



Alumni engagement, from the small detail to the big picture: using data to justify investment and demonstrate strategic impact

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#IDPE19

Alumni engagement: from the small detail to the **BIG** picture

Using data to justify investment and demonstrate strategic impact



Bradford
Grammar
School

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THE PERSE
SCHOOL

Session outline

- ▶ What do we mean by alumni engagement?
- ▶ What metrics are we using to demonstrate growth and impact?
- ▶ Communicating impact and managing expectations of the SLT
- ▶ Questions

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**”

CASE Alumni Engagement Metrics White Paper, August 2018

Where are we? Where do we want to be?

- **Alumni associations** – consciously uncoupled or a thriving marriage?
 - Context and opportunities
- **Events**
 - Reunions (who coordinates them? How can the Development Office add value and measure impact?)
 - Careers activities?
- **Communications and social media**
- **Challenges**
 - GDPR – protect your assets!
 - Philanthropic culture – engaged or suspicious?
 - Common Room



Database: with great power, comes great responsibility

... The database (cue Beethoven's Fifth ...)

- Get to know your database
- Check records and identify / segment major donors
- Augment records as you go
- Try queries and reports
- Keep it clean ;-)



What next?

Active, lost, uncontactable... what needs to be done?

Pupil engagement: what is an Old Bradfordian?

- **What?** Name, address, school information, interests, career, giving history, clubs, events, communications, friends etc!
- **For who?** Alumni, parents, potential donors
- **How?** Surveys, forms, publications, telephone campaigns, face-to-face at meetings/events

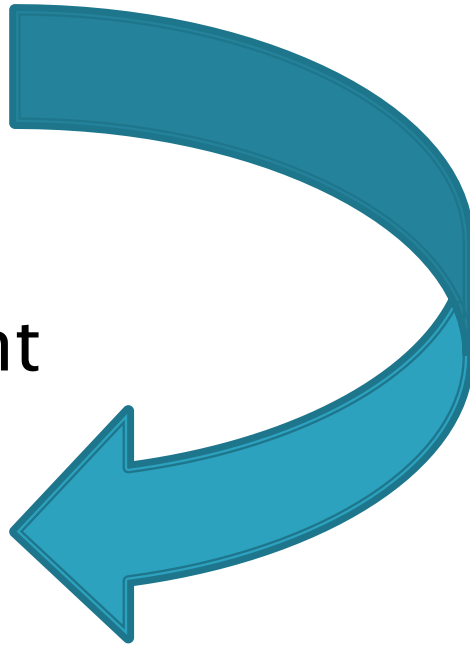
Know your database, know – and grow – your data ...

What metrics are we currently using?

Evidence-based approach – more than just a party planner!

e.g. engaging female OBs – where are they? Use the data to inform event strategy ...

- ▶ Event attendance
- ▶ Communications figures
- ▶ Volunteer engagement
- ▶ Social media engagement
- ▶ Financial



George Washington

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Media Actions Hgnor/Memorial Volunteer Prospect Membership Events

✓ Bio 1 Bio 2 ✓ Addresses Addressees/Salutations ✓ Relationships ✓ Appeals Notes ✓ Gifts Attributes

Biographical

Last name: Washington Aliases

First name: George

Middle name:

Titles: Mr.

Suffixes:

Nickname:

Maiden name:

ID: 770

Gender: Unknown SSN:

Birth date: Age:

☐ Deceased? Date:

Marital status:

Spouse: Martha Washington

Solicit code: Do not call after 9:00 PM

Preferred Address : Home

Country: United States More...

Address lines: 896 Test Dr.

City: Washington

State: DC District of Columbia

ZIP: 98765 DPC:

Phones/Email/Links

DNC	Type	Number/Email Address	Shared?
<input type="checkbox"/>	Home	789-555-1212	Not Shared
<input type="checkbox"/>	Cell Phone	789-444-2589	Cannot be Sh...

This constituent

☐ Is inactive ☐ Is a solicitor Details

☐ Gives anonymously ☐ Has no valid addresses

☐ Requests no email

Education Business Bank

Press F7 for table lookup No score 6/21/2013

Demonstrating growth and impact: Events

- ▶ What can we record?
 - Response rates for events
 - Attendees – numbers and demographic
- ▶ Limitations
 - Reasons for not attending
 - Engaging with the institution or each other?
 - Registering attendees
- ▶ Demonstrating success
 - Increase in attendance
 - Relative engagement
 - Repeat engagement
 - Stepping stones – gateway to further engagement



Demonstrating growth and impact: Comms

▶ What can we record?

- Number on mailing list
- Open rates
- Feedback received
- Data updates

▶ Limitations

- Gauging level of engagement

▶ Demonstrating success

- Positive feedback
- Increase in open/click-through rates
- Positive actions that follow – what do people do after reading?
- Clean data



Demonstrating growth and impact: Volunteers

- ▶ What can we record?
 - Number of volunteers
 - Frequency of volunteers
 - Demographic of volunteers
- ▶ Limitations
 - Defining engagement
 - Finding out information
 - Opportunities to volunteer
- ▶ Demonstrating success
 - Increase in volunteering
 - Repeat volunteers
 - Two-way engagement
 - Stepping stones to other engagement – link between volunteering and philanthropy
 - Monetising volunteering

Communicating impact

- ▶ Monetising volunteer time
 - Controversial topic!
 - NCVO: *VIVA – The Volunteer Investment and Value Audit*, Gaskin (2011)

Volunteer role equivalent wage x hours worked by volunteer

- Equivalent wage: Heritage lottery fund
 - Unskilled work: £50/day (£6.25/hour)
 - Skilled work: £150/day (£18.75/hour)
 - Specialist work: £350/day (£43.75/hour)

Communicating impact: Example

Equivalent wage: Heritage lottery fund

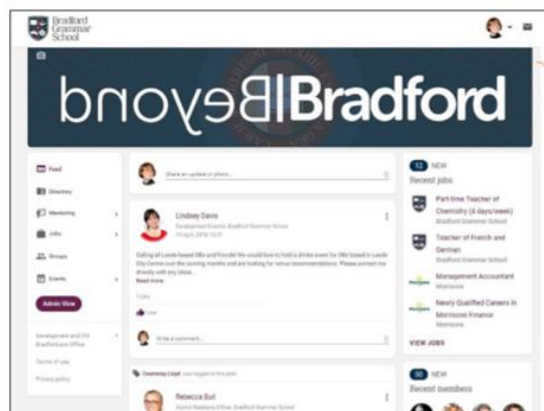
- Unskilled work: £50/day (£6.25/hour) – *Year Group Reps, helping with clubs*
- Skilled work: £150/day (£18.75/hour) – *Careers support, lunchtime talks*
- Specialist work: £350/day (£43.75/hour) – *Development Advisory Group*

Role	Hourly Rate	Hours per volunteer	Number of volunteers	Total equivalent value
Year Group Reps	£6.25	5	47	£1468.75
Outdoor Pursuits Volunteer	£6.25	60	6	£2,250
Careers Volunteer	£18.75	4	46	£3,450
Lecture/talk at school	£18.75	2	14	£525
Development Advisory Group	£43.75	8	6	£2,100
			119	£9,793.75

NB: Limitations of these figures (hours, real value etc.), but may be a useful starting point.

Demonstrating growth and impact: Social Media

Getting social



137.2K impressions
1.5K Link clicks
2,645 total followers
(30 new followers every month)

Beyond Bradford
Completed Graduway relaunch with new brand identity:
<https://beyondbradford.com/>



1,354
Registered Users

82 %
Willing To Help

NEW OB twitter page
The new twitter page is a one-stop-shop dedicated to our Old Bradfordians - paying testament to the opportunities our school creates, and supporting the growth and success of BGS
https://twitter.com/BGS_OBs



Old Bradfordians
@BGS_OBs Follows you

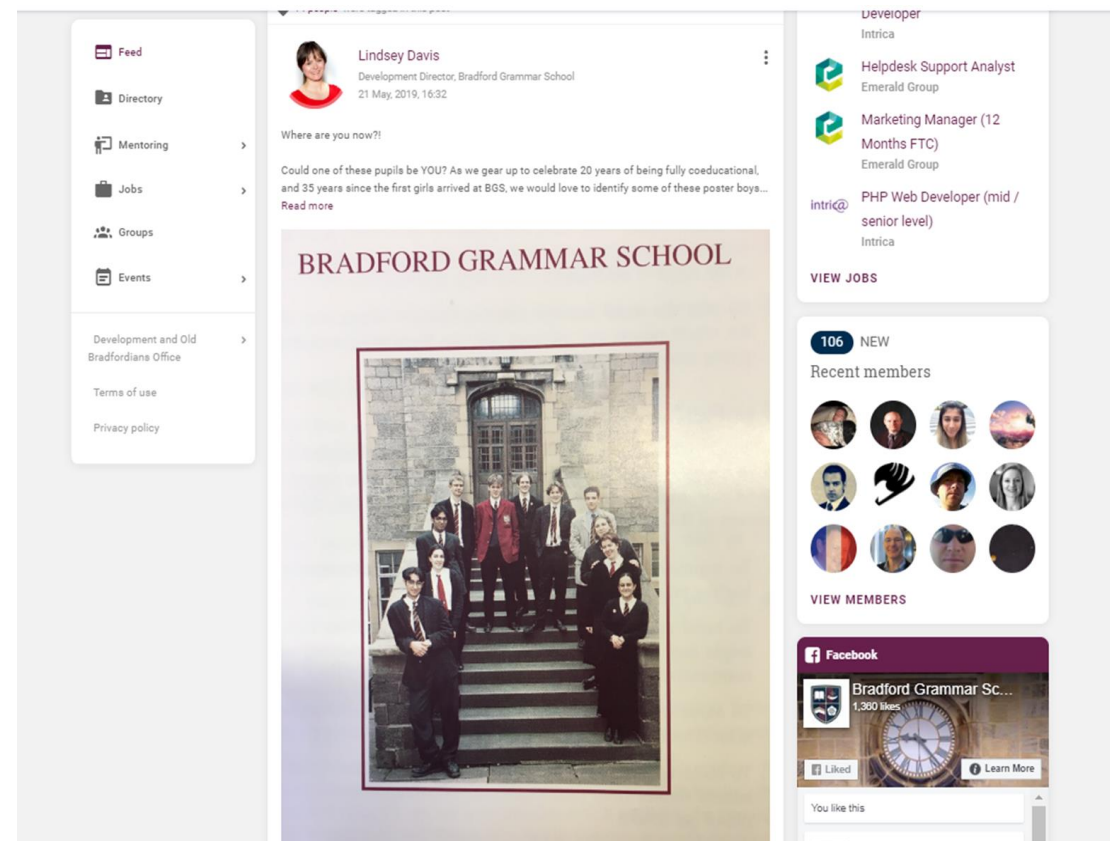
At @BradfordGrammar our Old Bradfordians are the greatest testament to the opportunities our School creates, supporting the growth and success of BGS #hocage

BGSat70
This mini social media campaign celebrates 70 years on the Frizinghall site and will run across the school year. We are recording stories to celebrate our heritage and our future - to connect to our wonderful school and each other. #BGS70
<https://twitter.com/BGSat70>



BGS at 70: A defined heritage & progressive future
@BGSat70 Follows you

To celebrate 70 years at Frizinghall & @BGS_OBs we are recording stories of our heritage and future - to connect to our wonderful school and each other #BGS70



Demonstrating growth and impact: Social Media

- ▶ What can we record?
 - Number of impressions
 - Number of interactions
 - Demographic of participants
- ▶ Limitations
 - Ephemeral
 - Difficult to demonstrate tangible impact
- ▶ Demonstrating success
 - Engagement tool for younger alumni
 - Anniversaries

Communicating impact

▶ Friendraising v Fundraising

- Transactional or sustainable?
- Relationships take time
- Value of conversations: network, dialogue
- Relationship between non-financial engagement and philanthropy
 - Long term pipeline
 - Volunteers are likely to support an organisation philanthropically (*Helping Out: A national survey of volunteering and charitable giving*, Low et al., 2007)
 - Events and communications allow you to get your message and case for support across, even without making an explicit ask

Communicating impact: Preparation

- ▶ Participation v financial impact (long-term versus short-term goals)
- ▶ What is your ROI? Costs + budget + staff + forecast ...
- ▶ Use events and comms to inform segmentation of prospect groups and identify major donors – bespoke engagement
- ▶ **Long-term, sustainable impact** ... more than just low-hanging fruit!

Soft power: alumni input and network analysis will inform your fundraising strategy ...



Communicating impact: Educating the educators!

- ▶ Study the history of last appeal for funds – was it a success?
 - Hoc Age, 20 years ago today ...!
- ▶ How much can you realistically raise this time? Agree the target with your Governors – but founded on friend-raising, groundwork metrics!
- ▶ Identify 20% of alumni who will give 80% of the funds
- ▶ From your consultation write a robust (draft) Case for Support
- ▶ Try it on a few major donor prospects but keep listening!

Communicating impact: Educating the educators!

- ▶ Development Director should build a strong relationship with SLT / Governing Body, and be given the space to develop a sensible but ambitious development strategy based on a mix of data and ‘field research’.
 - E.g. Direct Grant era alumni (1944–1979): ‘sweet spot’ for demonstrating ROI in the long term
- ▶ Invite your leadership to IDPE Conferences!

Communicating impact: Managing expectations

Take the Common Room with you

They have the relationships!

- Current context: TPS, budgetary concerns
- Strategy – common room as external relations
- Common room as a team – working with colleagues to further projects



Questions?