



How to use Alumni Metrics to Drive Results

Presented By: Jenny Cooke Smith, CASE
Thursday, April 14, 2022
2:00 – 3:00 p.m. Eastern Time



Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions



A little housekeeping...



We're recording this webinar!

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



Feel free to ask questions!

Use the Questions chat box to ask your questions. We will have a Q&A session at the end of the presentation.



We will be live-tweeting!

Share your highlights and takeaways with the **#qgivwebinar** hashtag, and please make sure to follow **@Qgiv**!



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Meet the Speaker



Jenny Cooke Smith | CASE

Jenny is the Director of AMAtlas Services for CASE. Jenny specializes in analyzing advancement trends, interpreting comparison benchmarks, and helping people understand the “stories behind the data.” Prior to joining CASE, Jenny spent 15 years in a variety of positions within Blackbaud’s Target Analytics, most recently leading donorCentrics™ benchmarking cohorts, which provide opportunities for institutions and organizations globally to review and discuss direct marketing and annual giving trends. She joined CASE in 2019 to help members find value through using CASE data and is most proud that, through projects like CASE’s Alumni Engagement Metrics, we can begin to answer questions such as “we know engagement leads to giving, but how do we show it?”



AMAtlasSM
Advancement Metrics and Research for Education

How to Use Alumni Engagement Metrics to Drive Results

Presented by:

Jenny Cooke Smith, Senior Director, AMAtlas Services, CASE

jsmith@case.org

Today's Session

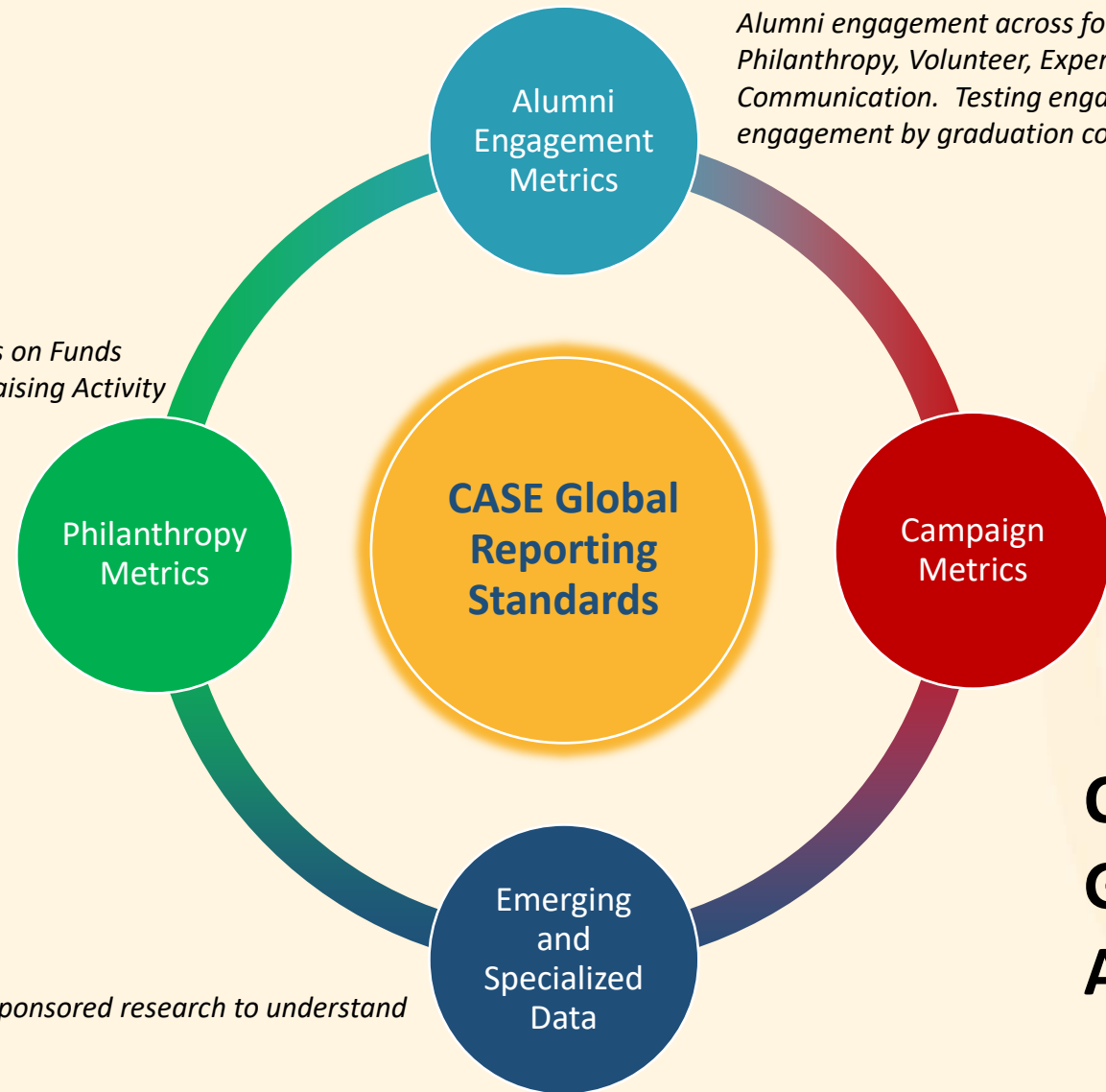
Introduction
to Alumni
Engagement
Metrics &
AMAtlas

Key Findings
and Outcomes

What's Next
and
Incorporating
Qgiv Research



Key Philanthropic Indicators on Funds Received and overall Fundraising Activity (New Funds Committed)



Alumni engagement across four modes: Philanthropy, Volunteer, Experiential, and Communication. Testing engagement lifecycle and engagement by graduation cohort.

Benchmark Completed Capital and Comprehensive Campaigns. Take part if you are in an Active campaign or if your school's campaign recently closed.

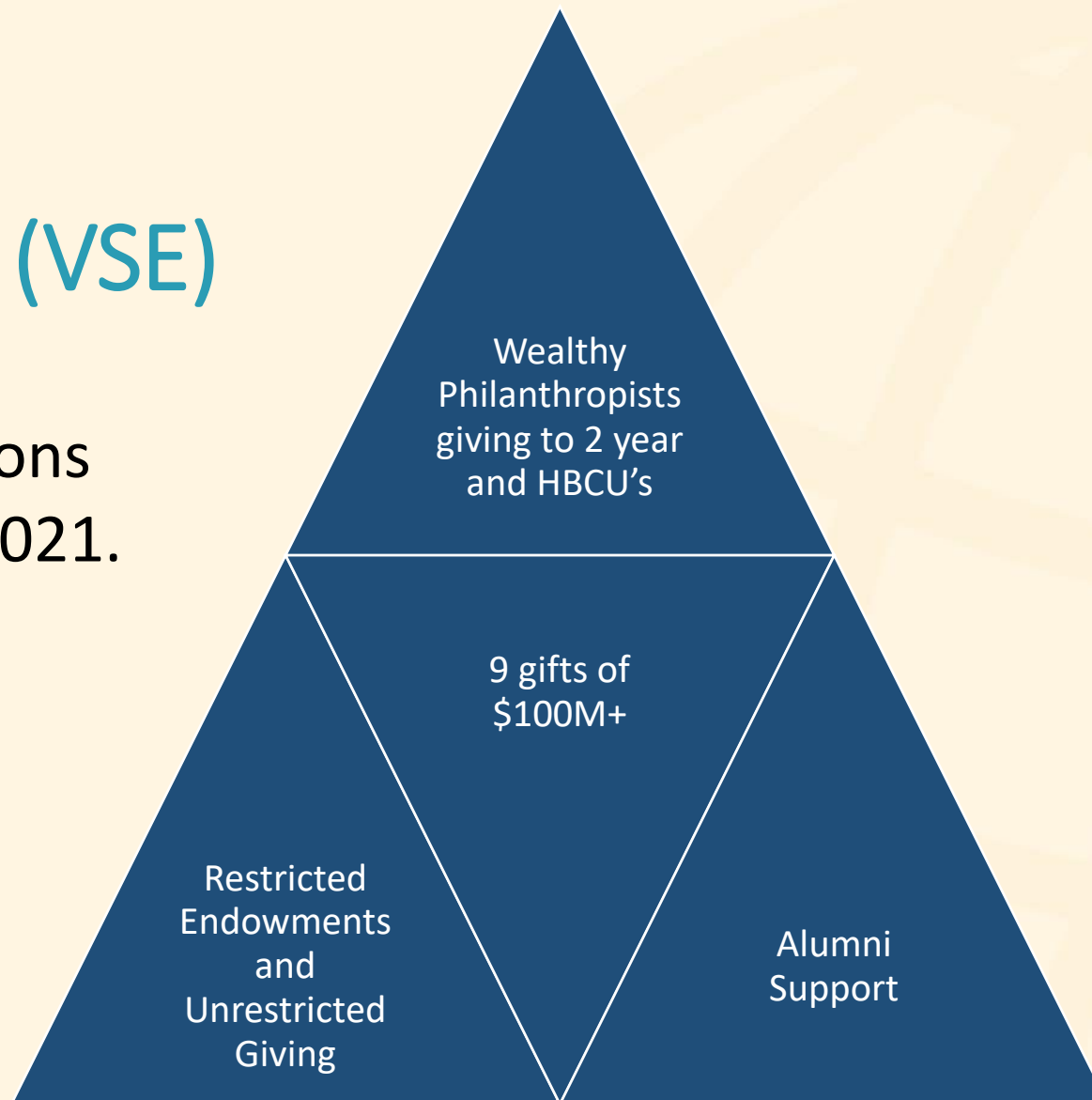
CASE Membership includes Global Benchmarks through AMAtlas surveys

Specialized and sponsored research to understand emerging trends.

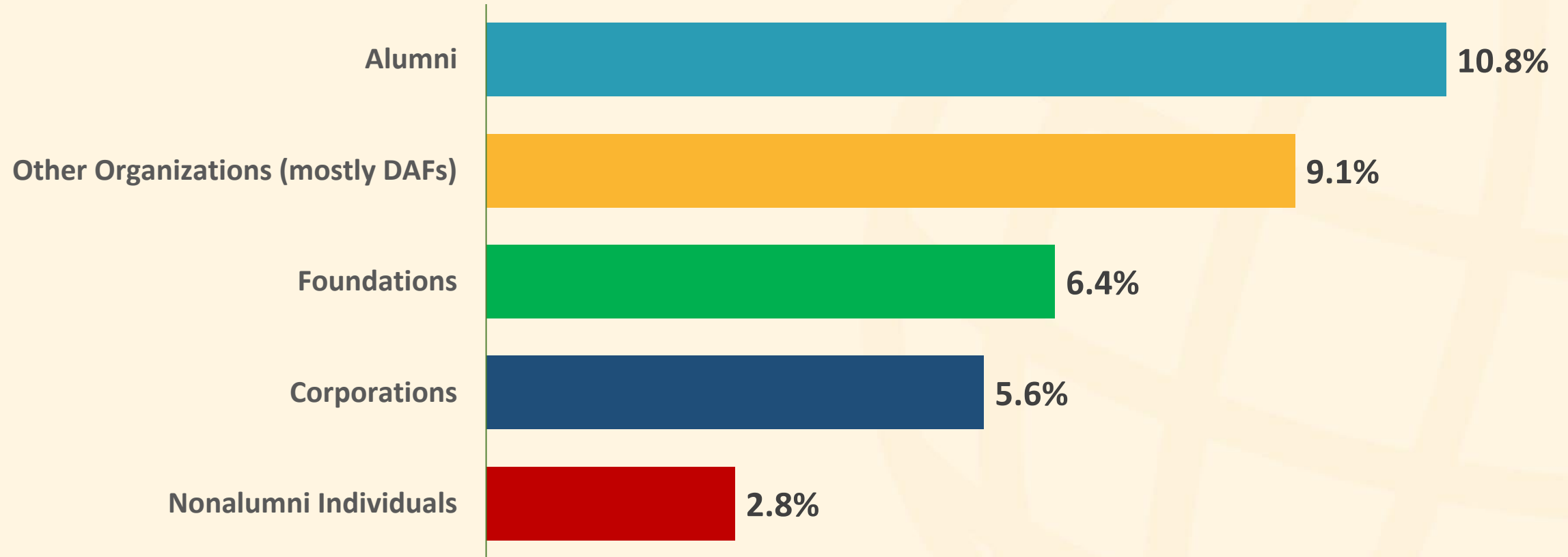


About the 2021 US Philanthropy Results (VSE)

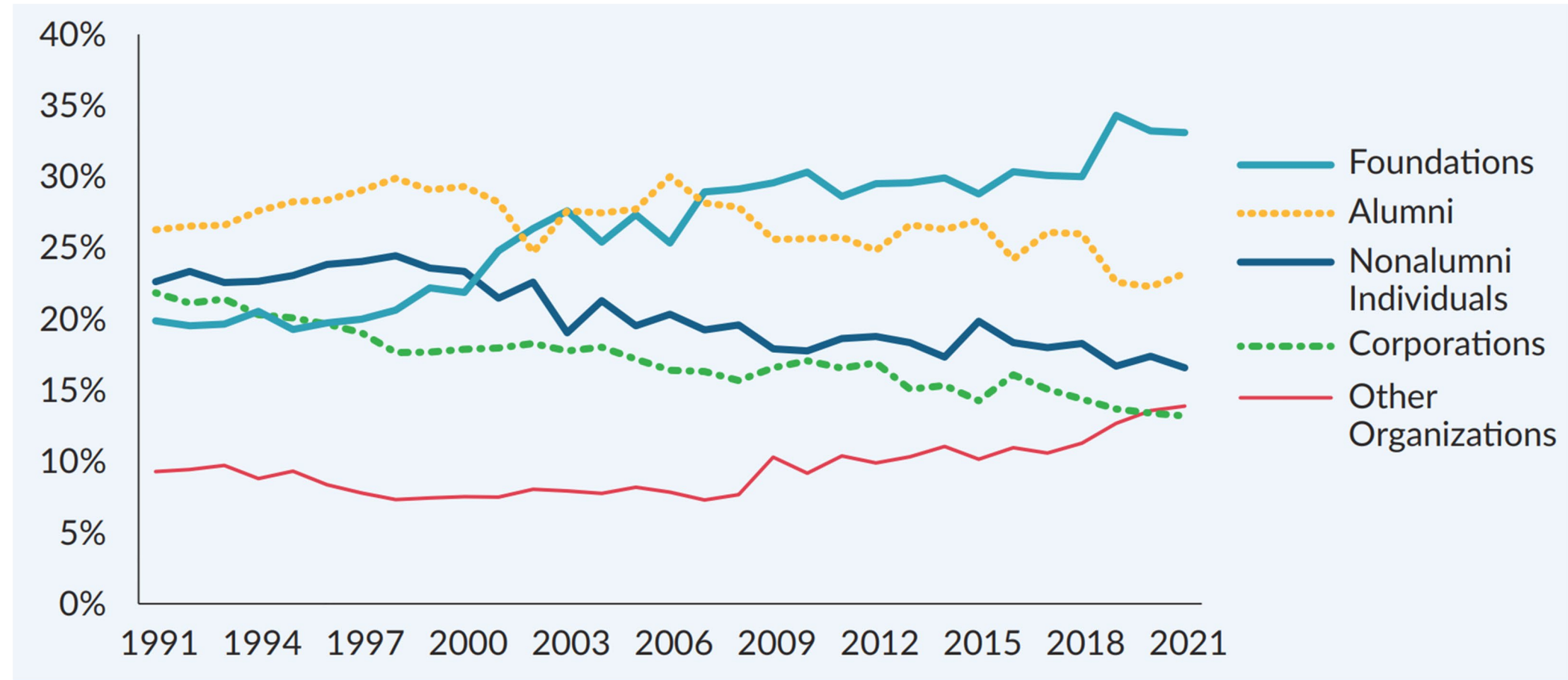
Higher Education institutions received \$52.9 billion in 2021.



US: All Sources gave more in 2021, compared to 2020



Giving by Source, 1991–2021





Alumni Engagement Metrics

- Goal: establish a global definition and framework of alumni engagement
- Third Year of Data Collection (Fiscal Year 2021)
- In Year 3, 364 participants from 16 countries took part

<https://www.case.org/resources/case-global-alumni-engagement-metrics-survey>



Key Definitions

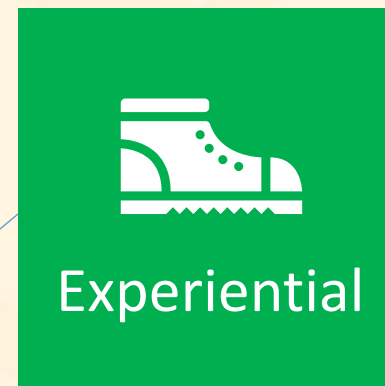
Alumni:

“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.”

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.”

Source: Alumni Engagement Metrics White Paper, August 2018



AEM Framework measures
engagement across four modes

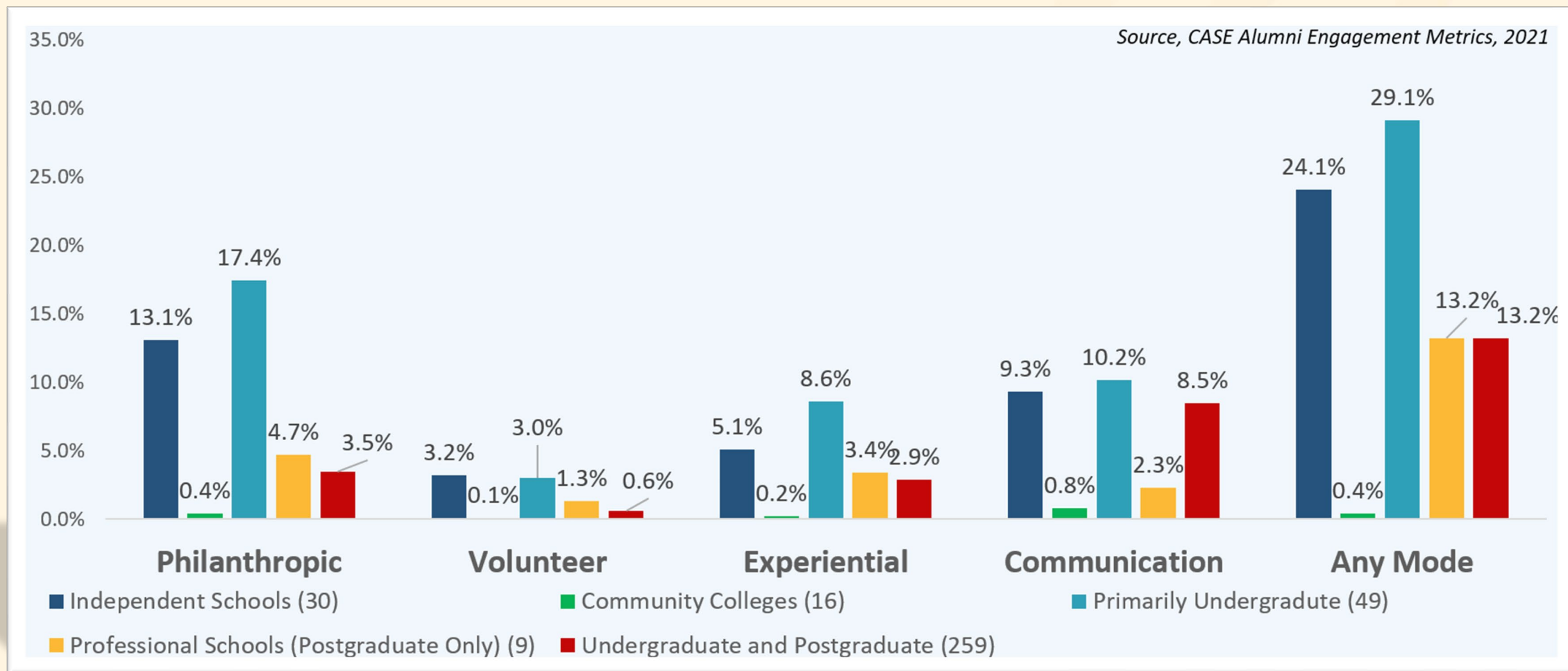


**# Total Alumni who participated in at least one
of the four engagement activities this year**

Total Alumni Population

**= Alumni Engagement
Rate %**

Percentage Engaged by Mode and Institution Type



Besides Percentage Engaged— what do we really need to know?

- How to Prioritize – where are your areas of strength and opportunity?
- Are you trending up or down in engagement overall? By mode?
- Are your resources in line with peers?
- Which messages are working/which channel(s) do alumni respond?
- Which events are driving more alumni to attend? Do they participate in other modes?
- Did new virtual events during the pandemic increase engagement? What does that mean moving forward?
- What is the behavior of engaged alumni? Do different modes have a higher likelihood of giving?
- How representative is the data you have captured?
- Behavior by Year of Graduation/Unit
- Behavior by Alumni Category
- Are you keeping alumni engaged year over year? What happens if they dis-engage?



2020-2021 Trends in Engagement

| | Philanthropic | Volunteer | Experiential | Communication | Any of the four modes |
|---------------|---------------|-----------|--------------|---------------|-----------------------|
| ALL | 1.94% | 4.40% | -1.31% | 0.4% | 1.59% |
| Asia Pacific | -8.21% | 13.26% | 2.28% | -12.51% | -6.92% |
| Canada | -13.96% | 4.89% | 17.31% | 22.53% | 17.89% |
| Europe | -7.89% | 4.24% | 3.46% | 8.64% | 10.25% |
| United States | 3.89% | 2.46% | -3.17% | -0.2% | 0.65% |

| | Philanthropic | Volunteer | Experiential | Communication | Any of the four modes |
|---|---------------|-----------|--------------|---------------|-----------------------|
| Independent Schools | 6.23% | 3.98% | -0.34% | -25.33% | 0.06% |
| Community Colleges | -7.68% | -6.38% | -28.95% | 59.50% | 23.89% |
| Primarily Undergraduate | 0.67% | 5.33% | -0.52% | 8.84% | 4.24% |
| Professional Schools (Postgraduate Only) | 5.30% | -6.76% | -10.58% | 9.90% | -6.32% |
| Undergraduate and Postgraduate | 2.13% | 4.93% | -0.95% | 1.83% | 1.94% |

Additional Insights for Experiential: Events

| | Median Count of Events (Virtual) | Range (Virtual) | Median Count of Events (In-person) | Range (In-person) | Median Count of Events offering Hybrid | Range (Hybrid) |
|--|---|--------------------|---|----------------------|--|-------------------|
| Independent Schools (20) | 11 | 1-48 | 1 | 0-5 | 0 | 0-3 |
| Community Colleges (15) | 5.5 | 0-62 | 1 | 0-20 | 0 | 0-2 |
| Primarily Undergraduate (40) | 68 | 0-283 | 1 | 0-5 | 0 | 0-4 |
| Professional Schools (Postgraduate Only) (7) | 31.5 | 7-57 | 1 | 0-37 | 0 | 0 |
| Undergraduate and Postgraduate (166) | 54 | 0-1,800 | 4 | 0-5 | 0 | 0-36 |



At the median, 94% of all events in 2021 were virtual (with no in-person component)



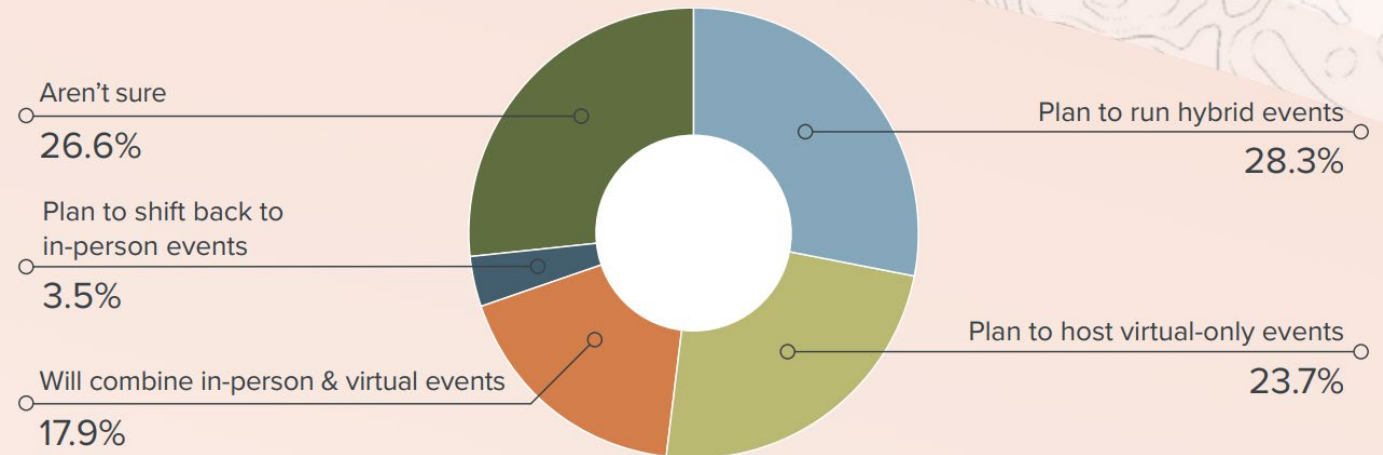
Source, CASE Alumni Engagement Metrics, 2021

AMAtlasSM
Advancement Metrics and Research for Education

“Our events will have a **virtual component** from now on. I anticipate **always planning for some kind of virtual audience**, whether that audience is quarantining because of COVID or grandparents geographically separated from their grandchildren.”

-Beth Sylvester, Bishop
McLaughlin Catholic High
School

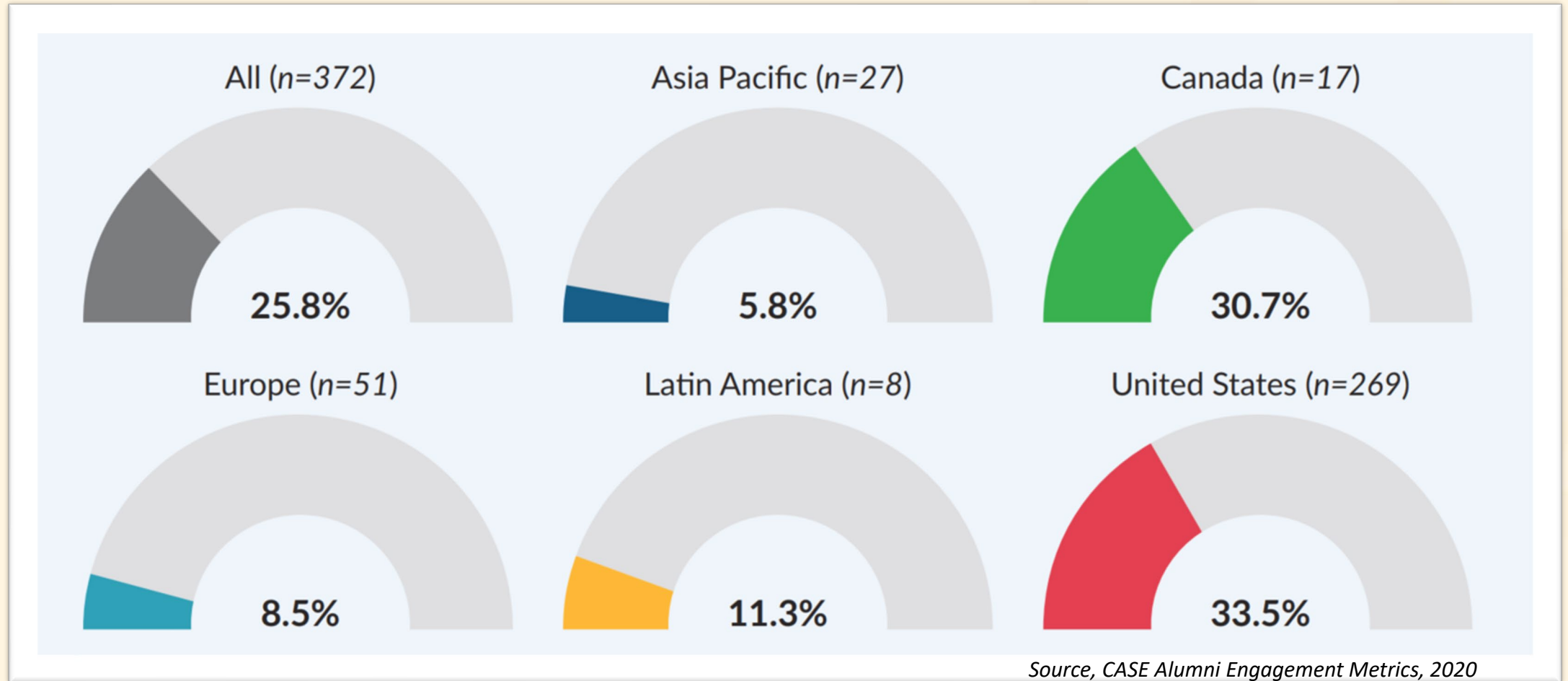
Event Planning for 2021



Source: “Report: Navigating the Unknown”; Qgiv



Percentage of Engagement Represented by Philanthropy, by Region



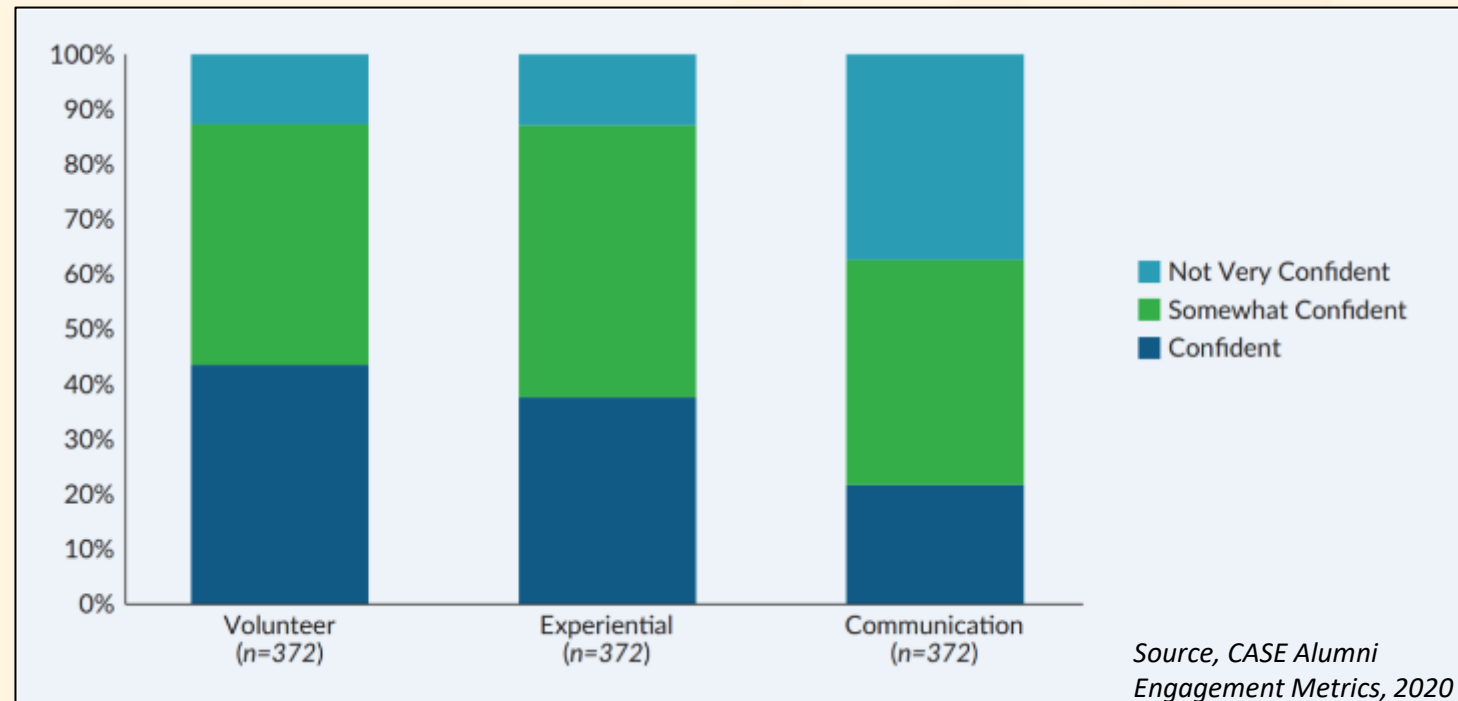
How representative is engagement data?

This isn't an exercise in counting; it's measurement.

“any reduction in uncertainty about the thing being measured”

-Douglas Hubbard, *How to Measure Anything*

Confidence Levels:
how confident are you
that the data you
capture is
representative of
programmatic
activities?



2020 Staffing for Alumni Relations

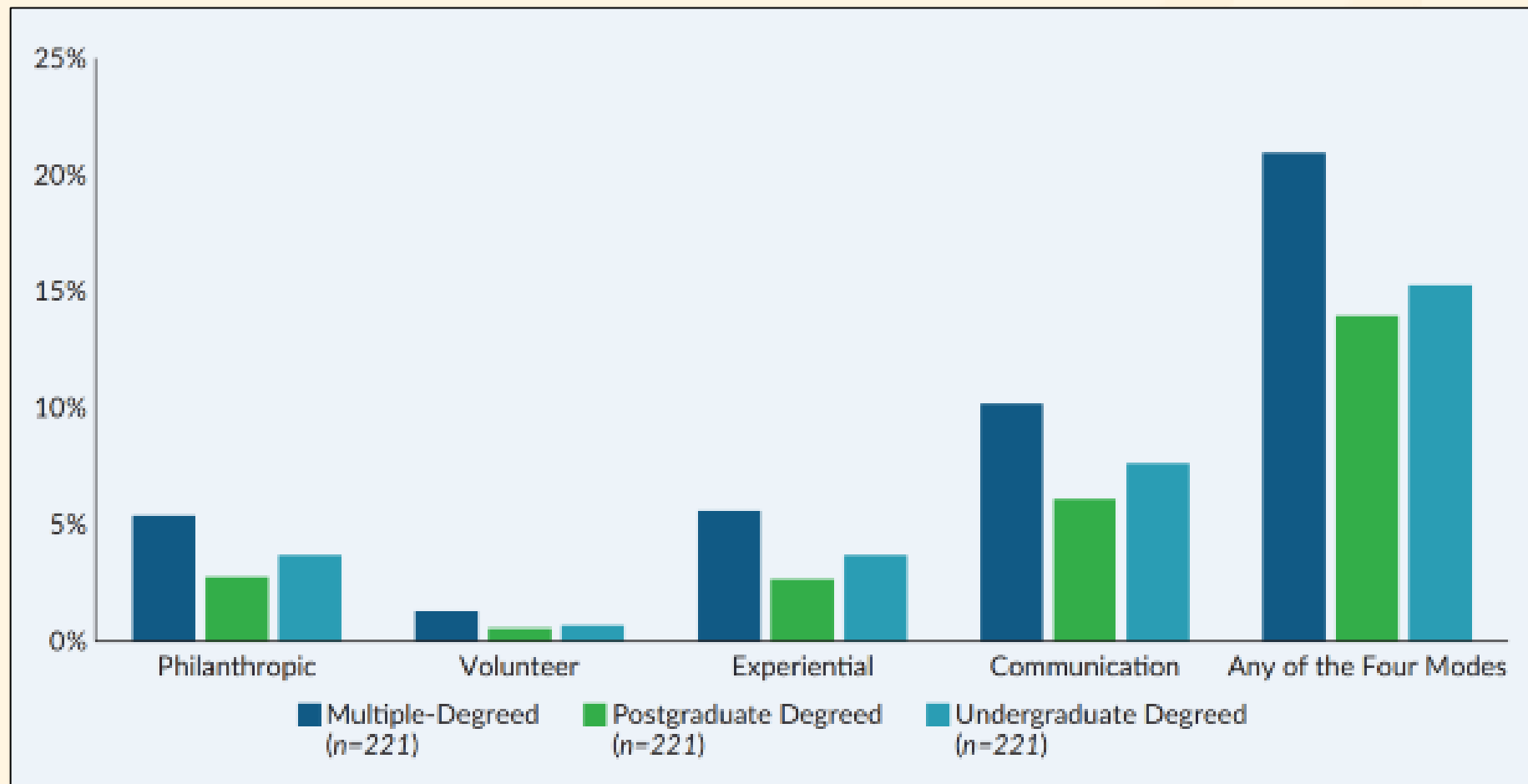
| | No. Responding | Medians | | |
|--|-------------------|-------------------------------|---|---|
| | | Alumni Relations Staff FTE | Legally Contactable Alumni per Alumni Relations Staff FTE | Total Engaged Alumni per Alumni Relations Staff FTE |
| All | 302 | 6.0 | 11,870 | 1,522 |
| Independent Schools | 17 | 2.0 | 3,703 | 751 |
| Community Colleges | 16 | 1.0 | 44,924 | 857 |
| Primarily Undergraduate | 33 | 5.0 | 5,536 | 1,219 |
| Professional Schools (Postgraduate Only) | 11 | 3.0 | 8,881 | 1,520 |
| Undergraduate and Postgraduate | 225 | 7.5 | 13,605 | 1,645 |

Source, CASE Alumni Engagement Metrics, 2020

Note – Staff counts did not change at the median for 2021 but Legally contactable alumni grew by 3% overall (consistently across regions and institution type)

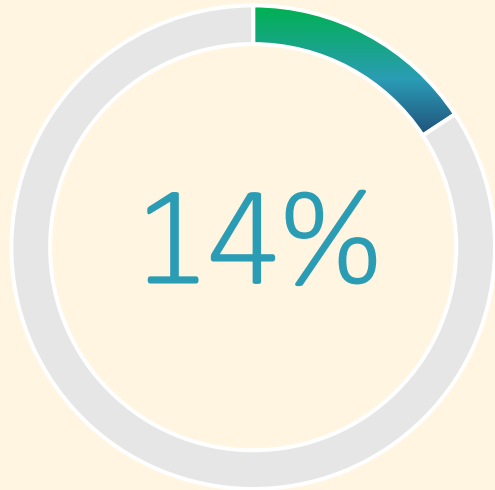


Alumni Engagement by Alumni Category

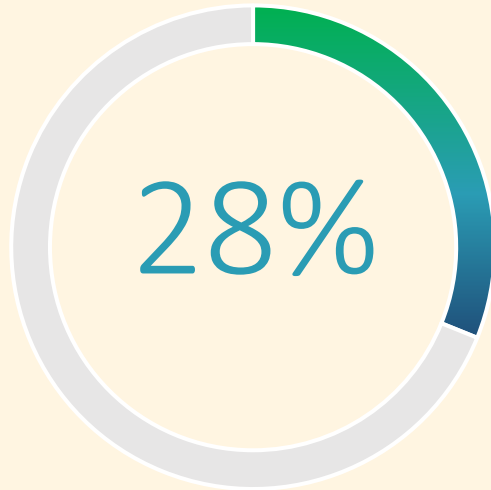


Source, CASE Alumni Engagement Metrics, 2020

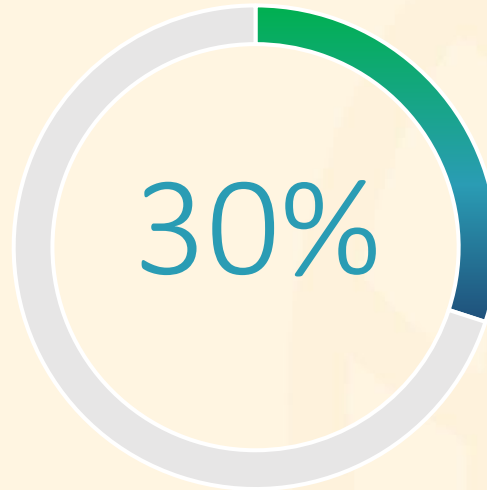
How do alumni engage in multiple ways?



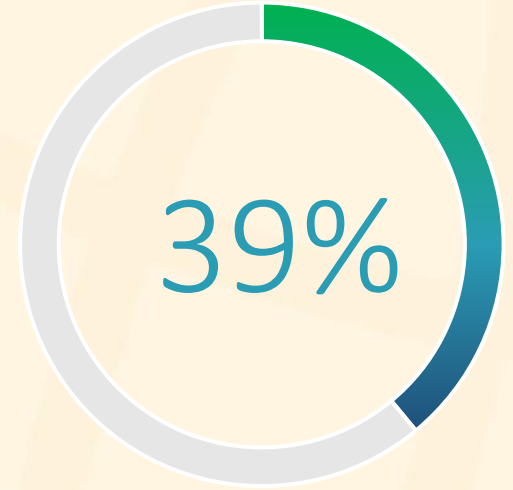
of Communications
Engaged Alumni
Give



of Experiential
Engaged Alumni
Give



of Alumni who are
Volunteers Give



of Alumni Donors
are engaged in other
activities

Source, CASE Alumni Engagement Metrics, 2020

Engagement by Graduation Cohort

- How does engagement differ by grad. year?
- Which cohort has the most donors?
- How do young alumni engage? Is it more than other groups?

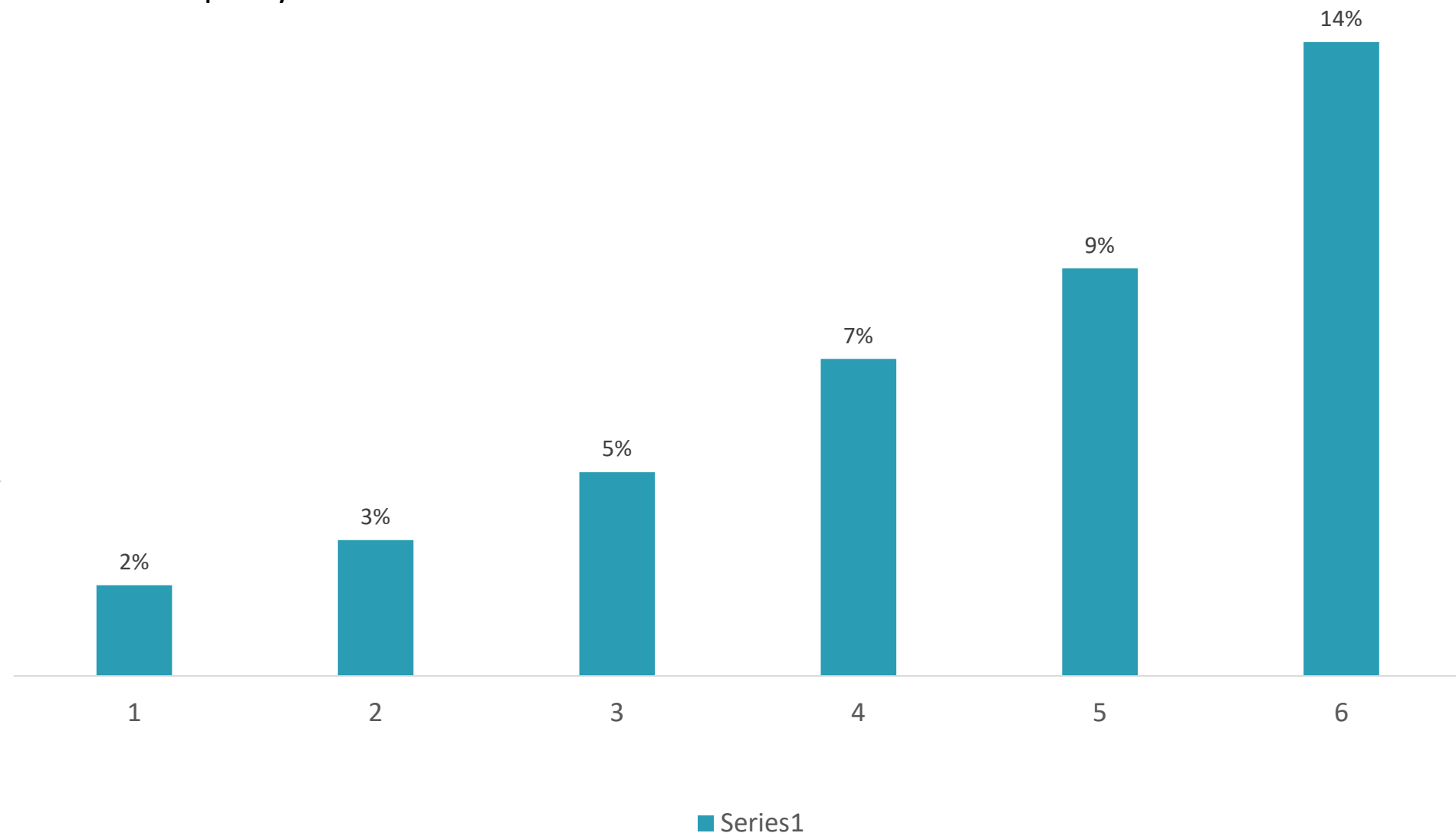


Alumni
Engagement
Metrics
(future)

Engagement by Graduation Cohort

*(sample of 50 schools from
Core Metrics Pilot Year 1)*

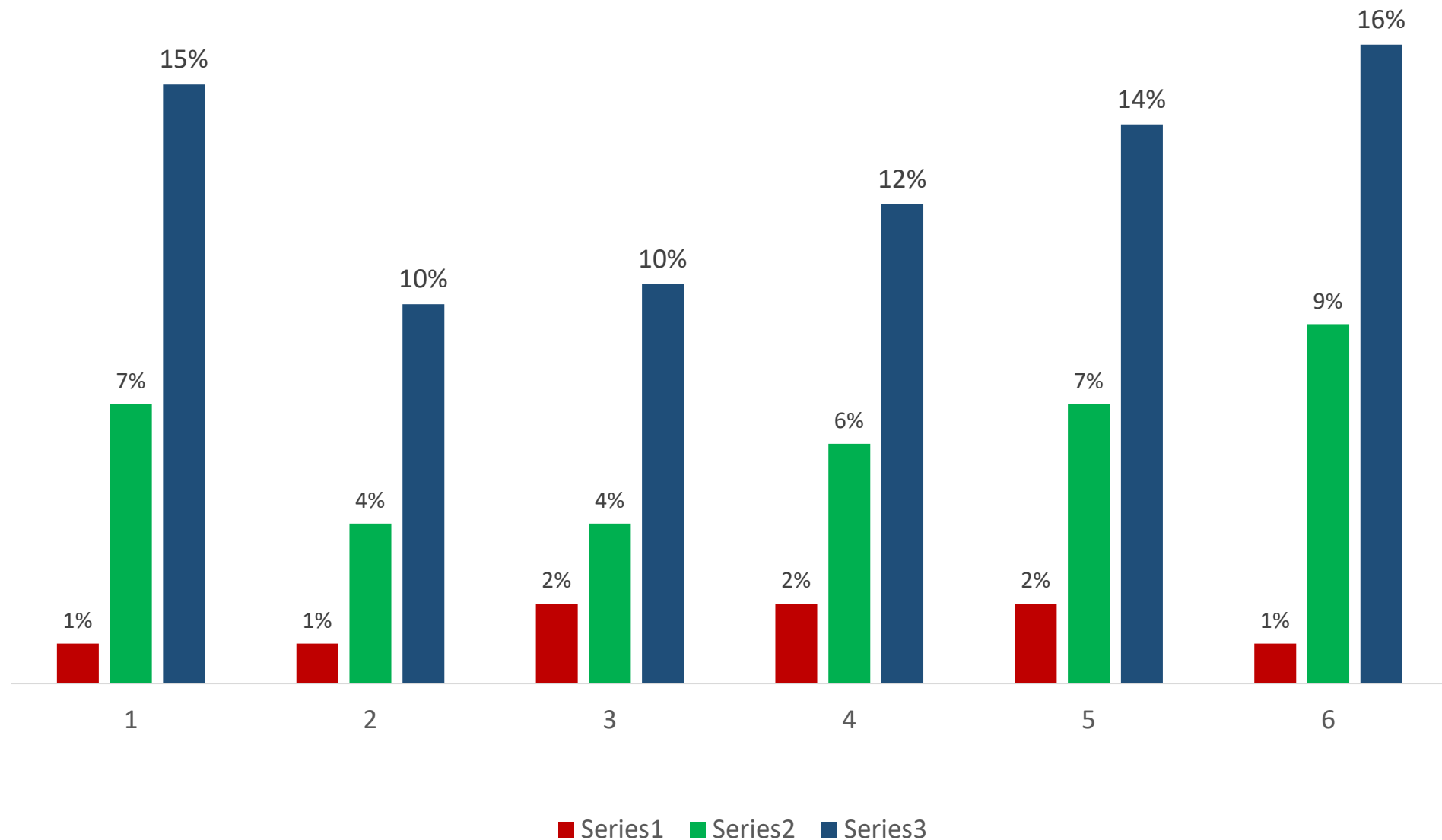
% Philanthropic by Graduation Cohort



Alumni
Engagement
Metrics
(future)

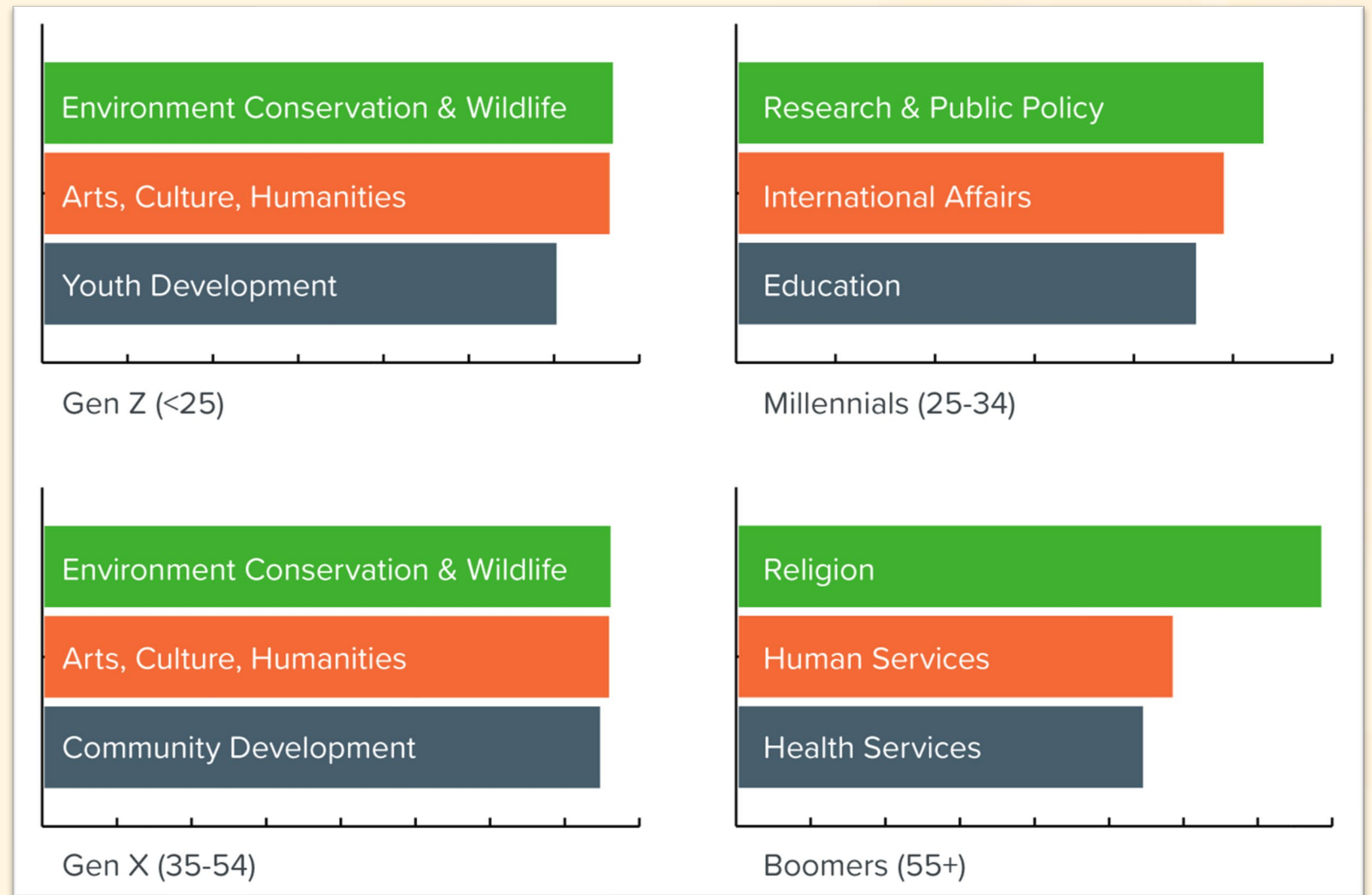
Engagement by Graduation Cohort

*(sample of 50 schools from
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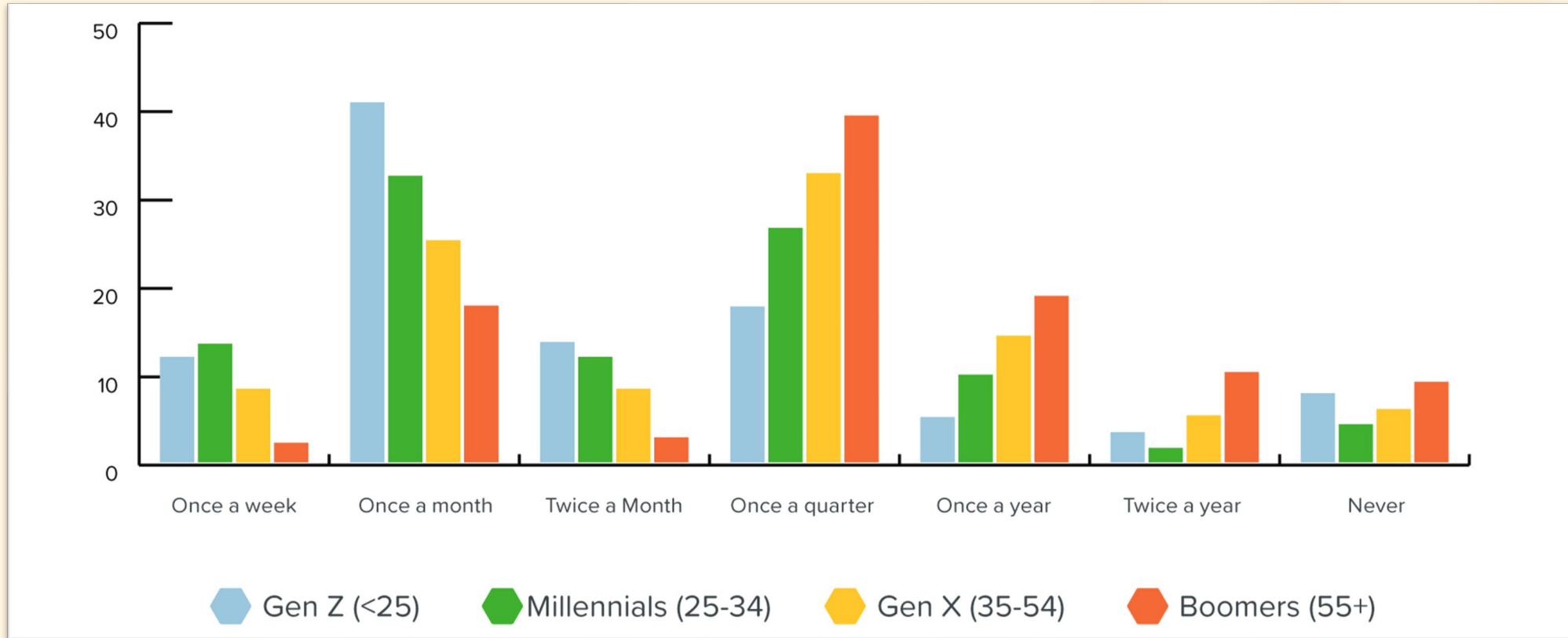


Understanding passions by Generation

Source: “Generational Giving Report;” Qgiv

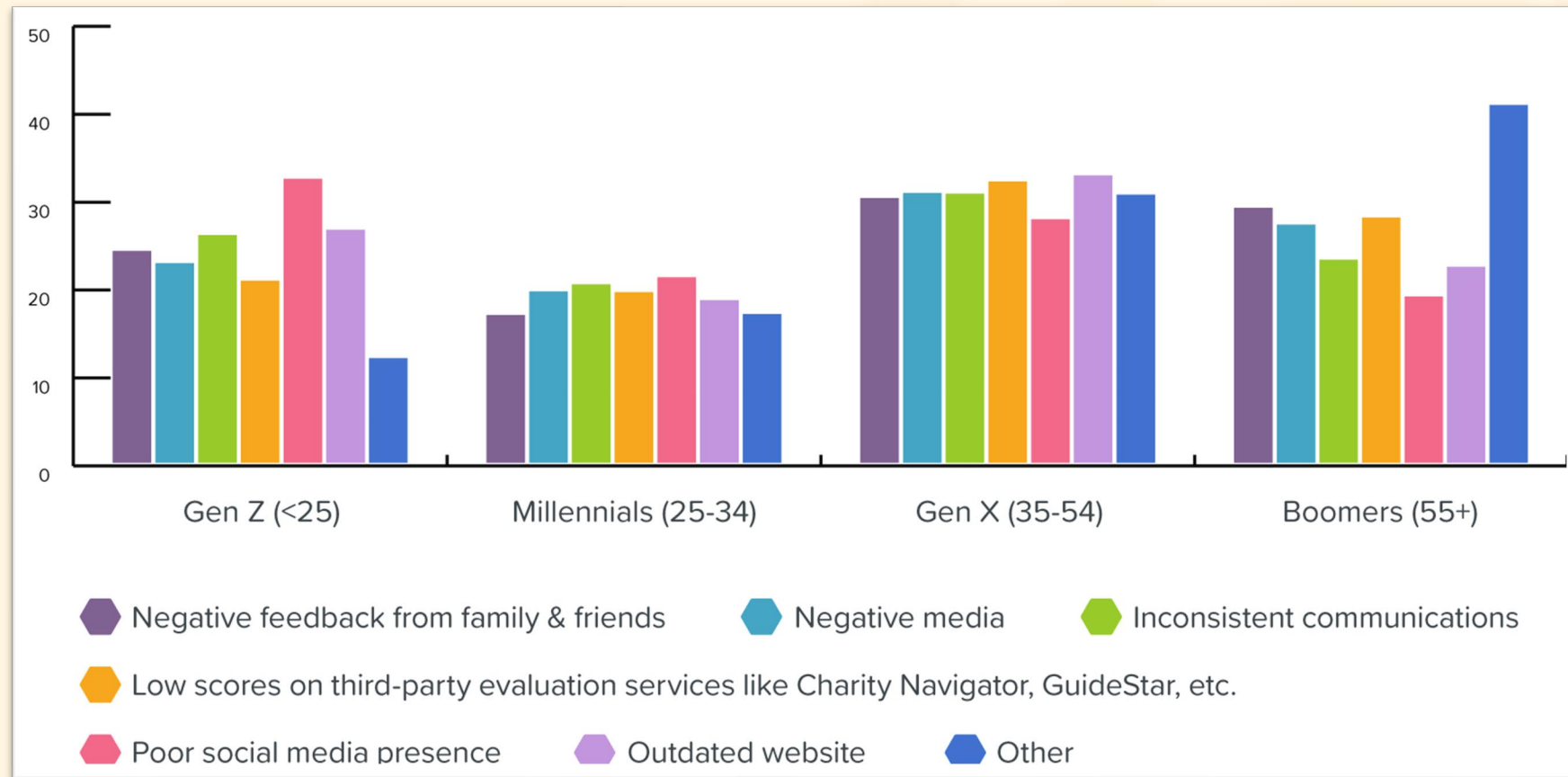


Incorporating Communication Strategies



Source: "Generational Giving Report;" Qgiv

Incorporating Communication Strategies



Source: “Generational Giving Report;” Qgiv

Alumni
Engagement
Metrics
(future)

Re-engaged
Alumni

Newly Engaged Alumni

Engaged This
Year and Last
Year

Dis-engaged Alumni

Engagement Trends

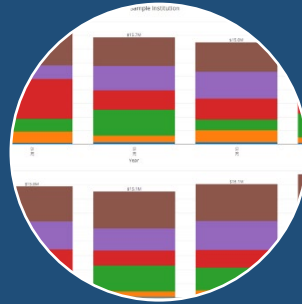
- What is my engagement retention rate?
- Is my “bucket” leaking faster than I can fill it with new and re-engaged alumni?
- Is reactivation in 2021 higher than expected after an atypical 2020?

CASE Member Benefits from AMAtlas



All CASE Members get access to survey results through **Data Miner** regardless of participation.

dataminer@case.org



All Members who submit Surveys receive a complimentary **GPS Report**, delivered in Data Miner.

For more info: jsmith@case.org



Other Services Unlocked: Submitting surveys unlocks Made-to-Order Reports (custom reports with review calls), and Facilitated Cohorts

For more info: jsmith@case.org

No action

Survey participation

Add-on services

A new benchmark: AMAtlas Peers

- 5 closest peers are noted in the GPS report
- All graphs include comparisons to AMAtlas peers, country/region, all AEM
- Results are delivered as a static html file into Data Miner

AEM Peers Algorithm

| | | | | |
|-------------------------------------|--------------------------------------|------------------------------|------------------------------|----------------------|
| Total Funds Received | Institution Type | Total Contactable Alumni | % Engaged Any Mode | Total Number Engaged |
| | Presence of Hospital? (if US or CAN) | Number of Enrolled Students | Alumni Association Dues? Y/N | % Volunteer |
| Cluster Analysis (if UK or Ireland) | | | Country | Public or Private? |
| | %Communication | Alumni Relations Staff Count | | |



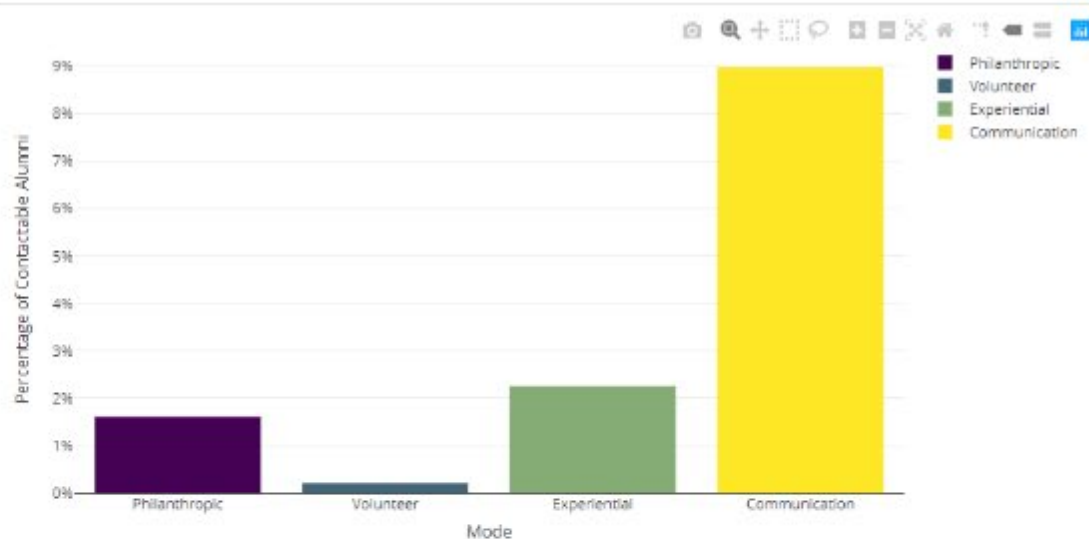
Compiled from the CASE Alumni Engagement Metrics (AEM) Survey 2020

This report, along with access to Data Miner, is provided as a CASE member benefit.

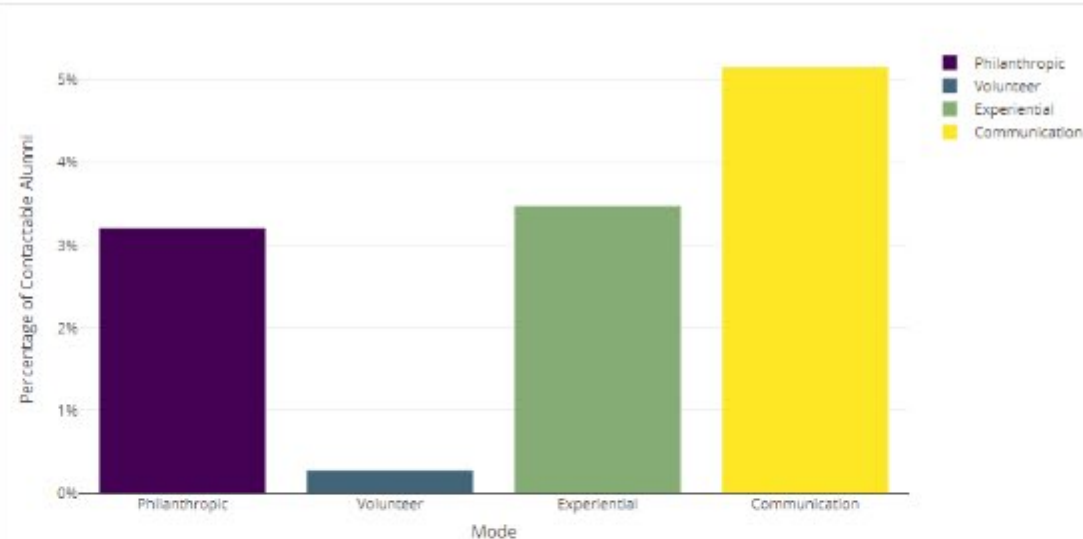
Once you have reviewed results, please see the [Next Steps](#) section for suggestions about how to get the most out of these results.

On behalf of the whole AMAtlas team, thank you for your participation!

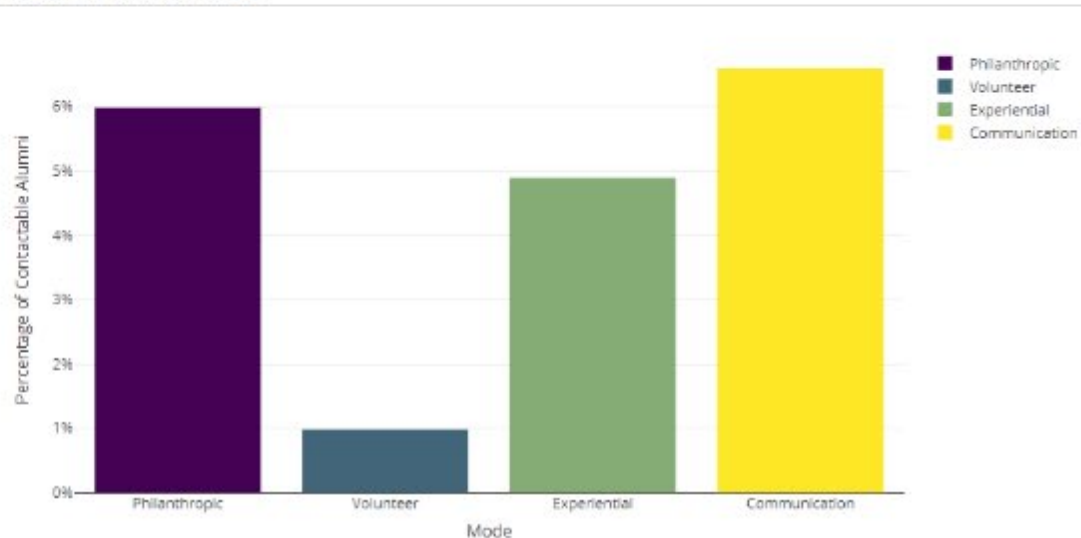
Sample Institution



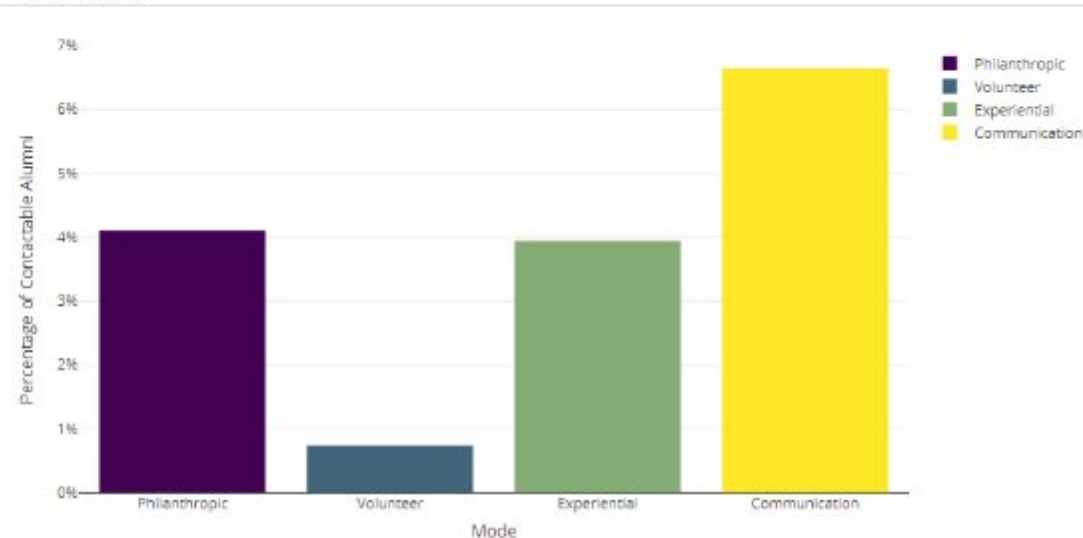
AMAtlas Peers (Median)



Sample Country/Region (Median)





All AEM (Median)



Sample Complimentary GPS Reports (members)

Accessing your report in Data Miner



AMAtlas Data Miner

The 2020 VSE survey data have been released publicly. Read the research brief on key findings here: <https://www.case.org/resources/voluntary-support-education-key-findings-2019-20>. Contact us at dataminer@case.org if you have any questions.

Recommended Reports


Core Data, Higher Education VSE Survey

Core Data, Precollege VSE Survey

Alumni Engagement Metrics - Summary Report

Downloadable Reports

2019 AEM GPS Report for California State University-San Bernardino



This highly visual presentation shows your institution's trends compared to peer institutions. Peers are created using an algorithm that weighs AEM data along with additional characteristics about your institution (public/private; country, institution type, etc.)

Download

Quick Links

Create New Report

Go to My Saved Reports

Create New Comparison Group

Go to My Downloadable Reports

Open Reports

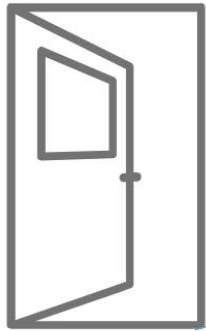
Current Operations: Unrestricted Totals

Featured Charts



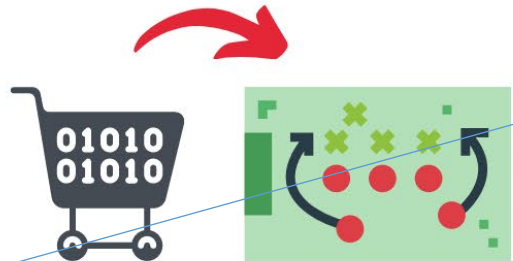
dataminer@case.org

Why Participate in the AEM Survey?



AEM Survey is a great entry point to AMAAtlas!

Advance your data and analytics capabilities

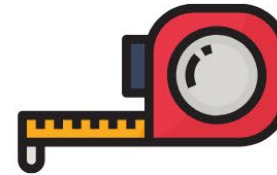


Insights for fundraising and engagement strategy

Develop data-driven strategies to direct your day-to-day activities

Allocate resources (staff time and \$) for maximum impact

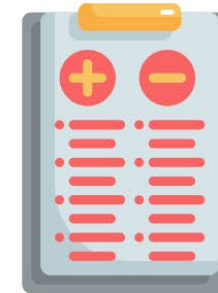
Achieve annual fundraising and engagement targets



Comprehensive metric

Evaluate the effectiveness of your fundraising AND engagement efforts

Track progress toward long-term institutional goals



Research, analysis, benchmarking

AMAAtlas Resources

- Data Miner
- Graphical Program Summary (GPS) Report
- Facilitated Cohorts

What can you do?

- Read [the Research Brief](#) for detailed findings and insights from the Fiscal Year 2020 survey. 2021 Results coming soon!
- Access resources from Qgiv: [Generational Giving Report](#); [Navigating the Unknown](#)
- If your institution participated – keep an eye out for your customized results in the GPS report. (we can also produce a custom report if you wish to partner with CASE in your analysis and identification of key findings/next steps). Let us know – dataminer@case.org if you need access.
- Learn from one another – Let's start testing, collaborating, and building successes together
- Building in the basics – can you identify newly engaged, retained engaged, and reactivated? By mode?
- Work with academic colleges, alumni leaders, data insights managers, etc. to start capturing key activities, take part in the survey, and goal-set/implement results from benchmarking
- Start small – identify segments with opportunity: event attendees who are multiple degree holders and not current donors; volunteers who attend events but don't give; add in giving levels for a more targeted approach.
- Reach out for help! jsmith@case.org



Questions?



This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.

Thank you for joining!

For more information on Qgiv's fundraising platform,
contact:

contactus@qgiv.com | 888-855-9595

For more information on Jenny Cooke Smith, contact her:

jsmith@case.org | 202-478-5555



Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions