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2023-24 CASE Insights on Alumni Engagement

Data Use Statement

There is no charge for institutions to submit data using CASE's survey tool. All CASE members, as a benefit of membership, will have complimentary access to survey results using CASE's online reporting tool, the CASE Insights data portal.. This reporting tool will allow you to see your own institution's data, to see any other submitting institution's data, and to select and save a group of peers and/or aspirational peers to see your data aligned with others'.

All participating institutions, thereby, are agreeing to share their data with other institutions. The data will not be anonymized when shared. Participating institutions agree not to share any other institution's data with third parties or in the public domain. CASE will only share aggregate anonymized information in the public domain.

In addition to access to the results via the CASE Insights data portal, CASE members will receive a free summary benchmarking report that illustrates their results compared to a set of peer institutions selected using CASE's algorithm, which will be uploaded to the CASE Insights data portal.

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Survey Resources

Visit the CASE Insights on Alumni Engagement documentation and support page, where you can find:

- The survey guidance document.
- PDFs with the questions on each version of the survey.
- Excel grids you can use to gather your data before entering them online if you wish. You must enter your data and submit the survey online.

Contact the Alumni Engagement team at aem@case.org if you need assistance or would like to schedule a walk-through of the survey.

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Select Your Survey Sections

Only 4 questions on the survey are required:

1. Alumni Counts

2. Summary of Alumni Engagement

3. Confidence Levels

4. Basic information about your institution.

After that, you have a menu of optional questions. You can do any, some, or none of those questions. If you're not sure, check "yes" for all of them. You can change any you decide to skip to "no" later.

If you switch from full to minimal or minimal to full, any data already entered will be deleted. Be sure to print a PDF if you want to use any of them to repopulate the new version.

Select Full or Minimal Version	o Full x **Minimal**

Alumni Relations Inputs	x **Yes** o No

Modes of Engagement - Additional Details	x **Yes** o No

Events Offered	x **Yes** o No

Event Attendance	x **Yes** o No

Graduation Cohorts	x **Yes** o No

Operations & Technology	x **Yes** o No

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1. Basic Characteristics

How many students were enrolled at your institution the day classes began in the year you are reporting? This is a one-day capture, representing the first day enrollment was considered established.

Enrollment, Opening Day	
If you completed the VSE survey, your enrollment on that instrument is shown here. The two should match.	

What type of institution are you reporting about?	

Is the institution public or private?	

Check here if your institution has a dues-paying alumni association.	

How many dues-paying alumni do you have? Enter zero if you did not check the box above.	

Select the numeral corresponding to the month in which your fiscal year ends.	

Select 3-digit currency abbreviation here:	

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2. Confidence Levels

This question measures how confident you are that the counts you provided are a comprehensive representation of alumni activities. This added information provides transparency and context to your counts by mode.

The scale does not represent how accurate you believe the data are, but, rather, how comprehensive they are.

Here are some scenarios for guidance:

- If your institution captures minimal data for Volunteer, Experiential, and/or Communications modes, you should select Not Very Confident (3) in the respective mode.
- Also, if you are completing the Minimal Version of the survey and leaving Communication blank, you should select Not Very Confident (3) for the Communication mode.
- If your institution collects volunteer information centrally, but you know that substantial activity happens through the units, faculties, or colleges you would likely select Somewhat Confident (2) to indicate your approximation of the activities you currently capture.
- If your institution hosts 400 events annually, but you only have access to data for 200 of those events, you should select Somewhat Confident (2) for the Experiential mode.
- If you can capture most of the data points within any mode, select Confident (1), understanding that you will likely never capture 100% of any category.

To summarize:
1=Confident
2=Somewhat Confident
3=Not Very Confident

Volunteer Data Confidence Level	
Experiential Data Confidence Level	
Communications Data Confidence Level	

Use this section if you would like to comment on your confidence levels.	

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3. Alumni Counts (Minimal)

1. ALUMNI COUNTS

In the grid below, indicate the number of alumni in each category. Only count each alumnus once. Definitions of each row and column can be viewed by clicking the underlined heading.

Definitions are also found in the reporting standards PDF: Open Alumni Engagement Instructions

Also note, that a social media (Twitter, Facebook, Instagram, etc.) contact without another method of contact is not sufficient to make someone contactable. Please limit your count of contactable to alumni for whom you have one or more of the following means of contact: telephone, email, postal mail.

	A. Living Alumni Count	B. Opted-Out	C. Legally Contactable
1. Total Degreed or Diplomaed Alumni			
2. Total Non-Degreed Alumni			
3. Total Alumni			

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4. Modes of Engagement (Minimal)

Summary of Alumni Engagement
Column D is optional. All other cells are required. Do not leave cells in any other column blank.

Do you want to report communications egagement?	

1a. Details of Modes of Engagement

Someone can be counted in more than one column. For example, if someone engaged in all four basic modes, he or she would be counted once in every column of that single row.

Do not count anyone on both rows. Alumni are either degreed or non-degreed, not both.

	A. Philanthropic (Phil.)	B. Volunteer (Vol.)	C. Experiential (Exp.)	D. Communication (Com.)
1. Total Degreed or Diplomaed Alumni				
2. Total Non-Degreed Alumni				
3. Total Alumni				

1b. Summary of Modes of Engagement

In Column E, enter the number of individuals who are counted in every column above. Count each person only once. This number should be relatively low because the person has to be in all the boxes to qualify.

It is more common to appear In Column F. That number should be larger. Report the total number of unique individuals each row contains. Count each person only once. It doesn't matter whether that person engaged in one, two, three, or all four modes. The alumnus/a is counted one time if that person is represented in any cell.

Column F is the bucket that holds all the alumni who engaged in any mode or modes. Simply put, Cell 3F is the number of alumni engaged. It should be the largest number in the grid.

	E. Unduplicated Number of Alumni Who Appear in ALL the Cells in a Row Above (P and V and E and C)	F. Unduplicated Number of Alumni Who Appear at Least Once in the Grid Above (P or V or E or C)
1. Total Degreed or Diplomaed Alumni		
2. Total Non-Degreed Alumni		
3. Total Alumni		

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Alumni Relations Inputs

Does your institution have a chief alumni relations officer?	o Yes o No

Use Row 1 to report on personnel who report to and costs that are under the budgetary control of your chief alumni relations officer.

Use Row 2 to report on personnel who do not report to and costs that are not under the budgetary control of that person. Include individuals who work toward any of the engagement goals, including fundraising, communications, event management where the objects of their activities are alumni.

	A. Alumni Relations FTEs	B. Alumni Relations Staff Salaries	C. Alumni Relations Staff Benefits	D. Alumni Relations Technology Cost	E. Alumni Magazine Cost	F. Non-Technology Cost Excluding Magazine
Alumni Relations Direct Investment						
Alumni Relations Indirect Investment						

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Modes of Engagement - Additional Details

There are two versions of this section. The first is short and simple. The second is longer and more detailed. The detailed version is preferred. Only do the condensed grid if you cannot complete the detailed grid.

Below you will choose which to complete. You may also opt out of both by deselecting this section in Section 1.

Which Version of the Question Do You Want to Complete?	o Condensed Grid o Detailed Grid

A. Condensed Grid:

Indicate the number of alumni who were engaged only via philanthropy and only via one or more of the other modes (volunteering, experience, or communications). Divide the alumni into degree or diploma holders and those who are not.

	A. Donors Not Engaged in Other Modes (Only P)	B. Engaged Alumni Not Giving (V, E, or C, but not P)
1. Degreed		
2. Non-Degreed		
3. Total Alumni		

B. Detailed Grid

In this question there is more than one mode of engagement in each column, and the alumnus must have engaged in all modes in that column to be counted there. For example, in Column A, count alumni who engaged BOTH in philanthropy and volunteer activities, not one or the other. This question also requires breakout by detailed degree category. Rows 7, 10, and 11 will auto-total.

	A. Phil.and Vol.	B. Phil. and Exp.	C. Phil. and Com.	D. Vol. and Exp.	E. Vol. and Com.	F. Exp. and Com.	G. Phil. and Vol. and Exp.	H. Phil. and Vol. and Com.	I. Phil. and Exp. and Com.	J. Vol. and Exp. and Com.
1. Secondary/ Independent School Diploma										
2. Associate-Degreed										
3. Undergraduate-Degreed										
4. Postgraduate-Degreed										
5. Multiple-Degreed										
6. Certificate or Award										
7. Total Degreed or Diplomaed Alumni										
8. Non-Graduate Alumni										
9. Other										
10. Total Non-Degreed Alumni										
11. Total Alumni										

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Events Offered

Count of In-Person, Virtual, and Hybrid Events Offered

Provide a count of the number of events your institution held in each category during the fiscal year. Click the underlined column headings to view category definitions. See the guidance document for a list of events that count as experiential engagement.

	A. Number of Virtual Events	B. Number of In-Person Events	C. Number of Hybrid Events	D. Total
Number of Events Held in the Reporting Year				

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Event Attendance

Types of Attendees

Report below the way in which alumni participated in the events you summarized in the question on events offered. That question is about the nature of events. This question is about individual behavior related to the events you offered. Sort alumni who attended events into (only) one of the three columns.

Each individual had an "event type" in the past fiscal year. Someone was either a virtual event type (Cell A), an in-person event type (Cell B), or someone may have participated both ways at two or more events in this reporting cycle (Cell C). Each year, a person can only have one "event type."

	A. ONLY Attended Virtually	B. ONLY Attended In Person	C. Attended Both In Person & Virtually
Number of Alumni Who Participated in the Reporting Year			

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Graduation Cohorts

If you did the minimal version of Section 4 (Modes of Engagement), did you report communications engagement?	o Yes o No

Alumni Engagement by Graduation Cohorts

In the grid below enter the number of alumni who contributed by graduation cohort. If someone received more than one degree from your institution, the cohort is determined by the first degree the person received. If someone attended the institution but did not receive a degree or diploma, enter that person on row 8.

	A. No. Legally Contactable Alumni	B. No. Engaged: Philanthropy	C. No. Engaged: Volunteer	D. No. Engaged: Experiential	E. No. Engaged: Communication
1. 0-5 Years Out					
2. 6-10 Years Out					
3. 11-20 Years Out					
4. 21-30 Years Out					
5. 31-40 Years Out					
6. 41-50 Years Out					
7. 51+ Years Out					
8. Non-Degreed/Non-Diploma					
9. Total					

	A. Legally Contactable Alumni From Section 3	B. No. Engaged In Philanthropy From Section 4	C. No. Engaged in Volunteering From Section 4	D. No. Engaged Experientially From Section 4	E. No. Engaged in Communication From Section 4
These are the values entered in Section 4: Alumni Counts and Section 5: Alumni Engagement. The values on Row 9 must match those values.					

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Operations & Technology

Does your institution have a dedicated data manager or data management team that oversees the collection, reporting, and analysis of alumni engagement activity?	

Which software platform(s) does your organization use to track, report on, and understand/analyze Alumni Engagement? Check all that apply in each category. There is a place to write in a product you use but that is not listed. You can also indicate that you do not use any by checking none.

PART I: Constituent Relationship Management (CRM) Software

Abila Millennium	
Agilon One	
Blackbaud CRM/Raiser's Edge/RENXT	
Ellucian CRM Advance/Advance/Banner/Colleague/PowerCampus	
Homegrown CRM	
Jenzabar	
PeopleSoft	
Salesforce	
Slate	
thankQ	
Veracross	
None	

Other CRM (Use semicolons between each product name.)	

PART II: Reporting and Data Visualization Tools

Advizor	
Cognos	
Drupal	
Envisions Argos	
Microsoft Power BI	
Qlik	
SAP Business Objects	
SAS	
Tableau/Einstein Analytics	
None	

Other Data Visualization Software (Use semicolons between each product name.)	

PART III: Multichannel Marketing and Communications Software

Blackbaud Luminate Online	
Campaigner	
Campaign Monitor	
Constant Contact	
DotDigital	
Emma	
Finalsite	
Gecko	

Mail Chimp	
Marketo	
MobileCause	
mongoose	
Salesforce Marketing Cloud/Social Studio	
Signal Vine	
Switchboard	
Thankview	
Thrutext	
None	

| Other Mar/Comm Software (Use semicolons between each product name.) | |

PART IV: Alumni Engagement and Career Platforms

Aluminati	
AlumniFire	
AlumniQ	
Anthology Alumni and Advancement Solutions	
Brazen	
BrightCrowd	
Chronus	
Firsthand/Vault	
Graduway	
Handshake	
MobileUp	
PBC Guru	
PeopleGrove	
Tassl	
Xinspire	
None	

| Other Engagement/Career Software (Use semicolons between each product name.) | |

PART V: Research and Fundraising Management

Aluminate	
Blackbaud Fundraiser Performance Management	
Blackbaud Peer-to-Peer (formerly JustGiving)	
Blackbaud ResearchPoint	
Community Funded	
Evertrue	
GiveCampus	
Hootsuite	
LexisNexis	
LinkedIn: Sales Navigator	
RNL	
Social Studio	
Social Toaster	
Sprout Social	
Wealth Engine	
None	

Other Research/Fundraising Mgmt. Software (Use semicolons between product names.)	

PART VI: Event Management & Ticketing Software

Attend	
Aventri	
Cvent	
EventBrite	
Facebook Live/ LinkedInLive/InstragramLive	
TicketMaster	
Zoom	
None	

Other Event Mgmt/Ticketing Software (Use semicolons between product names.)	