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ALUMNI ENGAGEMENT: BEST PRACTICES FOR BUILDING LONG-TERM RELATIONSHIPS

A 2018 Campbell & Company study of
best-in-class liberal arts institutions



INTRODUCTION

Alumni engagement is a perennial concern among higher education advancement professionals—and for good reason: a strong program can not only sustain your institution's annual fund over the long term, it can also help build your major donor pipeline and provide your school with some of its most active and effective volunteers.

But how exactly do you build a strong alumni engagement program? If this question were simple to answer, alumni participation rates north of 40 percent would be the rule, not the exception.

Although institutions of every stripe would stand to benefit from engaging their alumni more effectively, the challenges of building support among alumni are of particular relevance to small and mid-size liberal arts colleges. These institutions' strengths (e.g., historically rich campus cultures and traditions) and weaknesses (e.g., smaller alumni bases, higher tuition) present them with a unique set of opportunities and challenges when it comes to engaging their alums.

OUR RESEARCH

Campbell & Company held conversations with advancement leaders from six best-in-class alumni engagement programs, representing the following institutions:

- Carleton College
- Colby College
- Harvey Mudd College
- College of the Holy Cross
- Middlebury College
- Wesleyan University

These discussions allowed us to gain deeper insight into the associated opportunities and challenges and explore what leaders in the field are doing to build alumni support.

Building a strong alumni engagement program can take years, if not decades. However, we found that by making it an institutional priority and following best practices, advancement teams can institute the organizational changes and cultural shifts necessary to set themselves on the path to success.

Based on our conversations, Campbell & Company compiled a comprehensive series of strategies that your team can leverage as you work to deepen your connection to that most important of constituencies: your alumni. We also developed a [proprietary tool](#) to help you evaluate the maturity of your alumni engagement program.

CULTURE OF PHILANTHROPY

Student Giving and Volunteerism

Student Philanthropy Program: Think bigger than the senior class gift. Educating students about philanthropy and how it supports their education and on-campus experiences sets the foundation for giving back as an alum and "institutionalizes" giving. Asking students to give back before senior year builds a foundation for philanthropy. Consider an annual all-student philanthropy program as an expansion of the senior gift program—this will emphasize the importance of philanthropy education for students at every level.

Alumni Giving and Volunteerism

Class Agent Program: A strong class agent program is an excellent way for alumni to give back to the institution through fundraising. A strong program has dedicated staff, a budget to support the agents, materials to assist with solicitations, and an online platform that supports peer-to-peer fundraising. These peer-

to-peer solicitations can drive participation numbers. Offering trainings to your class agents gives them the confidence to ask their peers for money, and celebrating their successes can have an amplifying effect.

Alumni Volunteer Day: Opportunities for alumni to connect to each other through volunteering after they leave campus improves connections to the institution. A volunteer day held in regions across the country as well as on campus can contribute to the culture of philanthropy.

Alumni Appreciation Opportunities: Regularly celebrate the effort your alumni put into supporting the institution after graduation—from the biggest donors to the young alum who donates her time and energy conducting admissions interviews in her city. Doing so has the dual function of serving as philanthropy education for current students while fostering a sense of community and connection across different generations. The most successful





institutions have specific programs that bring alumni back to campus to meet with current students, share stories about their post-graduate experiences, and explain why they give back.

Participation Goals: Prioritizing broad participation over dollars earned can be a culture shift for institutions. Alumni more easily connect to the percentage of their peers who give back than dollars raised year-over-year. How do you present your fundraising numbers and celebrate successes? Setting a realistic goal can be encouraging and motivating for giving. The Board should be invested in the participation goals—reaching them is a source of pride for the entire institution.

Program Evaluation: Developing a unique “alumni engagement score” represents another way to track the effectiveness of your alumni engagement program and progress over time. Your team can update this score on an ongoing basis. We recommend using a variety of key data points (e.g., event attendance, class giving, frequency of giving, volunteer activity) to ensure that you are receiving the broadest and most accurate perspective possible. Additionally, consider tracking young alumni separately to

gain a better perspective on the preferences and behaviors of your future major donors.

Alumni Training: Organize an annual volunteer summit to which all alumni volunteers are invited for training and networking. Offering young alumni volunteers financial assistance to attend the summit, as needed, will increase attendance and will make the training accessible to all alums who want to participate.

Appeals—Part 1: Diversify beyond a “one size fits all” approach to your alumni appeals. You can rely on your class managers to provide insight into what type of appeals and tactics will resonate with the classes they manage. Millennials, for example, prefer “asks” that feel more personalized. As an added benefit, this will also provide your team with more accurate and segmented data.

Appeals—Part 2: While the proliferation of communications platforms has made it easier for institutions to stay touch with their alumni bases, be careful not to bombard them with “asks.” Remain selective and strategic, and keep the balance between appeals and non-appeals heavily weighted towards the latter.

Restricted Gifts: The annual fund should remain the focal point of your alumni engagement efforts, but experimenting with restricted class gifts can often yield surprising results. Class gifts to benefit a specific academic department or athletic team enable alumni donors—especially young alumni—to feel that their support is having a tangible effect on the institution. Consider conducting special giving efforts for restricted needs. This is a good way to use online giving days or challenges on platforms such as GiveCampus.

Recognition: Today, donors of all levels want to know how their gifts are being used. Make sure that everyone who has donated to a specific campaign or initiative receives some form of report—even just an infographic—providing insight as to how their money was spent. For young alumni, consider reducing the barriers to entry for your leadership giving levels to help lock them in as donors for the long term.

LEADERSHIP

Board

Strategic Priority: Board investment in alumni giving and participation offers top-down support for an important culture shift. Including alumni giving as a strategic priority can

empower staff to invest in the programming necessary to build a strong program. Alumni participation can take years to build, so the Board's investment must be long-term.

Board Recruitment: Alumni volunteer activity should be taken into account when recruiting new members to the Board of Trustees (or equivalent body). A history of engagement with their alma mater can be a strong indicator of productiveness at the Board level. Highly involved candidates will also likely be invested in alumni engagement as a strategic priority.

Commitment to Young Alumni: The Board can signal a firm commitment to young alumni engagement in particular by having one to two young alumni represented on its Board of Trustees. Giving expectations for young alumni members may be reduced to enable their membership.

Alumni Association: A strong alumni association board is a feeder for good Board leadership. It also contributes to the culture of alumni engagement and allows alums to feel connected to their alma mater through a leadership role. A dedicated young alumni





subcommittee of the alumni association can focus attention on engaging this important constituency and connecting them to their alma mater.

"Class Affinity" Model: Follow a "class affinity" model with a clearly defined hierarchy. Giving Board members responsibility for a range of classes, reunion chairs, class agents, and assistant class agents allows for clear expectations and targeted engagement.

President/Administration

Executive-Level Buy-In: The president or comparable leadership figure should signal their commitment to growing alumni engagement by voicing their support via communications to the institution's community and through regular attendance at alumni programming. Interaction with young alumni at regional and on-campus events is key to obtaining their buy-in and future support. Additionally, the president should devote significant resources to alumni engagement, including the hiring of key advancement and alumni relations staff.

STAFFING/INFRASTRUCTURE

Collaborative Culture: Because they are jointly responsible for the success of the alumni engagement program, all barriers to collaboration between the alumni relations and annual giving teams should be removed. If alumni relations isn't already a part of advancement, explore making this shift. Overall, the teams should view each other as partners working towards the same goal. Too often, alumni relations teams regard reunion as their "turf," and vice versa for annual giving teams and the annual fund. Foster a collaborative environment by celebrating the impact both teams have on these major initiatives and involving members from both teams in key meetings and planning sessions.

Staffing: There is no ideal ratio of staff to the size of an institution's alumni base. However, we've found that the most successful programs assign annual giving and alumni relations staff members to specific ranges of class years (e.g., 5th-15th reunions; 16th-35th; 36th-45th). This focuses work and provides a clear sense of mission. The annual giving and alumni

relations staff members who focus on the same alumni segments should work closely and collaboratively throughout the year.

Technology: Innovative new technologies can help mitigate the complexities that come with managing your program, which involves keeping track of thousands of individuals, often spread across the globe. Programs like GiveCampus enable seamless communication among staff, volunteers, and alumni by simplifying communication and enabling new means of leveraging preexisting data and information.

ALUMNI EVENTS

Overall, your event strategy should employ an inclusive approach—invitation lists should not be determined by giving level. The majority of your most "prestigious" and "exciting" events can and should be attended by a wide swath of alumni, from the youngest to the most senior, the least affluent to the wealthiest.

Alumni today respond better to events that are explicit in their "asks." Rather than burying the focus on fundraising at the bottom of the invitation, lead with it by highlighting the giving component. Young alumni, in particular, are highly transactional; you can appeal to them by positioning these events as "parties with a purpose."

On-Campus Programming

- Reunion weekend is the focal point of the institution's annual alumni-oriented on-campus programming. Your alumni association board should be involved in planning each year's reunion. Create a specific sub-committee or taskforce to coordinate closely with annual giving and alumni relations staff members.
- The annual giving and alumni relations teams should establish specific goals for different reunion years. For example, the 25th reunion might be focused on achieving





the class's highest ever annual fund participation, whereas the 50th reunion might be associated with a planned giving-related goal.

- The most successful institutions look for opportunities to engage alumni beyond reunion, taking stock of their full suite of on-campus programming to connect with alumni as deeply as possible. Focus on events that are multi-generational in nature (e.g., annual athletic rivalries, homecomings) and involve entire families.

Regional Events

- When visiting a city/region, the president should commit to attending one to two alumni-centric events, where they are equally as focused on connecting with young alumni as with lead alumni donors.
- Consider forming alumni clubs or chapters for cities with the highest density of alumni.

Smaller schools can explore joining forces with other schools in their region or athletic conference to split costs and build larger audiences.

- Alumni clubs and chapters should host annual "Welcome to..." events for alumni from the 10 most recent graduating classes who are new to the city.
- Consider organizing "on the road"-style events that bring administration and faculty leaders to your most populous alumni cities. These events provide alumni with campus updates—and make them aware of potential giving opportunities—while reengaging them in the intellectual traditions they have missed since graduation.

CAREER CONNECTIONS

The job search is top of mind for young alumni—they want to work in their field and often feel that their alma mater has not done enough to help them after graduation. Career services should be communicating with alums and offering resources to help them in their careers. If they are employed and happy with the assistance they received, they are more likely to give back.

Reduce barriers to collaboration between advancement and career services and consider formally relocating career services under the advancement umbrella.

- **Alumni to Student Connection:** Develop a sophisticated program that connects current students to alumni based on geographic region, extracurricular activities on campus, major, or career path. This signals to

students that they have a network to turn to after graduation and creates a culture of "being there for each other and having each other's backs."

- **Connecting Alums to Other Alums:** All alums have one thing in common—they graduated from your institution. The more they connect to each other, the more your institution will be at the forefront of their minds. Create an alumni database where alums can search for other alums in their area who have a similar background or career path. Allow alums to "opt out" of being a contacted by alums seeking advice or guidance.



CONCLUSION

Equal parts tactics, strategy, and culture, building a successful alumni engagement program requires patience and a willingness to experiment. Although there may be no "right" approach to engaging your alumni, we do believe that even those schools without a history of best-in-class participation rates can find some measure of success by being intentional and adapting the guidelines and practices we suggest above to their unique circumstances. In the diverse sector of higher education, there may be as many ways to effectively engage an alumni base as there are schools. We hope our research helps you find the solutions that will work best for your institution.

Questions? Contact the study authors to discuss our findings and how you can improve your alumni engagement program:

Associate Consultant Damien Berliet
(312) 896-8871
damien.berliet@campbellcompany.com

Consultant Caitlin Bristow
(312) 896-8889
caitlin.bristow@campbellcompany.com