

# Alumni Engagement Metrics

PREPARED BY THE

**Alumni Engagement Metrics Task Force**  
Council for Advancement and Support of Education

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WHITE  
PAPER



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## ACKNOWLEDGMENTS

CASE thanks the members of the CASE Alumni Engagement Metrics Task Force for their contributions to the project. Participants are listed on page 12.

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## TO SUBMIT COMMENTS AND SUGGESTIONS

Send an email to [alumnimetrics@case.org](mailto:alumnimetrics@case.org)

## ABOUT CASE

The Council for Advancement and Support of Education (CASE) is the professional organization for advancement professionals at all levels who work in alumni relations, communications, marketing, development and advancement services.

CASE's membership includes more than 3,700 colleges, universities and independent and secondary schools in more than 82 countries. This makes CASE one of the largest nonprofit education associations in the world in terms of institutional membership. CASE also serves more than 85,000 advancement professionals on staffs of member institutions.

The association produces high-quality and timely content, publications, conferences, institutes and workshops that assist advancement professionals in performing more effectively and serving their institutions.

For information, visit [www.case.org](http://www.case.org) or call +1-202-328-2273.



## THOUGHT LEADERSHIP

As part of its strategic plan, CASE is committed to advocating on behalf of those working to advance education. This white paper serves as one of many CASE initiatives dedicated to thought leadership.

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# CONTENTS

- Executive Summary** ..... 4
- Creating a Common Language: Terminology and Definitions** ..... 5
  - Alumni ..... 5
  - Alumni Engagement ..... 5
- Definitions of Alumni Engagement Categories** ..... 6
  - Volunteer..... 6
  - Experiential..... 6
  - Philanthropic..... 6
  - Communication..... 6
- Engagement Measurement Inputs** ..... 8
- Data Collection, Reporting and Analysis** ..... 9
- Preliminary Rollout** .....10
- Frequently Asked Questions**.....11
- Alumni Engagement Metrics Task Force Members**.....12

## Executive Summary

The Alumni Engagement Metrics Task Force was created by the CASE Commission on Alumni Relations in the fall of 2016 to address the need for an industry wide framework to measure alumni engagement. The creation of the Task Force was the culmination of a decadelong discussion within the profession on the topic of alumni engagement metrics.

The Commission established the following parameters to guide the work of the Task Force:

**Mission:** Develop an industrywide framework to measure alumni engagement.

**Vision:** Adopt a framework as the industry standard.

**Goals:** Develop tools to measure and guide, and develop member services to support this effort.

With CASE membership surpassing 3,700 institutions in 82 countries, the challenge of creating a universally adaptable framework for measuring alumni engagement is formidable. The launch of the new CASE strategic plan, *Reimagining CASE 2017–2021*, fully supports the Task Force's charge to help CASE be the leading source of expertise and best practices. The metrics project was undertaken in an approach consistent with CASE values and in response to numerous CASE member inquiries. The work of the Task Force will help to establish a framework of excellence that empowers advancement professionals to be agile, bold and innovative.

The Commission and the Task Force recognize the importance of creating a simple and basic framework to measure alumni engagement and are cognizant of the perils of past measurement attempts, which were often overwhelming and beyond the scope of available resources. The Commission and the Task Force

also recognize the iterative nature of this project and therefore anticipate it to evolve over time.

The Task Force has focused on engagement activity that can be measured in a consistent manner and can be applied to the broad spectrum of CASE member organizations around the globe: colleges and universities; independent schools; community colleges; and private, public, small and large institutions. In the creation of a framework for alumni engagement metrics, the Task Force has employed a disciplined and focused approach to build a foundation of measurement.

The Task Force has attempted to integrate the work of many institutions and communities of practice that have successfully developed promising and innovative alumni metrics practices. The Task Force is grateful for these contributions from around the globe. The Task Force also recognizes that many CASE member institutions are not currently involved with engagement metrics activity. Given this wide range of experiences and resources, the Task Force is committed to developing a metrics framework that will bring together all institutions in a comprehensive manner and will be characterized by ease of implementation. As this framework evolves and the industry develops greater expertise, it is anticipated that the alumni metrics model will grow in sophistication and scope as more is learned from industry experts and CASE members.

The foundation for engagement metrics will help institutions establish measurable engagement goals, assess progress toward achieving those goals and support the creation of a continuous pathway to success. This initial step will be a basic building block necessary to create a foundation for the future, which will be relevant and useful to all CASE member institutions.

## Creating a Common Language: Terminology and Definitions

The creation of a framework to measure alumni engagement requires a common set of terms and definitions. With more than 3,700 CASE members, the Task Force recognizes there will likely be institutional nuances regarding terms and definitions. Institutions may apply the definitions as they deem appropriate to measure engagement. The Task Force also recognizes that the proposed definitions may not be fully in sync with definitions used in our reporting systems (such as the Voluntary Support of Education Survey). This will require further work and discussion.

### ALUMNI

**Graduates of the institution and others with a prior academic relationship, including non-graduates, certificate and credential holders, distance learners, lifelong learners, residents, post-docs, honorary degree recipients and honorary alumni.**

The Task Force recognizes the wide variety of criteria used by CASE member institutions to determine who is counted as an alumnus/a. The inclusion of “others with a previous academic relationship” establishes specific parameters, while still allowing for flexibility.

This broad definition also represents the changing nature of those served by academic institutions. As a result of globalization and other rapid changes in the workforce, there is an increasing demand for lifelong educational opportunities that extend well beyond the traditional four-year educational experience. For example, large numbers of community college students do not receive degrees from these institutions but are valued as alumni who can be engaged.

This definition of alumni is not meant to alter institutional reporting requirements that may include a different definition of alumni. The goal of the Task

Force was to create a broad definition that would be inclusive of all CASE member institutions.

Note that for the initial framework of engagement, the definition of alumni does not include parents, friends, or non-alumni faculty or staff. However, the Task Force recognizes the importance of providing engagement opportunities to these groups.

### ALUMNI ENGAGEMENT

**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.**

Critical to the definition of alumni engagement is the belief that these activities must have significant value to alumni while also supporting the institution’s mission. As alumni become more discerning regarding their charitable investments of time, talent and treasure, it is incumbent upon institutions to add value to the alumni engagement experience.

## Definitions of Alumni Engagement Categories

The Task Force agreed that the primary categories of alumni engagement are volunteer, experiential, philanthropic and communication. Rather than attempt to list each possible engagement activity, the Task Force developed inclusion criteria within each definition of the proposed engagement activities to guide institutions in determining which activities to classify as engagement.

### **VOLUNTEER**

**Formally defined and rewarding volunteer roles that are endorsed and valued by the institution and support its mission and strategic goals.**

Examples of volunteer engagement include: governing or advisory board members; student recruitment career mentors; public advocates and classroom speakers. However, the Task Force recognizes that as the metrics model evolves, it is likely that a more expansive list of volunteer engagement roles, which could be categorized differently, will be developed.

There was also discussion about ranking or weighting volunteer roles, based on the depth and breadth of volunteer assignments. The Task Force believes these questions will be answered as the alumni metrics project grows and matures.

### **EXPERIENTIAL**

**Meaningful experiences that inspire alumni, are valued by the institution, promote its mission, celebrate its achievements and strengthen its reputation.**

The Task Force wished to expand the scope of this category beyond the traditional view of alumni relations as a series of special events. While traditional events such as homecomings and reunions

would remain in this category, there is a recognition that alumni interests are changing dramatically. Experiential engagement activities will need to provide compelling reasons for alumni to participate and will need to show significant value to alumni to optimize relationships.

### **PHILANTHROPIC**

**Diverse opportunities for alumni to make philanthropic investments that are meaningful to the donor and support the institution's mission and strategic goals.**

Philanthropic engagement represents all forms of financial and in-kind support of the institution. It includes annual, planned and campaign giving; equipment; art work; real estate; and securities and other qualifying charitable gifts, including gifts paid to affiliated organizations, self-governing alumni associations and athletic booster clubs.

The Task Force supports the belief that philanthropic engagement is optimized when the interests and goals of the donor and the institutional mission are equally considered.

The Task Force recognizes that the term *philanthropy* at times includes activity beyond financial support. For purposes of the Task Force work, philanthropy will be limited to financial support.

### **COMMUNICATION**

**Interactive, meaningful and informative communication with alumni that supports the institution's mission, strategic goals and reputation.**

The Task Force takes the position that interactive forms of communication with alumni be recognized as engagement, a position supported by the CASE Commission on Communications and Marketing. This would include social media posts, class notes submissions, social media "likes" and other forms of interactive communication. Activities such as mailing a publication or distributing an

electronic communication, while valuable, would not be included in the category of communication engagement, a position also supported by the Commission on Communications and Marketing.

Data collection of communication engagement will come with significant challenges and will likely evolve over time. This point notwithstanding, the Task Force recognizes the scope and potential impact of communication engagement now and in the future.

## Engagement Measurement Inputs

Inputs are defined as the basic resources that are needed to develop and manage an alumni engagement program and include the following:

- Number of living alumni
- Total institutional alumni relations staff FTE (full time equivalent)
- Total institutional alumni relations staff salary budget
- Total institutional alumni relations program budget

For purposes of simplicity and uniformity, the Task Force recommends the measurement metrics include only alumni relations inputs, with the option to broaden this later. The Task Force also recognizes that the data collection may be difficult for some institutions. As the Task Force views this project as a work in progress, participating institutions will be asked to report data that is readily available.

The Task Force debated the inclusion of the cost of staff benefits as an engagement input. Recognizing that this would be filled with complications due to wide differences in staff benefit programs, only salary was included.

The engagement input data will allow institutions to assess the impact of their financial investment in engagement activities year over year and to build rationale to support increasing and/or redirecting financial resources.



## Data Collection, Reporting and Analysis

The Task Force proposes a simple approach to alumni engagement data collection. Each individual who participates in any of the engagement activities described above will be recorded on an annual basis. Each institution will need to determine where this data is recorded. The role of both advancement services and information technology staff will be critical in creating this data collection infrastructure.

CASE staff will research metrics data collection instruments that have been developed by individual institutions and communities of practice. CASE will create a simple data collection instrument in consultation with the Commission on Alumni Relations and the Task Force. The collected data may be analyzed in several ways, including:

- Total number of alumni engaged across the four categories
- Total number of alumni engaged in each category
- Total number of alumni engaged in multiple categories
- Total number of unduplicated engaged alumni

Institutions will be able to track this data over time to assess the impact of engagement activities, to evaluate programs and to develop strategic engagement goals. Alumni engagement metrics data can be used by institutions to support ongoing success and continuous improvement. Data can also be used to build correlations to demonstrate the impact

that engagement has on alumni behavior including giving, hiring the institution's graduates or recommending the institution to potential students.

While the data lend themselves to peer benchmarking, the Task Force recognizes the limitations of benchmarking since no two institutions are alike. The Task Force does not support the creation of a ranking system for alumni engagement.

## Preliminary Rollout

The Task Force has solicited input from a wide variety of CASE members and communities of practice. Its goal was to ensure that the developing framework is comprehensive, and creates a common language. The Task Force members have listened to input solicited from fellow professionals. The following list of communities of practice have served as focus groups to comment on the proposed plan.

Private College & University Alumni Directors  
(PCUAD)

Council of Alumni Association Executives  
(CAAE)

CASE Summit for Leaders in Advancement

CASE/Universia Latin America Conference

New England Alumni Relations  
(NEAR) Conference

Alumni Relations Exchange Conference

Graduway Global Leaders Conference

CASE Europe Annual Conference

CASE Institute for Senior Alumni  
Relations Professionals

CASE Commission on Communications  
and Marketing

Group of Eight (Australia)

CASE Conference for Community College  
Advancement

## Frequently Asked Questions

### **Will the proposed Alumni Engagement Metrics (AEM) instrument create another set of rankings and required standards?**

No. The AEM provides a framework for institutions to measure alumni engagement, but is not a required set of standards. The metrics data will help institutions record data over time, which can assist them in tracking and monitoring progress in alumni engagement activity. The AEM is not meant to measure alumni engagement against peer institutions.

### **The AEM seems rather basic. Is this by design?**

Yes. CASE has more than 3,700 institutional members located in 82 countries, each with unique structures, experiences and resources. The Task Force created a metrics system that can be used across the CASE membership spectrum. The primary value of AEM is to allow institutions to internally analyze engagement data for planning purposes.

### **My institution has been tracking alumni engagement metrics for some time. Will we be expected to stop what we are currently doing and adopt the AEM?**

No. The Task Force recognizes that many institutions are currently tracking engagement metrics, which the task force fully supports. We also recognize that many institutions are not tracking engagement metrics but are very interested in beginning this task. It is our hope that the AEM will provide a basic framework, which will evolve over time, for those institutions wishing to begin to track engagement metrics.

### **Will implementing the AEM require a lot of extra work from alumni staff, who are already very busy?**

We don't think so. Our goal in creating AEM was to develop a system that was simple and easy to implement. However, the data collection will require

strong internal partnerships, particularly with IT and advancement services.

### **There seem to be opportunities to take a deeper dive on much of this data. Does the task force anticipate further developing the AEM?**

Yes. We expect to learn many lessons once AEM is implemented and anticipate that the instrument will grow in sophistication over time.

### **How will the data be collected?**

The CASE staff is developing a simple online reporting tool to collect and store the basic AEM data.

### **My alumni relations program actively engages students and parents. Why aren't they included in AEM?**

In our desire to keep the AEM data collection simple and consistent, we decided to focus on alumni only. However, we anticipate that as AEM evolves, parents, students and other constituents could be added.

### **Can my institution participate in the AEM data collection if we don't have all the data requested in the survey?**

Yes. We want to encourage all institutions to participate, even if in a limited manner.

### **Including the communication engagement category makes sense, but I am concerned about the data collection.**

While we think it is important to include communication engagement, we recognize the challenge of data collection. More discussion will be necessary.

### **How are we to decide if our engagement activities should be included in our data collection?**

The task force created definitions for each engagement category so that an institution can decide the activities to include. If you determine that your activity meets the definition, include this in your data collection.

## Alumni Engagement Metrics Task Force Members

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