

UNDERSTANDING AND MEASURING ALUMNI ENGAGEMENT

December 4 - 6, 2019 | West Hollywood, CA



Learn how to tell the story of your alumni relations efforts through data.

OVERVIEW

Alumni relations teams across the nation are under increasing pressure to demonstrate their results and to better connect their contributions to fundraising and development efforts. In order to effectively respond to these demands, advancement professionals must be able to quantify alumni engagement, demonstrate ROI, and bring to life the story of their shop's alumni engagement efforts.

Join us for this timely and unique learning experience to learn strategies, tools, and best practices on gathering and using alumni data to improve your work and optimize your programs. With the help of our expert faculty, you will discuss the key components of developing and measuring alumni engagement, including:

- Gathering and analyzing essential data
- Quantifying the volunteer experience
- Deploying alumni attitude and event surveys
- Using data to inform future planning
- Applying an engagement scoring model

You will have the chance to connect with our experienced speakers and your peers from across the country to share and discuss challenges, as well as proven approaches and methodologies to successfully measure alumni engagement.

PRE-CONFERENCE WORKSHOP: CREATING YOUR INITIAL ENGAGEMENT SCORING MODEL

This optional workshop is aimed at setting a foundation of understanding around the creation and implementation of an engagement scoring model. If you have not instituted a scoring model, this will be a great session to ask questions of our faculty and engage in steps from creation to implementation. The learning here will serve as a foundation to the full conference experience, where we will be building upon your scoring tool.

WHO SHOULD ATTEND

Professionals from across alumni relations and advancement services who are looking to build or enhance scoring models will greatly benefit from the content of this course. Leaders and decision makers who would like to better share the story of their alumni efforts will also find this training valuable.

BRING YOUR TEAM AND SAVE

Alumni relations and advancement services professionals will benefit from the information shared at this event. Attending together will ensure that you can take advantage of both the data and programmatic angles of this conference and develop a strategy for moving forward.

Save over 15% when you register three or more colleagues.

AGENDA

Pre-Conference Workshop

Pre-Conference Registration and Continental Breakfast (included in workshop registration fee)

8:30 - 9:00 a.m.

Pre-Conference Workshop: Creating Your Initial Engagement Scoring Model

9:00 a.m. - 12:00 p.m.

This pre-conference is aimed at setting a foundation of understanding around the creation and implementation of an engagement scoring model. If you have not instituted a scoring model, this will be a great session to ask questions from our faculty and engage in steps from creation to implementation. The learning here will serve as a great preface to the full conference experience.

Lunch for Pre-Conference Attendees (included in workshop registration fee)

12:00 - 1:00 p.m.

Day 1

Conference Registration

12:30 - 1:00 p.m.

Welcome and Opening Remarks

1:00 - 1:30 p.m.

Defining Alumni Engagement

1:30 - 2:45 p.m.

Engagement is the foundation of alumni relations work. We will talk through the industry identified definition of engagement and outline how alumni activities translate to engagement.

Break

2:45 - 3:00 p.m.

Working Session: Exploring and Understanding the Data You Have

3:00 - 3:30 p.m.

In this working session, you will assess the alumni data you currently gather. The question around how to use data to drive events and programming will be answered. We will focus on your individual campus needs and include sharing with the group to highlight best practices and trends.

AGENDA

Day 1 (CONTINUED)

Events Metrics

3:30 - 4:45 p.m.

Once you gather improved alumni data, how do you use this information to guide future program planning? Based on event performance and alumni interests, what should you be doing more? Can you revamp or eliminate events or programs? Our instructors will address these questions and talk about how to better segment your populations to optimize your alumni relations operations.

Day 1 Closing and Q & A

4:45 - 5:00 p.m.

Networking Reception (included in registration fee)

5:00 - 6:00 p.m.

Day 2

Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Volunteer Metrics

9:00 - 10:00 a.m.

We will quantify the work of volunteers and share best practices on synthesizing the data that comes from volunteer engagement. We know that this is a great engagement point, and there is a correlation to giving.

Morning Break

10:00 - 10:15 a.m.

Alumni Surveys

10:15 - 11:00 a.m.

While you may survey alumni in your shop, do you know how to develop questions that will reveal the most applicable information? This session will cover survey design, data analysis, and responder follow-up for both alumni attitude and event surveys.

AGENDA

Day 2 (CONTINUED)

Engagement Scoring Models: Refining and Expanding the Model

11:00 a.m. - 12:30 p.m.

You will examine different scoring models, including how they were developed and what you can learn from their implementation. Whether you have a model or will be building one, this time will allow you to both build and adapt, based on your individual needs.

Lunch (included in registration fee)

12:30 - 1:30 p.m.

Gathering Data and Ensuring Data Integrity

1:30 - 2:30 p.m.

One of the biggest issues shops face is how to gather data to inform metrics. From volunteer metrics to connecting with alum via social media, we will provide ways to quantify alumni engagement across data points. Here we will discuss building relationships across campus to gain buy-in and ensure proper data collection. Our faculty will also give suggestions that will help you make the most of your database and simple functions in Excel. The session will begin with brainstorming your current data-gathering challenges and will be revisited in the afternoon's working session.

Working Session: Data Gathering and Goal Setting

2:30 - 3:00 p.m.

The day will continue with time to focus your efforts on figuring out which cross-campus allies will help you ensure that your data-gathering is successful. You will also begin to sketch out goals for the upcoming year and gather feedback from your colleagues.

Afternoon Break

3:00 - 3:15 p.m.

Using Metrics to Inform Planning

3:15 - 4:15 p.m.

Once you gather improved alumni data, how do you use this information to guide future program planning? Based on event performance and alumni interests, what should you be doing more of? Can you revamp or eliminate events or programs? Our instructors will address these questions and talk about how to better segment your populations to optimize your alumni relations operations.

Day 2 Wrap-Up and Q & A

4:15 - 4:45 p.m.

AGENDA

Day 3

Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Staffing and Structure

9:00 - 10:00 a.m.

We will explore what is working and ways to reorient your shop around your new goals and plans. To fully realize your effort of making more data-driven decisions for your alumni programming, staffing is necessary to ensure that your shop is on board with this cultural change. Our faculty will offer practical advice on managing up, laterally, and down to guide you to success.

Morning Break

10:00 - 10:15 a.m.

Reporting and Telling the Story of Your Metrics

10:15 - 11:15 a.m.

Having the data is great, but telling the story of the data is better. Share best practices for quantifying your engagement experience and utilizing those metrics to share information within your organization and across campus. Let the data serve as an additional way to communicate the value of the work happening within alumni engagement.

Action Plan and Next Steps

11:15 - 11:45 a.m.

We will have covered a lot of ground in the previous two days; this session is designed to bring concept to concrete and to equip you with the tools and plan to implement what you have learned once you return to campus.

Final Faculty Q & A Panel and Conference Close

11:45 a.m. - 12:15 p.m.

INSTRUCTORS

Reggie Bustinza

Executive Director of Alumni Association, Northern Illinois University

Reggie is responsible for management of the Northern Illinois University Alumni Association, including board relations, financial and staff management, and programmatic success.

Reggie started in alumni relations more than ten years ago, initially focused on geographic chapters and affinity groups, before branching out into volunteer management and engagement metrics. Drawing on his business background, he has focused on data-driven decision making, and using analytics to spur continuous improvement of all communications and programs.

Reggie has won a CASE Silver Award in the area of Alumni Relations Best Practices for the metrics system created at Lewis University, been published in CASE Currents, and honored by Bradley University with the Burgess Award for intra-departmental collaboration.

Before his time at NIU, he was the Director of Alumni Relations at Lewis University in Romeoville, IL. He was Associate Director of Constituent Programs at his alma mater, Bradley University in Peoria, IL. Reggie holds a bachelors in the arts in communication and a masters in business administration, both from Bradley University.

Mark Koenig

Associate Vice President, Advancement Services, Oregon State University

In Mark's current role, he oversees the research, relationship management, information technology services, and database management units. In addition, Mark is responsible for the fundraising and campaign administration for the organization.

Mark has extensive experience in the development and utilization of fundraising best practices. These areas include incorporating analytics, conducting surgical wealth screenings, orchestrating discovery programs, and bridging the communication divide between information technology and advancement.

Mark is currently the chair for the Council for Advancement and Support of Education District VIII, and holds executive corporate advisory positions with Ellucian Advance and WealthEngine.

Prior to joining Oregon State, Mr. Koenig was the Director of Prospect Research and Management for The George Washington University in Washington, D.C. He has also held research positions at Georgetown University, Georgetown Medical Center, and Rice University. A native of Tulsa, Oklahoma, he earned his bachelor's in history and economics from the University of Houston and a masters in Adult Education and Organizational Capacity from Oregon State University.

INSTRUCTORS

Ray Satterthwaite

President, Engagement Analysis Inc.

Ray began his career at McGill University in Montreal as the director of alumni relations and annual giving of the 180,000 member alumni association. He then moved to Queen's University in Kingston to serve as associate vice principal of advancement and chief development officer, running a successful \$262 million capital campaign. Ray has been involved with both CASE and CCAE and is a past president of CCAE. His research, speaking engagements and articles on the topic of alumni engagement have earned him recognition for his work on alumni engagement, including Faculty Star and Rising Star honors from CASE. In 2007, he founded Engagement Analysis Inc., a consulting and research company helping clients identify, measure, and use engagement information to improve their programs.

LOCATION

December 4 - 6, 2019 | West Hollywood, CA

Hotel:

Andaz West Hollywood

8401 Sunset Blvd.

West Hollywood, CA 90069

323-656-1234

Room rate:

\$225 + tax

Room block dates:

The nights of December 3, 4, and 5, 2019.

Room block cutoff date:

November 12, 2019.

Reserve Your Room: Please call 323-656-1234 and indicate that you are with the Academic Impressions group to receive the group rate. Please book early - rooms are limited and subject to availability.

The Academic Impressions Experience



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Trainings are practical and action oriented so you can hit the ground running



Carefully vetted expert instructors who are also practitioners in the field



Learner-centric and designed for interaction and collaboration



Highly recommended:
9 out of 10 participants recommend our trainings to colleagues