*Alumni Engagement measurement and Impact:*

*Benchmarking for success*
*Final paper for ICARe 2019*

Engagement | Affinity | Impact

# Practitioner's Perspective

It's a great time to be working in the field of alumni engagement, in no small part because we are increasing our ability to see the impact of our work.

Over the past decade, CASE has brought together a number of international initiatives to better examine how we, as a sector, enable our alumni to support the strategic goals of our institutions. This includes not only the International CASE Alumni Relations Survey (ICARS), the International CASE Alumni Relations Survey for Business Schools (BICARS) and the Asia-Pacific Alumni Relations Survey (APARS), but also the work of the CASE Commission on Alumni Relations (including the Alumni Engagement Metrics Task Force) and the European Volunteer Metrics Pilot Project. All of these disparate groups have been striving in their own ways to answer the question: 'why does alumni engagement matter?'

This report is the first step to articulate an answer to that question for institutions across a range of countries, regions and institutional contexts. Our goal, ultimately, is to do that in a joined up way across the world.

Practitioners involved in the CASE surveys mentioned above, the various CASE volunteer groups and all 140 institutions who took part in this report, set out to answer a series of questions for themselves, and for all of us working in this sector. Fundamentally, we need to know:
· What are we giving to our alumni communities? How do we provide support that is helpful and meaningful?
· In turn, what are our alumni giving to our institutions? How is that support enabling our missions? Are we making the most of their support?

This report moves us along a path to answering those questions.

The institutions contributing to this report want to know that their work to engage alumni contributes to their institution's strategic goals (usually focused on recruitment, teaching and the student experience and research) as well as the success and fulfillment of their alumni (the success of alumni should be an institutional strategic goal as alumni embody the impact of our teaching).

In reading the report, it's important to keep in mind that by engaging alumni to support our institutional missions, what we actually do is support more students (and support those students better), and enable more research discoveries which can be applied to real-world problems. We need to remain focussed on activities which support those goals and which do that most effectively and efficiently. To do that, we need to measure and reflect on what we do.

Although this report provides benchmarking, it's not about how we measure up against other institutions but about understanding how what we do helps us achieve our strategic goals. By seeing what others do, we can learn the most effective and efficient ways to engage alumni to achieve this, and see whether these activities are actually making a difference.

For those of us working in alumni relations, we also need to understand how to justify and bid for resources to carry out this vital work; in short, we need to demonstrate why giving us more funding results in more outcomes for our institutions.

This report can help us:

1. understand and demonstrate the value of alumni relations programmes (ROI)
2. assist in evidence-based decision making and deploying resources more effectively
3. motivate engagement from staff, volunteers and internal stakeholders
4. leverage internal support, i.e. build the business case
5. benchmark over time and against peers
6. enable and support stewardship of non-financial alumni contributions
7. elevate the profession by demonstrating impact and effectiveness

Here's an example. We all spend a lot of time and energy organising events. How do we know if our events are successful? First we have to define 'success'. Is this measured by the number of attendees? No, that just shows how much we spent on catering and name badges. Is it measured by a survey? No, that shows whether people had a nice time. We should focus on 'did this event (or volunteer programme or other activity) help achieve any of the institution's strategic goals?' We can then set up activities which do that more effectively. I guarantee senior management will be much more interested in how effective our events and activities are in achieving a goal than in whether or not lots of people turned up and ate the catering. This report gives us some of the tools to help us do this.

To continue to understand these questions, and to make our programmes more effective, we need you to get involved. You can do this in a number of ways, from submitting your own institution's results to writing a blog for CASE about your thoughts on anything in the report.
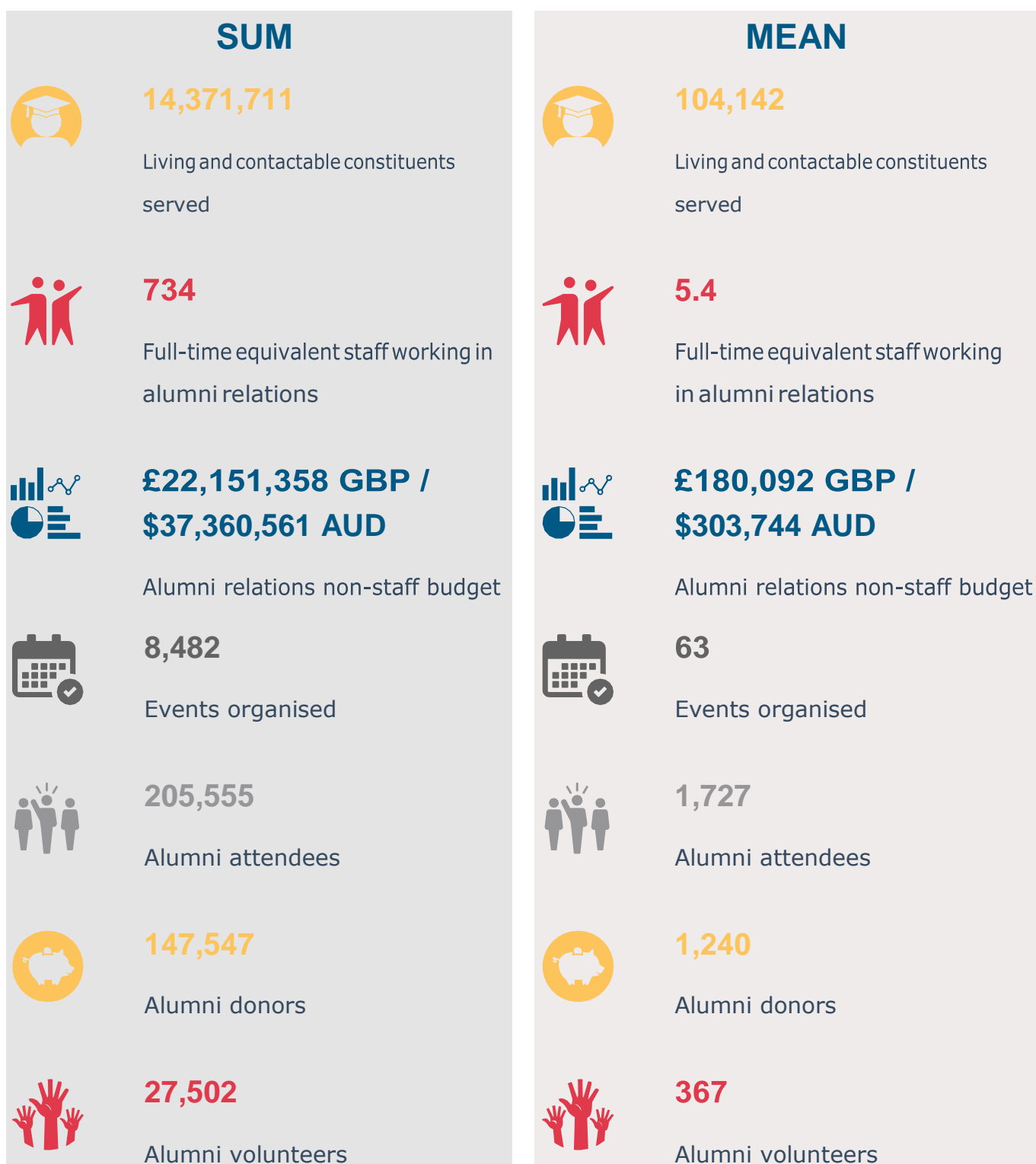
If you do your own tracking, you may learn about what is effective for you. If you share with CASE, you'll share that insight with the sector, making all of us more effective. We look forward to hearing from you.

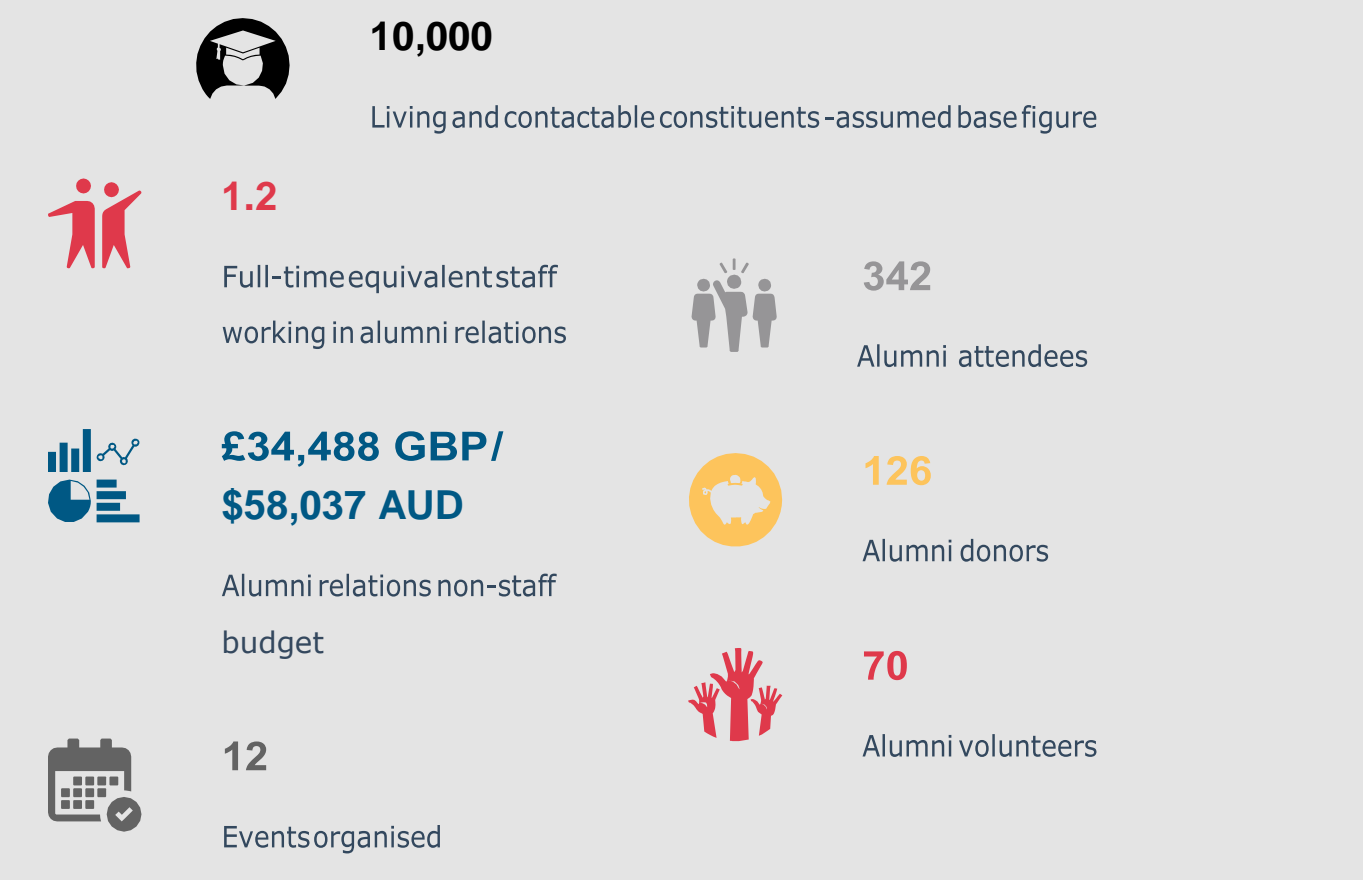**Alumni Relations Editorial Board 2018**

Charlotte Burford, Alumni Relations Manager, University of East Anglia
Claire Rundstrom, Head of Alumni Relations, The University of Sheffield
Claire Turford, Alumni Relations & Development Officer, Teesside University
Daniel Brennan, Director of Alumni & Community Relations, University of Queensland
Emma McFadyen, Head of Alumni Relations & Volunteering, University of Exeter
Erin Hallet, Head of Alumni Relations, Imperial College London
Holly Peterson, Head of Constituency Engagement, University of London
Lucy Nicholson, Communications & Alumni Relations Manager, Trinity Laban Conservatoire Of Music & Dance
Luke McGarrity, Head of Campaign Data & Insight, University of Birmingham
Nena Grceva, Head of Alumni Relations, Central European University
Nick Miller, Chief Executive, The Bridge Group
Nicola Pogson, Director of Alumni Relations, Imperial College London
Rachel Newbury, Head of Alumni Engagement & Development Services, Lancaster University
Sarah Banks, Deputy Director of Alumni & Stakeholder Relations, The University of Melbourne
Steve Walsh, Head of Operations & Information Strategy, Oxford Brookes University
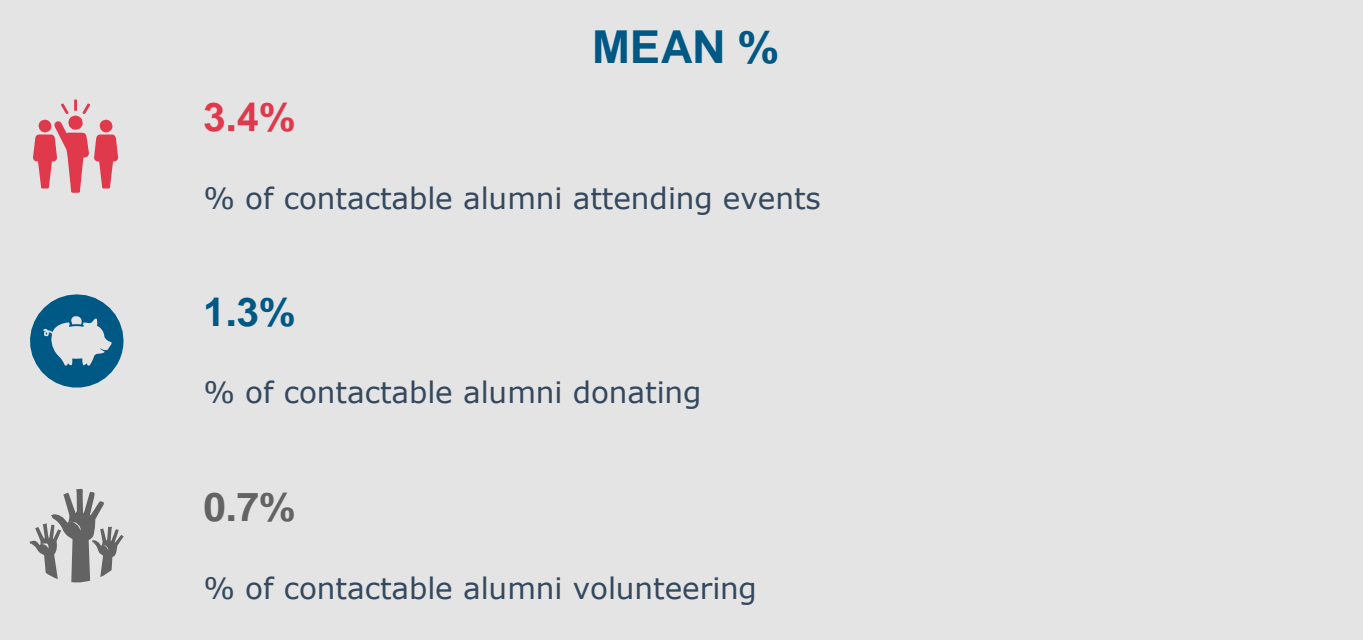
# 1. Key Findings

The infographics below illustrate the state of the sector across Europe and Asia-Pacific using total (i.e. sum) and average (i.e. mean) figures. Mean figures for computed variables involve calculations on a like-for-like basis. For example mean staff per 10,000 contactable constituents is based on two variables from the survey, alumni relations staff and contactable constituents. This is calculated by first computing staff per 10,000 contactable constituents for each institution and then calculating the mean across all the institutions, instead of computing it by using the sum figures for staff and dividing it by the sum figure for contactable constituents. The latter has an inherent bias as not all institutions answered all questions in the survey and not all questions exist in all three surveys that form the dataset for analysis.

| SUM | MEAN |
|---|---|
| **14,371,711** | **104,142** |
| Living and contactable constituents served | Living and contactable constituents served |
| **734** | **5.4** |
| Full-time equivalent staff working in alumni relations | Full-time equivalent staff working in alumni relations |
| **£22,151,358 GBP / $37,360,561 AUD** | **£180,092 GBP / $303,744 AUD** |
| Alumni relations non-staff budget | Alumni relations non-staff budget |
| 8,482 | 63 |
| Events organised | Events organised |
| 205,555 | 1,727 |
| Alumni attendees | Alumni attendees |
| **147,547** | **1,240** |
| Alumni donors | Alumni donors |
| **27,502** | **367** |
| Alumni volunteers | Alumni volunteers |

Alumni relations functions often measure metrics per 10,000 contactable constituents to reflect the relative size of an institution's contact base. Average (i.e. mean) figures per 10,000 contactable constituents were:

**10,000**

Living and contactable constituents - assumed base figure

**1.2**

Full-time equivalent staff working in alumni relations

342

Alumni attendees

**£34,488 GBP/ $58,037 AUD**

Alumni relations non-staff budget

**126**

Alumni donors

**12**

Events organised

**70**

Alumni volunteers

Alumni conversion rates for event attendance, philanthropic giving and volunteering were:

## MEAN %

**3.4%**

% of contactable alumni attending events

**1.3%**

% of contactable alumni donating

**0.7%**

% of contactable alumni volunteering

# 2. Alumni Engagement

The CASE Commission on Alumni Relations created a global Alumni Engagement Metrics Task Force in October 2016. The task force was assigned with developing a sector-wide framework to measure alumni engagement. In August 2018, the task force published a white paper, proposing definitions for key terms that form the basis of developing a common language across alumni relations professionals. These definitions are not directive in nature but facilitative, and should be interpreted as guidance for the sector. Institutions may apply the definitions as they deem appropriate to measure engagement.

## 2.1 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.

## 2.2 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.

### 2.2.1 Experiential engagement

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

### 2.2.2 Communication engagement

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

### 2.2.3 Volunteer engagement

Formally defined and rewarding volunteer roles that are endorsed and valued by the institution and support its mission and strategic goals.
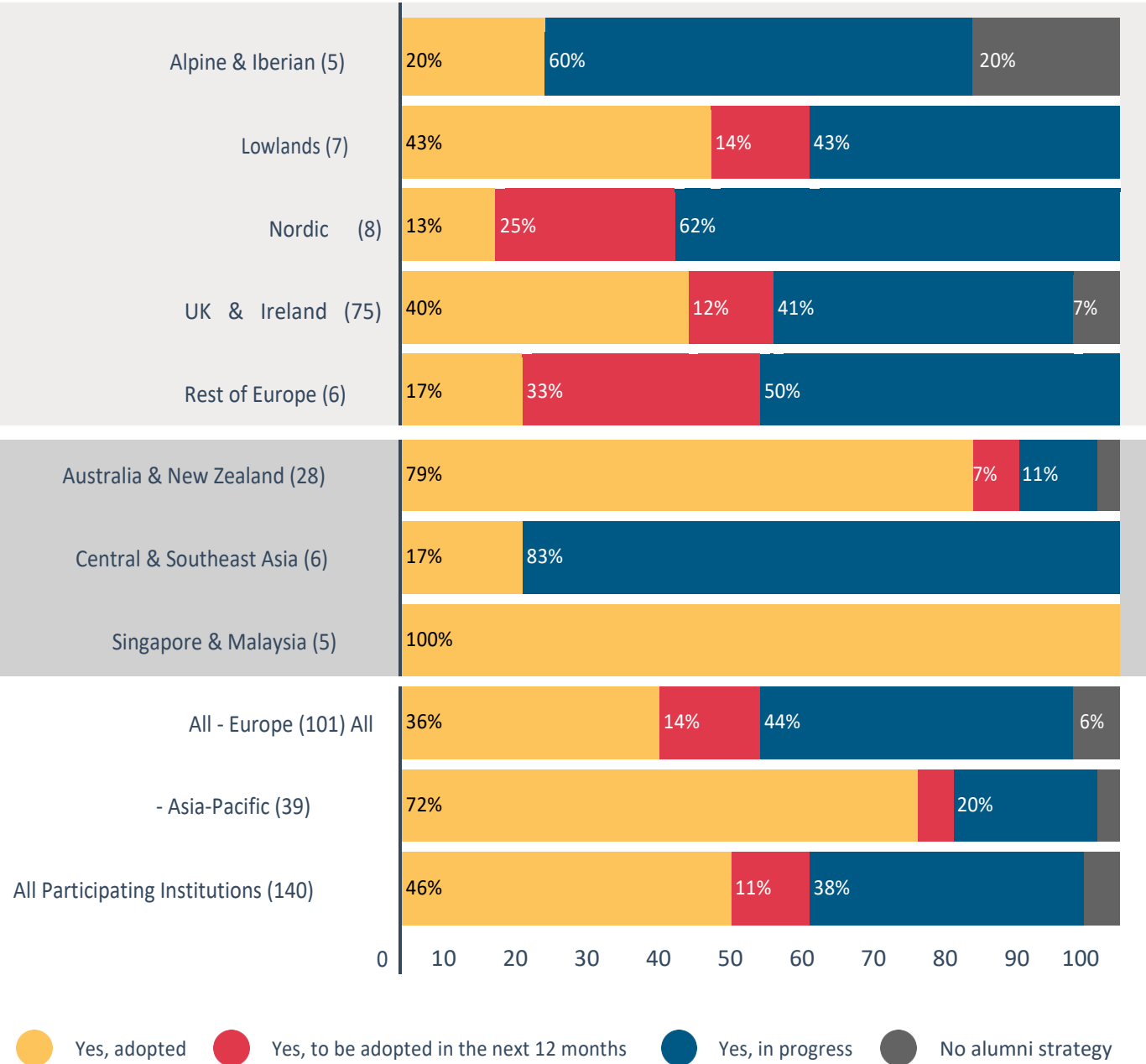
### 2.2.4 Philanthropic engagement

Diverse opportunities for alumni to make philanthropic investments that are meaningful to the donor and support the institution's mission and strategic goals.

# 3. Alumni Engagement Strategy

Data from the survey provides support to the longstanding belief that a robust alumni relations strategy can be transformational in terms of scaling up or starting an alumni relations programme.

Across the regions:
- Institutions in 'Australia & New Zealand' (78%) and 'Singapore & Malaysia' (100%) have a high percentage of institutions that have implemented an alumni relations strategy.
- In Europe, less than half the participating institutions in 'UK & Ireland' (40%) and 'Lowlands' (43%) have alumni relations strategies in place.
- Across the board, institutions are planning to create an alumni relations strategy soon, leaving a very small proportion of institutions with no signs of an alumni relations strategy in sight.

| Region | Yes, adopted | Yes, to be adopted in the next 12 months | Yes, in progress | No alumni strategy |
|---|---|---|---|---|
| Alpine & Iberian (5) | 20% | | 60% | 20% |
| Lowlands (7) | 43% | 14% | 43% | |
| Nordic (8) | 13% | 25% | 62% | |
| UK & Ireland (75) | 40% | 12% | 41% | 7% |
| Rest of Europe (6) | 17% | 33% | 50% | |
| Australia & New Zealand (28) | 79% | 7% | 11% | |
| Central & Southeast Asia (6) | 17% | | 83% | |
| Singapore & Malaysia (5) | 100% | | | |
| All - Europe (101) All | 36% | 14% | 44% | 6% |
| - Asia-Pacific (39) | 72% | 20% | | |
| All Participating Institutions (140) | 46% | 11% | 38% | |

Legend: 🟡 Yes, adopted    🔴 Yes, to be adopted in the next 12 months    🔵 Yes, in progress    ⚫ No alumni strategy

| Age of programme (Mean number of years) | Yes, adopted | Yes, to be adopted in the 12 months | Yes, in progress | No |
|---|---|---|---|---|
| Events offered | 18 | 22 | 17 | 15 |
| Volunteering offered | 15 | 21 | 12 | 13 |
| Fundraising asks made | 15 | 11 | 13 | 21 |

| Constituents (Mean) | Yes, adopted | Yes, to be adopted in the 12 months | Yes, in progress | No |
|---|---|---|---|---|
| Students | 25,263 | 15,771 | 16,766 | 10,808 |
| Contactable constituents | 130,308 | 78,380 | 86,422 | 52,910 |
| Email addresses | 73,618 | 45,332 | 51,136 | 34,032 |
| Telephone contacts | 97,714 | 61,615 | 62,114 | 38,625 |
| Postal addresses | 110,486 | 79,152 | 79,627 | 46,720 |
| Employment details | 32,696 | 24,072 | 20,587 | 16,152 |
| Attendees | 2,050 | 1,532 | 1,562 | 456 |
| Volunteers | 558 | 116 | 170 | 223 |
| Donors | 1,347 | 789 | 1,334 | 359 |

| Events organised | Yes, adopted | Yes, to be adopted in the 12 months | Yes, in progress | No |
|---|---|---|---|---|
| On-campus | 41 | 20 | 27 | 12 |
| Off-campus, but in country of domicile | 11 | 15 | 11 | 8 |
| International events | 28 | 22 | 21 | 12 |

| Programmatic budget (Mean non-staff budget) | Yes, adopted | Yes, to be adopted in the 12 months | Yes, in progress | No |
|---|---|---|---|---|
| Non-staff budget (GBP) | £224,481 | £154,687 | £142,502 | £63,316 |
| Non-staff budget (AUD) | $379,179 | $260,222 | $239,850 | $106,450 |

| Alumni relations staff | Yes, adopted | Yes, to be adopted in the 12 months | Yes, in progress | No |
|---|---|---|---|---|
| FTE Alumni relations staff | 6.7 | 3.8 | 4.7 | 2 |

# 4. Alumni Benefits

Alumni relations is not only about generating alumni support for the institution but, equally importantly, about providing value to alumni over their lifetime. As part of this approach, institutions should consider the impact of their benefits on resources and alumni affinity and should offer benefits that are:

## RELEVANT

serve the needs of the alumni segments

## UNIQUE

benefits not available to the alumni community outside of institutional networks

## EXCLUSIVE

available only to the alumni community

## COLLECTIVE

helps bring together alumni in a network or community

## VALUED

makes alumni feel good about themselves and their connection with the institution

## VISIONARY

contributes to achieving institutional goals

Alumni benefits serve important uses when used strategically to:

- create a sense of belonging or offer credibility to recent graduates (lifetime institutional email, merchandise and membership cards)
- support lifelong learning (library access and online resources)
- contribute to business and career development (find-a-friend service and alumni business promotions)
- leverage institutional connection (sports and institutional discounts)

# 5. Key Metrics

**CONTACTABLE ALUMNI**

Contactable constituents are living individuals, served by the alumni function, who can be contacted by at least one medium of communication - email, telephone or post. Often institutions exclude constituents who have opted out from receiving communications when they compile data on their contactable constituents.

Effects of the European General Data Protection Regulation may have an effect on the number of contactable constituents in years to come across all regions.
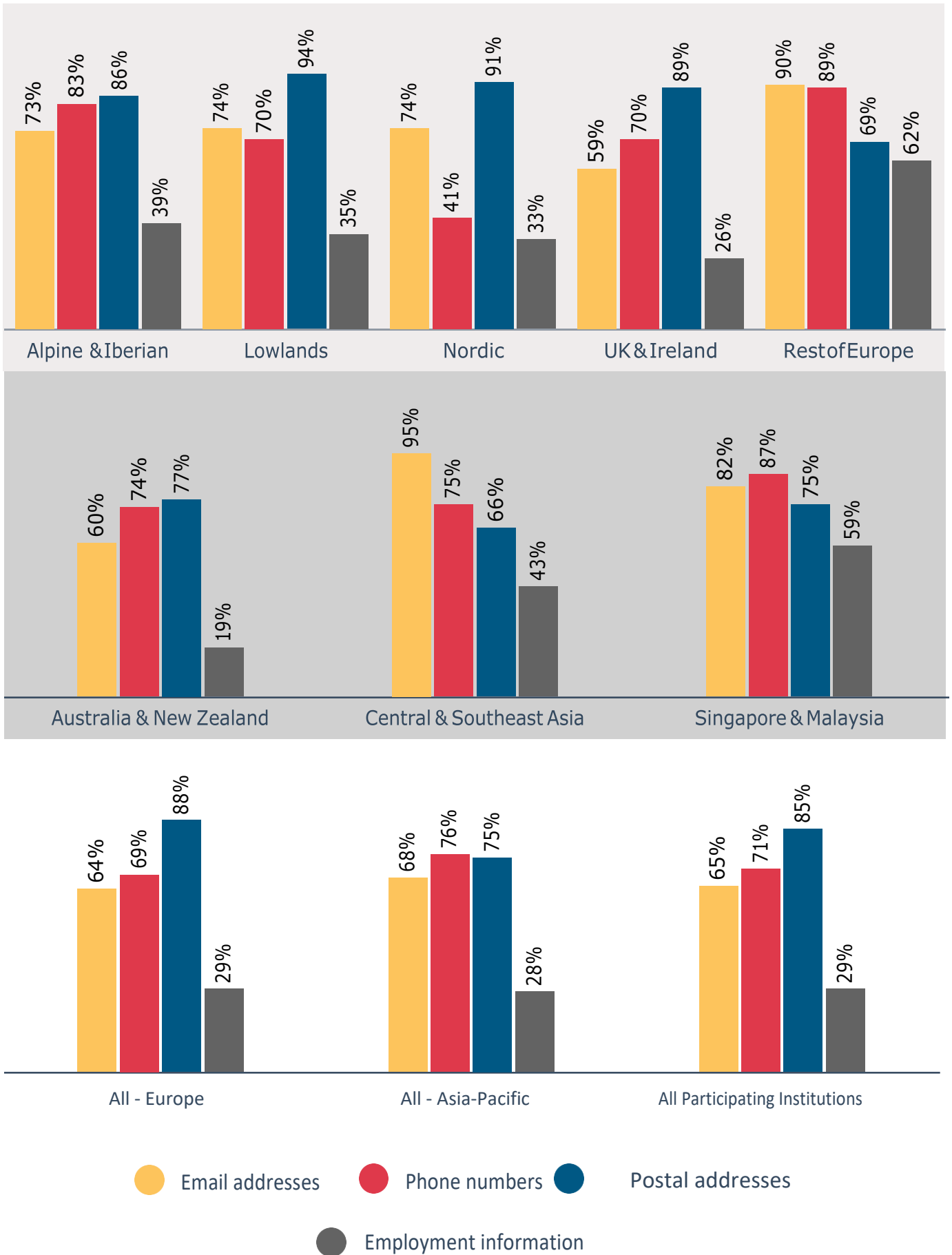
As these contacts form the basis of most direct communication to alumni, it is important to regularly undertake data cleansing exercises to verify if constituents have moved home or to remove any duplicate records. With multiple contact numbers and email addresses it is also a challenge to identify constituents' preferred channel of communication.

Having an understanding of how this number affects metrics and benchmarks will ensure engagement participation rates are interpreted and analysed correctly as the number of contactable constituents underpins the calculations of most engagement participation rates. For example an institution with 100 attendees and 10,000 contactable alumni will report an engagement rate of 1% and the same institution may report a higher engagement rate (2%) after a data quality check that reduces its contactable alumni to 500.

Regionally, there is a significant difference between average contactable constituents:
- Mean number of contactable constituents at institutions in 'Australia & New Zealand' is more than 151,922, the highest across all the regions, but just over half (56%) are contactable by email and four out five contacts have a phone number (78%) or postal address (18%).

- Mean number of contactable constituents at institutions in 'UK & Ireland' is also relatively high compared to other regions (108,598), but just over half (55%) are contactable by email. In terms of phone numbers and postal address, 69% contacts have a phone number and 89% have a mailing address.

- Institutions in 'Lowlands' and 'Nordic' regions have 81,850 and 35,712 mean number of contactable constituents, with over 90% contactable by direct mail.

- Institutions in 'Central & Southeast Asia', on average, have email addresses for almost 95% of their constituents.

- With relatively large contact databases (111,115), institutions in 'Singapore & Malaysia' also demonstrate above-average contactable participation rate with over 70% contactable by email (70%), phone (93%) and direct mail (98%).
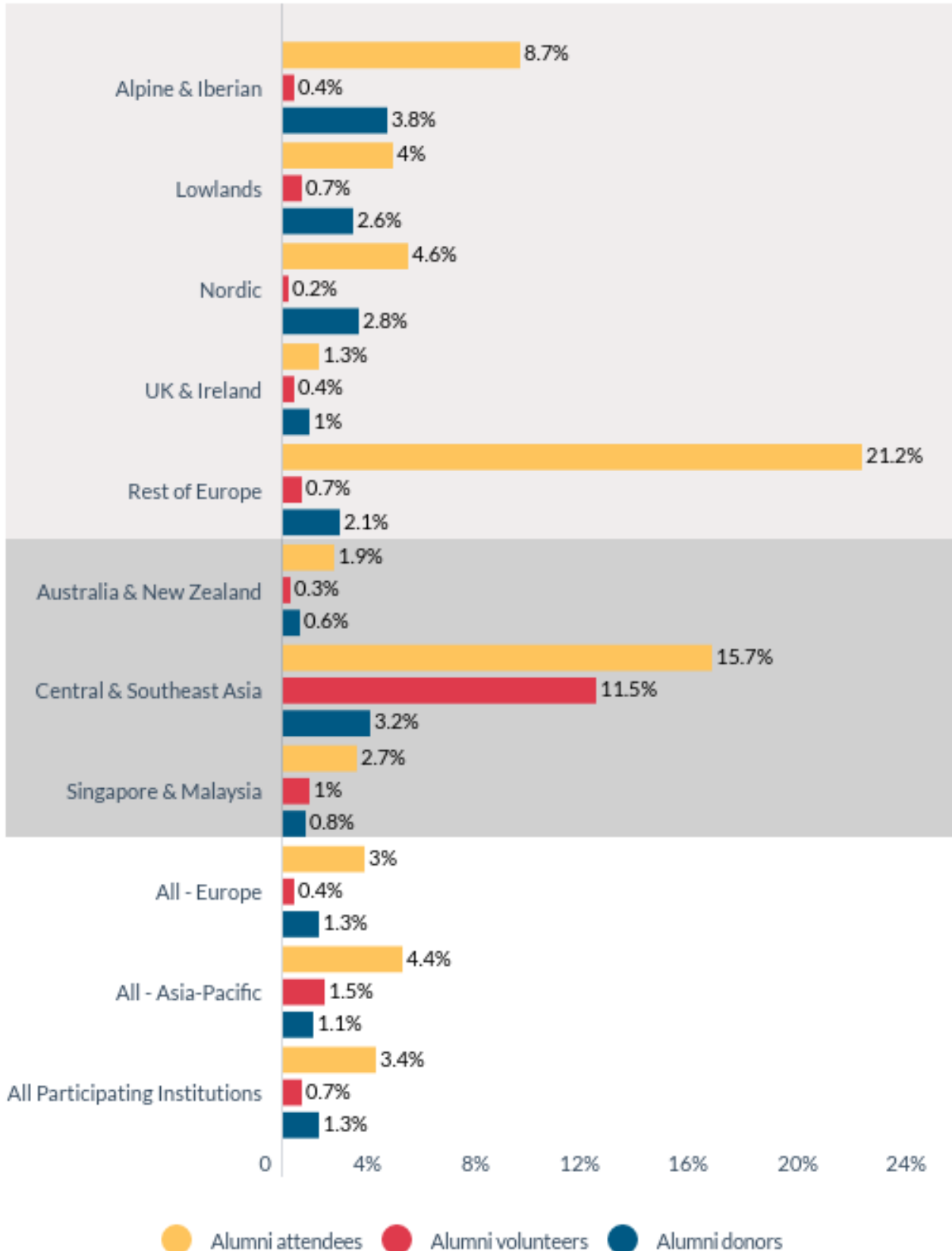
% of constituents contactable

**Alpine & Iberian**
- Email addresses: 73%
- Phone numbers: 83%
- Postal addresses: 86%
- Employment information: 39%

**Lowlands**
- Email addresses: 74%
- Phone numbers: 70%
- Postal addresses: 94%
- Employment information: 35%

**Nordic**
- Email addresses: 74%
- Phone numbers: 41%
- Postal addresses: 91%
- Employment information: 33%

**UK & Ireland**
- Email addresses: 59%
- Phone numbers: 70%
- Postal addresses: 89%
- Employment information: 26%

**Rest of Europe**
- Email addresses: 90%
- Phone numbers: 89%
- Postal addresses: 69%
- Employment information: 62%

**Australia & New Zealand**
- Email addresses: 60%
- Phone numbers: 74%
- Postal addresses: 77%
- Employment information: 19%

**Central & Southeast Asia**
- Email addresses: 95%
- Phone numbers: 75%
- Postal addresses: 66%
- Employment information: 43%

**Singapore & Malaysia**
- Email addresses: 82%
- Phone numbers: 87%
- Postal addresses: 75%
- Employment information: 59%

**All - Europe**
- Email addresses: 64%
- Phone numbers: 69%
- Postal addresses: 88%
- Employment information: 29%

**All - Asia-Pacific**
- Email addresses: 68%
- Phone numbers: 76%
- Postal addresses: 75%
- Employment information: 28%

**All Participating Institutions**
- Email addresses: 65%
- Phone numbers: 71%
- Postal addresses: 85%
- Employment information: 29%

Legend:
- Email addresses
- Phone numbers
- Postal addresses
- Employment information

## ALUMNI EVENTS ATTENDEES, VOLUNTEERS AND DONORS

The survey collected aggregate information on number of alumni event attendees, alumni volunteers and alumni donors over a 12-month cycle. These three key data points have been used widely as an engagement criteria to assess the overall success of an alumni programme. The sector is now looking at metrics beyond these three criteria too.
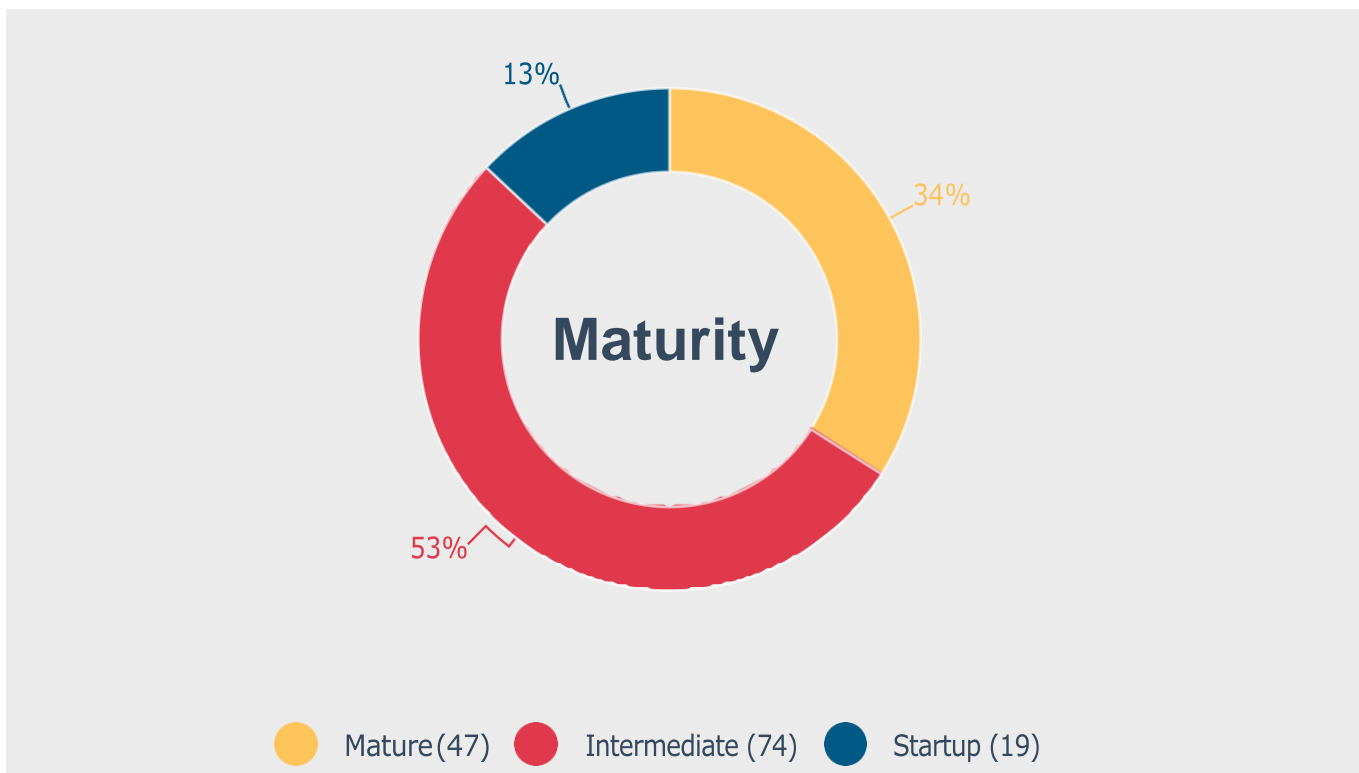
**% of contactable alumni attending events, volunteering and donating**

| Region | Alumni attendees | Alumni volunteers | Alumni donors |
|---|---|---|---|
| Alpine & Iberian | 8.7% | 0.4% | 3.8% |
| Lowlands | 4% | 0.7% | 2.6% |
| Nordic | 4.6% | 0.2% | 2.8% |
| UK & Ireland | 1.3% | 0.4% | 1% |
| Rest of Europe | 21.2% | 0.7% | 2.1% |
| Australia & New Zealand | 1.9% | 0.3% | 0.6% |
| Central & Southeast Asia | 15.7% | 11.5% | 3.2% |
| Singapore & Malaysia | 2.7% | 1% | 0.8% |
| All - Europe | 3% | 0.4% | 1.3% |
| All - Asia-Pacific | 4.4% | 1.5% | 1.1% |
| All Participating Institutions | 3.4% | 0.7% | 1.3% |

Legend: ● Alumni attendees ● Alumni volunteers ● Alumni donors

# 6. Level of Maturity

The report also offers information by level of maturity, thereby offering benchmarking opportunities for participating institutions. Information on level of maturity (start-up, intermediate, mature) was self-reported by participating institutions in the survey.

More than half the participating institutions considered their alumni relations function as intermediate in terms of level of maturity, 34% considered their alumni relations capabilities as mature while 13% were in the start-up phase.



Maturity

13%    34%    53%

● Mature(47)    ● Intermediate (74)    ● Startup (19)

**Mature:** Alumni relations programmes who have been offering events, volunteering and giving programmes for more than 15 years. On average, over a 12-month reporting period, they would have 125,000 contactable constituents with 2,000 event attendees, 2,000 donors and 350 volunteers. They would typically oversee an events programme of 100 events annually. In terms of resources and investment, these programmes would report an annual non-staff budget of £250,000 GBP / $400,000 AUD with 8 FTE staff.

**Intermediate:** Alumni relations programmes who have been offering events, volunteering and giving programmes for more than 10 years but less than 15 years. On average, over a 12-month reporting period, they would have 100,000 contactable constituents with 1,500 event attendees, 900 donors and 400 volunteers. They would typically oversee an events programme of 50 events annually. In terms of resources and investment, these programmes would report an annual non-staff budget of £150,000 GBP / $260,000 AUD with 5 FTE staff.

**Start-up:** Alumni relations programmes who have been offering events, volunteering and giving programmes for less than 10 years. On average, over a 12-month reporting period, they would have 50,000 contactable constituents with 500 event attendees, 400 donors and 70 volunteers. They would typically oversee an events programme of 25 events annually. In terms of resources and investment, these programmes would report an annual non-staff budget of £80,000 GBP / $135,000 AUD with 3 FTE staff.

# 7. Alumni Engagement Models

Over the years, practitioners and experts have developed new models for alumni engagement and adapted existing models from other sectors to fit within an alumni relations setting. The report highlights three such models and hopes to inspire readers to use these to create their own models that work for their institution.

## 4.1 Circular Model[1]

The A-A-A Model aims to encapsulate the core pillars of alumni engagement measurement in one simple framework that is both easy to understand and share. The model proposes three key elements that depend on each other and that can be measured to determine the overall performance of an alumni engagement programme. This assessment can be undertaken at any stage of the student-alumni life cycle. It captures criteria associated with:

- Affinity (feelings, attitudes and behaviours)
- Activity (input and output measures to determine return on engagement)
- Action (impact outcomes that help achieve strategic goals and objectives)

## 4.2 Linear Model[2]

This linear model proposes a definition for alumni engagement that aims to shift the idea of alumni engagement being purely transactional to having more to do with relationship-building. Relationships with alumni change and can be affected by the engagement programmes throughout the alumni life cycle. The definition reflects this journey using the different stages that alumni go through, similar to customer journey life cycle models that are widely used outside of higher education.

The model defines alumni engagement as "the level of Attraction, Connection, Affection, and Influence an alumnus has with their alma mater over time".

## 4.2 Matrix Model[3]

This matrix model encompasses alumni engagement based on feeling and behaviour that was recorded for each alumni in the database using a scoring system (based on the results of an alumni survey) and potential impact purely based on data that assessed fundraising ability. Plotting all alumni on a matrix where the x-axis denoted 'engagement levels' and y-axis denoted 'impact levels', the model was able to segment the alumni base into four key categories, each with specific characteristics:

- Sleepers are alumni who have little or no connection to the university and who have the ability to make only a low to moderate impact.

- Champions have a moderate to strong connection with the school and have the ability to make a low to moderate impact.

- Potential leaders exhibit low to moderate connection with the school but have the ability to make a moderate to high impact.

- Leaders demonstrate a moderate to strong connection with the school and have the ability to make a moderate to high impact.

[1]Developed by Holly Palmer, Director, Holly Palmer Consulting & Yashraj Jain, Research Manager, CASE for CASE Europe Alumni Relations Institute 2018

[2]Adapted from "Alumni & Advancement: Agree on a Definition of Engagement" published on Alumni Access by Gary Toyn, Marketing and Engagement Consultant, Access

[3]Adapted from "The science behind alumni engagement" by Jason Coolman, Associate Vice-President od Development, University of Waterloo, published in the April 2011 edition of Currents