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ALUMNI ENGAGEMENT METRICS RESULTS

In 2019, CASE conducted the Global Alumni Engagement Metrics (AEM) Survey, the inaugural data collection for CASE's alumni engagement metrics framework. A task force of global alumni relations professionals was created in 2016 by the CASE Commission on Alumni Relations to establish an industry-wide framework for measuring alumni engagement. A White Paper¹ with the task force's framework recommendations was published in August 2018. Following the White Paper, a beta group of institutions was formed to refine the framework using input from representatives of CASE's global membership, including both alumni relations and advancement services professionals, resulting in this new survey.

The CASE Global Alumni Engagement Metrics survey is designed to provide a simple and basic way of capturing various types of alumni engagement on an annual basis. These metrics can be applied across the broad range of CASE member institutions in more than 80 countries. Institutions include independent schools serving the primary and secondary sectors and colleges and universities of varying sizes and types. The inaugural version of the survey only counts individuals who are engaged, without weighting or scoring various types of engagement. This will evolve over time.

All CASE members have access to survey results in [AMAtlas Data Miner](#), CASE's longitudinal and comparative metrics online reporting solution, even if you did not complete the survey. This guide provides you with information about how to access data specific to this survey within the online application. It will also point you to online tutorials that provide additional instructions for utilizing the software.

ACCESSING AMATLAS DATA MINER

Go to: <https://amatlasdata.case.org>

Contact the CASE AMAtlas team at dataminer@case.org to request an account.

We will email you an invitation, active for two weeks, to set up an account on the AMAtlas Data Miner site. If you miss the two-week window, contact us, and we will send another invitation.

Follow the link in the email to set up your account. If you already have an account on the CASE AMAtlas Surveys website (the site that hosts the VSE, AEM, and Talent Management surveys),

¹ Alumni Engagement Metrics White Paper:
https://www.case.org/system/files/media/file/CASEWhitePaper_AlumniMetrics%20AUG18.pdf

use the same username and password. If you create a different password in Data Miner, your AMAtlas Surveys account password will also change.

If you forget your password, go to the login page and click the **Forgot your password** link. Enter your email address. You will be emailed a link to reset your password. The new password will be applied to your Data Miner account and your AMAtlas Surveys account, if you have one. Contact us if you have forgotten your username. In most cases, it is your institutional email address.

AMATLAS DATA MINER TRAINING AND ASSISTANCE

This guide is focused specifically on accessing AEM results in Data Miner. If you need assistance getting started using Data Miner:

- Consult the [Data Miner Quick Start Guide](#) and [Data Miner Visual Guide](#). These and other training materials and videos are also available within Data Miner from the **Help** link on the main menu.
- Contact the CASE AMAtlas team at dataminer@case.org for assistance or to schedule a complimentary individual or group training session.

ALUMNI ENGAGEMENT METRICS – SUMMARY REPORT

The CASE AMAtlas Team has created an AEM summary report. It includes:

- Number of alumni engaged in each of the four basic modes of engagement
- Number of alumni engaged in different combinations of the modes of engagement
- Total counts for living, opted-out, and legally contactable alumni
- Alumni per staff ratio
- Percent engaged in each of the four basic modes of engagement

See more information about modes in the [Appendix](#).

To access the AEM summary report, go to the **Recommended Reports** widget on the Data Miner home page, and click the Open icon. When you open the report, you can:

- Toggle the tabs to view the detail report, custom charts, and more.
- View and work with the report onscreen, including sorting and hiding columns (click the arrow next to the column heading to see the options) and showing hidden columns (click the three horizontal lines on the right to see the hidden columns).

- Download the report as a CSV file.
- Copy the report and edit the inputs.

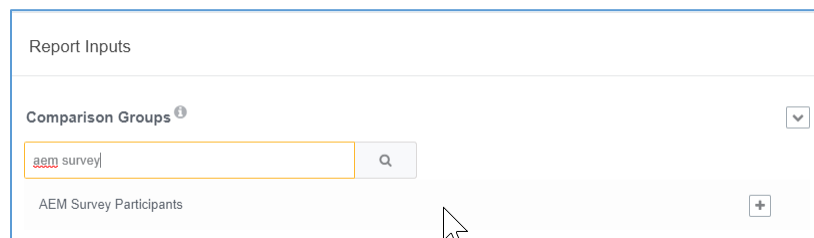
CREATING AEM REPORTS

[For more detailed information about creating reports and comparison groups in Data Miner, please see the [Data Miner Quick Start Guide](#) or [Data Miner Visual Guide](#). Contact dataminer@case.org to request assistance or schedule a training session.]

To create your own AEM report, on the main menu, select **Reports > New Report** or select **Create New Report** from the Quick Links on the right side of the home page.

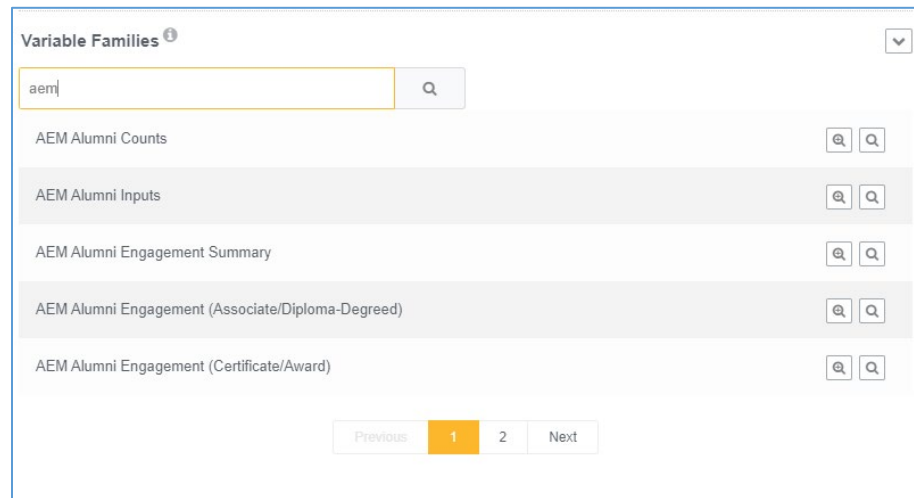
You must select at least one comparison group or institution, one variable, and one year. Make your selections on the Report Inputs screen.

- **Comparison Groups or Institutions:** To include all institutions that participated in the AEM Survey, search for the comparison group **AEM Survey Participants** and use the + to add it to the report.



You can also browse or search for other comparison groups or institutions by name and click + to add them to the report. Data Miner has many comparison groups created by the CASE AMAtlas team. You can also create your own custom groups of institutions.

- **Variable Families:** Search for the term **AEM** to find all variable families related to the AEM survey.



Each family contains several AEM data variables.

- To add all the variables in the family to the report at once Click the **Add** button, the magnifying glass with the + symbol inside it.
- To open a list of all the variables in the family and select variables individually to add to the report Click the **Search** button, the plain magnifying glass. The Variable Families section will collapse, and the Variables list will open.
- The **AEM Alumni Engagement Summary** family includes several calculated variables across the seven alumni categories (e.g., associate/diploma-degreed, undergraduate-degreed, graduate-degreed, etc.) included in the AEM survey.
- You can also skip Variable Families and search for individual variables by name in the Variables section.
- **Variables:** If you chose to search a list of variables from a variable family, those variables will display here. You can browse them and add them to the report by using the + button.

If you did not search a variable family, all the variables in AMAtlas Data Miner for all surveys in the database will display. You can search for a word in their names. Click + to add variables to the report.

- **Note:** In addition to the AEM survey, Data Miner includes variables and variable families related to the Voluntary Support of Education (VSE) survey. CASE surveys (e.g., CASE-Ross, CASE-CCAE) whose data reside in the CASE Benchmarking Toolkit, are not currently included in Data Miner. This may change in the future.
- **Years:** Click + to add years to the report. The AEM survey launched in 2019. There are no AEM data prior to that year.

After you select all your report inputs, click the yellow **Run Report** button that appears below the report inputs on the right.

The report will open. Click the report title, which defaults to Untitled, or the Save button on the right to save the report. Give the report a title, an optional description, and select the Active status. (Inactive status is rare.) If you are a unit administrator, also choose whether to share the report with others at your institution.

CONTACT THE CASE AMATLAS TEAM

The CASE AMAtlas team provides AMAtlas Data Miner support and complimentary training sessions for new or veteran users. Our regular office hours are 9:00 a.m.–5:00 p.m. Eastern.

Email: dataminer@case.org

Phone: +1 (917) 336-4023

APPENDIX

DEFAULT COLUMNS INCLUDED IN DATA MINER REPORTS

The following columns, primarily institutional characteristics, are currently included in Data Miner reports by default. The **AEM Summary Report** is customized and does not include all the default columns.

- **Year:** Fiscal year of the data
- **Comparison Group:** The group of institutions selected
- **Institution Id:** The institution's unique CASE identifier
- **Institution Country:** Country of the reporting institution
- **IPEDS No.:** Unique identifier from the Integrated Postsecondary Education Data System (U.S. only)
- **Founding Year:** This is collected in the VSE survey so will only populate for U.S. or Canadian institutions that participate in the VSE survey and provided the data.
- **Carnegie Classification (2015):** Classifications for U.S. higher education institutions generally based on predominant type of degree awarded. Updates are released periodically, and classifications may change as schools add/remove programs. These classifications are as of the 2015 release.
- **Carnegie Classification (2018):** Same as above but as of the 2018 release
- **Control:** Form of control and management of the institution by either a governmental agency or body (Public) or a non-governmental entity (Private)
- **State:** For U.S. institutions only
- **Institution:** Name of institution that submitted the data

AEM SURVEY VARIABLES OVERVIEW

The information below provides a brief overview of AEM Survey data fields in Data Miner. For full definitions of what is included in each field, particularly for modes of engagement, review the full [CASE Global Alumni Engagement Metrics Survey Guidance Document](#).

AEM ALUMNI COUNTS

There are seven categories of alumni and 3 inputs for each. The grid below represents the 21 variables in this variable family. Not all alumni categories apply to all institutions, so institutions may not have data in all 21 fields. In year one, no field was required so there will be schools with blanks throughout. Moving forward, Legally Contactable will be required as this field serves as the denominator in the calculation for a measurement of engagement.

Alumni Counts				
Category	Category	<u>Living Count</u>	<u>Opted-Out Count</u>	<u>Legally Contactable Count</u>
1	Associate/Diploma Degreed	Count of Alumni	Count of Alumni	Count of Alumni
2	Undergraduate Degreed	Count of Alumni	Count of Alumni	Count of Alumni
3	Postgraduate Degreed	Count of Alumni	Count of Alumni	Count of Alumni
4	Multiple Degreed	Count of Alumni	Count of Alumni	Count of Alumni
5	Certificate or Award	Count of Alumni	Count of Alumni	Count of Alumni
6	Non-Graduates	Count of Alumni	Count of Alumni	Count of Alumni
7	Other	Count of Alumni	Count of Alumni	Count of Alumni

AEM ALUMNI INPUTS

This variable family includes basic data about the institution’s alumni relations staffing, expenditures, and alumni dues. Expenditures are entered in the institution’s domestic currency.

Alumni Relations Staff FTE	AR Staff FTE
Total institutional alumni relations staff FTE (full time equivalent)	Count of Staff

Alumni Relations Expenditures	Actual Expenditures (Domestic Currency)
Alumni Relations Staff FTE Expenditures	Amount reported in your domestic currency
Alumni Relations Technology Expenditures	Amount reported in your domestic currency
Alumni Magazine Expenditures	Amount reported in your domestic currency
Alumni Relations Non-Technology Expenditures	Amount reported in your domestic currency

Alumni Association - Dues paying or not?	Yes/No?
Dues Paying-Alumni Assoc?	1 = Yes; Blank = No

AEM ALUMNI ENGAGEMENT SUMMARY

All variables in this family are calculated from data fields in the survey.

Total Engagement in the Four Basic Modes

These four variables are the sum of all seven alumni categories for each basic mode.

	Column A	Column B	Column C	Column D
Alumni Category	<u>Philanthropic (P)</u>	<u>Volunteer (V)</u>	<u>Experiential (E)</u>	<u>Communication (C)</u>
Diploma-Degreed				
Associate-Degreed				
Undergraduate-Degreed				
Graduate-Degreed				
Multiple-Degreed				
Certificate or Award				
Non-degreed				
Other				
Total	Total Philanthropic Engagement	Total Volunteer Engagement	Total Experiential Engagement	Total Communication Engagement

Total Engagement in Multiple Modes

These variables are the sum of all seven alumni categories for each of the multiple modes.

	Column E	Column F	Column G	Column H	Column I	Column J
Alumni Category	Phil, Vol (P/V)	Phil, Exp (P/E)	Phil, Com (P/C)	Vol, Exp (V/E)	Vol, Com (V/C)	Exp, Com (E/C)
Diploma-Degreed						
Associate-Degreed						
Undergraduate-Degreed						
Graduate-Degreed						
Multiple-Degreed						
Certificate or Award						
Non-degreed						
Other						
Total	Total Philanthropic & Volunteer Engagement	Total Philanthropic & Experiential Engagement	Total Philanthropic & Communication Engagement	Total Volunteer & Experiential Engagement	Total Volunteer & Communication Engagement	Total Experiential & Communication Engagement

	Column K	Column L	Column M	Column N
Alumni Category	Phil, Vol, Exp (P/V/E)	Phil, Vol, Com (P/V/C)	Phil, Exp, Com (P/E/C)	Vol, Exp, Com (V/E/C)
Diploma-Degreed				
Associate-Degreed				
Undergraduate-Degreed				
Graduate-Degreed				
Multiple-Degreed				
Certificate or Award				
Non-degreed				
Other				
Total	Total Philanthropic, Volunteer, & Experiential Engagement	Total Philanthropic, Volunteer, & Communication Engagement	Total Philanthropic, Experiential, & Communication Engagement	Total Volunteer, Experiential, & Communication Engagement

	Column O
Alumni Category	<u>Phil, Vol, Exp, Com (P/V/E/C)</u>
Diploma-Degreed	
Associate/Diploma-Degreed	
Undergraduate-Degreed	
Graduate-Degreed	
Multiple-Degreed	
Certificate or Award	
Non-degreed	
Other	
Total	Total Philanthropic, Volunteer, Experiential, & Communication Engagement

Total Engagement in Any Mode

	Column P
Alumni Category	<u>P or V or E or C</u>
Diploma-Degreed	
Associate-Degreed	
Undergraduate-Degreed	
Graduate-Degreed	
Multiple-Degreed	
Certificate or Award	
Non-degreed	
Other	
Total	Total ANY Mode

Total Alumni Counts

Sum of the data across all seven alumni categories.

- Total Living Alumni
- Total Opted-Out Alumni
- Total Legally Contactable Alumni

Alumni per Staff Ratio

- Alumni per Staff Ratio: Total Legally Contactable Alumni/Total Staff FTE.

Percentage of Alumni Engaged by the Four Basic Modes

- Percent Communication Engaged – Total Communication Engagement/Total Contactable Alumni
- Percent Experiential Engagement – Total Experiential Engagement/Total Contactable Alumni
- Percent Philanthropic Engagement – Total Philanthropic Engagement/Total Contactable Alumni
- Percent Volunteer Engagement – Total Volunteer Engagement/Total Contactable Alumni

Currently, Data Miner does not automatically calculate % Engaged by ANY Mode. Not all institutions currently capture data across all four modes, therefore that calculation could be misleading. If you export the data into a CSV file, you may wish to create this calculation for institutions capturing the same modes as your institution. (Example: If you captured only Philanthropic and Volunteer data you may wish to compare your institution against other institutions that also only captured those two modes.)

AEM ALUMNI ENGAGEMENT (BY DEGREE CATEGORY)

Each variable family includes the number of alumni in that category engaged in the basic and multiple modes of engagement and in any mode. See the grids [above](#) for the modes.

- AEM Alumni Engagement (Associate/Diploma Degreed)
- AEM Alumni Engagement (Certificate/Award)
- AEM Alumni Engagement (Graduate-Degreed)
- AEM Alumni Engagement (Multiple-Degreed)
- AEM Alumni Engagement (Non-Degreed)
- AEM Alumni Engagement (Other Alumni)
- AEM Alumni Engagement (Undergraduate-Degreed)