MEASURING AND EVALUATING YOUR
ALUMNI RELATIONS PROGRAM

#aiAlumEngage

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ACADEMIC IMPRESSIONS

LEARNING OUTCOME

After participating…

…you will be able to objectively measure the success of your alumni relations program.

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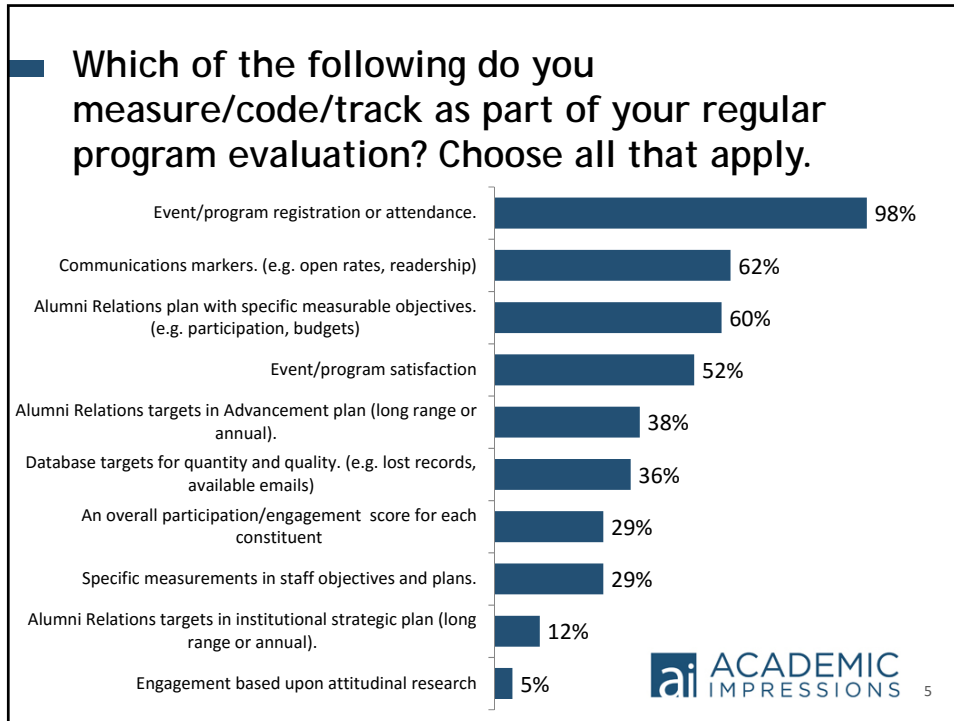ACADEMIC IMPRESSIONS

AGENDA

- Survey review
- Aligning alumni relations operations with institutional priorities
- Metrics for an alumni relations program
- Determining the right metrics for your shop
- Communicating your metrics system to leadership
- Using your metrics to guide planning

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SURVEY REVIEW

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Which of the following do you measure/code/track as part of your regular program evaluation? Choose all that apply.

Category	Percentage
Event/program registration or attendance.	98%
Communications markers. (e.g. open rates, readership)	62%
Alumni Relations plan with specific measurable objectives. (e.g. participation, budgets)	60%
Event/program satisfaction	52%
Alumni Relations targets in Advancement plan (long range or annual).	38%
Database targets for quantity and quality. (e.g. lost records, available emails)	36%
An overall participation/engagement score for each constituent	29%
Specific measurements in staff objectives and plans.	29%
Alumni Relations targets in institutional strategic plan (long range or annual).	12%
Engagement based upon attitudinal research	5%

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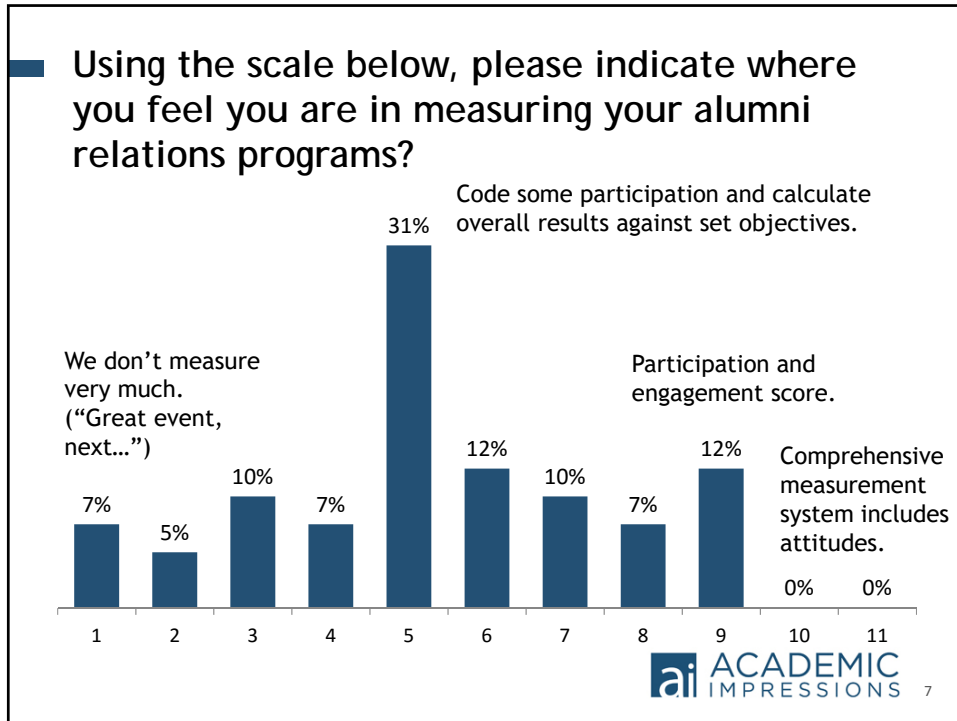## Using the scale below, please indicate where you feel you are in measuring your alumni relations programs?

1. We don't measure very much. ("Great event, next…")

3. We measure by post mortem discussions and anecdotal feedback on events and discuss annual objectives and results among our team.

5. We track and code some participation (event, volunteer, and program) and calculate overall results against set objectives.

7. We set overall participation targets for our programs, have a good sense of what needs tracking in the database, we track our target activities and also do some regular surveys for attitudes towards programs. Results are related to unit and institutional goals.

9. We have all of the above resulting in a participation or engagement score that is weighted for value, each constituent has a rating that is examined over time and across segments/programs. These scores are part of plans for Alumni Relations, Advancement and the school overall.

11. We have a very comprehensive and well understood measurement system. Our composite tracking score for each constituent also includes attitudinal measures on the strength of their relationship with the school and overall attitude is measured over time.

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Using the scale below, please indicate where you feel you are in measuring your alumni relations programs?

Code some participation and calculate overall results against set objectives.

We don't measure very much. ("Great event, next…")

Participation and engagement score.

Comprehensive measurement system includes attitudes.

Scale point	1	2	3	4	5	6	7	8	9	10	11
Percent	7%	5%	10%	7%	31%	12%	10%	7%	12%	0%	0%

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HOW TO MEASURE ANYTHING

Douglas W. Hubbard (2010)

MEASUREMENT: A QUANTITATIVELY EXPRESSED REDUCTION OF UNCERTAINTY BASED ON ONE OR MORE OBSERVATIONS.

- Your problem is not as unique as you think
- You have more data than you think
- You need less data than you think
- Data is more accessible than you think
- Circumference of the Earth(Eratosthenes), Quality (Cleveland Orchestra), Piano Tuners in Chicago (Fermi)

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ALIGNING ALUMNI RELATIONS
OPERATIONS WITH INSTITUTIONAL
PRIORITIES

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CHAT

What role does alumni
relations serve in
advancing your institution?

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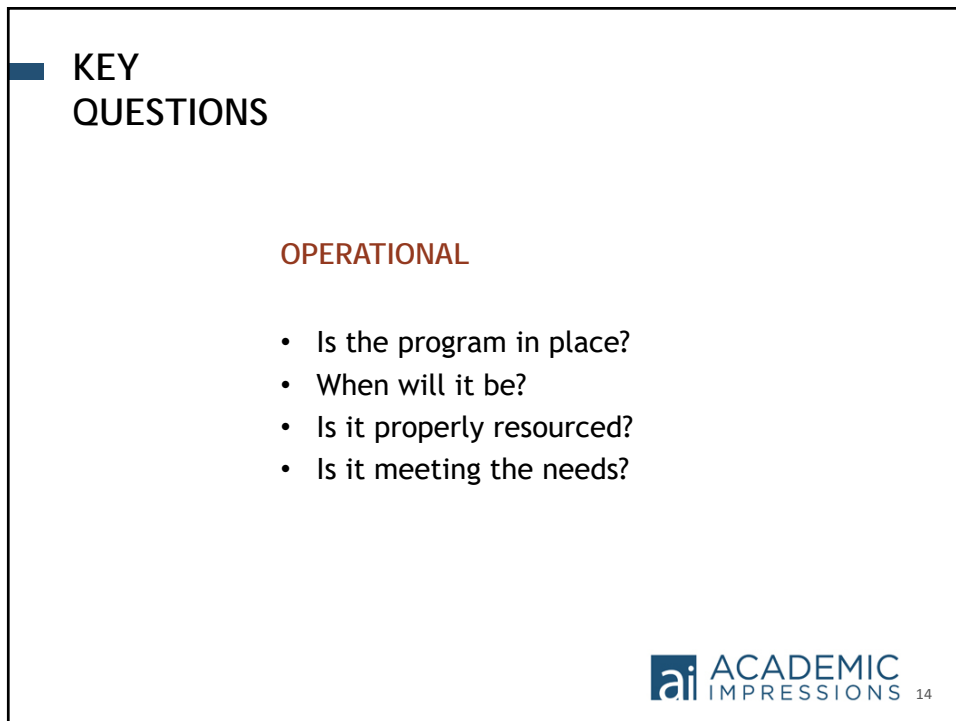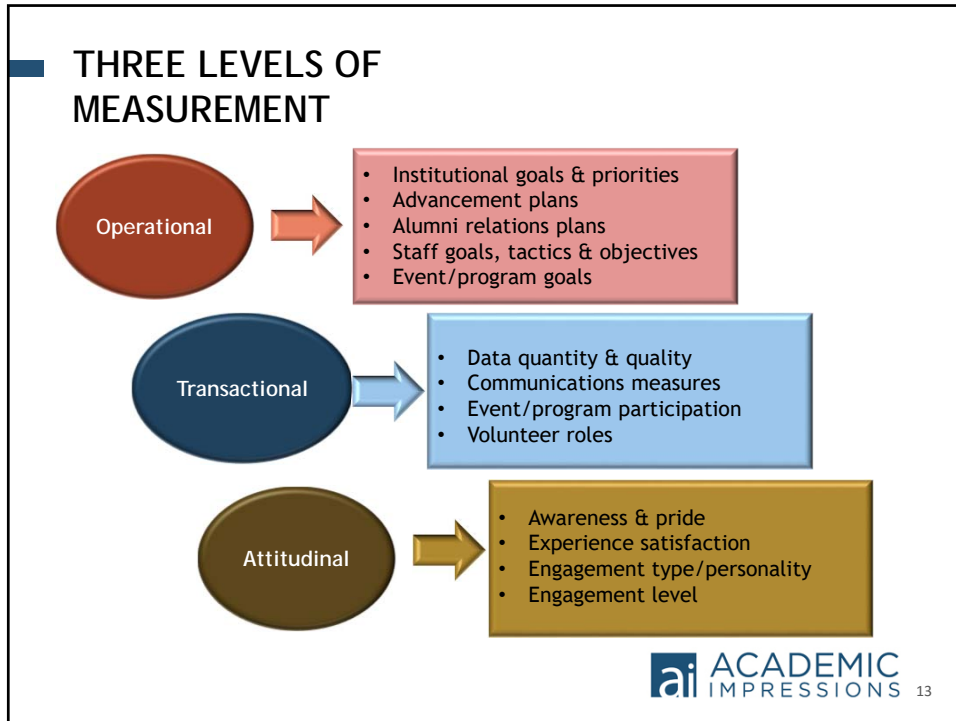💬 **CHAT**

Why is measurement important to supporting that role?

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METRICS FOR AN ALUMNI RELATIONS PROGRAM

THREE LEVELS OF MEASUREMENT

Operational

- Institutional goals & priorities
- Advancement plans
- Alumni relations plans
- Staff goals, tactics & objectives
- Event/program goals

Transactional

- Data quantity & quality
- Communications measures
- Event/program participation
- Volunteer roles

Attitudinal

- Awareness & pride
- Experience satisfaction
- Engagement type/personality
- Engagement level

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KEY QUESTIONS

OPERATIONAL

- Is the program in place?
- When will it be?
- Is it properly resourced?
- Is it meeting the needs?

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KEY QUESTIONS

TRANSACTIONAL

- Is there participation?
- Is it growing?
- Are there additional measurable benefits like gifts?
- Is it tracked?

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KEY QUESTIONS

ATTITUDINAL

- Are people satisfied with it?
- Does it enhance their relationship?
- Improve their perceptions?
- Deepen their pride?

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BASIC MODEL

AN ENAGAGED ALUMNUS HAS:
- ✓ Participated
- ✓ Volunteered
- ✓ Donated

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BASIC MODEL

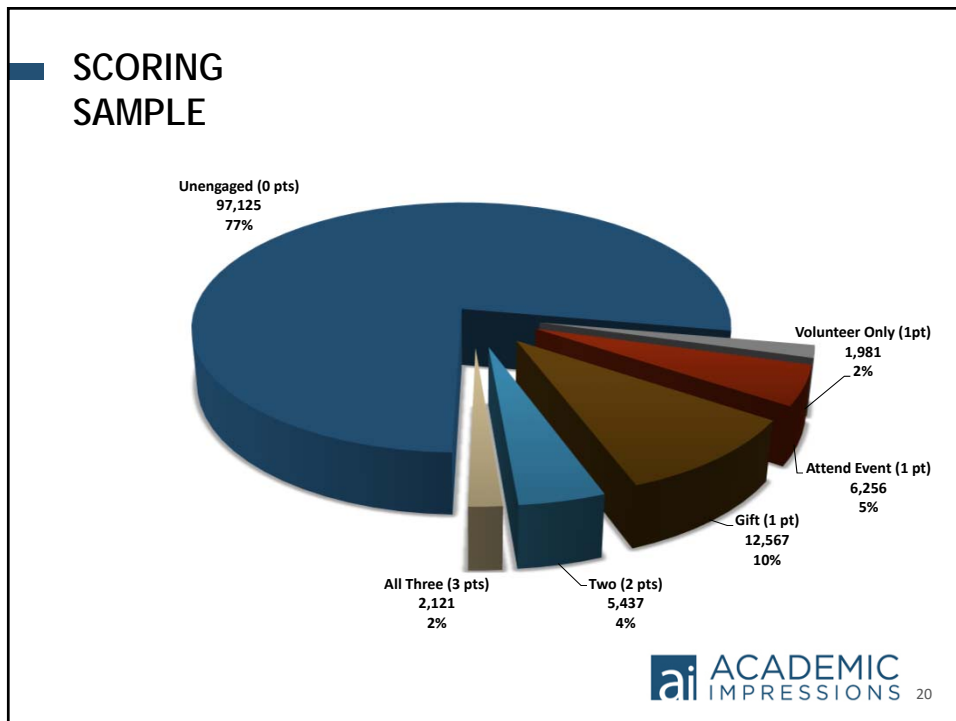| PARTICIPATED	DONATED	VOLUNTEERED
• Attended an event • Participated in a webinar	• Made a financial contribution to the institution at any level or to any designation	• Given their time on behalf of university

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TAKEAWAYS

$$\frac{\text{Participants + Volunteers + Donors}}{\text{Total Alumni Population}} = \text{OVERALL ENAGEMENT SCORE}$$

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SCORING SAMPLE

Unengaged (0 pts)
97,125
77%

Volunteer Only (1pt)
1,981
2%

Attend Event (1 pt)
6,256
5%

Gift (1 pt)
12,567
10%

All Three (3 pts)
2,121
2%

Two (2 pts)
5,437
4%

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SIMPLE SAMPLE

- 116,067 Alumni
- Used existing data
- Participation key factor
- Correlation .92
- Usage
  - Prospect
  - Targeting/Screening
  - Event planning
  - Volunteer recruitment
  - Segmentation
  - Campaign planning

SCORE	NUMBER	AVG. $
0	18,238	$163
1	36,162	$276
2	31,267	$698
3	25,565	$1,223
4	14,858	$2,767
5	10,508	$5,657
6	3,098	$9,776
7	1,251	$11,267
8	1,487	$14,244

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PLUSSES & MINUSES

+

- Easy to determine
- Not too much scoring work
- Agreement on score
- Can be tracked
- Data not complex
- Allows for planning

–

- Multiple events, History
- Assumes positive experience
- Doesn't account for event commitment/investment level
- Intensity of volunteer role
- Level of donation

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WEIGHTED MODEL SCORES

1. Interviewed 25 staff and volunteers
2. Ratings for record data, events, giving and volunteerism
3. Developed algorithm (weights) and mapped data
4. Correlated results with giving (.96 correlation results)

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WEIGHTED MODEL SCORES

Score	0	1	2	3	4-7	8-12	13-17	17-20	20+
Alumni	19,338	35,062	32,367	24,465	15,958	9,408	4,198	1,151	587
Donors	1,353	11570	17,801	17,614	12,925	8,843	4,072	1,151	587
Avg. $	$63	$120	$298	$544	$1,329	$4,898	$9,245	$12,987	$18,668
%Part.	7%	33%	55%	72%	81%	94%	97%	100%	100%

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WEIGHTED MODEL

+ Relation

Variable

Life $

Engagement Score
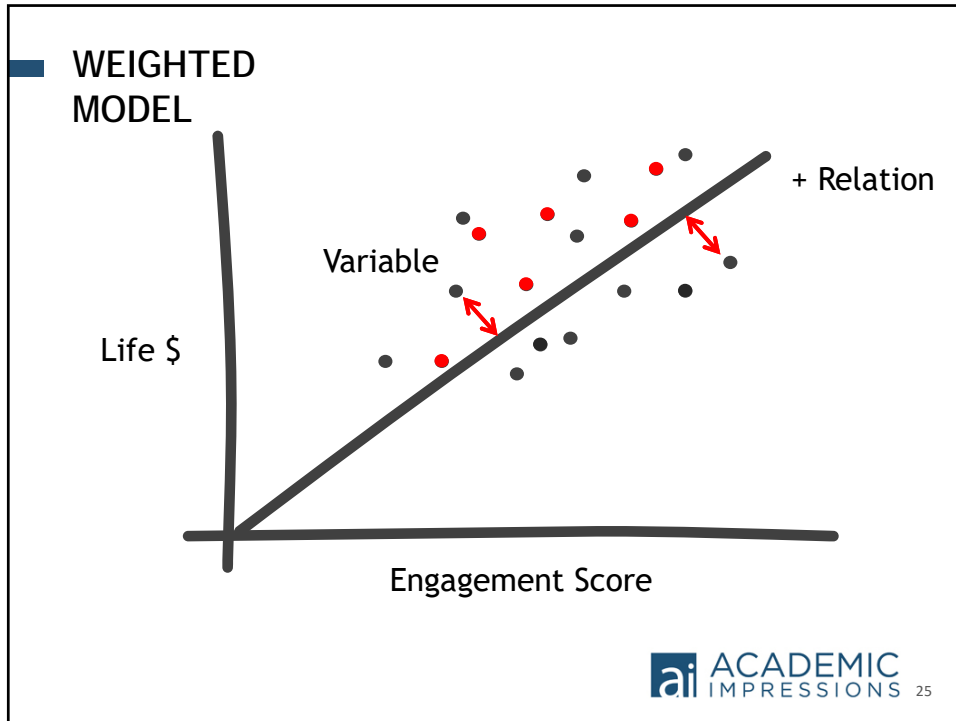
DATA ANALYSIS SOFTWARE

BASIC	FREE ONLINE
• Excel	• R
• Numbers	• KNIME
• Access	• Orange
• DataDesk	• Rapidminer

PLATFORMS	ENGAGEMENT ANALYSER
• SPSS	• Prototype
• IBM Miner	
• SAS	
• ORACLE	

ENGAGEMENT ANALYSER
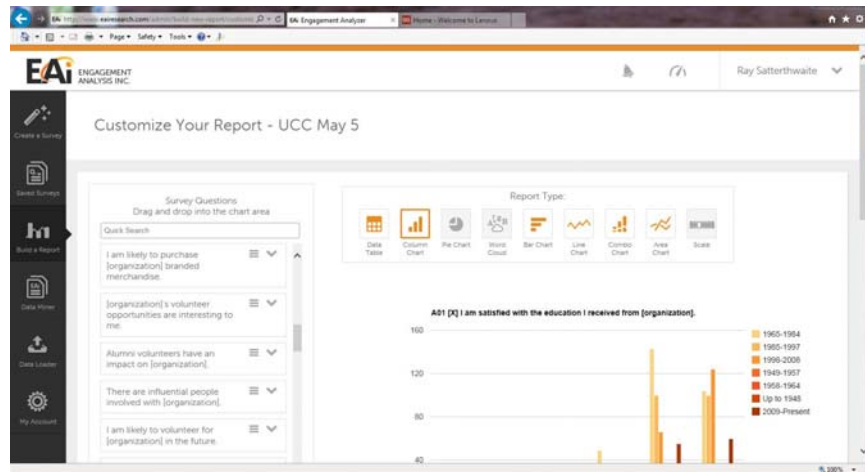
SEGMENTATION SLICING & DICING

- Academic unit
- Age
- Region
- Life stage
- Staff member
- Event/program
- Other...

CAUTIONS & NOTES

- Spread the word and the work!
- Get agreement on process
- Measurable vs reasonably measurable
- It takes three years
- Differentiate good scoring from good engagement

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CAUTIONS & NOTES

- Benchmarking difficult with different measures
- Programs will evolve and change
- Sometimes subjective, especially weights
- Lack of historical information
- Transaction only assumes happiness

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? QUESTIONS

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BEHAVIORAL THEORY & ENGAGEMENT

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THE ENGAGEMENT INDEX ©

EAi ENGAGEMENT INDEX© QUESTIONS

1 = Strongly Disagree

6 = Strongly Agree

Non-Engaged < 2.5   Somewhat Engaged ≥ 2.5 and < 4.5   Engaged ≥ 4.5

REPUTATION
Academic Experience = I was very satisfied with my academic experience.
Extra-curricular Experience = I valued my extracurricular experience.
Reputation Awareness = I am aware of the University's current reputation.
Reputation Pride = I am proud of my association with the University.

RELATIONSHIP
Alumni Communication = I keep informed of what is going on at the University.
Alumni Participation = I often participate in the activities of the University.
Involvement Opportunity = There are many interesting ways for me to be involved.
Involvement Action = I am willing to get involved in the University's activities.

RESULTS
Awareness of Case = I know what the University's needs are.
Impact of Giving = I understand the impact of my gift.
Donor Participation = I support my University regularly
Donor Level = I support my University to the best of my capacity

PERSONALITY TYPES REVIEW

R4 (CAMPBELL & RICKER)	ENGAGEMENT TYPES (EAI)
• Rallyer	• Cheerleader
• Reconnector	• Server
• Reminiscer	• Networker
• Resistor	• Skill builder
	• Connector
	• Socialite
	• Contrarian

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NET PROMOTER SYSTEM©

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- "If asked, how likely are you to recommend [school] to a qualified student?"

- "How likely are you to recommend [event] to someone else?" "Why?"

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CAUTIONS & NOTES

- Not just about behavior, attitude is also important but… attitude ≠ behavior
- Difficult to define and track
- Definition and measures will differ by school/company
- People are different and have had different experiences

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CAUTIONS & NOTES

- It's not a short term question, but a lifelong interaction
  - Take into account who they are
- Consider where they start
- A lot can happen along the way
- Not all within your control

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COMMUNICATING YOUR METRICS SYSTEM TO LEADERSHIP

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ROE: RETURN ON ENGAGEMENT

	Engagement Level (Points)		
	Not Engaged (0-49)	Somewhat Engaged (50-74)	Engaged (75-100)
Donor Return on Engagement			
Past Donors	21%	64%	85%
Consistent Donor (5 Years)	0%	4%	19%
Average Life Gift	$272	$2,740	$16,155
Median Life Gift	$0	$152	$568
Charity of choice (Top 3)	0%	13%	56%
Relationship Return on Engagement			
% Promoters	1%	42%	88%
NPS (promoters - detractors)	-56%	25%	87%
Tell went to (School)	7%	28%	70%
Events Coded	12%	62%	91%
Likely to Volunteer	0%	6%	50%

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COOL USE PROSPECT ANALYSIS

Number and Value of Prospects By Engagement Score

	Prospects Overall Engagement Score						
Prospect Rating	1	2	3	4	5	6	TOTALS
$1,000,000	1	2	0	3	2	1	9
$500,000	2	3	3	4	5	3	20
$250,000	5	6	6	8	5	7	37
$100,000	10	7	15	11	12	8	63
$50,000	15	18	15	20	18	21	107
$25,000	18	22	26	14	17	19	116
$10,000	33	24	24	27	21	27	156
$5,000	24	33	36	45	37	29	204
Total Prospects	109	117	128	136	122	121	712
Potential	10%	20%	30%	40%	50%	60%	
Potential Revenue	$590,000	$1,511,000	$1,896,000	$3,978,000	$4,335,000	$4,194,000	$16,504,000

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KEEP YOUR BOARD INVOLVED

TRUST & COMMUNICATION ARE CRITICAL

- No goals in year 1
- Agree on measures and outcomes
- Compare outcomes to objectives
- Sometimes judgment is OK
- Let experience influence the plan
- Celebrate success, but distinguish between effort and success
- No strategic plan survives its execution!

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KEYS TO COMMUNICATING

- Always relate score back to overall objectives, it's not about the score.
- Tailor messages for key groups – academics especially.
- "Buy in" is critical to data capture – especially for larger schools.
- Differentiate short and long term numbers.

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USING YOUR METRICS TO GUIDE PLANNING
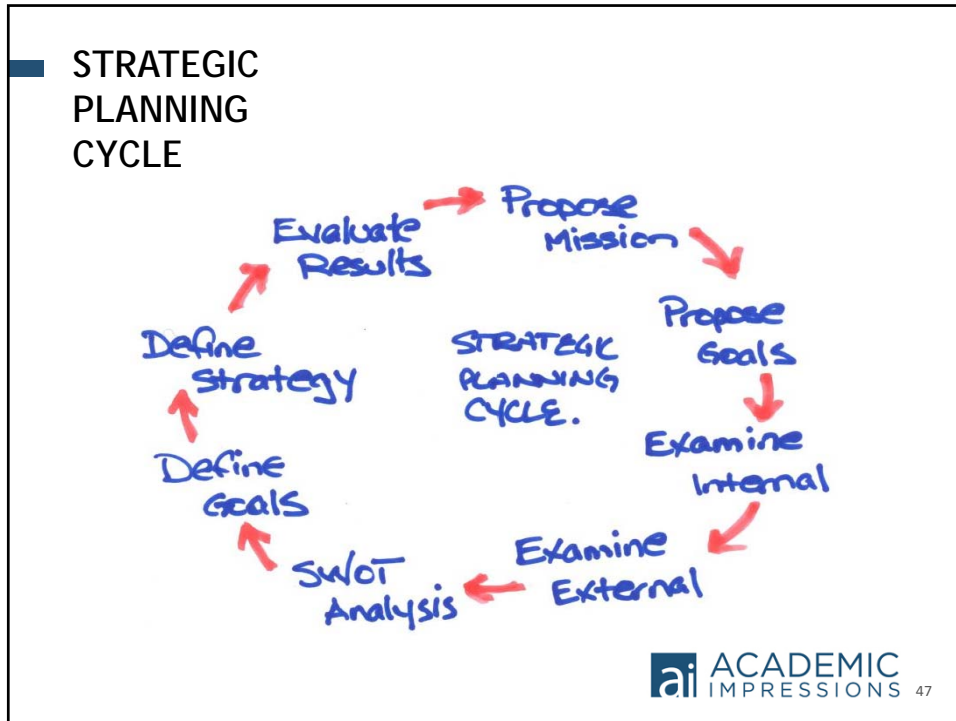
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ORGANIZATIONAL PLANNING

EVERY ORGANIZATION HAS SOME FORM OF PLANNING AND MEASUREMENT.

- Institution wide plan and priorities
  - Be involved
  - If you can't then be aware
- Advancement role
  - Support the plan
  - Communicate the priorities
  - Animate the priorities
  - Involve others

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STRATEGIC
PLANNING
CYCLE

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BE SMART!

"I believe that this nation should commit itself to achieving the goal, before this decade is out, of landing a man on the moon and returning him safely to the earth."
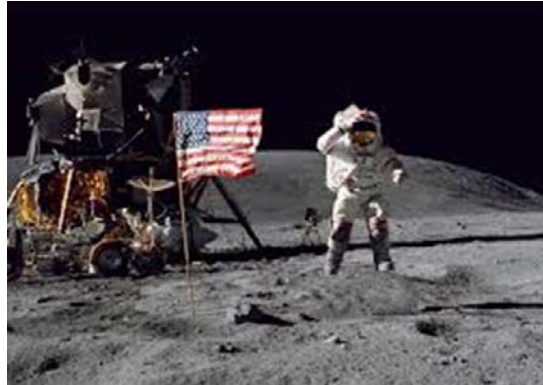
JFK, Man on the Moon Speech
Joint Session of Congress May 25, 1961

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BE SMART!

KENNEDY'S GOAL
WAS SMART

- Specific
- Measurable
- Action-Oriented
- Realistic
- Time-Constrained

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BALANCED
SCORECARD®

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CONSIDERATIONS
FOR SMALL
SHOPS

- If you can, assign ownership to someone
- Keep the score even simpler
- Automate as much as you can
- Don't give up – it's like meditation
- It won't save time – it will focus it

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CONSIDERATIONS
FOR LARGE
SHOPS

- Assign ownership to one unit if you can, but distribute the work
- Make sure other areas can see their programs in the score
- "Credit" becomes more important – especially if used in evaluations
- Keep an eye on what folks are entering – see above
- Report at least annually

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RESOURCE

Penn State Alumni Association Strategic Plan

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DEVELOPING METRICS FOR STAFF MEMBERS

- Make it personal - Involve them in the plan
- Make sure they have all three levels of in their measures
- Meet with your team regularly
- Follow-up at year end
- Use learning to influence next plan
- Again, distinguish effort from results

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WHY
EVENTS

Event Plans
- Tangibles
  - Budget, Time
  - Response
  - Attendance
- Intangibles
  - Satisfaction
  - Engagement
  - Pride
  - Awareness
  - Connections

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RESOURCE

Staff Planning Worksheet

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? QUESTIONS

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🔑 TAKEAWAYS

- Start slow and stick with it
- Communicate and involve others
- Don't get hung up on the math
- Avoid the rabbit holes
- Keep an eye in ROI(E)
- Its about the process not the technology
- Cleanliness is next to godliness... for data
- Don't focus programs for points

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EVALUATION

Thank you!

Please remember to complete the event evaluation. Your comments will help us continually improve the quality of our programs.

https://www.surveymonkey.com/s/C6X33CD

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