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.
--

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

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

D. Enter 3-digit currency abbreviation here:

--

2. Modes of Engagement (Full Version)

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

1. Summary of Alumni Engagement
REQUIRED

If you do not capture engagement by alumni category or if you do not collect data within the communications mode, email aem@case.org and request the shorter form.

In each cell, count each person only once. Include each person in only one row, as well.

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.

In Column A, philanthropic support, count either hard- or soft-credit participation.

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

In Column F:

- Count alumni who engaged in ANY of the four modes--one or more than one.
- Count each person only once, even if the person engaged in more than one mode. This column will yield the total unduplicated number of alumni who were engaged in at least one mode.
- Your values should be equal to or greater than the largest value in column A, B, C, or D in that row (you had at least that many engaged)
- Do not enter the sum of columns A-D in column F. Alumni can be counted in more than one column in A-D, but column F is de-duplicated and thus should be less than the sum of columns A-D.

	A. Philanthropic	B. Volunteer	C. Experiential	D. Communication	E. ALL Four Modes	F. ANY of the Four Modes
1. Secondary/Independent School Diploma	--	--	--	--	--	--
2. Associate-Degreed	--	--	--	--	--	--
3. Undergraduate-Degreed	--	--	--	--	--	--
4. Postgraduate-Degreed	--	--	--	--	--	--
5. Multiple-Degreed	--	--	--	--	--	--
6. Certificate or Award	--	--	--	--	--	--
7. Total Degreed or Diplomaed Alumni	--	--	--	--	--	--
8. Non-Graduate Alumni	--	--	--	--	--	--
9. Other	--	--	--	--	--	--
10. Total Non-Degreed Alumni	--	--	--	--	--	--
11. Total Alumni	--	--	--	--	--	--

2. Combinations of Engagement
OPTIONAL

In this section there is more than one mode of engagement in each column, and the alumnus must have engaged in all modes in that column to be counted there. For example, in Column A, count alumni who engaged BOTH in philanthropy and volunteer activities, not one or the other.

If you cannot report in this way, simply leave this section blank. Do NOT use zero to indicate not answering.

	A. Phil.and Vol.	B. Phil. and Exp.	C. Phil. and Com.	D. Vol. and Exp.	E. Vol. and Com.	F. Exp. and Com.	G. Phil. and Vol. and Exp.	H. Phil. and Vol. and Com.	I. Phil. and Exp. and Com.	J. Vol. and Exp. and Com.
1. Secondary/Independent School Diploma	--	--	--	--	--	--	--	--	--	--
2. Associate-Degreed	--	--	--	--	--	--	--	--	--	--
3. Undergraduate-Degreed	--	--	--	--	--	--	--	--	--	--
4. Postgraduate-Degreed	--	--	--	--	--	--	--	--	--	--
5. Multiple-Degreed	--	--	--	--	--	--	--	--	--	--
6. Certificate or Award	--	--	--	--	--	--	--	--	--	--
7. Total Degreed or Diplomaed Alumni	--	--	--	--	--	--	--	--	--	--
8. Non-Graduate Alumni	--	--	--	--	--	--	--	--	--	--
9. Other	--	--	--	--	--	--	--	--	--	--
10. Total Non-Degreed Alumni	--	--	--	--	--	--	--	--	--	--
11. 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

--

Experiential Data Confidence Level

--

Communications Data Confidence Level

--

Use the space below to comment on how you determined confidence levels.

Comments on Confidence Levels:

--

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	--	--	--

6. Alumni Engagement by Graduation Cohorts
OPTIONAL

In the grid below enter the number of alumni who contributed by graduation cohort. If someone received more than one degree from your institution, the cohort is determined by the first degree the person received. If someone attended the institution but did not receive a degree or diploma, enter that person on row 8.

	A. No. Legally Contactable Alumni	B. No. Engaged: Philanthropy	C. No. Engaged: Volunteer	D. No. Engaged: Experiential	E. No. Engaged: Communication
1. 0-5 Years Out	--	--	--	--	--
2. 6-10 Years Out	--	--	--	--	--
3. 11-20 Years Out	--	--	--	--	--
4. 21-30 Years Out	--	--	--	--	--
5. 31-40 Years Out	--	--	--	--	--
6. 41-50 Years Out	--	--	--	--	--
7. 51+ Years Out	--	--	--	--	--
8. Non-Degreed/Non-Diploma	--	--	--	--	--
9. Total	--	--	--	--	--

Error Checks for Graduation Cohorts:

1. Number of legally contactable alumni in cell A9 above must equal number of legally contactable alumni in Section 1, which is shown in cell A3 of that question.

2. Number of alumni engaged in philanthropy in cell B9 should equal what you entered in Question 1, cell A11.

3. Number of alumni engaged in volunteering in cell C9 should equal what you entered in Question 1, cell B11.

4. Number of alumni engaged experientially in cell D9 should equal what you entered in Question 1, cell C11.

5. Number of alumni engaged in communications in cell E9 should equal what you entered in Question 1, cell D11.

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

--

Agilon One

--

Blackbaud CRM/Raiser*s Edge/RENXT

--

Ellucian CRM Advance/Advance/Banner/Colleague/PowerCampus

--

Homegrown CRM

--

Jenzabar

--

PeopleSoft

--

Salesforce

--

Slate

--

thankQ

--

Veracross

--

None

--

Other CRM Software
(Use semicolon between product names.)

--

PART II: Reporting and Data Visualization Tools

Advizor

--

Cognos

--

Drupal

--

Envisions Argos

--

Microsoft Power BI

--

Qlik

--

SAP Business Objects

--

SAS

--

Tableau/Einstein Analytics

--

None

--

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

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PART III: Multichannel Marketing and Communications Software

Blackbaud Luminate Online

--

Campaigner

--

Campaign Monitor

--

Constant Contact

--

DotDigital

--

Emma

--

Finalsite

--

Gecko

--

Mail Chimp

--

Marketo

--

MobileCause

--

mongoose

--

Salesforce Marketing Cloud/Social Studio

--

Signal Vine

--

Switchboard

--

Thankview

--

Thrutext

--

None

--

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

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PART IV: Alumni Engagement and Career Platforms

Aluminati

--

AlumniFire

--

AlumniQ

--

Anthology Alumni and Advancement Solutions

--

Brazen

--

BrightCrowd

--

Chronus

--

Firsthand/Vault

--

Graduway

--

Handshake

--

MobileUp

--

PBC Guru

--

PeopleGrove

--

Tassl

--

Xinspire

--

None

--

**Other Engagement/Career Software
(Use semicolons between product names.)**

--

PART V: Research and Fundraising Management

Aluminate

--

Blackbaud Fundraiser Performance Management

--

Blackbaud Peer-to-Peer (formerly JustGiving)

--

Blackbaud ResearchPoint

--

Community Funded

--

Evertrue

--

GiveCampus

--

Hootsuite

--

LexisNexis

--

LinkedIn: Sales Navigator

--

RNL

--

Social Studio

--

Social Toaster

--

Sprout Social

--

Wealth Engine

--

None

--

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

--

PART VI: Event Management & Ticketing Software

Attend

--

Aventri

--

Cvent

--

EventBrite

--

Facebook Live/LinkedInLive/InstragramLive

--

TicketMaster

--

Zoom

--

None

--

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

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