Alumni Engagement and Philanthropy at Colleges and Polytechnics

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Introduction

This report examines current and historical trends in alumni engagement – in the context of small colleges and polytechnics – and recent scholarly and professional resources on the topic.

Alumni engagement is an area that polytechnics and smaller colleges have historically neglected, but in an era of unreliable and fluctuating government resources, it has become a new priority for many institutions across the country. This report examines how similar institutions engage alumni to become involved in order to: serve as role models and mentors for students to inspire them to complete their degrees; provide internship and networking opportunities; volunteer for and support events and activities that raise funds; cultivate an alumni donor base; project a positive image in the community; and act as ambassadors in the community promoting their school as a high-quality education choice.

Recently, advancement practitioners of higher education fundraising and alumni relations have realized the need to specifically define alumni engagement and have made attempts at doing so. In a 2018 white paper on alumni engagement metrics, the Council for Advancement and Support of Education (CASE) defined alumni engagement as "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" and notes that critical within this definition is "the belief that these activities must have significant value to alumni while also supporting the institution's mission."

External funding for colleges and technical institutes has historically been business and industry related, where potential employers or businesses help to subsidize the educational or training programs that benefit them directly, and similarly, governing and foundation boards have been positioned to provide support to these colleges. Increasingly, though, these same colleges are turning to private individual donors. This prospective group of donors has a unique perspective on the college experience as they are often the first-generation, multi-cultural, and part-time students who seek out the convenience, practicality, and affordability of colleges and polytechnics. Additionally, they come from backgrounds that have not historically provided a philanthropic tradition, meaning that although they may have high levels of altruism, they do not have traditions of private giving to education. The result for academic leaders is that they must find a way to develop or create an introduction of former students to the culture of institutional support.

College students form a relationship with the colleges they attend that evolves throughout their lifetime as they graduate and become alumni. This institutional relationship, typically known as "level of engagement," exists on continuums of positive or negative, strong or ambivalent. Increasingly, institutions rely on strong relationships with alumni for

philanthropic, volunteer, and political advocacy amidst declining public support and investment in post-secondary education.

Linkages between a school and its alumni donors are built, strengthened, and maintained by individual relationships. However, the development of such relationships cannot occur by happenstance; it must be deliberate and purposeful. Relationship development between an educational institution and its future alumni begins during course enrollment. The more a learner becomes involved with their educational institution, the more likely that same individual will support the educational institution as an alumnus; the experiences while enrolled at college provide a primary determinant of future alumni participation. When students experience fulfillment with their college experiences and relationships, this may transform into future involvement with the educational institution.

Alumni are the only asset guaranteed to grow every year. **However, alumni relations is often treated as the stepchild of advancement, when it should be treated as the cornerstone of advancement.** Alumni are the single largest sources of philanthropic support for many, if not most, universities and colleges, and their value extends well beyond financial contributions. They are advisors, advocates, and allies in support of institutional mission, highly motivated not only by loyalty, but also by a vested interest in seeing the equity of their diplomas grow over time.

Understanding philanthropic phenomena in post-secondary education merits study because fundraising is a critical source of revenue that helps maintain academic program quality, invigorate capital projects, and spur exponential endowment growth – providing a stable source of operating income during times of prosperity and times of financial distress. The goal of this report is to understand issues, challenges, and best practices regarding engagement of college alumni.

Challenges

There are many challenges that colleges and polytechnics face in improving alumni engagement. A study by CASE revealed some hurdles to overcome:

1. Many polytechnic and smaller college employees working in alumni relations roles have less than two years of experience working in the field.
2. Many schools have not maintained a dedicated annual budget for alumni relations.
3. Many schools lack updated contact information for most of their alumni.
4. Stigma of inferiority on the part of small colleges.
5. Shorter enrollments than four-year institutions.
6. Many polytechnic graduates pursue degrees beyond their associate degree and develop long-term relationships with those other post-secondary institutions.
7. Many graduates enter the workforce immediately and if their polytechnic is ineffective in reaching out to them, most lose interest in being involved.

8. Many early educational experiences at polytechnics have been described as "transactional" or "nomadic." Institutions need to better understand how to transform these students into "alumni settlers" who will remain involved with the institution once they complete their academic program.
9. Many alumni believe the institution is already adequately funded.
10. Reliance upon business and industry to serve as major contributors.
11. Low brand awareness and high competition for donors due to number of non-profits and colleges and universities to which alumni transfer.
12. Little communication has occurred with alumni over the years and now institutions are playing catch up.
13. Lack of traditions compared to four-year universities .
14. High student debt.
15. Current high inflation.

Additional Challenges

➢ Another issue that can present challenges for polytechnics and smaller colleges is defining who are considered to be alumni. Some polytechnic advancement professionals suggest that the term "alumni" should be renamed or refined to be reflective and inclusive. It shouldn't just be those that graduated with a degree. Some institutions have expanded the definition of alumni to include students who completed 45 or more credits, while others have begun to consider graduates of non-credit training programs. How this group of students is named and defined will have a direct impact on the institution's engagement and fundraising efforts. If the definition is expanded, the population of alumni is increased.

➢ With a scarcity of resources, how do colleges begin to build an enhanced alumni engagement program? Who should be targeted? Research indicates that being geographically located close to campus makes it easier and more attractive for alumni to become involved. Alumni also indicate that their stage of life has an impact on involvement. Raising young children or attending graduate school were examples of reasons not to volunteer, for example.

➢ Four-year universities have historically engaged alumni through events such as class reunions, homecoming, and athletic events, as well as fundraising campaigns. Some researchers assert that fundraising practices should be examined uniquely since it's possible that solicitations purely for funds may cause alumni to disengage. Instead, if alumni are invited to events, they may become involved and become donors later. When alumni return to campus, feelings of nostalgia can trigger meaningful connections – especially when there is an affinity for a particular group, academic program, or other activity.

➢ One major problem in communicating with alumni is that typically the first contact a young graduate has with the institution is a gift solicitation – sometimes just a month or two after commencement. This tells them that their new relationship with their alma mater is all about money. It also doesn't make sense that a 22-year-old graduate would receive the same solicitation as older, more established alumni.

Alumni who want to stay connected with the institution will typically welcome frequent communication. If the communication always contains a gift solicitation, however, positive feelings about the institution may wane, and even turn to resentment.

➢ Growth in distance learning and commuter students can often diminish a student's connection to an institution. In one study, online learners, when compared to campus learners, did not demonstrate as close a connection between social integration and commitment to the educational institution. Dedication by the educational institution to the engagement of the non-traditional learner in the college environment, especially at this time of increased online learning, is of primary importance.

➢ Maintaining connections with alumni once they leave campus can be an incredible challenge, particularly in the early years following graduation when contact information is often changing. One paper by Rego and Kennedy (cited in the bibliography) describes how, through an innovative digital marketing campaign, the University of New Brunswick's Alumni Office developed a fun virtual caricature who became the face of the alumni office and set out on a worldwide adventure to locate and engage with UNB's 'missing' alumni. He 'travelled' the world over an 11-month period connecting with UNB alumni through a series of digital communication pieces, collecting updated contact information from 6,500+ alumni in over 90 countries, and providing new opportunities for engagement and solicitation. The paper reviews the process of planning a contact information campaign and developing the communications tactics that best fit the institution. It also looks at UNB's campaign results as well as ideas for ongoing measurement.

Polytechnics vs. Traditional Residential Colleges

Affordability and ease of access position polytechnics as a gateway to higher education for many students for whom baccalaureate degree attainment might otherwise be difficult or impossible. While these gateway institutions provide increased access to the academy, the combined curricular and co-curricular experiences of polytechnic students differ vastly from those of their peers engaged in a traditional residential college experience. These differences are attributable in part to risk factors common to polytechnic students.

Technical institutes enroll more underrepresented, part-time, and first-generation students than their four-year counterparts. When compared to students enrolled at a residential university, polytechnic students face more barriers to success, such as academic under-preparedness, the need for developmental education, low socioeconomic status, low parental education attainment levels, and a broad range of academic goals that range from transfer degrees to enhancing job skills or personal enrichment.

A student's enrollment in a non-residential college setting can exacerbate the threats to her/his success by providing a learning environment that offers limited opportunities for student engagement outside the classroom. The vast majority of students enrolling in two-year institutions are commuter students, defined as those who do not live on campus but

attend from local and surrounding areas. Commuter students spend less time in campus activities and leisure time with peers and faculty outside of class than residential students. Surveys have found that residential students report receiving a richer, more satisfying college experience than their commuter peers. In contrast to a non-residential post-secondary setting, residential learning environments provide greater opportunity for engagement with faculty and peers in groups and organizational activities.

The differences of the daily experiences in a non-residential technical school and residential university can create unique challenges for polytechnic students at the time of their transfer to a residential university setting. Upon transfer, students emerging from a non-residential campus enter an environment in which they live and learn alongside students who have been in a residential university setting since the outset of their post-secondary studies. Residential students who have been at the university since enrolling as freshmen are well entrenched in the university culture, engaged with student organizations and leadership opportunities, well-known to their peers, comfortable with the campus and the community, and familiar with how to access university services and support.

Recognizing the importance of responding to the unique circumstances, expectations, and needs of each student, colleges and universities invest significant fiscal and human resources to attract and enroll students and subsequently provide a positive experience for those who matriculate. These efforts, broadly defined as enrollment management, begin through the development and distribution of recruitment materials and the design and execution of robust campus visits for prospective students. Once students enroll, the work continues through formalized academic and co-curricular activity offerings to appeal to the broad array of interests in the student population. In addition, the purposeful planning of institutional policies and campus space design focus on fostering and encouraging student engagement with faculty and peers in formal and informal settings.

Research has demonstrated a connection between the students' perceptions of their overall experience and their subsequent commitment to the institution as alumni. Positive alumni feelings corresponding to pride in the university degree, alumni willingness to recommend the alma mater, and alumni perceptions of life improvement as attributable to their degrees/certificates are positively associated with alumni association membership. Multiple studies have found that undergraduate student experiences have a significant impact on alumni giving behavior. These studies have shown that satisfaction with the student experience is the most important precondition leading to alumni affinity. Among the most transformative and long-lasting developmental effects of the post-secondary experience are the positive relationships students develop with peers, faculty, and others in the college setting.

Through their enrollment in more than one institution over the course of their college education, polytechnic students may develop distinct and unique perceptions about and relationships with each institution they attended. Subsequent to their college experiences, alumni could attribute the benefits derived from their post-secondary educational attainment to each institution of attendance in varying degrees. The weighting of this attribution might have an effect on alumni inclination to engage in manifestations of alumni affinity with one or all the colleges they attend.

One approach that smaller colleges have taken is systematically supporting alumni to continue their engagement after graduation by providing community and volunteer engagement program offerings to current students – a sort of "alumni in training" method. Program designers developed strategies to increase student motivation, skills, traditions, social opportunities, and agency to sustain their engagement as alumni and to encourage existing alumni to be more civically active. This programming, referred to as the Continuing Engagement Program (CEP), consists of a series of initiatives designed to support the ongoing engagement of students, alumni, community members and partners, and faculty in intentional, life-long community-based work for positive change. Specifically, designers aim to a) connect current students to engaged alumni in theme-based communities of practice, b) provide training and support for both groups to engage in social change actions, and c) sustain continued engagement going forward by creating digital communities and providing other electronic information resources.

Much of the historic literature about "alumni engagement" focuses on fundraising. In the last few years, growing interest has emerged in viewing alumni as vital "public workers." Individual institutions are exploring the idea of alumni engagement as community engagement. Because college and polytechnic students' experiences as students is a primary determining factor on how they will engage after graduation, a focus should be on designing programs (during orientation, free instruction sessions/workshops, alumni speakers, community activities, informal social gatherings, clubs, etc.) to deepen community engagement skills, foster continued engagement, deepen emotional connections, create traditions, and communicate the benefits of being active alumni. These programs work toward ensuring that engagement begun in institution-based civic engagement experiences becomes more of a lifelong pattern, an impact that amplifies existing programmatic outcomes – and potential philanthropic involvement. Encouraging and maintaining positive student experiences and alumni affinity is important to post-secondary institutions, regardless of size or degree level.

Benefits of an Effective Alumni Engagement Program

1. Alumni work with current students to increase graduation rates.
2. Alumni provide a valuable and consistent donor pool.
3. Alumni act as ambassadors that communicate the quality of the school in the community.
4. Alumni can aid in the recruitment of students.
5. Alumni can serve roles as volunteers and mentors.
6. Engagement may result in alumni seeking additional educational opportunities for themselves.
7. Loyal alumni and those who achieve distinction in their careers can speak in classes, mentor students, hire graduates, and refer students, thus exhibiting the quality of the education they received.

Alumni Relations Best Practices

Research conducted by the Luoma Leadership Academy at Minnesota State University identified five fundamental components of a successful alumni association.

The first component is a clear website that is easy to navigate. Key features of the website should include information on alumni services such as networking opportunities, library access, lifelong learning programs, transcripts, and bookstore discounts. The website should also include career services information like college job fairs, job openings, and volunteer and mentorship opportunities for alumni. There should also be information on upcoming events, as well as photos from recent events. There should be a link that allows them to give a donation. And finally, there should be a section where graduates can update their contact information and share their personal stories.

The second best practice identified in the report was that smaller colleges create a newsletter or magazine that would be available in print and online. The publication should highlight new programs, alumni profiles, activities and events, construction, and any other news that could interest alumni.

The third component is hosting alumni networking opportunities, which could include a wide variety of events. Class reunions, social gatherings, ribbon-cuttings, graduations, hall of fame or other celebrations that celebrate alumni, 5k walk/runs, holiday events, and volunteering opportunities should be communicated to alumni in an effort to keep them informed and connected to the college.

The fourth best practice is offering alumni services such as job listings, mentorship opportunities, transcripts, and library, fitness centre, and computer access. These services should be consistently communicated in order to remind graduates of the support services

that are available to them as alumni of the institution, no matter how long it has been since they were a student at the school.

The final best practice identified in the report is fundraising. Some colleges are successful beyond getting donations from their alumni. They actually have alumni who work to help them raise money in the community.

Other recommendations include:

➢ Have a central, staffed alumni office
➢ Establish a cross-department steering committee to focus on alumni engagement
➢ Identify available resources to support initiatives
➢ Engage alumni to participate in routine and special events
➢ Continue to grow alumni connections within academic departments
➢ Continue to pursue social networking applications to connect with alumni
➢ Increase the frequency of communications sent to alumni
➢ Improve the alumni database with updated information
➢ Use celebrations such as anniversaries to reach out to alumni and engage them
➢ Strong commitment of the institution president and board of trustees
➢ Aim to have an alumni association with at least ten percent active alumni

According to Skari and Ullman (2012) who researched alumni associations, "In order to capitalize on the rich pool of prospective alumni donors, colleges must build programs to identify, support, and engage alumni, thereby turning former students into alumni donors." Their research identified six key building blocks for developing successful small college alumni associations. The support of the college president is the first key building block, along with financial support. They noted, "Research suggests that the more dollars colleges spend on alumni efforts; the more dollars alumni give." The second key building block is "socialization." Schools should begin with engaging current students. The visual presence of the alumni association on the college campus "can socialize community college current students to become alumni and alumni donors." Collecting accurate contact information of former students is the third key building block. "Accurate contact information is critical to a successful alumni giving program – and to communication strategies that keep alums informed and connected." Developing strategies to remain in contact with alumni is the fourth key building block. Whether it is through social media, various print media or emails, it is important to keep alumni informed. The fifth key building block is creating opportunities for engagement. Colleges should invite alumni back on campus and to community events the colleges sponsor. Alumni who attend events sponsored by their alma mater have a greater tendency than others to make a charitable gift. And the sixth key building block is "Making the ask." After utilizing the previous five key building blocks, it is time for the college to solicit alumnus for a charitable gift. When asked why they made a donation, the most common reason people offer is that someone asked them to give.

Another 2015 study by Bergstrom identified eight common elements in small colleges with effective fundraising programs. The top eight elements were as follows:

(a) strong leadership, particularly from the president of the institution and the chief development officer, (b) institutional commitment, providing staff and office support, (c) definition and communication of the institutional niche, image and mission, (d) institutional culture and context, including the traditions, values, and reputation of the institution, (e) entrepreneurial fund raising, defined as acting upon new opportunities and embracing new ideas and approaches, (f) donor relations, seen as involvement in the life of the institution and the personal relationships developed with members of the institution, and (g) the wise investment of the funds raised by the institution.

Donor Characteristics

Successful fundraising is increasingly important for post-secondary institutions for operational funding and understanding the role of donor motivation is key to such efforts. As current and former students are beginning to be viewed more and more as potential donors, similar to that of the alumni of the four-year college and universities, leadership should begin to assess what are characteristics that will increase the likelihood of securing philanthropic and volunteer support. Research stresses the importance of defining who is an alumnus and understanding polytechnic alumni donors to identify which predictors provide insight into student engagement and the potential for private gifts.

Studies have shown that gifts to other organizations, income, donations to four-year institutions, age, highest level of education achievement, highest degree held, how far do the alumni live from the school, and how long it has been since the alumni attended the school determine who gives. A 2014 study found four characteristic themes that contribute to former students becoming donors – a positive emotional attachment to the college, a student's positive experience with faculty and staff while attending the college, former students who still live in the service district of the college, and those former students who contributed to other organizations.

Philanthropic donations by alumni are often impelled by a feeling of loyalty to the institution, a form of inspired "paying it forward," or an expression of gratitude. As a result, colleges should engage in activities designed to cultivate and inspire such feelings starting at the earliest level. The lifetime contributions of young alumni who begin donating at a young age are exponentially greater than those who begin giving at a later age. Inspiring feelings of attachment to the institution can help colleges receive more philanthropic donations from recent alumni, which can increase national rankings/reputation and reduce reliance on tuition and other budget revenues subject to government cuts.

Quantitative studies have advanced our understanding of how alumni engagement may be related to connectedness and giving. In regard to individual's antecedents and alumni giving predictors, a study of Middlebury [Vermont] College's giving records over 23 years found that significant predictors of alumni giving were as follows: volunteering for the college, residence in areas with alumni chapters, existence of relatives who are alumni, sports team memberships, and those involved in undergraduate activities such as club members or student volunteers.

In addition to the various types of theories that have emerged that attempt to understand alumni attachment and behavior towards their alma maters, researchers have also begun investigating how a variety of demographic characteristics and student experiences influence alumni donating and volunteer behavior. Not surprisingly, alumni with a higher amount of wealth, or "capacity," are significantly more likely to donate to their alma maters and in higher amounts, with household incomes earning $90,000 or more significantly more likely to give. Student experience is another significant influence on giving, with higher satisfaction levels leading to increased alumni giving levels. In fact, research suggests that the most significant determinant of alumni giving levels may be the individual's satisfaction with his or her school experience, noting that those who were "very satisfied" give almost three times as much as alumni who were "ambivalent," generally dissatisfied," or "very dissatisfied" with their college experience.

Age has also emerged in the research literature as a potential influence upon alumni giving, with higher donation amounts correlating with increased age of alumni. Subjective dispositions, or a wide range of personality traits inherent to an individual that refer to the way that people interpret the world around them, have been shown to significantly influence volunteer and philanthropic behavior. Generally speaking, volunteers tend to be more extroverted, more empathetic, more trusting, and more likely to believe their efforts make a difference, and that people are more likely to volunteer when they feel like they *should* do something and *can* do something.

Research has found that the institution's mission served as a motivator for some alumni. Increased giving by small college alumni can greatly impact the institution's ability to maintain an open-admission policy for those who seek educational opportunities and to help students meet their goals. Research also reveals that reputation of the college, allegiance to the college, and company employee involvement were factors that contributed to philanthropic donations. Determining factors also include emotional attachment to the institution, participation in alumni events, and participation in and donation to other voluntary and religious groups.

Alumni donors are most likely to give when they are engaged in experiences that draw upon their sentimentality of the college experience and that connect their identity to that of current or future students. Alumni identity comes across in how alumni donors believe that

their gifts will impact someone like them and perpetuate a college experience they fondly enjoyed. Understanding how to reinvigorate alumni enthusiasm through effective events and volunteer activities will allow college practitioners to create a vibrant community of alumni who interact regularly, influence their peers, and show continued support through their time and money.

It is important to understand alumni role identity to improve the ability of colleges and universities to recruit volunteers and solicit alumni donations.

Ideas from the Literature for Improving Alumni Engagement

1. Create a curriculum for a one-day training program that would educate faculty and staff about strategies for engaging alumni, inspire them to become part of a college-wide effort, and create a new culture that values alumni involvement. An employee survey could be made available prior to the training to allow participants to share their ideas, which can be included in the curriculum. An evaluation of the training could be conducted afterwards.
2. Provide alumni with the opportunity to wear school branded products.
3. As students identify with the educational institution brand and become alumni, alumni donations increase with brand identification.
4. Develop a detailed and current alumni social media plan.
5. Create a college-wide alumni engagement task force.
6. Host additional alumni events and invite alumni to participate in existing campus events and activities.
7. Maintain a detailed, current, and clean alumni database.
8. Systematically gather and update alumni contact information.
9. The college website is the front door of the campus. It needs to attract and inform current and prospective students, their families, alumni, professors, and donors. An alumni link needs to be prominent on the school home page.
10. Make it easy on web pages and social media for alumni to attend events, mentor, support career services, tutor, share stories, provide internships, and update contact information.
11. Involve faculty in collaborative alumni engagement efforts. For many alumni, their strongest connection to the institution is not with the administration, but with the faculty. Some alumni indicate interest in donating to the educational institution, but with directives to identified departments. It is important to note that one of the strongest correlations found between alumni satisfaction and alumni giving was having had a faculty or staff member take interest in him or her during time of enrollment. Due to the reality of scarce resources, an institution needs to get alumni engagement assistance from others who are not necessarily in the alumni relations division.
12. Develop policies to engage alumni with current students in their program area.
13. Host alumni networking opportunities.
14. Identify proper prospects, create interest, promote involvement, and obtain commitment to invest.

15. Alumni should be invited to all kinds of events – not just alumni events.
16. Host events at different locations throughout the community and province. One example from the literature is an alumni event held in a nursing home where the CEO later donated money to create a new nursing scholarship.
17. Hold prominent and well-promoted Distinguished Alumni Award ceremonies and celebrations.
18. Provide a calendar of Alumni Association meetings and events on the web and social media sites.
19. Strategically educate current students about what's awaiting them once they are alumni. In order to be successful at alumni engagement, current students must be treated as future alumni from the minute they walk into new student orientation. The institution should get students involved in fundraising efforts and community service projects and communicate with them about their future role as alumni.
20. Provide alumni profile stories.
21. Publish an alumni e-newsletter.
22. Some research recommends targeting young alumni as the key to success – that they represent the "game changers" in the alumni relations and development equation. This research asserts that schools which can cultivate, engage, and steward young alumni well now are those who will be rising to the top in the next 10 to 25 years – as these alumni become the central benefactors and leaders of their institutions.
23. Higher levels of student engagement lead to higher levels of alumni engagement.
24. The more the alumni feel their degrees helped them in their career success, the more the alumni may attribute this success to their attendance and involvement with the educational institution, thus adding to the reputation of the educational institution.
25. Studies show that students who participated in an enriching activity, such as a study abroad or internship program, are more likely to give than students who did not participate.
26. Research identifies a strong relationship between student community service and community involvement by alumni. The results hold promise for the long-term value of engaging students in community service activities to promote civic awareness, active citizenship, and enduring community involvement of alumni.
27. Opportunities can be provided to alumni to continue electronic library access (user licenses permitting), elearning opportunities, affinity chat rooms, fitness centre access, credit card affinity program offers, alumni travel tours, lifetime university email addresses, etc.
28. Clearly articulate the benefits of being an engaged alumni to both current and former students.
29. Research recognizes the institution president as the one with primary responsibility for creating an institutional culture and providing resources for an alumni relations infrastructure. A strong institutional president needs to understand the vital role of development.
30. Well publicized monthly "happy hours" for alumni to gather at an alumni-related establishment.
31. Communicate volunteer opportunities to current students and recent graduates.
32. Interact with community and business partners to boost the school's profile.

33. Integrate alumni development into the institution's strategic plan.
34. Populate foundation boards with individuals who have an interest and the ability to solicit funds.
35. Research to fundraise effectively, including research of the fundraising environment, the community, and donors.
36. Schools should encourage student engagement beyond academic pursuits and offer numerous ways for students to get involved with campus life (e.g. leadership development through the student government association, the school newspaper, student programming, service learning, academic honor societies, trade associations, leadership workshops, social groups, clubs, athletics, and other extracurricular activities). Students involved in a student organization score higher on post-graduate commitment levels as compared to students who do not join a student organization.
37. Hold graduation ceremonies and traditions with import. The positive emotions experienced by some graduates at the graduation ceremony may point to their future bond with the educational institution as alumni.
38. Develop an alumni donor honor wall and/or recognition/stewardship policies customized for alumni.
39. Utilize alumni in a formal capacity to recruit new students.
40. Increase the number of career and professional development opportunities offered to alumni – both in-person and online.
41. Host more events in areas where there is a heavy concentration of alumni.
42. Offer lifetime memberships to the Alumni Association.
43. Create reasonable price points for requested donations.
44. You have to ask. If you do not ask, people do not know there is a need.
45. Tell what has happened, what has occurred, with people who have received scholarships/donations.
46. Try and host events later in the evening and on weekends so work and other weekday obligations do not hinder engagement.
47. Organize events targeted at specific schools and programs.
48. Research has found that the probability of receiving funds from alumni association members was greater than receiving money from graduates who had not made the commitment to be an alumni association member.
49. Parental financial connections to the educational institution may foster financial connections with new alumni. If a parent supports the program or educational institution, the likelihood exists any children attending the educational institution may follow suit after graduation.
50. Relationship development with future alumni should begin during enrollment with a focus on traditions valued by the educational institution.
51. Don't be afraid to think outside the box, be creative, and try new approaches; don't be afraid to fail. Resist a culture of sameness.

Young Alumni Engagement: Harnessing Generation #ShowMe

A scalable, sustainable strategy to engage young alumni (YA) requires a thorough understanding of how YA view your school. Support them as students and offer what they need in the first five years after graduation to gain lasting loyalty and affiliation. In a recent webinar, Ben Seewald of Queen's University shared his insights into building a successful YA engagement program from the essential starting point: while future alumni are still students.

Aim High

1. Measure your YA programming against exemplars and peers. Adapt some of their successful strategies to your school.
2. Layer a YA element into existing events and programs; provide visibility for YA as leaders / ambassadors at high-profile events.
3. Use pilot projects to test out new strategies at low cost / risk.
4. Employ campus allies to build bench strength: Deans, service departments, popular faculty members.

Transitions Matter

1. Graduating high-school students receive lots of recruiting attention from universities and colleges, but once they enroll, that attention ends. Alumni relations can help ease the transition into post-secondary education with tailored programs.
2. Engage student leaders, interns, and others as ambassadors or mentors to new students.
3. Get students into the "future alumni" mindset through branding, perks, and discounts.
4. Provide career-prep events to help the transition from new grad to employee:
   o Backpack 2 Briefcase tips (with support from Career Services)
   o Coaching on how to write a good resumé, build a LinkedIn profile, develop soft skills: financial literacy, personal branding
   o Interview rehearsals
   o Mentoring / career advice from prominent alumni in a related field
   o Dress for success / business etiquette lessons

Pilot Projects Build Innovation

1. Jump-start change with small, focused projects.
2. Choose a social media platform and focus on it extensively for a trial period.
3. Feature blogs by YA aimed at other YA and promoted through social media.
4. Build the YA focus into alumni awards, magazine articles, social media posts.

Think Like a Millennial / Gen Z

1. Relate to this demographic now; it gets harder to capture attention with time and distance from graduation.
2. Provide the experience of a mall rather than one store: a suite of discounts, access, perks.
3. Listen to their needs and wants; make it easy for them to say yes to smaller commitments.
4. Crowd-source fundraising appeals.
5. Provide 7 - 9 touch points before any financial ask.

The entire webinar may be viewed here.

Alumni Programming

While researchers have identified a link between participation in alumni programming and giving, little research has been conducted on whether financial support to the institution differs based on participation in different types of alumni programming. Forming an understanding of whether participants' giving to the institution changes based on participation in various types of alumni programming may provide information that can be used to focus resources on specific types of programming.

To build and maintain relationships, alumni relations offices offer a variety of communications, programming, and opportunities, and yet, some of these may not make a difference in a graduate's financial support of the institution. For example, do alumni who participated in a reunion event adjust their financial support of the institution differently than alumni who participated in a community service program. Alumni relations and development offices have to determine where to invest time and resources.

In an era that is increasingly focused on fundraising, alumni offices are being asked to demonstrate value to the institution that goes beyond the number of events that have been held or similar metrics that do not show a direct link to financial support. In determining whether a specific type of programming is likely to engender higher financial support, alumni offices may be able to demonstrate increased value to the institution and use staff time more effectively by focusing on those programs with higher potential fundraising impact.

In a 2011 study of 22 alumni involvement factors at universities, all factors were shown to positively influence major giving, that is, making large financial contributions to the institution. Those shown to be the most influential included serving on a university volunteer board, identifying with the institution's mission, identifying with institutional leadership, visiting campus, a sense of obligation to the institution, attending alumni events, reading

alumni publications, the perceived need of the institution, and visiting the alumni website frequently.

Given the wide range of available options to engage alumni, institutions have to strategically plan their offerings to appeal to a large group of graduates. By better understanding if financial support to the institution changes based on participation in various types of programming, institutions may be better positioned to select specific program offerings.

In a 2017 study by Widenhorn, the following program types were used to research whether participation leads to differing levels of financial support: affinity programming, alumni career services, community service opportunities, large scale social events, lifelong learning, and mentoring programs. The results of the statistical analyses by Widenhorn for all research questions showed statistically significant differences by type of alumni program and by institution, indicating that there are differences in giving based on participation in different types of alumni programs. Institutions should evaluate all programing and their correlation with giving over time to determine where to focus time and resources. It is important for institutions to consider offering a variety of program types to see whether there are program types that result in a greater likelihood of a change in giving.

Defining Domains of Alumni Engagement

Indiana University organised alumni engagement into 10 categories. They are meant to be used in a variety of institutions no matter the size, culture, location, or structure.

Academic Engagement
Adjunct faculty members, guest lecturers, competition judges, mentors, reviewers of academic programmes and curricula, and other similar roles.

Alumni Outreach
Alumni groups based on shared affinity, geography, identity, and interest.

Career Development
Internship opportunities; online and in-person workshops, seminars, and panel discussions; individualized coaching and mentoring; job fairs; and networking opportunities.

Diversity and Multiculturalism
Identity-based groups and networking experiences, cultural awareness experiences, and recruiting initiatives.

Lifelong Learning
Online and in-person lectures, seminars, and workshops, as well as family camps, group travel, retreat centers, and other immersive learning experiences and facilities.

Philanthropy
Institutional fundraising, annual giving campaigns, galas, golf outings, community service projects and partnerships.

Spirit, Pride, and Tradition
Alumni award and recognition events, homecoming celebrations, reunion programmes, ceremonies, gameday events, game watches, and postseason events and travel.

Student and Recent Graduate Leadership Development
Alumni-student mentoring initiatives, student-to-alumni networking activities and programming designed for alumni who graduated fewer than 11 years ago.

Student Recruitment
Alumni interview programmes, college fair tabling, legacy admissions programmes, prospective student recommendations and referrals, and admitted student programmes.
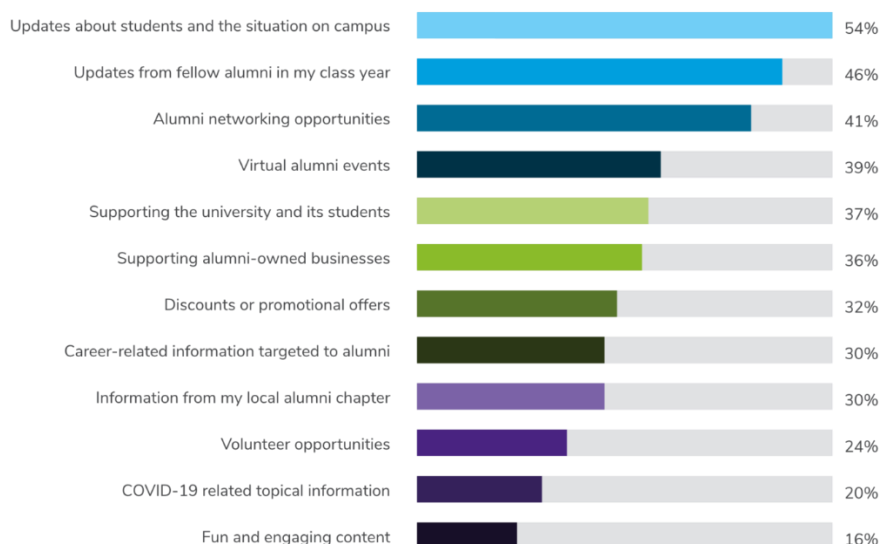
University Advocacy
Political and public advocacy initiatives, student citizenship development experiences and other programming designed to raise awareness of university achievements, needs and priorities.

Adjusted Strategies During COVID-19

The pandemic changed how colleges seek to engage and support graduates. A 2021 survey on alumni engagement trends during the pandemic was conducted to help post-secondary institutions better understand the level of interest in engaging with their alma mater and opportunities to adjust strategies for engagement and communications during the past three years.

TYPE OF CONTENT THAT ALUMNI EXPRESSED INTEREST IN

Content	Percentage
Updates about students and the situation on campus	54%
Updates from fellow alumni in my class year	46%
Alumni networking opportunities	41%
Virtual alumni events	39%
Supporting the university and its students	37%
Supporting alumni-owned businesses	36%
Discounts or promotional offers	32%
Career-related information targeted to alumni	30%
Information from my local alumni chapter	30%
Volunteer opportunities	24%
COVID-19 related topical information	20%
Fun and engaging content	16%

One-quarter of all respondents indicated that they had made a gift to their institution in the current year, while 29% had never made a gift. Among the overall population, 23% indicated that their likelihood to make a gift is lower, while only 7% of respondents are more likely to make a gift. For those who are more likely to make a gift, 63% expressed interest in supporting student emergency funds, while 48% of respondents indicated they would consider supporting the annual fund. This information can help institutions with guidance on how to frame solicitations in the future.

Typically, a key part of alumni engagement and fundraising efforts focuses on alumni programs to build relationships and increase attendee engagement with their alma mater. Institutions quickly shifted to virtual events following the start of the pandemic. Survey respondents indicated that webinars on academic-related topics have been the most popular choice, followed by discussions with campus representatives. Of respondents, 41% indicated that they were somewhat or very likely to attend a virtual alumni event in the fall of 2021, with 65% of these respondents indicating that they are more likely to participate in a virtual event than before the pandemic. This shows one of the impacts of the pandemic — a greater interest in virtual engagement.

Recent alumni, or individuals who graduated between 2012 and 2022, make up a key part of most alumni engagement strategies. 33% of recent alumni report receiving, on average, less than one email a week, but more than once a month, with a higher percentage reporting receiving communications more often than the overall population. While those receiving emails more than once a month but not weekly generally feel this is the right amount of communications (74%), this is a lower percentage than for the overall population. Therefore, institutions should review communications to this cohort and identify potential ways to streamline communications and ensure that communications to recent alumni provide relevant content. Recent alumni are interested in a different content mix than the overall population.

The COVID-related alumni survey results highlight opportunities for institutions to adjust engagement strategy following the pandemic. Institutions should review communications to focus on messaging that resonates with constituents. In addition, communications to recent alumni should be segmented and include information on careers.

Alumni Engagement Program Evaluation and Metrics

Colleges worldwide invest in alumni engagement strategies, but many seem to not do a very good job at it. In fact, according to a 2020 study, 90% of respondents admitted they "need to do more" in engaging former students. The first step towards this improvement is choosing the right alumni engagement metrics to measure your success.

Accurate measurement of alumni engagement has often been described as somewhat of a mythical creature in post-secondary advancement. The task of creating a measurement tool is daunting, not because it cannot be done but rather because the usefulness of the tool is wholly dependent on what is meaningful to the work of the institution in which it resides. Once a tool is developed, appropriately vetted, and implemented, it is imperative that sustainable business infrastructure is in place for it to evolve and adapt with institutional changes over time.

Understanding what comprises alumni engagement and how to measure it has proven to be difficult. While no widespread agreement exists on the components by which alumni engagement should be evaluated, several dimensions have typically been used in the literature to assess alumni engagement levels. CASE (2018) identified four categories of alumni engagement: 1) volunteer engagement (rewarding volunteer roles that are endorsed and valued by the institution and support its mission and strategic goals); 2) experiential engagement (meaningful experiences that inspire alumni, are valued by the institution, promote its mission, celebrate its achievements, and strengthen its reputation); 3) philanthropic engagement (diverse opportunities for alumni to make philanthropic investments that are meaningful to the donor and support the institution's mission and strategic goals); and 4) communication engagement (interactive, meaningful, and informative communication with alumni that supports the institution's mission, strategic goals, and reputation).

Schools typically measure engagement in a limited number of ways. Some of the ways include calculating attendance at events, number of alumni who volunteer, and number of alumni who open email they receive from the office. Volunteer numbers captured include alumni who serve as Alumni Board members, alumni who serve on other known alumni advisory boards across campus, alumni guest speakers, and alumni who work as event volunteers. Capturing volunteer metrics can be challenging since alumni may volunteer in areas of the institution where there is no formal involvement with the Office of Alumni Engagement. Participation rate measures the percentage of alumni who provide financial contributions to the college during the year.

Metrics Examples

Objective	Metric
Increase alumni engagement	# of contactable constituents that are living individuals, served by the alumni function, who can be contacted by at least one medium of communication - email, telephone, or post # of donations received from alumni

Enhance stakeholder experience	• Community growth • # of active users as % of total • # of visits/user
Increased support of alumni career events/programming	• # of jobs posted • Post event surveys (satisfaction, lessons learnt, value) • # of registered mentors/mentees
Development of appealing content	• Measure traffic to platform and returning visits • # of alumni interactions • # of alumni generating content

Having an understanding of how contactable number of alumni affects metrics and benchmarks will ensure engagement participation rates are interpreted and analyzed correctly as the number of contactable constituents underpins the calculations of most engagement participation rates. For example, an institution with 100 attendees and 10,000 contactable alumni will report an engagement rate of 1% and the same institution may report a higher engagement rate (2%) after a data quality check that reduces its contactable alumni to 500.

A matrix model developed at the University of Waterloo in 2011 encompasses alumni engagement based on feeling and behavior that was recorded for each alumni in the alumni department's database using a scoring system (based on the results of an alumni survey) and potential impact purely based on data that assessed fundraising ability. Plotting all alumni on a matrix where the x-axis denoted 'engagement levels' and y-axis denoted 'impact levels', the model was able to segment the alumni base into four key categories, each with specific characteristics:
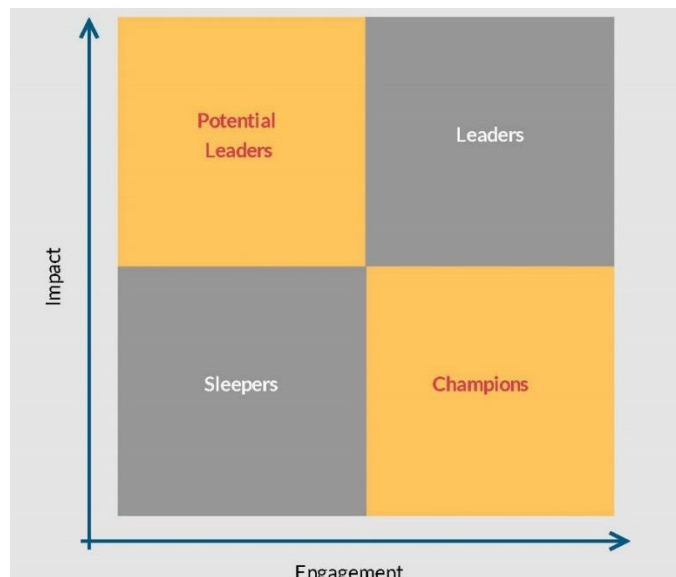
- **Sleepers** are alumni who have little or no connection to the university and who have the ability to make only a low to moderate impact.

- **Champions** have a moderate to strong connection with the school and have the ability to make a low to moderate impact.

- **Potential leaders** exhibit low to moderate connection with the school but have the ability to make a moderate to high impact.

- **Leaders** demonstrate a moderate to strong connection with the school and have the ability to make a moderate to high impact.

It's easy to mistake traffic metrics or social media likes for engagement metrics while not factoring in harder to measure, less tangible elements. There is no one-size-fits-all solution for measuring alumni engagement. Each community has their own definition of what engagement means to them. Plus, before diving into measurement, it is essential to clearly define the main objectives of your community and link these objectives to the appropriate metrics. However, there are some fundamental approaches to measuring engagement that can work for many alumni communities:

Measure Volunteering as Much as Financial Donations

Of course, donors are essential for your fundraisers but alumni departments also need to take into account alumni who volunteer. They are donating to fundraisers with their time. Highly active volunteers could eventually become donors.

Beyond tracking volunteer participation, offices should also pay attention to alumni interested in volunteering but haven't yet participated. This group could have demonstrated their interest by engaging with volunteering posts or signing up to volunteer. Consider setting up a nurturing campaign to convert this group into active volunteers. You could offer incentives, more targeted communication, or ask them to contribute to a fundraiser in a specific way.

Event Attendance Is Important. Actual Participation Is Better

Event attendance is an indicator of engagement. However, there are a few other things to take into consideration. Capture how many event attendees are actively participating. For example, you could look at who is interacting with your social posts and creating their own content relating to the event. Pay attention to alumni who RSVP'd no to the event. A no still shows engagement. Keep the conversation going with this group. Share any post-event content that could interest them and encourage them to come to your next event.

Value Alumni Creating or Sharing Content Online Over Social Media Likes or Traffic

You may have a massive following on your social media accounts. But this doesn't necessarily indicate genuine engagement. Quality beats quantity. A more accurate indication of alumni engagement is the number of alumni actively commenting and sharing your posts and producing and tagging you in content – this is the behavior you need to monitor. You need to go further than counting likes. Which members of your community are leading the forum discussions? Who is reaching out and connecting with other alumni? Keep an eye on the type of content that gets the most traction amongst your community. This can help you guide your content strategy and ensure you create the kind of content your alumni want to read.

Look at Email Open and Click Rates Rather Than the Size of Your Email List

Track who is opening your emails and who is taking action by signing up for an event or making an online donation. Benchmark these metrics against previous campaigns and track the evolution of these metrics.

Giving Trends

Track the number of contributors for every cause and campaign. This helps you understand your average gift size and segmenting donors into various types (first-time donors/major donors, etc.). The average first-time donor has a 23% chance of retention while a repeat donor has a 60% chance and monthly donors have a 90% chance. It is important to identify first-time donors and nurture them into repeat contributors to increase your retention rate and guaranteed contributions.

Methods of Giving

How do your donors prefer to give? Online donation pages, text-to-donate links, cash transactions, and checks are all valid methods of payment. Studying giving trends help you understand which of them gives the most ROI so you can push more focus on that channel (while still keeping other options open).

Strategic Plan

A one, three, or five-year strategic plan cannot succeed without constant monitoring of progress, success points, and improvement opportunities. Use software and human resources to continually check:

1. How far along each activity has come in achieving its targets.
2. If you need to evolve or dissolve strategies.
3. When one action concludes successfully, how and when you transfer to the next.

Additional materials located in this report's 'Resources' section can help practitioners develop sound evaluation methods for alumni engagement.

Conclusion

It is clear that polytechnics and smaller colleges can benefit from increased alumni engagement in multiple ways. First, because alumni often live in the same community as their alma mater, they can be advocates and ambassadors. They can recommend the school as a high quality, affordable education. They can offer internships and hire graduates. They can also serve on advisory boards and committees and represent examples of success for current students.

Alumni can also play a vital role in volunteering for events and other activities that could increase success rates for students. They can act as tutors and mentors. They can speak in classrooms and at events like new student orientation. They can help staff department displays and share their experience with prospective students at open houses. The polytechnic experience presents challenges, and students benefit by talking with individuals who persevered through those challenges and succeeded.

Research shows that engaged alumni are more likely to become donors. If alumni maintain meaningful connections with the institution, they are more willing to donate funds when they are financially able to do so. In a time of unsteady funding, it is vitally important that colleges and polytechnics create robust alumni engagement programs.

Alumni giving correlates with satisfaction with their learning experience. The positive experience of current students translates into better fundraising success when they become alumni. The attitudes and perceptions alumni maintain regarding their former institutions is a key factor in whether they give. Educational institutions targeting greater engagement from alumni should contemplate what makes alumni feel a part of the college; what level of closeness makes alumni regard the college at a more personal level, and how can that closeness be attained.

For all post-secondary institutions, successful learning environments are those with a student-centered approach that fosters holistic student engagement, development, and success. Student engagement includes time spent developing relationships with peers and faculty. Creating and sustaining this approach requires intentional design, ongoing assessment, and the commitment of institutional leaders to provide the resources required to foster and encourage student success through active engagement in academic and extra-curricular activities with faculty and peers outside the formal classroom setting, beyond the hours of a structured class schedule.

College and polytechnic alumni affinity is often manifested in volunteer service as mentors, ambassadors, board members, and donors. Research suggests that the geographic proximity of many polytechnic alumni to their alma mater provides better access and more opportunity for frequent engagement. Additionally, this proximity positions the college to be an asset that has potential to benefit the entire community.

To encourage alumni to give, we have to find them, we have to understand them, and we have to cultivate them in a careful way. In an era of declining public funding and increasing tuition as the method to offset reduced funding, financial support from alumni can help to ease the tuition burden and provide other resources that colleges can use to improve the quality of the educational experience. Alumni are also a source to assist colleges with recruitment of new students, volunteers, and advocates for the school.

A college's image in the community is determined by how well the school conveys its mission, its stories, and its contributions to the local economy. A school's image is defined as how accurately and how extensively information about the institution is conveyed to external constituents. The reputation of the college, its history, core values, the integrity of its leaders all contribute to the college's credibility and image in the community. The *institutional culture* of a post-secondary institution plays a significant role as an element of effective fundraising. Colleges should have "institutional pride." As small colleges continue to implement strategic goals and priorities to achieve student success, the campus environment should facilitate positive student experiences and instill college pride.

The polytechnic school experience is often viewed as transactional and not having a history of tradition, school pride, or a culture of philanthropy which resonates with its students or alumni. While many technical institute alumni say the school is the place that enabled them to achieve future educational and career goals, at first glance, the polytechnic experience does not appear to be front of mind for many alumni. Low institutional affinity among polytechnic alumni could be a result of the transactional nature of the polytechnic experience or the early image of technical institutes as a place of last resort for many students enrolled. Fortunately, the polytechnic image is changing. The schools today are often viewed as the school of practical choice for students from a variety of demographic, trade, and economic backgrounds.

As a result of polytechnics entering post-secondary fundraising late compared to many four-year colleges and universities, and not engaging alumni in private fundraising efforts until relatively recently, schools have the opportunity to be innovators and rethink institutional advancement and alumni engagement. Engaging students as future alumni and educating existing alumni about their role within the institution are viewed as the next steps of maturity for polytechnics. For these institutions to be successful in their philanthropic initiatives, all members of the school's community have a role to play in creating traditions and a culture of support for the institution. There is potential for affinity and lifelong connectedness to

exist between polytechnics and their alumni if a student experience exists and if an alumni experience is created, communicated, and nurtured. Students should be educated about the alumni experience too and opportunities for students and alumni to connect should exist. This involvement establishes a potent foundation for future connection with their institutions as active alumni.

Too often unsatisfactory results have been obtained from alumni because college personnel have tried to move directly from the identification of a need to attempting to obtain an investment. An organized alumni that cultivates continuing interest in the school and supplies information greatly enhances the probability of alumni giving. When college and polytechnic leaders make the investment in alumni programming and utilize the elements described in this report, there is opportunity for great success.

Resources

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Polytechnic Alumni Relations Websites

Algonquin College
https://www.algonquincollege.com/alumni

British Columbia Institute of Technology
https://www.bcit.ca/alumni

Conestoga
https://www.conestogac.on.ca/alumni

Fanshawe College
https://www.fanshawefoundation.ca

George Brown College
https://www.georgebrown.ca/alumni

Humber College
https://humber.ca/advancementandalumni/alumni.html

Kwantlen Polytechnic University
https://alumni.kpu.ca/s/1893/match19/home-alumni.aspx

RRC Polytech
https://www.rrc.ca/alumni

Southern Alberta Institute of Technology
https://www.sait.ca/alumni

Saskatchewan Polytechnic
https://alumni.saskpolytech.ca/alumni

Seneca College
https://www.senecacollege.ca/alumni.html

Sheridan College
https://www.sheridancollege.ca/alumni

Alumni Engagement Strategic Plan Examples

Alumni and Supporter Relations Strategy, University of Sydney 2020-2025

Binghamton University Alumni Association Strategic Plan

College of the Sequoias – Three-Year Strategic Alumni Engagement Plan

Columbia University Alumni Association Five-Year Strategic Plan

Connecting Forward - University of British Columbia Strategic Plan 2017-2022

Fanshawe Alumni Engagement Plan 2020-2022

Johns Hopkins University Alumni Engagement Strategic Plan 2020-2025

Lafayette College Alumni and Parent Engagement Plan 2021-2025

Lindenwood University Alumni Relations Strategic Plan 2020-2025

Ohio Alumni Association Strategic Plan for Alumni Engagement

Pepperdine University – Five Year Strategic Plan for Alumni Engagement

Strategic Plan for Engaging Santa Clara Alumni

Tulane University Strategic Plan 2020-2023

University of New Brunswick Alumni Engagement Strategy 2020-2025

University of North Carolina Greensboro Five -Year Strategic Plan

University of the Fraser Valley Strategic Plan

[Western University Alumni Association Strategic Plan](#)

Other Online Resources for Alumni Engagement

[8 Ways to Measure Alumni Engagement](#)

[Alumni Engagement: Three Ways to Keep Former Students Involved Post-Pandemic](#)

[How the UNB Alumni Office Re-Connected with 6500+ Alumni](#)

[How to Craft an Alumni Relations Strategic Plan Effectively (CallHub)](#)

[Princeton AlumniCorps](#)

[Relationship Building: The Key to Alumni Engagement](#)

[Statistics for Alumni Engagement, Giving, and Membership](#)

[The Future of Young Alumni Engagement in Canada (Presentation on YouTube)](#)

[What Can We Learn from the CASE Alumni Engagement Metrics Report?](#)

For further information

About ViTreo

ViTreo is a full-service fundraising and nonprofit leadership development firm. We have extensive expertise in every area of major gift fundraising and philanthropy. We offer a clear approach in an industry that can be overwhelming and often overcomplicated.

ViTreo Group has over a century of combined consulting experience with expertise in major campaign planning and management, talent acquisition, naming rights, nonprofit governance, stakeholder engagement, and leadership development. We provide timely, creative and strategic advice to clients in the public and nonprofit sectors. We are proud to have worked with hundreds of organizations from health, education, arts and culture, recreation, and social service to the environment.

ViTreo has a wealth of expertise and experience in every area of major gift fundraising and philanthropy. We provide just-in-time and retained strategic counsel to Canada's most influential board members, CEOs and opinion leaders.

Rooted in the word vitreous, "vitreo" is a Latin prefix meaning clear or resembling glass. Glass exemplifies many of our core values including transparency, clarity and utility.

Sharing provisions