

Beyond the pounds Is ROE the new ROI?

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Chair: Karen Hartshorn

The recent IDPE benchmarking report demonstrates fundraising is a natural outcome of good alumni engagement – but how can we measure it? How can we record impact beyond ROI?

Hear how to measure Return on Engagement (ROE), learn what is trending today in the industry, and demonstrate how effective alumni engagement will ultimately increase your Return on Investment (ROI).

Agenda

- ▶ Introduction
- ▶ Engagement Definition
- ▶ Engagement Scoring Models
- ▶ Industry Trend
- ▶ Your Mission – Tell Your Story!

Introduction

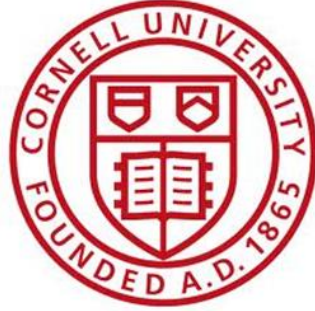


12 Years



LEHIGH
UNIVERSITY

7 Years



5 Years

GG+A

5 Years



0.83 Years

ENGAGEMENT

Engagement – Definition

To attract, secure, and hold fast the attention, efforts, loyalty, passion, and support of an alumnus.

Engagement – The REAL Challenge

MILLENNIALS!!!





John Mulaney
Netflix – *Kid Gorgeous*

I got a letter from my alma mater asking for a “gift”... a gift of money!

In their letter, they were like, “Hey, it’s been awhile since you’ve given us money.” I was like, “Hey, it’s been awhile since you’ve housed and taught me.” **I thought our transaction was over.** I gave you \$120,000 and you gave me a weird cinder-block room with a Reservoir Dogs poster on it and the first real heartbreak of my life and then we called it a day.

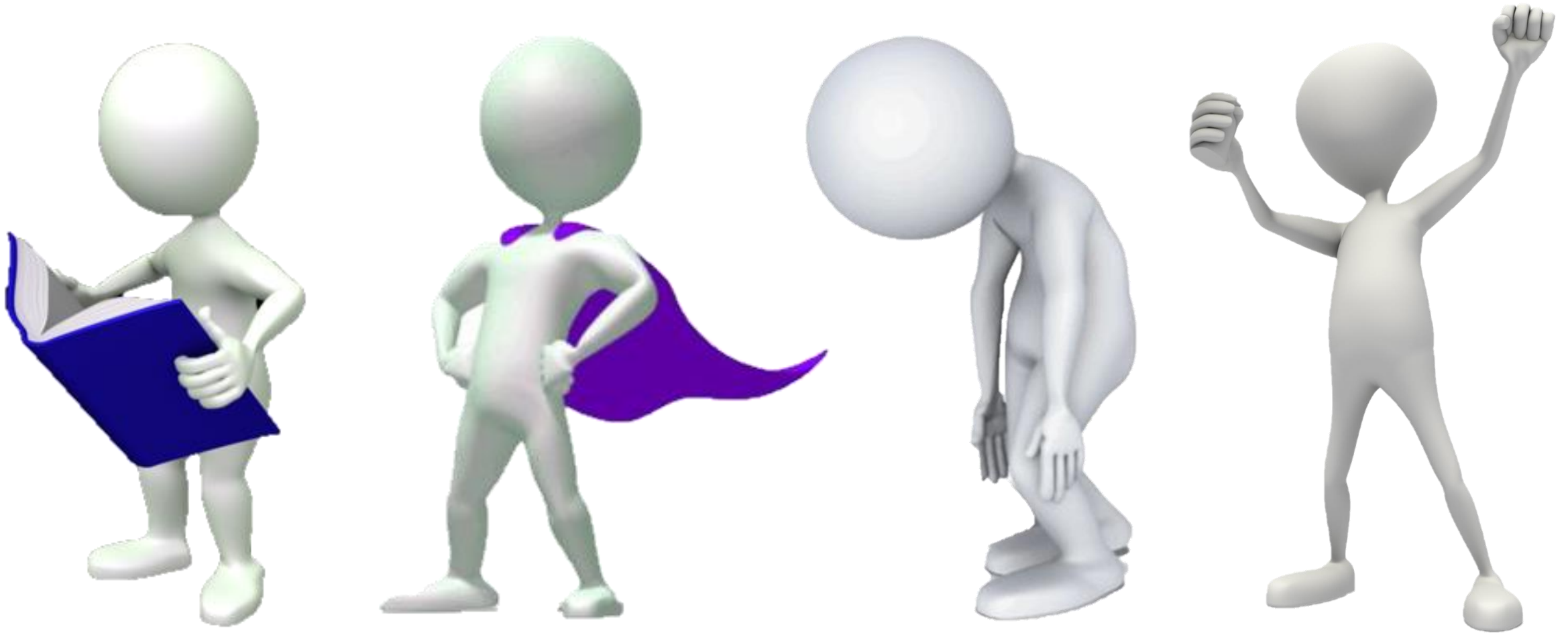
Engagement

To attract, secure, and hold fast the attention, efforts, loyalty, passion, and support of an alumnus.

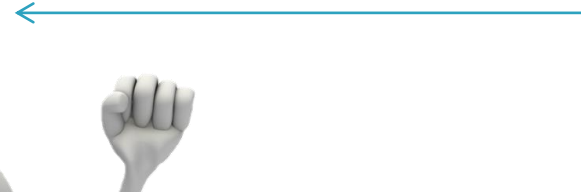
Engagement

But, how do we measure it?

“Engaged”



“Engaged”



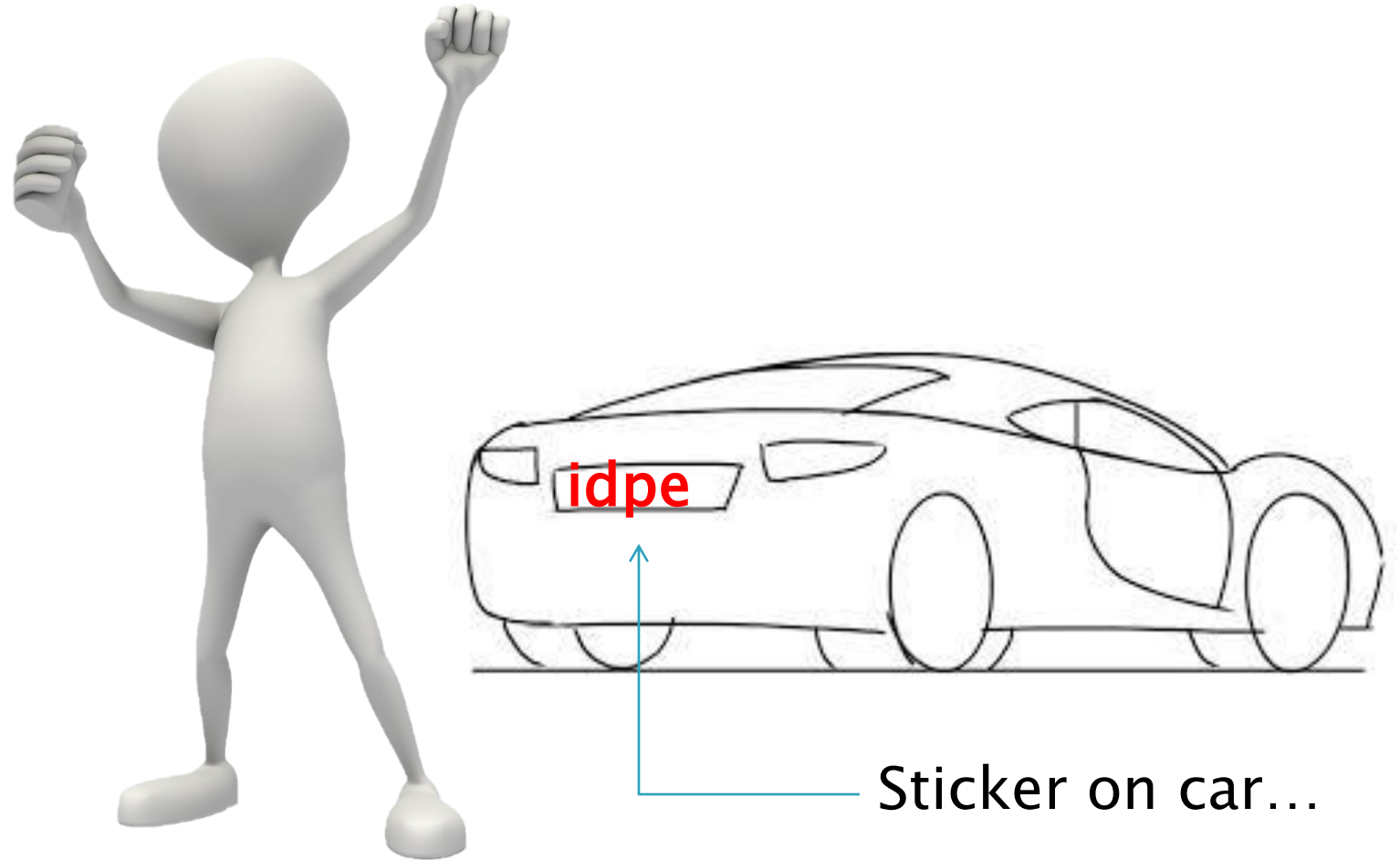
Waves the flag...

“Engaged”

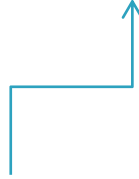
Wears the shirt...



“Engaged”



“Engaged”



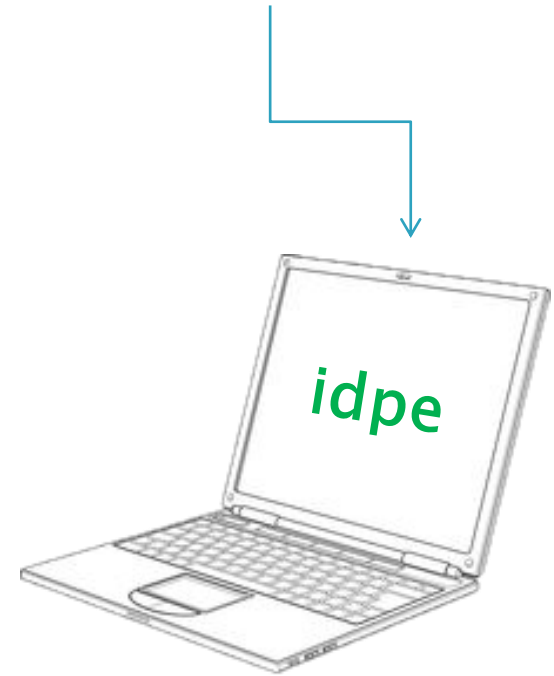
Diploma on wall...



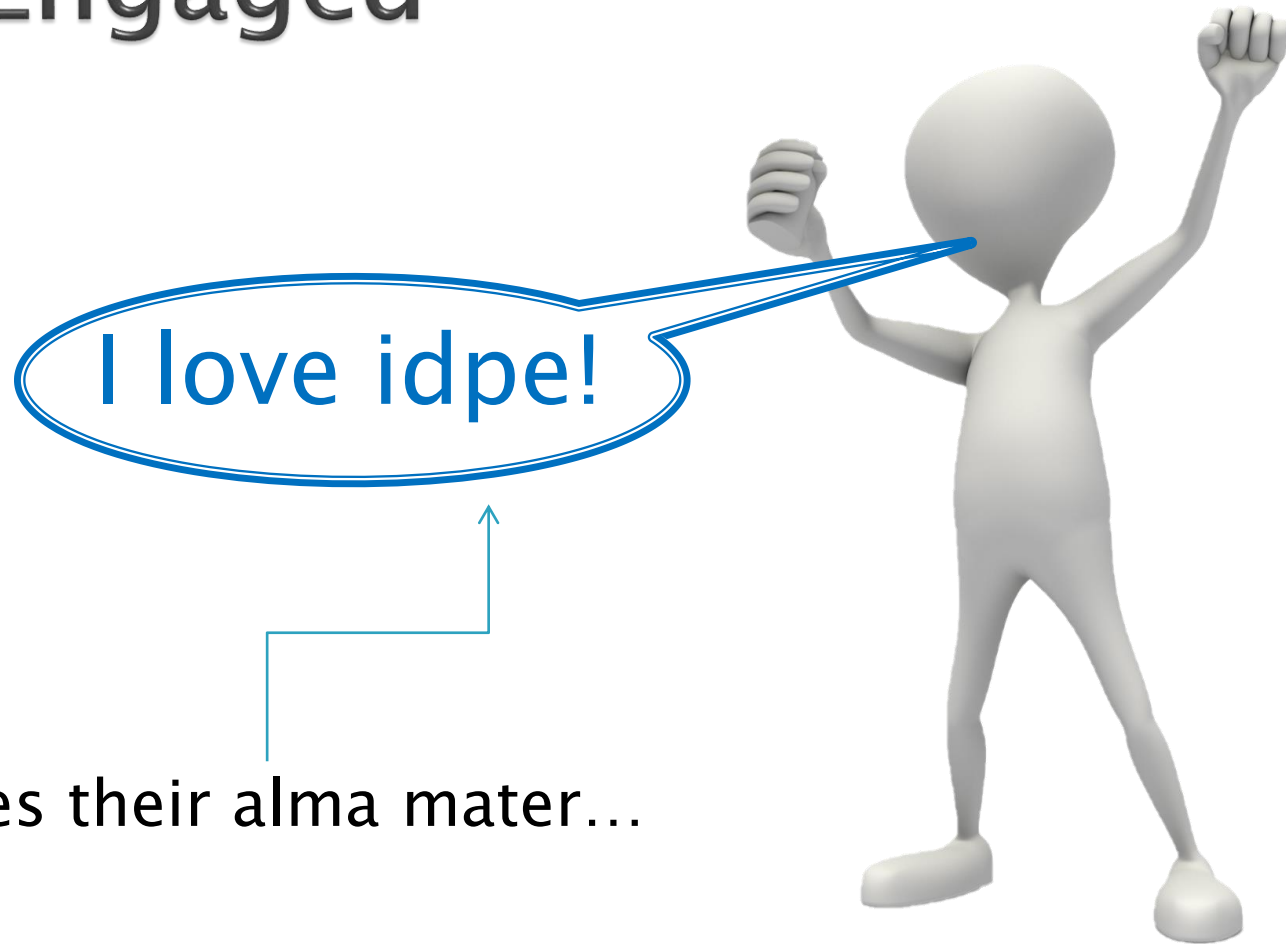
“Engaged”



Visits the website...



“Engaged”



Loves their alma mater...

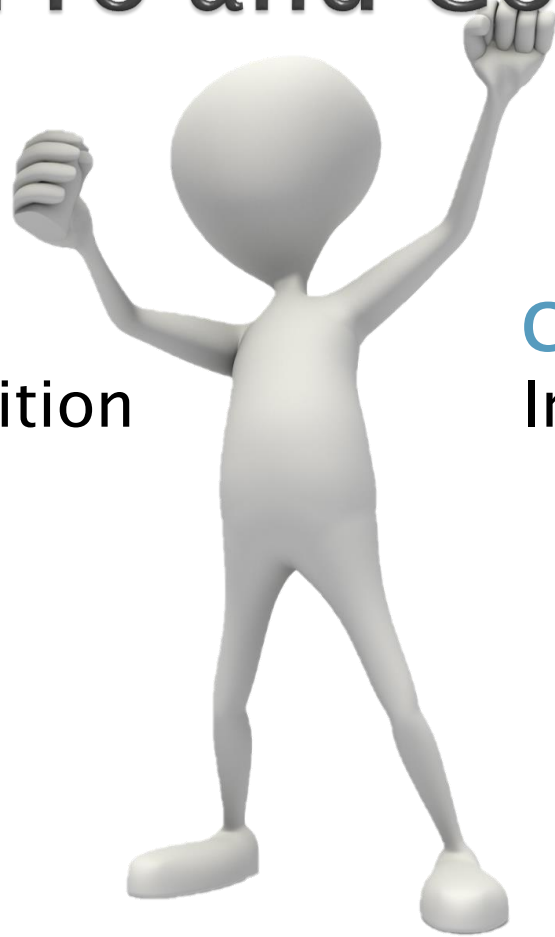
Engagement – Pro and Con

PRO

Broad and inclusive definition

CON

Impossible to track



True Story



MEASURABLE ENGAGEMENT

MEASURABLE ENGAGEMENT

Attended an event

Opened the e-newsletter

Liked page on Facebook

Submitted a class note

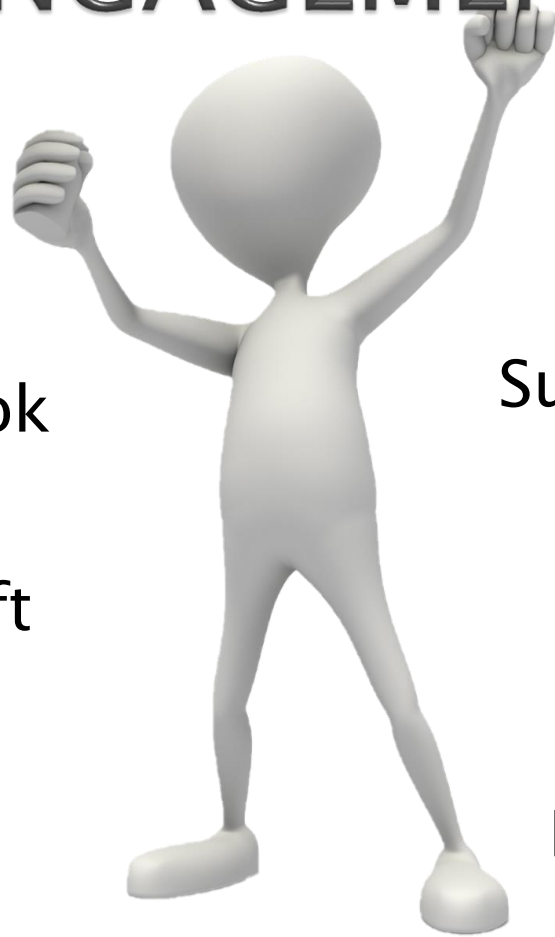
Made a gift

Volunteered

Joined LinkedIn Group

Followed us on Twitter

Responded to a survey



MEASURABLE ENGAGEMENT

PRO

Everything is quantifiable



CON

Would take a lot of resources to track

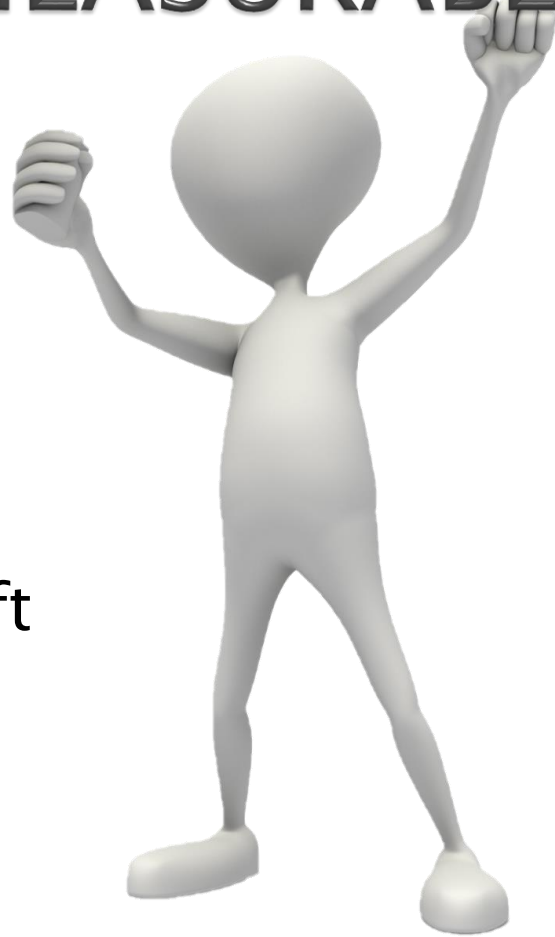
REASONABLY MEASURABLE ENGAGEMENT

REASONABLY MEASURABLE ENGAGEMENT

Attended an event

Made a gift

Volunteered



REASONABLY MEASURABLE ENGAGEMENT

PRO

Everything is “easily” quantifiable and track-able.

Emerging industry approach:
“Go – Give – Help” Model

CON

All behaviour counts the same.
(not “weighted”)



REASONABLY MEASURABLE ENGAGEMENT

An “engaged” alumnus is someone who has done at least one of the following:

- ✓ Attend – attended an event, webinar, etc.
- ✓ Volunteer – given their time on behalf of school
- ✓ Donate – made a financial contribution (at any level)

$$\frac{(\text{Attendees} + \text{Volunteers} + \text{Donors}) - \text{Duplicates}}{\text{Total Contactable Alumni Population}} = \text{Alumni Engagement Score (\%)}$$

REASONABLY MEASURABLE ENGAGEMENT

Small U.S. Public University

Alumni Group	FY15	
	Number of alumni	% of engaged alumni
Alumni Donors	2,012	3.2%
Alumni Attendees	623	1.0%
Alumni Volunteers	35	0.1%
Total Engaged Alumni	2,441	3.9%
All Alumni	63,290	

REASONABLY MEASURABLE ENGAGEMENT

Mid-Size U.S. Public University

Alumni Group	FY2014	
	Number of alumni	% of engaged alumni
Alumni Donors	5,230	4.9%
Alumni Attendees	1,659	1.6%
Alumni Volunteers	99	0.1%
Total Engaged Alumni	6,503	6.1%
All Alumni	107,021	

REASONABLY MEASURABLE ENGAGEMENT

Large U.S. Public University

Alumni Group	FY15	
	Number of alumni	% of engaged alumni
Alumni Donors	19,332	7.9%
Alumni Attendees	2,416	1.0%
Alumni Volunteers	351	0.1%
Total Engaged Alumni	20,700	8.5%
All Alumni	244,231	

REASONABLY MEASURABLE ENGAGEMENT

“Mega” U.S. Public University

Alumni Group	FY15	
	Number of alumni	% of engaged alumni
Alumni Donors	48,500	9.7%
Alumni Attendees	?	?
Alumni Volunteers	?	?
Total Engaged Alumni	?	?
All Alumni	500,000	

REASONABLY MEASURABLE ENGAGEMENT

“Elite” U.S. Private University

FY15 - Undergraduate Alumni		
Alumni Group	Number of alumni	% of engaged alumni
Alumni Donors	24,424	45.0%
Alumni Attendees	8,866	16.4%
Alumni Volunteers	6,400	11.8%
Total Engaged Alumni	26,924	49.7%
All Alumni	54,222	

REASONABLY MEASURABLE ENGAGEMENT

U.S. Liberal Arts College

Alumni Group	FY2015	
	Number of alumni	% of engaged alumni
Alumni Donors	6,184	26.3%
Alumni Attendees	2,820	12.0%
Alumni Volunteers	1,175	5.0%
Total Engaged Alumni	7,522	32.0%
All Alumni	23,505	

REASONABLY MEASURABLE ENGAGEMENT

U.S. Liberal Arts College

Alumni Group	FY2015	
	Number of alumni	% of engaged alumni
Alumni Donors	2,943	23.4%
Alumni Attendees	664	5.3%
Alumni Volunteers	328	2.6%
Total Engaged Alumni	3,439	27.4%
All Alumni	12,552	

REASONABLY MEASURABLE ENGAGEMENT

	FY2010		FY2011		FY2012		FY2013		FY2014	
Alumni Group	Number of alumni	% of alumni	Number of alumni	% of alumni	Number of alumni	% of alumni	Number of alumni	% of alumni	Number of alumni	% of alumni
Alumni Donors	9,046	38.5%	9,463	39.6%	9,033	37.0%	9,865	39.6%	9,367	37.0%
Alumni Attendees	2,779	11.8%	3,701	15.5%	3,037	12.4%	6,840	27.5%	4,672	18.5%
Alumni Volunteers	1,264	5.4%	1,147	4.8%	1,723	7.0%	861	3.5%	711	2.8%
Total Engaged Alumni	11,107	47.3%	11,168	46.7%	10,453	42.8%	11,784	47.3%	10,780	42.6%
All Alumni	23,466		23,924		24,444		24,911		25,297	

REASONABLY MEASURABLE ENGAGEMENT

U.S. Independent School

Alumni Group	FY2016	
	Number of alumni	% of alumni
Alumni Donors	1,271	25.9%
Alumni Attendees	475	9.7%
Alumni Volunteers	118	2.4%
Total Engaged Alumni	1,383	28.2%
All Alumni	4,900	

REASONABLY MEASURABLE ENGAGEMENT

U.S. Independent School

Alumni Group	FY2016	
	Number of alumni	% of alumni
Alumni Donors	926	13.4%
Alumni Attendees	471	6.8%
Alumni Volunteers	80	1.2%
Total Engaged Alumni	1,327	19.2%
All Alumni	6,910	

REASONABLY MEASURABLE ENGAGEMENT

U.S. Independent School

FY2016

FY2017 - GOALS

Alumni Group	Number of alumni	% of alumni	Number of alumni	% of alumni
Alumni Donors	654	12.0%	722	12.9%
Alumni Attendees	387	7.1%	500	8.9%
Alumni Volunteers	247	4.5%	300	5.3%
Total Engaged Alumni	965	17.7%	1,110	19.8%
All Alumni	5,449		5,615	

REASONABLY MEASURABLE ENGAGEMENT

Manchester Grammar School

	FY2015	
Alumni Group	Number of alumni	% of alumni
Donors	506	4.8%
Attendees	1,253	11.9%
Volunteers	0	0.0%
Total Engaged Alumni	1,447	13.7%
All Alumni	10,565	

REASONABLY MEASURABLE ENGAGEMENT

Manchester Grammar School

	FY2015		FY2016	
Alumni Group	Number of alumni	% of alumni	Number of alumni	% of alumni
Donors	506	4.8%	526	4.9%
Attendees	1,253	11.9%	384	3.6%
Volunteers	0	0.0%	22	0.2%
Total Engaged Alumni	1,447	13.7%	783	7.3%
All Alumni	10,565		10,677	

REASONABLY MEASURABLE ENGAGEMENT

Manchester Grammar School

	FY2015		FY2016		FY2017	
Alumni Group	Number of alumni	% of alumni	Number of alumni	% of alumni	Number of alumni	% of alumni
Donors	506	4.8%	526	4.9%	615	5.7%
Attendees	1,253	11.9%	384	3.6%	487	4.5%
Volunteers	0	0.0%	22	0.2%	19	0.2%
Total Engaged Alumni	1,447	13.7%	783	7.3%	883	8.2%
All Alumni	10,565		10,677		10,788	

REASONABLY MEASURABLE
ENGAGEMENT
CORRELATION TO GIVING

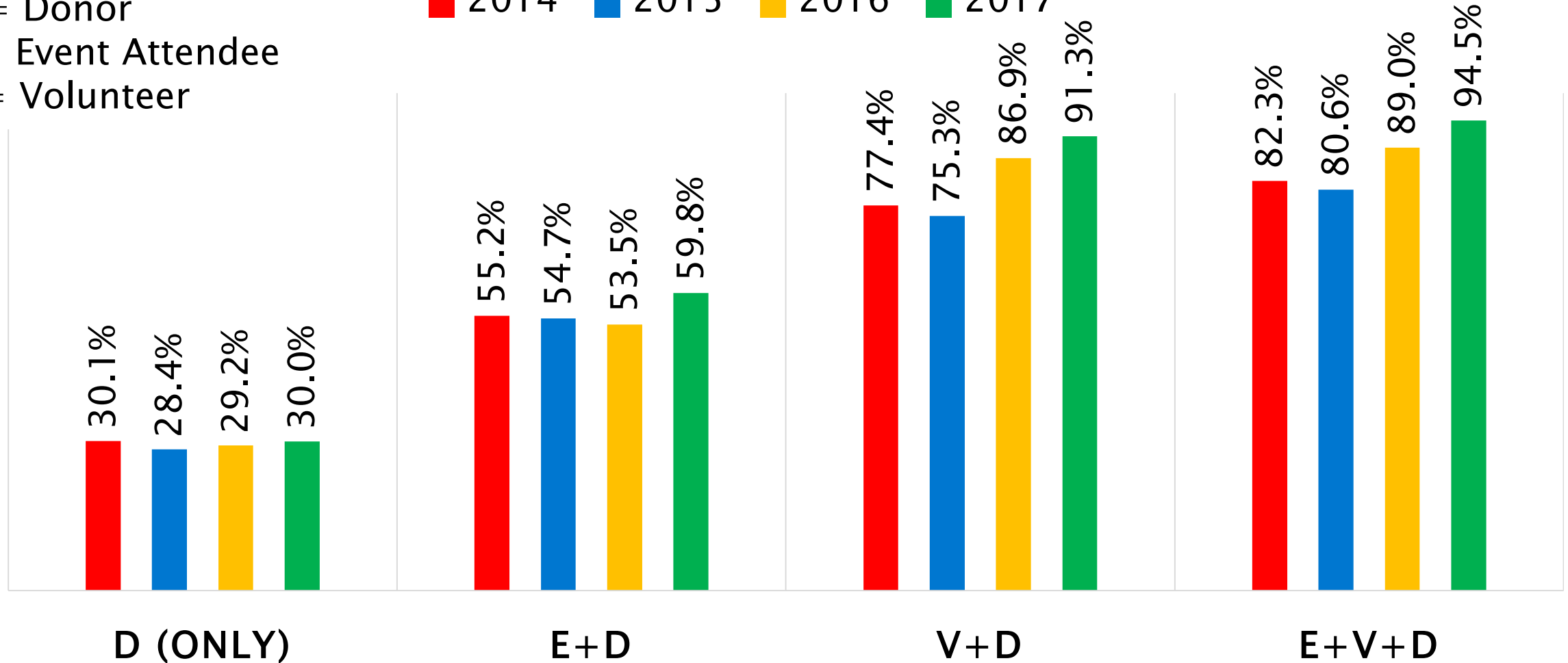
GIVING PERCENTAGE – ELITE PRIVATE

D = Donor

E = Event Attendee

V = Volunteer

■ 2014 ■ 2015 ■ 2016 ■ 2017



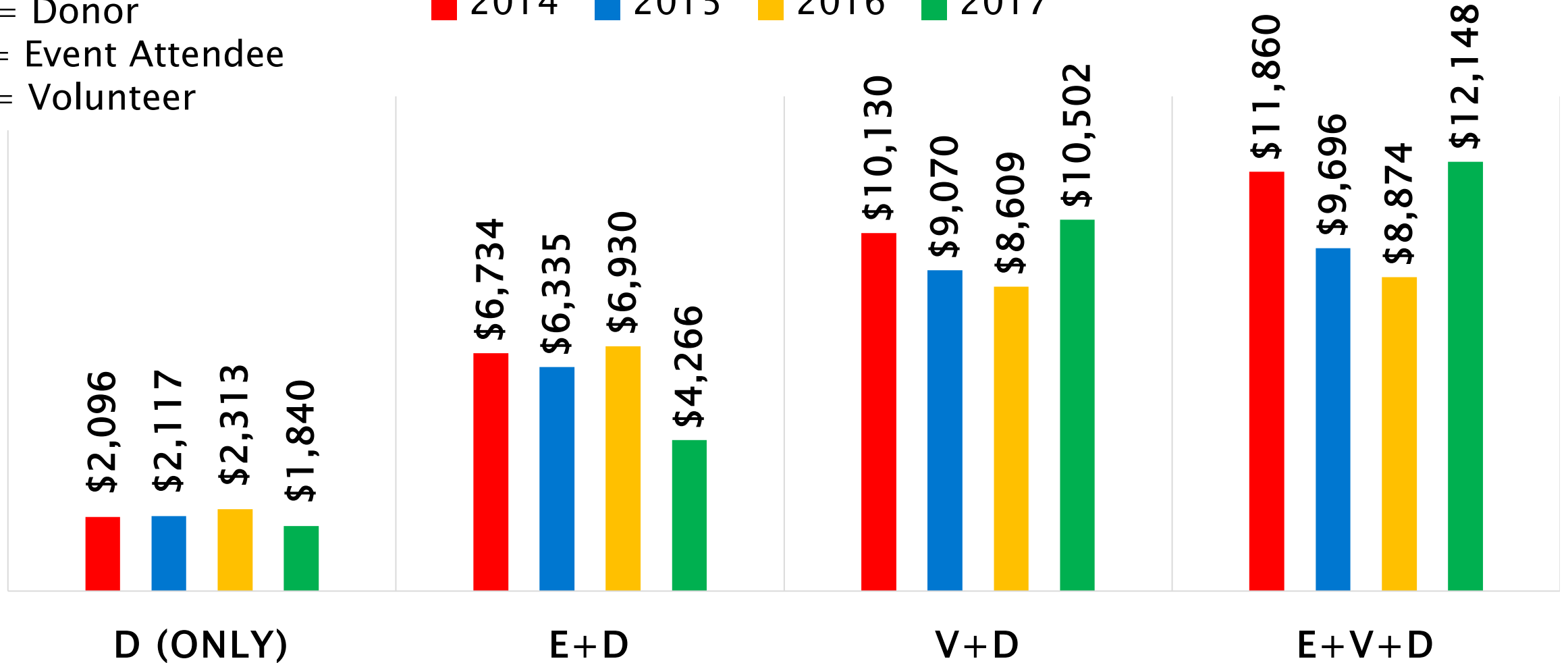
AVERAGE GIFT - ELITE PRIVATE

D = Donor

E = Event Attendee

V = Volunteer

2014 2015 2016 2017



REASONABLY MEASURABLE ENGAGEMENT

WEIGHTED ✓

REASONABLY MEASURABLE ENGAGEMENT

ATTENDED AN EVENT

What type of event?

How many events?

On campus or off campus?

MADE A GIFT

What size of gift?

Multiple gifts?

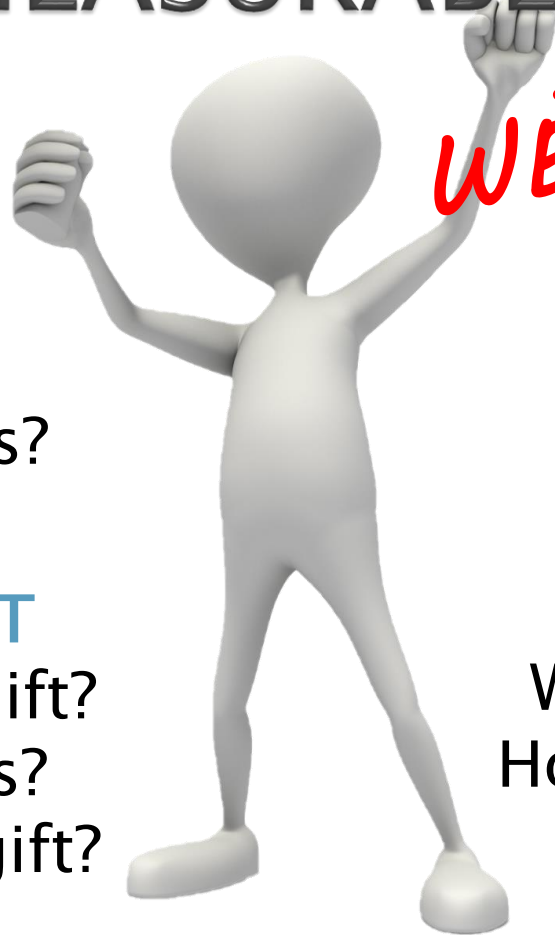
What type of gift?

WEIGHTED

VOLUNTEERED

What type of volunteer role?

How long was volunteer term?



REASONABLY MEASURABLE ENGAGEMENT

WEIGHTED

PRO

Appropriate weighting
placed on certain behaviors

CON

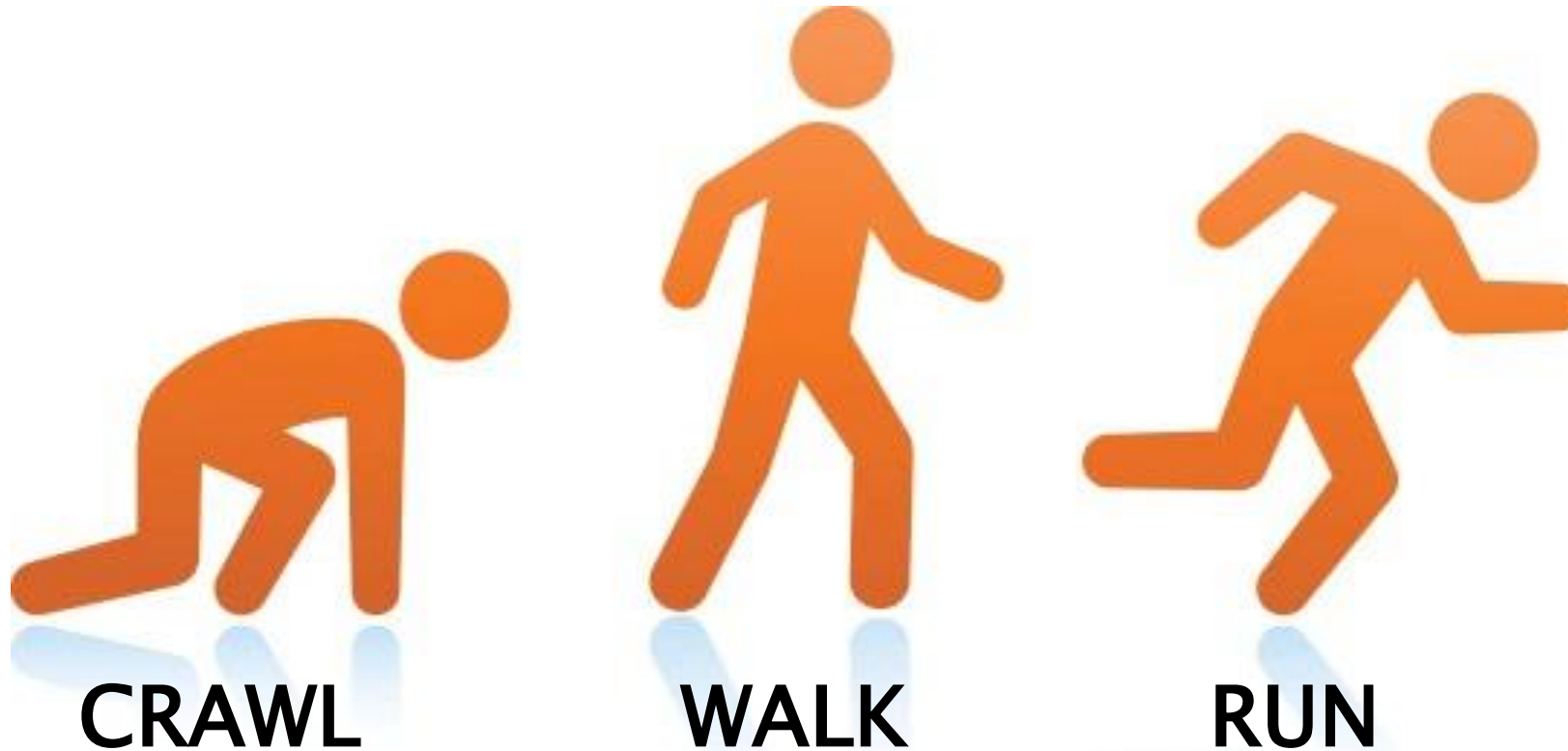
Could be fairly resource intensive



EVOLUTION

EVOLUTION

Don't let the perfect be the enemy of the good.



EVOLUTION



INDUSTRY TREND

INDUSTRY TREND

Standard Definitions

- ▶ Alumni
- ▶ Alumni Engagement
- ▶ Four primary forms of engagement
 - Experiential
 - Volunteer
 - Philanthropic
 - Communication

INDUSTRY TREND

Alumni Definition

- ▶ 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.

INDUSTRY TREND

Alumni Engagement Definition

- ▶ Activities which 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.

INDUSTRY TREND

Experiential Engagement Definition

- ▶ Meaningful experiences which inspire alumni, are valued by the institution, promote its mission, celebrates its achievements and strengthens its reputation.

INDUSTRY TREND

Volunteer Engagement Definition

- ▶ Formally defined and rewarding volunteer roles, which are endorsed and valued by the institution and support its mission and strategic goals.

INDUSTRY TREND

Philanthropic Engagement Definition

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

INDUSTRY TREND

Communication Engagement Definition

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

INDUSTRY TREND

Manchester Grammar School

	FY2015		FY2016		FY2017	
Alumni Group	Number of alumni	% of alumni	Number of alumni	% of alumni	Number of alumni	% of alumni
Donors	506	4.8%	526	4.9%	615	5.7%
Attendees	1,253	11.9%	384	3.6%	487	4.5%
Volunteers	0	0.0%	22	0.2%	19	0.2%
Total Engaged Alumni	1,447	13.7%	783	7.3%	883	8.2%
All Alumni	10,565		10,677		10,788	

INDUSTRY TREND

Manchester Grammar School

	FY2015		FY2016		FY2017	
Alumni Group	Number of alumni	% of alumni	Number of alumni	% of alumni	Number of alumni	% of alumni
Philanthropic	506	4.8%	526	4.9%	615	5.7%
Experiential	1,253	11.9%	384	3.6%	487	4.5%
Volunteers	0	0.0%	22	0.2%	19	0.2%
Communications	1,240	11.7%	1,177	11.0%	1,161	10.8%
Total Engaged Alumni	1,994	18.9%	1,500	14.0%	1,578	14.6%
All Alumni	10,565		10,677		10,788	

INDUSTRY TREND

Manchester Grammar School

	FY2015		FY2016		FY2017	
Alumni Group	Number of alumni	% of alumni	Number of alumni	% of alumni	Number of alumni	% of alumni
Philanthropic	506	4.8%	526	4.9%	615	5.7%
Experiential	1,253	11.9%	384	3.6%	487	4.5%
Volunteers	0	0.0%	22	0.2%	19	0.2%
Communications	1,241	11.7%	2,827	26.5%	3,339	31.0%
Total Engaged Alumni	1,994	18.9%	2,927	27.4%	3,382	31.3%
All Alumni	10,565		10,677		10,788	

YOUR MISSION

TELL YOUR STORY!

YOUR MISSION

- 1) Fill out “Tell your story” postcard
- 2) Start gathering engagement data
- 3) Report on it in this format
- 4) Gather longitudinal data
- 5) Correlate giving with other 3 areas
- 6) Share the data with key stakeholders
- 7) IDPE to collect data for all schools
- 8) IDPE to develop comparative benchmark for like schools

	FY2017	
Alumni Group	Number of alumni	% of alumni
Philanthropic	615	5.7%
Experiential	487	4.5%
Volunteers	19	0.2%
Communications	1,161	10.8%
Total Engaged Alumni	1,578	14.6%
All Alumni	10,788	