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"Alumni Relations and Institutional Giving"

News Articles from CASE

A TASTE for Adventure

Student-alumni program goes informal with great success

By Gayle Bennett

A lazy Saturday on any campus likely finds students studying, sleeping, or hanging out. Students at Maryland's Johns Hopkins University can add zip-lining and spelunking, among other activities, to the list of things to do.

Thanks to the Take a Student to Events—or TASTE—program, students can choose from a range of fun or professional outings—planned, hosted, and paid for by alumni in the D.C. and Baltimore areas, and facilitated by the alumni office.

Marketing the program to each constituency has been a breeze. "Last year we focused on first-year students and sent one e-mail blast," says Justin Fincher, associate director for student and young alumni programs. "We had so many interested students—over 200—that that was all we had to do." Alumni were informed of the program via e-mail communications, and 70 alumni hosts signed on; many hosted more than one event or multiple students per outing.

Prior to the TASTE program, the alumni office had a student-alumni program that was meant to forge a more formal relationship. "While the intentions of the program were good, the relationships generally didn't materialize," says Fincher. With TASTE, each event is meant to be a one-off situation. "We really want to be more casual about it and help them connect," he says. Students and alumni can choose to stay in touch or not.

Alumni office interns ensure that students know the logistics—where to meet and what to wear—and after the events, they follow up with the hosts about their experiences and whether they'll participate again. "Our goal is to retain these folks," Fincher says. "We are finding that hosts who have good experiences, and the majority of them do, end up hosting two to three times a semester."

Events have ranged from group dinners to job shadowing to the aforementioned zip-lining and spelunking. "Anything outdoors is usually very popular," Fincher says. "Students are more interested in fun activities and not necessarily a lecture or event where they have to wear a suit and tie."

Retrieved from case.org.

Conducive to Success

Integration of alumni relations and development is vital to our institutions

By Thomas J. Minar

In today's resource-scarce and return-on-investment-oriented institutional environment, can we afford to do alumni relations for the sake of alumni relations? In other words, within advancement, can or should alumni relations exist in a vacuum?

I ask these questions as a longtime alumni relations professional and volunteer. I have been an alumni director, an advancement vice president, and the president of my alumni association. My background and interest in alumni relations has led not just to the success but also the joy of my major and principal gift work. Because at the crux of these questions is the relationship of alumni relations to development, or the relationship of friendraising to fundraising.

Some alumni relations professionals, however, want nothing to do with fundraising. They are genuinely concerned with the engagement of alumni in their institutions, and they believe that certain aspects of and approaches to fundraising are threatening to alumni and damaging to the relationship between alumni and the institution.

This attitude allows constituents to become, and remain, uncomfortable with asks; yet we know that philanthropy is critical to the health of our institutions. Teaching that to our students is a long-term solution, but not teaching the lesson of philanthropic engagement to alumni, parents, and other friends is akin to hiding our heads in our shells.

When I talk about integration, I am not arguing for integrating marketing, including public and media relations, enrollment, and other forms of institutional outreach. I am also not arguing for merging the annual fund office with the alumni office. I am focusing on the functions of alumni relations and fundraising, and the symbiotic relationship between them. The best alumni relations officers understand the direct relationship of their work to resource gathering, and they integrate awareness of philanthropy and development programs and even solicitation into their work.

Why raise friends among family?

I don't want to be friends with alumni. When our former students were admitted to our institutions, they became family; therefore, friendship isn't what we should strive for.

Institutions strive, instead, for the ongoing engagement of alumni in the life of the institution and, ultimately, for their sharing of time, talent, and treasure. In *The Complete Guide to Fundraising Management*, Stanley Weinstein writes, "Friendraising activities are essential to any fundraising effort. As people become more involved, they become more committed. Their donations increase as their sense of belonging grows."

This is not news to any alumni relations or development professional. But it leads to these questions: Why do we do friendraising if it intends simply to be fundraising without an ask? Are we ashamed of fundraising? Being afraid to solicit is a systemic problem at the root of many institutions' development nonperformance.

In education, we tend to use the term friendraising to describe the actions we take to "raise friends" for an institution. We imply that friendraising comes before fundraising. And while funds can be a byproduct of friendraising, we tend to raise friends because we want to be (literally, we want our institutions to be) popular. All too often, we have made friendraising synonymous with alumni relations, which is a simplification of what alumni relations is or should be.

Some alumni directors and even advancement vice presidents will claim that their institutions' alumni aren't ready even for the annual fund brochure to be on the registration table at alumni weekend or an off-campus alumni event. They maintain that their alumni relations activity is about raising friends for the institution and that friends might someday become donors. Leaving philanthropy out of the equation by leaving the brochure off the table deceives constituents into thinking that their support isn't important or isn't a critical motive behind the mere existence of such programs. In a sense, it's dishonest.

And because of that dishonesty, I hate the term friendraising. I think the idea that "raising friends" is an isolated activity does our institutions damage. Isolating relationships from potential financial support is naïve in that it risks denying the simple notion that giving comes from the heart. Alumni relations does not just set the stage for the separate work of development—it is a critical piece of the equation.

Even if we do not engage in any talk of fundraising in alumni relations, we likely still imply that we will convert our friends into funders. Instead, let's talk openly, as in a strong family system, about the financial realities of education and the role of philanthropy in supporting what educational institutions do. Our constituents, our family members, will see their own roles expand, and that will provide opportunity for cultivation, solicitation, and long-term expansion of giving.

Giving and more

Fundraisers, presidents, deans, and faculty members too often focus on the final outcome of the fundraising process—the big, or even ultimate, gift from the donor. As strategic professionals, we must work with our colleagues to remind them that philanthropy is an outcome of effective long-term relationship building and that relationships are not simple.

Our fundraising colleagues often fail to remember the wide range of engagement activities upon which we can build the best relationships. We should not think of giving as the only long-term outcome of building relationships with our alumni, though it is critical and perhaps the most important action that many of our alumni can take to help the institution. However, if we merely invite our alumni to events and then ask them for financial support, we limit the potential of these relationships.

Fundraisers need to understand that engagement strategies that advance the institution also include involving alumni as mentors, class lecturers, out-of-class speakers, program participants, connoisseurs of the arts, athletics supporters, alumni association volunteers, advisory board members, sources of internships and jobs (for alumni and students alike), strategic plan counselors, recruiters, and advisors. This wide approach to creating deep, familial relationships between alumni and the institution makes alumni feel included, important, and valued for reasons far beyond their checkbooks.

So when I talk about the necessary relationship between alumni relations and giving, and I am challenged that I don't value the other things alumni bring to the table, I refute that argument. But I do also hope that the more intense involvement of these alumni will result in their giving. And I know that many people will give more because they are engaged in those meaningful ways.

Furthermore, I think that our best volunteers are also donors. Often volunteers without financial commitment to the institution are lacking perspective on a part of their relationship with us and the reality of life at a private or privately supported public educational institution.

Models for integration

Whether an institution is growing or contracting, integrating alumni relations with development can bring success. American University's regional advancement program integrates prospect discovery and qualification, annual fund and gift solicitation, and alumni engagement through chapter activity, admissions recruitment, and student mentorship.

Doing these things on a regional basis strengthens our overall understanding of our constituents and helps our academic units identify engagement strategies specific to each constituent. Directors of regional advancement serve as key on-the-grounders for us in four regions around the country, as well as in the D.C. region, and ultimately are key conduits between the institution and our constituents. Anyone at the university seeking information or connection in a particular geographic area can count on the regional staff being knowledgeable and helpful. Regional advancement activities stand alongside an alumni relations program that provides engagement through more than 125 annual events all around the world.

Unlike many other advancement issues, integration can be easier for smaller institutions. Smaller offices or those facing downsizing can perhaps integrate certain traditional alumni relations activities with annual fund awareness or ask alumni relations officers to schedule face-to-face visits during their event travels. Another option is increasing the role of traveling major gift officers in regional alumni programming.

In any of these settings, the focus should be on making our constituents aware of the role of philanthropy in the institution and thus comfortable with solicitation.

Giving is part of full engagement

We must never offer events and giving as the only options for alumni engagement. Don't give alumni the opportunity to claim that we only want their money. Offer them a range of opportunities, but always include giving as a critical opportunity. Even the most active alumni who do not give are not fully engaged. Their relationship with the institution is not complete without their gift.

Additionally, development-focused alumni relations will give alumni relations offices credibility with boards, presidents, and even advancement vice presidents. At my institution, these internal constituents praise staff who clearly have development outcomes in mind throughout alumni relations initiatives—even the simple annual fund solicitation at a faculty speaker event gets a positive response that we really are "doing our jobs." Creating and measuring that focus will add to alumni officers' professionalism and help advance the discipline.

Put simply, alumni relations for the sake of alumni relations isn't fair to anyone. It shorts the institution, and it says to alumni that we really just want to be friends. Instead, treat them as family and engage them fully in the life of your institution.

Retrieved from case.org.

A Is for Affinity

Survey helps hone advancement efforts

Some alumni are never going to give. Never. It usually takes several attempts for a development office to figure that out, however. A new survey tool from Oregon State University's College of Business aims to take the guesswork out of determining alumni affinity.

The Building Community Initiatives survey, developed by marketing professor Jim McAlexander, yields alumni affinity grades based on four key measures: the university's identity and brand (Do they wear logo clothing?); the institution (Do they like the direction of the leadership?); their peers (Are they in contact with former classmates?); and their education (Has it helped them in their careers?).

"The affinity score is a clever mix of qualitative and quantitative data," says Mark Koenig, senior director of advancement services at the OSU Foundation, which used the survey during "The Campaign for OSU."

The foundation surveyed 32,000 unengaged alumni and identified high-affinity alumni for a successful targeted phonathon. Major gift officers used the BCI scores, along with capacity ratings, to prioritize their workloads.

In addition, the foundation reached out to those with low BCI scores. "If someone's really high on brand, peers, and education but low on institution, that means they don't like where the university

is headed or don't know. That gives [gift officers] talking points," says Amanda Terhes, co-director of the College of Business-based Close to the Customer Project, which provides market research services including BCI.

Terhes says there are uses for alumni affairs and communications departments as well. The survey of OSU business school alumni revealed that a cohort from the early 1990s was unhappy with its education. Officials realized that when those graduates were on campus, the administration was considering huge budget cuts.

"They didn't actually cut, but there was that fear," Terhes says. "Students in the 1990s felt they weren't getting as good of an education because they were told they weren't getting as good of an education." In an effort to change that perception, the business school's publication is reaching out to successful alumni about the impact their education has had on their careers for potential articles.

For more information on BCI, visit oregonstate.edu/bci.

Retrieved from case.org.

Alumni Relations Benchmarking Template

The Alumni Relations Benchmarking Template was originally developed by the Association of Private College and University Alumni Directors ([PCUAD](http://www.pcuard.org)). In April 2009 the template was adapted and formally adopted by the CASE Commission on Alumni Relations to provide alumni relations practitioners at all types of institutions with examples of questions they might use to benchmark their programs with those of peer organizations.

The questions are intended to serve as a template for communities of practice using the CASE Benchmarking Toolkit. CASE is working to test the integration of the questions into the toolkit so that practitioners can adopt and adapt entire sections for their own surveys.

Meanwhile, the full template is provided here to stimulate discussion and serve communities of practice planning to use the toolkit for peer-group benchmarking.

CASE is grateful to PCUAD for sharing these benchmarking questions for the benefit of the entire alumni relations community.

Organizational Management	
Does the alumni relations office have a strategic operating plan that is shared with key stakeholders?	YES/NO
Does the alumni relations office have a marketing and communications plan for the alumni office / association?	YES/NO
Does the alumni relations office have a plan to recruit and retain a diverse alumni relations staff?	YES/NO

Does the alumni relations office have up-to-date job descriptions for all staff?	YES/NO
Does the alumni relations office have an up-to-date organization chart?	YES/NO
Does the alumni relations office have a plan for staff development (professional, management, technical, etc.)?	YES/NO
Does the alumni relations office have written office procedures (handbook, online, etc.)?	YES/NO
Does the alumni relations office have adequate office space?	YES/NO
Does the alumni relations office hold regular staff meetings?	YES/NO
Does the alumni relations office have an annual planning retreat?	YES/NO
Does the alumni relations office reward or recognize staff innovation and initiative?	YES/NO
Does the alumni relations office conduct annual staff evaluations?	YES/NO
Does the alumni relations office conduct annual program evaluations?	YES/NO
Does the alumni relations office create an annual report?	YES/NO
Does the alumni relations office have a written crisis management plan in place?	YES/NO
Does the alumni relations office have a written disaster recovery plan in place?	YES/NO
Demographics	
Number of undergraduate mailable alumni	
Number of undergraduate unmailable alumni ("lost" or "do not contact" undergraduate alumni)	

Number of emailable undergraduate alumni	
Number of graduate mailable alumni	
Number of graduate unmailable alumni ("lost" or "do not contact" graduate alumni)	
Number of emailable graduate alumni	
Number of emailable alumni (total)	
Number of undergraduate students (enrolled full-time)	
Number of graduate students (include all graduate students, full and part time, for this figure)	
Number of alumni relations professional staff (FTE)	
Number of alumni relations support staff (FTE)	
Number of student worker FTEs in the alumni relations office	
Total number of staff dedicated to frontline fundraising and alumni relations	
Total number of unique alumni who attended any institution / alumni event over the last year	
How many alumni live outside the country?	
Do you have an international alumni relations engagement plan?	YES/NO
Senior Administration Partnerships	
Does the alumni relations executive director meet regularly with senior administration?	YES/NO
Does the alumni relations office educate institution leaders about the value of alumni relations?	YES/NO
Do volunteer leaders meet regularly with senior administration?	YES/NO

Do senior administrators meet with alumni in general?	YES/NO
Does the alumni relations executive director meet with or present to trustees or committee?	YES/NO
Does the board of trustees have a committee that focuses on alumni relations issues?	YES/NO
Is the alumni relations staff represented on institution-wide initiatives or committees?	YES/NO
Institutional Fundraising	
Number of undergraduate alumni who gave a gift	
Number of alumni who gave a gift	
Percent annual giving (participation rate reported to US News and World Report magazine)	
Is there a good / productive working relationship between the alumni office and the development office?	YES/NO
Is there collaboration between the alumni office and the development office?	YES/NO
Does the alumni relations office have a role in communications to alumni about fundraising?	YES/NO
Does the alumni relations staff file contact reports on activity with key alumni?	YES/NO
Does the alumni relations office participate in capital campaigns?	YES/NO
Overall, is fundraising at your institution more centralized or more decentralized?	More centralized/More decentralized
Does the alumni relations office financially support the fundraising model at your institution?	YES/NO
If so, briefly state how (in 50 words or fewer).	YES/NO

Database Management	
Do you have a single central database?	YES/NO
Do you have a written policy for volunteer use of alumni data?	YES/NO
Do you have an active program for ensuring data integrity?	YES/NO
Do you code event attendance?	YES/NO
Do you code awards?	YES/NO
Do you code volunteer activities?	YES/NO
Do you code affinity groups?	YES/NO
Do you code club membership / participation?	YES/NO
Do you code travel program participation?	YES/NO
Student Outreach Programs	
Total number of student participants in student-alumni events	
Senior class gift participation percentage	
Number of students in your student alumni group	
Do the student outreach programs have a written mission, plan, and goals?	YES/NO
Is there a job description for student volunteers?	YES/NO
Does a student-alumni group exist?	YES/NO
Is there a good / productive working relationship between the alumni office and the student affairs staff and appropriate student leaders?	YES/NO
Does the alumni board address student-alumni relations (committee, accepts reports, etc.)?	YES/NO

Publications: Electronic Communications

Number of registered users within online community	
Number of institution-activated or email forwarding addresses activated	
Unique logins to online community per month (average)	
Number of people who have registered for an event online	
Do you have an alumni Web site?	YES/NO
Do you have an online community (communications and services)?	YES/NO
Does your alumni office have a marketing plan aimed at emerging social networks?	YES/NO
Do alumni have the ability to update their personal information online?	YES/NO
Do alumni have access to a variety of electronic newsletters?	YES/NO
Does your alumni office have a broadcast e-mail policy?	YES/NO
Do you have an online alumni directory?	YES/NO
Is the alumni Web site managed by the alumni relations office?	YES/NO
Does your board consider issues pertaining to technology and electronic communication?	YES/NO
Do you have a staff member responsible for training alumni relations staff in electronic communications?	YES/NO
Do you assign any staff member to lead electronic communications in their job description?	YES/NO
Do you have a written plan for incorporating technology in alumni relations?	YES/NO

Do you have tracking and evaluation mechanisms in place?	YES/NO
Is there a good / productive working relationship between the alumni office and the campus technology office and / or outside vendors?	YES/NO
Do you have a printed alumni directory?	YES/NO
Do you offer online event registration?	YES/NO
Publications: Magazine	
Number of issues per year	
Circulation per issue	
Does the magazine includes class notes?	YES/NO
Does the magazine include alumni association message or news?	YES/NO
Does the magazine includes alumni profile(s)?	YES/NO
Does the magazine include student, faculty, and campus culture coverage?	YES/NO
Does the magazine include athletic reporting?	YES/NO
Does the magazine include the president's column, or news about presidential activity?	YES/NO
Does the magazine include fundraising in each issue?	YES/NO
Is there a partnership between the magazine and the alumni relations office?	YES/NO
Is there an electronic magazine presence?	YES/NO
At least one issue of your alumni magazine is sent to all alumni in U.S.	YES/NO
At least one issue of your alumni magazine is sent to international alumni	YES/NO

At least one issue of your alumni magazine is sent to current parents	YES/NO
At least one issue of your alumni magazine is sent to current students	YES/NO
Where does the primary responsibility for the alumni magazine reside?	Alumni Office/Other Office
Does your institution send other printed alumni publications to all alumni?	YES/NO
Budget and Finance	
Does the alumni relations office have an annual budget review and planning process?	YES/NO
Does the alumni relations office review staff salaries on an annual basis?	YES/NO
Which entity provides the largest source of financial support for your alumni relations operation?	Institution/Foundation/Alumni Association/Other
Alumni relations self-generated support (in dollars)	
Alumni relations staff salary support (in dollars) from institution (exclude benefits)	
Alumni relations program support (dollars) from institution	
If your institution has an alumni center, is this facility supported primarily by the institution's budget?	YES/NO
Additional Questions	
Does the alumni relations office have an alumni association?	YES/NO
If YES/NO, does the alumni association charge dues for membership?	YES/NO
Are membership dues counted as gifts?	YES/NO
Are your regional clubs or chapters supported by the alumni	YES/NO

relations staff?	
Do your regional clubs or chapters have any reporting requirements to the alumni relations department or association to maintain its "member in good standing" status with your organization?	YES/NO

Retrieved from case.org.