



**Improving Relations with
Nontraditional Alumni:**
*Strategies for Engaging Former Continuing
Education Students and Soliciting Donations
from Nontraditional Alumni*

Custom Research Brief – December 11, 2008

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Sources:

- The Advisory Board Company's internal and online (www.advisory.com) research libraries
- Education Resources Information Center (ERIC) www.eric.ed.gov
- National Center for Education Statistics www.nces.ed.gov
- U.S. News & World Report www.usnews.com/college
- The Chronicle of Higher Education www.chronicle.com
- Internet, via search engines and multiple university Web sites

Research Parameters:

As requested by the member university, the Council focused its research on:

- Institutions with large nontraditional student populations (i.e., continuing education students, adult learners, distance learners, etc.)
- Public and private four-year institutions with continuing education programs

A Guide to the Institutions Profiled in this Brief

Institution	State	Classification	Total Enrollment	Undergraduate Student Age	Continuing Education Enrollment	Distance Education Enrollment	Ranking
A	NJ	Private, Baccalaureate College	2,056 (all undergrad)	34% 25 +	10%	38%	Liberal Arts Colleges, Fourth Tier
B	OH	Private, Very High Research	9,844/4,207	3% 25 +	58%	81%	National Universities, Top 45
C	NY	Public, Master's University	12,914/12,197	83% 25 +	8%	8%	Master's Universities, Unranked
D	NY	Private, Baccalaureate College	17,435/15,014	95% 25 +	Not Available	Not Available	Liberal Arts Colleges, Unranked
E	DC	Private, High Research	25,078/10,701	7% 25 +	11%	78%	National Universities, Top 55
F	IL	Private, High Research	15,545/9,950	9% 25 +	9%	65%	National Universities, Top 115

Note: Above data is from the National Center for Education Statistics and U.S. News & World Report.

Project Challenge:

The provost at a private research university on the East Coast approached the Council with the following questions:

What are effective strategies for encouraging continuing education students to engage in alumni activities and, ultimately, to contribute financially to an institution? How do other universities connect with alumni and former students who are in their thirties and forties (a traditionally difficult cohort to solicit donations from due to their numerous financial responsibilities and family obligations)?

Introduction:

In an effort to connect with a traditionally detached alumni population, the requesting member is looking to develop effective strategies for encouraging continuing education students to engage in alumni activities and, ultimately, to contribute financially to the institution. The provost at the member university notes that while adult learners are loyal to the institution, they usually do not have the opportunity to form substantial relationships with other members of the campus community. Consequently, the Alumni Engagement and Development offices struggle to solicit gifts and remain connected with this unique student population.

Additionally, the member explains that it is difficult to engage former students who are in their thirties and forties, as these individuals have numerous financial responsibilities and are often busy raising families. Therefore, the provost tasked the University Leadership Council with identifying innovative methods for reaching out to alumni in their thirties and forties (as well as nontraditional continuing education students in this age group) and encouraging them to donate to the university.

Colleges and universities across the country face similar challenges in engaging these former adult learners and nontraditional alumni. The Council found that administrators at both institutions that strictly serve continuing education students and universities with smaller adult learning populations all stress the difficulty of soliciting donations from these unique alumni groups. Despite these common frustrations, each institution contacted was able to share successful outreach practices for connecting with graduates of continuing education programs and alumni who are in their thirties and forties. These insights are profiled in the following pages.

Key Findings:

- **None of the institutions interviewed solicit donations from current continuing education students.** Most colleges and universities base the decision on whether or not to appeal to current adult learners for donations on the campus culture and student body profile. At Institution F, for example, many undergraduates are “first generation college students who struggle to afford tuition, let alone an additional contribution to the annual fund.” Therefore, contacts explain that Alumni Relations has a strong policy against asking students to give financially while they are enrolled in the university. Similarly, contacts at Institution C explain, “They’re working adults with many other financial burdens. We’re not going to ask them for money on top of what they are already paying in tuition. Some schools may do senior gift programs, but we don’t engage in anything like that.” While Institution D does not have a formal senior gift program for adult learners, the final “conferral of degree” bill includes information about joining the alumni association and asks if the future alum would like to make a graduation gift.
- **Segmenting the overall alumni population into smaller interest groups, such as “continuing education alumni” or “graduates of the School of Business” enables institutions to message directly to a specific cohort.** While most institutions send nontraditional alumni general, university-wide outreach, many accompany such solicitations with more direct letters that address the graduate’s particular program or unique experience as an adult learner.

Key Findings (Cont'd):

- **Institution B was the only institution contacted that does not specifically target former continuing education students with Alumni Relations outreach and donation solicitations.** Many contacts note that one of the biggest indicators of future giving is past philanthropic involvement with an institution. At Institution B, nontraditional alumni historically do not contribute financially to the university. Therefore, the school's University Relations and Development office does not focus its resources on this segment of the population. As explained in greater detail on page 8, University officials cite Institution B's "charge-back" system for development services as a major reason why colleges at Institution B choose not to target former adult learners for donations. Contacts at the five other institutions interviewed emphasize the need to tailor the messaging in alumni publications and gift requests in order to spur nontraditional alumni to donate.
- **None of the institutions interviewed use age as a control when segmenting the alumni population; thus, they do not explicitly target graduates who are in their thirties and forties.** While contacts at each of the colleges and universities profiled note that their institutions struggle to keep in touch with alumni in their thirties and forties, only one school offered a strategy for engaging with this cohort, a groups that is often described as being too preoccupied with family and financial responsibilities to remain connected to their alma mater. Institution A deliberately markets their annual Homecoming Weekend as a free, family-friendly event. Contacts at Institution A explain, "Even though they might not be in a position to give right now, the idea is to keep alumni connected, so that when they finally have the capacity to donate, they are engaged with the college and still want to give back financially."

Common Forms of Outreach

While outreach varies by institution, there are several methods that all of the colleges and universities profiled use to connect with former continuing education students. The following table highlights each of these strategies and provides a brief overview.

Strategy	Overview of Strategy
Direct Mailings	Whether an invitation to a reception or a donation solicitation, mailings typically include specific information that relates to the targeted alumnus' experience at the institution. Schools with predominantly nontraditional student populations often draw on the connection alumni have with certain faculty members or their particular field of study. Those institutions with a mix of traditional undergraduates and adult learners tend to send continuing education alumni direct mailings, which are separate from those issued to the general alumni population. This segmentation allows the institution to connect with a specific cohort and invite them to events that are based around their field of study (e.g., faculty lectures, academic program-based receptions, etc.) rather than their graduating year.
Email	Similar to traditional mailings, colleges and universities communicate with former adult learners via email to remind them to update their biographical information when necessary (e.g., after moving or changing jobs). Most contacts report that the institution connects with alumni through personalized emails (as opposed to generic mass messages).
Web site	Maintaining an up-to-date alumni Web site makes it relatively easy for graduates to join the alumni association, provide accurate biographical information, and stay informed about upcoming events and reunions related to their professional field and academic division.
Phonathon	While some institutions conduct phonathons for the explicit purpose of soliciting donations or inviting alumni to an upcoming event, it is common for institutions to use the interaction as an opportunity to identify how former nontraditional students view the institution and the ways in which they would like to remain connected. The Alumni Relations and Development staff draws on this insight to craft future solicitations that target the specific experience of continuing education alumni and to plan events that appeal to this unique cohort.
Alumni Magazine	All of the institutions contacted for this report publish an institution-wide alumni magazine, which often includes news about the school; upcoming events; and various alumni, faculty, and current student profiles. In addition to sending former adult learners the general alumni magazine, some institutions also distribute a separate publication geared specifically toward the unique experience and interests of the institution's nontraditional alumni.
Alumni Association Chapters	In order to facilitate connections between graduates and their alma mater, alumni offices typically organize affinity groups and regional chapters of the alumni association. Unlike traditional graduates, continuing education alumni rarely identify with those who graduated in the same year. Instead, the connection for these former adult learners is often with the faculty members and other nontraditional students in their field of study. Therefore, these alumni chapters tend to be program-based or related to a professional industry rather than targeted at cohorts such as "The Class of 2008" or "all graduates of the School for Continuing Education."

During the course of research, the Council uncovered numerous examples of institutions that have brought unique twists to the traditional strategies discussed above. These, and other more innovative methods of outreach, are profiled in depth in Section III of this brief.

Introduction:

About 35 percent of this small, independent institution's 2,000 undergraduates are considered Adult Learners – nontraditional, continuing education students, who balance professional and family responsibilities with a rigorous academic course load. Whether enrolled full-time in a traditional day program or simply taking evening and weekend classes on a part-time basis, adult learners have needs that differ greatly from those of their 18 to 22 year-old counterparts. Contacts at Institution A explain that most continuing education students commute to campus for a few hours per week and thus have limited interaction with the traditional undergraduate population. The Alumni Relations staff recognizes that once these adult learners receive degrees, they will have a unique connection to the college, one that necessitates employing unique outreach strategies in order to keep the cohort engaged and willing to give back.

Engaging Alumni:

Former Continuing Education Students

Program-Specific Events – Contacts note that nontraditional alumni often feel a closer connection to the faculty and other graduates of their academic division than they do the college as a whole. Therefore, instead of planning reunions around a specific class year, the Alumni Relations office provides former adult learners the opportunity to reconnect with professors and alumni of the same academic field at division-based events.

Spotlight: Dinner with Your Favorite Professor

The Alumni Relations staff at Institution A recently teamed up with the Dean of the Humanities Division to plan an event for alumni of the History, English, Philosophy, and Religion programs. According to contacts, this partnership was necessary for two reasons:

1. Former students typically keep in touch with their professors, updating them with their current contact information
2. Alumni are much more likely to attend events if they receive a personalized invitation from their "favorite professor"

Of the 80 alumni invited to the Humanities Reunion, 30 returned to campus to dine with 20 of their favorite professors. Contacts note that an upcoming event will center on the retirement of a longtime member of the faculty.

Alumni in their 30's and 40's

Family-Friendly Homecoming – While Institution A does not tailor donation solicitations to specifically target traditional or nontraditional alumni in this age group, contacts note that Alumni Relations promotes Homecoming as a free, kid-friendly event for the whole family. Offering games and activities, like a moonwalk, face painting, and arts & crafts, the college is able to attract this traditionally disconnected cohort back to campus by appealing to their children.

"Even though they might not be in a position to give right now, the idea is to keep alumni connected, so that when they finally have the capacity to donate, they are engaged with the college and still want to give back financially."

– Director of Annual Giving and Alumni Relations

Regional Receptions – Institution A also hosts regional receptions with the president. These events appeal to alumni who "are not as attentive and too busy to be involved with on-campus activities." Contacts caution against using regional receptions to solicit donations from alumni who have not been engaged with the institution in the past. "We make it as easy as possible for this group to attend receptions and connect with the college, but you need to be careful not to push too hard when it comes to asking for financial contributions."

Engaging Alumni (cont'd):

Interactive Website – Institution A recently re-launched its alumni Web site, which now includes an online version of the alumni magazine, a link to the Alumni Association’s Facebook page, and downloadable photos from past alumni events. Contacts note that the site’s interactive format and continually updated content “entices alumni to continue to return to the page to see what’s new at the college - a simple way to keep them connected.”

Understanding the Culture:

Engaging with nontraditional alumni is a challenge for any institution, which is why contacts at Institution A emphasize the need to understand this group’s unique perspective. The following are strategies for doing so:

Alumni Surveys – In order to gain an understanding of how alumni – both traditional and nontraditional – view the college, the Alumni Relations office frequently surveys graduates about their experience as students and the programming they would like the institution to offer. While only 15 percent of the alumni contacted actually responded to the questionnaire, contacts state that the results from the 500 completed surveys are very helpful when segmenting alumni. By grouping former students by common interest areas, Institution A is able to target these populations with direct mailings that reference their experience as students as well as the types of activities they identified on the survey as being appealing to them as alumni.

Informal Interviews – Alumni Relations and Development officers are also able to glean information about an alumnus’ connection with the institution through informal conversations. Whether a phone call, an email exchange or an on-campus visit, contacts at Institution A highlight the importance of having constant interaction with former students. Establishing an “open door” policy and encouraging graduates to call or stop by any time is an effective way of garnering information on how they want to engage with the college.

Through these surveys and individual conversations, the Alumni Relations office is able to develop programming around the specific needs of the alumni population– in general, and for targeted groups like former continuing education students. Contacts explain that by asking nontraditional alumni exactly how they would like to engage with the college, the Alumni Relations staff better understand what sort of events to plan. Development officers gain information about how to tailor their messaging to appeal to prospective donors.

Messaging:

With a keen understanding of each segment of the alumni population’s relationship with their alma mater, the Alumni Relations Office at Institution A works with the Development Office to create a post-graduate experience for the individual cohorts that will encourage them to remain engaged, and ultimately, to donate to the college. At Institution A, nontraditional alumni typically identify with their professors and the academic programs in which they were enrolled as students. While some former continuing education students connect with the general adult learner population, most see themselves as graduates of a particular division (e.g., Humanities). Therefore, instead of asking nontraditional alumni to contribute to the Weekend Program for adult learners or the institution in general, Development officers usually draw on an alum’s experience within their specific academic program when soliciting donations.

Introduction:

With no school specifically dedicated for continuing or professional studies, and adult learners comprising just three percent of the undergraduate population, Institution B does not focus on engaging nontraditional students in fundraising activities. Contacts in the University Relations and Development office echo the sentiment communicated by many other officials that the principal indicator of future philanthropic involvement is whether or not an individual has a history of giving to an institution.

Due to the fact that most continuing education alumni do not typically contribute financially to the university, Institution B has decided not to allocate resources to pursuing former adult learners. The case study below highlights the specific internal factors that serve as disincentives for the university's college divisions to target this unique alumni population.

The Charge-Back Model

In order to explain the reasoning behind Institution B's decision not to pursue former adult learners with outreach and donation solicitations, it is important to first describe the structure of the university's Alumni Relations and Development office. Contacts at Institution B note, "There is one major systemic barrier to acquiring new donors like nontraditional alumni, and that the charge-back system we use for our development services."

Institution B is made up of nine colleges, each of which has an Alumni Relations and Development staff dedicated to engaging and soliciting donations from the school's graduates. The number of staff assigned to a particular college ranges from five to 25 full-time employees, depending on the size of the alumni population. In addition to the college-specific advancement teams, Institution B also has a central University Relations and Development office. While the college-specific officers organize programming and decide which alumni to solicit donations from, the central division is charged with actually managing direct mailings and conducting phonathons. Contacts state that this structure has two benefits:

1. Releases the individual colleges from being responsible for allocating resources to any unwanted university-wide fundraising campaigns
2. Enables the dedicated officers to choose how often they would like to conduct outreach/how much they want to spend on solicitation efforts

For example, the law school's advancement team may request that the central University Relations and Development office send a mailing targeted at the school's alumni. In order to include messaging specific to former law school students, the college's dedicated staff will work with the central team to craft the letter, but will not actually be involved in sending the mailing or managing responses. Similarly, if the College of Arts & Sciences would like to conduct a phonathon, the school's dedicated Alumni Relations and Development staff will instruct the central office as to which graduates to contact, but will not actually staff the phone banks. The College of Arts & Sciences is then billed a flat rate (\$5,50) for each call the University Relations and Development staff makes on the school's behalf. In other words, Arts & Sciences is charged the same amount whether an alumnus donates 10 dollars or 10 million dollars. The college, therefore, will choose to target alumni who consistently contribute or are likely to contribute in the future. Former adult learners and nontraditional alumni rarely meet either of these criteria.

"From the school's standpoint, it is not worth it to contact continuing education students, alumni in their 30s and 40s, those alumni who just graduated or students who are still working on their degree because they are not likely to give."

— Executive Director for Administrative Affairs,
University Relations and Development

Introduction:

With the average student matriculating at the age of 40, this Master's university in Upstate New York serves a largely nontraditional student population. Part of a large state university system, Institution C enrolls approximately 13,000 adult learners in a variety of online and onsite degree programs. Because the majority of courses at Institution C are offered as independent studies, students form closer bonds with their professors than they do with their peers. Contacts explain, "The college doesn't actually have classes at one central campus, so students don't know each other while enrolled, and therefore, they don't know each other as alumni."

Engaging Alumni:

Despite the fact that almost 85 percent of college's student body is over the age of 25, contacts note that Alumni Relations and Development outreach methods are "probably more alike than different from other universities' strategies."

"Unlike other institutions where nontraditional students make up a small portion of the overall population, we focus on those alumni; that's all we do."

– Director of Alumni and Student Relations

Former Continuing Education Students

Prospective Student Recruitment – According to contacts, alumni are very willing to volunteer to speak with prospective students about their college experience and the benefits of receiving a degree from Institution C. With graduates scattered throughout the state, Alumni Relations typically hosts student recruitment events where there are large concentrations of former students. Contacts stress, "We only launch alumni volunteer events in regions where there is enough staff and alumni interest to ensure a successful event. We want alumni to leave feeling really good about what they did, so that when they go home they will have a positive experience with the college fresh in their minds." Contacts state that most graduates measure the success of an event according to whether they were able to discuss their experience at Institution C with prospective students. Therefore, it is vital that alumni have the opportunity to do interact with prospective students at these events. As contacts explain, "Alumni are not coming to a reception to socialize with other graduates because they are all strangers. There has to be something at the event that appeals to them."

Faculty Lectures – Due to the fact that alumni are more interested in reuniting with their former professors than their classmates, the Alumni Relations staff does not organize class reunions or homecoming activities. Instead, alumni events center on faculty lectures or academic topics targeted at a particular cohort of graduates.

"We'll invite alumni to an academic lecture by a key member of the faculty that the vast majority of alumni in a particular region have taken a course from. If a professor is retiring or doing a seminar or a workshop, alumni are more likely to come out to that event, because that's the connection they have to [Institution C]."

– Director of Alumni and Student Relations

Alumni in their 30's and 40's

Recognizing that alumni in this age group are usually smaller donors, the college does not invest significant resources into targeting those graduates who are in their thirties and forties. According to contacts, "They often say, 'once my kids are out of college, I'll contribute more.'" Thus, while these former students are unable to give back financially, Alumni Relations encourages them to participate in volunteer events. By fostering a relationship and not focusing on soliciting donations, Institution C is able to keep these graduates connected to the institution, which will hopefully lead to future gifts.

"Those alumni who volunteer with us now are more inclined to give back later on in the form of financial contributions to the college."

– Director of Alumni and Student Relations

Messaging:

Whether a phonathon, a direct mailing, an e-mail blast or the alumni magazine, the outreach methods Institution C employs to connect with alumni are the same that most colleges and universities use. What is unique about Institution C's strategy is how the Alumni Relations office messages to former students. As contacts explain, "The methods we use are the same. It's the message and the nature of the appeal that needs to change." Therefore, the college focuses on the alumni-faculty connection, profiling professors— as opposed to current students or alumni— in many publications and mailings.

"You have to create an emotional connection between your college and the alumni. Every institution does that. If it's the University of Virginia, they are going to conjure up the image of the Rotunda, their signature building, with students sitting in front of it on the quad. That's their connect to the university."

— Director of Alumni and Student Relations

Unlike UVA, Institution C's "campus" solely consists of a central administrative complex of offices. As Institution C offers classes at locations throughout New York State, there is no one physical image to reflect the common experience of all students. In order to make the emotional appeal necessary to engage alumni and solicit donations, Alumni Relations references the close student-professor relationship and highlights that the college affords adult learners the opportunity to earn a degree in a flexible and convenient way. As contacts state, "We try to emphasize that we helped you earn a degree at a time when you couldn't have done it any other way."

Spotlight: Letter from the President of the Institution

Contacts describe the "soft appeal" as an art form that relies on a solid understanding of institution's culture and a message appropriate for the target audience. At Institution C, the Alumni Relations and Development staff have mastered this less overt form of solicitation by taking into consideration two important characteristics of their alumni population when crafting outreach letters:

1. Former students are often too busy and disinterested to read long descriptions of past events and current happenings at the college
2. Many alumni resent frequent requests for donations

In order to address these issues, the college only sends the alumni newsletter three times per year and it comes directly from the president's office. As contacts explain, "We make it short and to the point - just a couple of bulleted paragraphs about upcoming events, faculty news, and an appeal to join the online community." The closing lines of the letter thanks the alumnus for his/her continued support of the college. Other than enclosing a return envelope, there is no reference to the need for future contributions, which, according to contacts, alumni appreciate: "It's a very soft ask, but it's one of our most successful appeals."

Introduction:

Since 1971, 121,000 adult learners have graduated from this unique Baccalaureate college in Upstate New York. With 95 percent of the student population over the age of 25, Institution D offers working adults the opportunity to earn Liberal Arts, Business, Technology, Nursing, and Health Sciences degrees by combining credits earned through completing:

- Distance courses from the college and other regionally accredited institutions
- Traditional courses at a local campus
- For-credit examinations
- Work, community, and volunteer experiences

Engaging Alumni:

Due to the fact that at Institution D there is no central campus and students are not required to take any traditional in-class courses, contacts note that many graduates have never met a single administrator, professor, staff member or “classmate.” Therefore, it is a major challenge for the Alumni Relations staff at Institution D to build a sense of affinity for the institution based on an alumnus’ experience at the college. Instead, Alumni Relations seeks to engage alumni by appealing to their will to interact with prospective students.

“Before deciding what kinds of events to hold, we did a fair amount of background research. We surveyed our alums and found that they wanted the chance to talk about their educational experience and the value of the college with prospective students.” – Director of Development

Prospective Student-Alumni Events

In the past year, the college has launched a series of events that not only allow alumni to interact with one another, but also give them the opportunity to speak with current and prospective students. To date, Alumni Relations has hosted two regional receptions, one in Buffalo, New York and a second in San Francisco, California. Contacts explain that the locations were chosen by active alumni who offered to oversee the logistics of securing a venue to hold the event and help plan the format. In order to appeal to a wide range of graduates, the college also had prominent faculty and alumni speak at the receptions.

Personalized Outreach – While only 60 alumni attended the two receptions, contacts note that direct outreach was an effective way of reconnecting with many graduates who had not been in touch with the college since receiving their degree. The two full-time Alumni Relations staff members called 300 alumni for each event. While admittedly time consuming, contacts state that personally inviting graduates over the phone was a very successful form of outreach:

“Everyone we contacted knew that the college called and really cared whether or not they were going to come to the event. If they came, that was great. If we were able to speak with them and they couldn’t make it, we were still able to glean some information about their connection to the college. And we at least left messages for those who didn’t answer, so that they knew we were trying to get in touch. It will be interesting to see if that had any sort of impact, but I do think it was worthwhile to make all of those calls.” – Director of Development

According to contacts, the events highlighted the need to keep already active alumni involved with the college. During phone conversations and at the actual receptions, many graduates mentioned that they wanted more opportunities to remain connected to their alma mater. The following page addresses additional tactics Institution D employs to engage the college’s alumni population.

Engaging Alumni (cont'd):

Alumni Association Advisory Board – The Alumni Association is represented by an advisory board of nine elected alumni members. Advisory board members and the Executive Committee (president, vice president, and secretary) each serve a three-year term. Contacts explain that the board, which has been affiliated with the college since its inception, recently took on a more “action-based and tactic-driven role.” In an effort to engage alumni in volunteer activities, the board is currently working to create an alumni outreach committee. According to contacts, the group would attend college fairs and visit military bases to talk with prospective students about their experience at the college.

Program Spokespeople – The Alumni Relations office recently partnered with Admissions to create a database of volunteer alumni spokespersons who travel the country talking about the college. Contacts note, “The Criminal Justice program is a key area that we are working with Admissions to provide alumni profiles and testimonials about the experience they had.” In order to identify potential spokespersons, Alumni Relations simply sent a target blast e-mail to all graduates of the Criminal Justice program. According to contacts, “We got a great response. People want to be involved with the college, so when you ask them, they feel very honored.”

Commencement Ceremony – Every July, the college holds a commencement ceremony in Albany, New York. In addition to presenting diplomas to graduates, the college invites alumni to the event to reunite (and in most cases, meet) their classmates and professors. This past year, there were about 200 alumni in attendance, which Alumni Relations used as an opportunity to understand the types of future programming they would be interested in attending. Additionally, the staff explicitly ask graduates to describe how their degree has impacted their life. Contacts explain, “After commencement, we send a personal email to each of the attendees saying, ‘We’re so glad to have met you and enjoyed hearing your story. Would you mind sharing more of it with me?’ People want to tell their stories and we like to include them in our donation solicitations.” Whether volunteering or giving financially, contacts state that those who attend commencement are much more engaged with the college.

Solicitation Messaging:

According to contacts, the college initiated a new development strategy about 10 years ago. Employing many common outreach tactics (e.g., direct mailings, phonathons, online giving, alumni magazine, etc.), the Development office focuses on solicitation messaging.

Informal Surveys – Contacts stress the importance of understanding why alumni believe it is important to give back. “Whether at commencement or a regional event, we take advantage of every opportunity to talk with an alumnus and get their story. And we use those quotes in our letters to other alumni – testimonials about how others made it possible for them to earn their degree, so the feel it’s their duty to provide future students with the same opportunity. I think what alumni say is going to resonate more than anything we would create in the Development office.”

“Unlike schools where there is a big faculty-student connection to draw on in outreach, we tend to focus on alumni stories as opposed to faculty and staff stories. Other colleges probably have more course work than we do, so there’s that connection. It’s a different experience here, so we can’t use that in our solicitations.”
– Director of Development

Alumni Testimonials – Instead of emphasizing the relationship alumni had with their professors, Institution D’s solicitations tend to highlight how graduates use their degrees to advance their careers and improve their lives. While contacts admit that the college is not “wildly successful with fundraising” (just 3,000 of the school’s 121,000 alumni donated in 2007-08), they argue that including alumni stories in the outreach is instrumental in encouraging other alumni to give: “When we talk with them about their reasons for giving, they sometimes cite an alumni testimonial – something they heard another graduate was able to do because of their degree.”

Solicitation Messaging (cont'd):

College Mission – The Alumni Relations and Development staff underscores the college's commitment to providing an education to all those who desire one in all solicitations and alumni outreach. Contacts note that unlike a for-profit institution, such as the University of Phoenix, in serving military personnel and nurses, among others, Institution D has a mission that inspires alumni to give back to the institution.

"We are not just enrolling students who are 18 and just getting their degree because their parents are paying for it. And we're not educating those who are just doing it for career advancement. We're educating people who are really going to change the world - guarding our borders and working in our operating rooms. Who wouldn't want to donate to a cause like that?"
– Director of Development

Staff Donations – Because of this culture of serving the common good and providing an education accessible to the masses, contacts explain that the college actually has a high staff giving rate: "Over 50 percent of our staff participated in the Annual Fund last year, which was a 25 percent increase from the year before. They identify with the college's mission and commitment to helping those who want an education to get one, so they give to many of our scholarship programs." Faculty and staff donations grew organically at Institution D. According to contacts, professors and administrators would hear about their colleagues giving to the Annual Fund and want to get involved as well.

"Staff participation is a message that we are trying to spread, not only to alumni, but to other members of the faculty and administration. The scholarship letters explain that the staff contributes greatly and feel strongly about providing people with the opportunity to receive an education. Like all of our outreach, we try to take a very personal approach – put a face to the solicitation."
– Director of Development

Messaging by Age – The college takes a broad based approach to alumni outreach, and thus, does not specifically target any particular age group. According to contacts, "Age is not much of an indicator of future gifts with our alumni population. So we don't necessarily focus on thirty and forty-year-olds. But we're also not just targeting seventy and eighty-year-olds."

Outreach Strategies:

Alumni Magazine – The college sends the alumni magazine to all degree recipients twice per year. The publication simply includes a return envelope and a general message about the importance of giving back.

Direct Mailing – Contacts argue that it is "not worth it to reach out to those who aren't likely to give." Therefore, the college only targets those who have given (or graduated) in the past five years with its direct mail campaign. The personalized letter is then followed up with a phone solicitation.

"An organization can spend a ton of money trying to reach out to alumni who haven't given in the past, but what's the actual return on your investment? Research shows that those who consistently give are the best prospects for future giving, so we focus on them."
– Director of Development

Graduation & Anniversary Donations – While the Alumni Relations and Development offices do not solicit donations from current students, in general, the Institution D encourages those graduating to consider making a "graduation gift." Additionally, contacts note that in a recent effort to cultivate new donors, the college has begun soliciting gifts from alumni on the one-year anniversary of the conferral of their degrees.

Introduction:

The programs of the College of Professional Studies (CPS) at Institution E are designed to appeal to adult learners and working professionals. According to contacts, "CPS offers undergraduate and graduate programs that address the competency requirements of adults working in emerging and rapidly changing professions." In addition to offering on-campus courses, the university also supports part-time graduate degree and certificate programs at off-campus locations and through online distance learning.

Targeting Nontraditional Alumni:

Despite the various opportunities for continuing education students, contacts note that adult learners only make up a small percentage of the overall student population. Therefore, unlike other institutions, which solely serve nontraditional education students, Institution E does not focus a significant amount of time or resources on soliciting donations from former continuing students.

No Dedicated Development Officer – While the University assigns a Development officer to each of the traditional undergraduate and graduate colleges, there is no one staff member dedicated to the College of Professional Studies. Contacts explain that there is no need to dedicate a Development officer to the college because the Alumni Relations and Development office does not separate alumni into groups based on the colleges they attended. Instead, graduates are segmented by academic programs and professional industries.

"You have to stop looking at them from the point of view of how they attended the university and focus more on what they are doing now and what their interests would be. Once they are out in the work world, they are not differentiated."

*– Associate Vice President
of Alumni Relations and Development*

Alumni Relations at Institution E recognizes that CPS graduates have more of a connection with their academic or professional field than they do with the university as a whole. Thus, in order to engage these alumni, the university must appeal to their specific interests and not target them with university-wide messaging. Additionally, nontraditional alumni do not respond to solicitations that draw on their relationship with the College of Professional Studies or their class year. Contacts explain that class and college reunions generally do not work well for the cohort because "while they are in the program, there is rarely any discussion about a connection to the broader university and alumni base."

Academic Field and Industry-Based Receptions – Drawing from the model of professional conferences, which target all those who are engaged in a particular field, the university hosts receptions that integrate nontraditional and traditional alumni from an academic field or professional industry. Contacts note, "CPS alumni don't want to be seen as nontraditional. So, anything that promotes industry-wide networking should include them. We're doing receptions across schools for certain professional areas and we're getting a good response to those. Those events give CPS alums an opportunity to connect and keep up with their field."

Contacts stress that there is an important difference between targeting nontraditional alumni who have gone on to excel in their careers and seeking to engage former adult learners who simply took a few continuing education courses. Degree recipients, according to contacts, typically have some connection to the university and are thus willing to contribute financially or volunteer their time. Conversely, "the cohort of people who are just pulling together a bunch of credits to finish up their bachelor's, they are a lot more difficult to solicit and probably not worth reaching out to." Thus, the university only solicits donations from degree recipients.

Engaging Alumni:

Understanding that active alumni participation often leads to financial contributions, the Institution E seeks to engage all graduates, traditional and nontraditional alike, in alumni events and mentoring programs.

Alumni Advisory Groups – The university identifies nontraditional alumni who are successful in their respective fields and invites them to sit on advisory boards, which make suggestions to the administration as to how to create industry-connected programs. Contacts explain, “If you are a prospective student looking to earn a career-oriented, nontraditional degree, you are going to want evidence that it works. So, alumni with that degree who have succeeded in that field are great testimonials and are good people to advise the administration on how to market to those future students.”

“One indicator of future giving is past giving, but another is active alumni involvement. So, if you get someone who has been successful in their field to come back to talk to students, faculty or other alumni, you will begin to cultivate a relationship with them.”

*– Associate Vice President
of Alumni Relations
and Development*

Alumni-Student Career Mentoring – Alumni Relations and the Career Center work together to connect current students with alumni who graduated from the same academic programs. This alumni-student pairing is both beneficial for the student, who receives advice on possible careers paths associated with their particular degree, as well as to the alumnus, who forms a deeper bond with the university. As contacts note, “Alumni appreciate the opportunity to mentor students. It makes them feel like they have a role, a way to contribute to the university. It’s a recognition of their success.”

Alumni Weekends – The university hosts various alumni weekends that are targeted at specific graduates. While there are traditional class reunions, these events cater to nontraditional alumni as well, who may not have a connection with their continuing education classmates. Thus, receptions, lectures, and other activities center on a particular academic or professional field. According to contacts, “It is important to do good segmentation, so that you are inviting alumni who may actually be interested in attending the talk or the cocktail party.” Targeted invitations are necessary in order to avoid what many Alumni Relations officers refer to as “solicitation fatigue.”

“It annoys alumni if you over-contact them with solicitations or invitations that don’t relate to their degree. I know from personal experience that when my alma mater used to invite me to local sports bar events after I had already moved out of the area, I found that incredibly annoying, so I would just stop reading those mailings. But if my program invited me back for a conference in the area I got my doctorate in, well, that’s a different story.”

– Associate Vice President of Alumni Relations and Development

Introduction:

For almost 100 years, the School of Continuing and Professional Studies (SCPS) at Institution F has supported the educational goals of adult and other nontraditional learners. According to contacts, SCPS provides programs that allow continuing education students to complete their undergraduate degrees as well as “a new program of non-credit courses for professional development and lifelong learning.”

Structure of the Office of University Advancement:

The Office of University Advancement assigns at least one development officer to each of the university’s 11 colleges and schools. As contacts note, “larger schools may require more than one individual, and smaller schools such as the School of Continuing and Professional Studies do not require a full-time assignment.”

“The decision to introduce a dedicated Development officer for an individual school needs to be an institutional decision as to how to strategically allocate staff. We did it six years ago so that we could have customized messages for each of the schools. Every institution needs to look at their numbers, but it has worked for us.”

– Regional Director, University Advancement

Currently, there are four development officers who, in addition to other responsibilities, jointly cover SCPS. University Advancement designates one of the four as the main officer, dedicating 20 percent of that person’s time to working with the SCPS’s dean and managing planned and major gifts. A member of the Annual Giving staff manages mailings and phonathons ,while the university’s Corporate and Foundations Relations department manages corporate gifts to all colleges, including the School of Continuing and Professional Studies. Contacts also note that the Alumni Relations office manages various alumni events on behalf of SCPS.

General Alumni Engagement:

Due to the relatively small size of the SCPS programs, the school often takes advantage of larger, more general cultivation and stewardship events that are scheduled across the university.

Spotlight:

University-wide Endowed Scholarship and Distinguished Alumni Events

Each year, the university Stewardship Office holds an endowed scholarship event for donors and recipients of scholarship awards. While Advancement officers from the School of Continuing and Professional Studies are not involved in organizing or staffing the event, the school does invite alumni in hopes of soliciting new donations.

The university also hosts an annual distinguished alumni awards event. A dean from each of the colleges presents one award to an outstanding graduate of their school on behalf of the university. The program is organized and staffed by the central Special Events staff. According to contacts, “such an event is not necessarily a way of identifying new prospects, but often times, the university’s most distinguished alumni are also key prospects.”

Targeting SCPS Alumni:

Annual Giving Campaign – In addition to targeting nontraditional alumni with university-wide events, the SCPS Development officers also employ several school-specific solicitation strategies within the Annual Giving program. Contacts note, “The university’s Annual Giving strategies to engage SCPS alumni are similar to those utilized by the other schools and colleges.” Each fiscal year, the Advancement office sends two direct mailings and holds two phonathons. There is also a mass appeal sent to all SCPS alumni donors as well as various e-solicitations.

“Mass appeal and e-solicitations are not targeted to SCPS alumni specifically - they have a general [Institution F] message. However, the direct mail letters and phonathon scripts are targeted to [nontraditional] alumni based on their unique experience at [Institution F].”

*– Regional Director,
University Advancement*

According to contacts, the SCPS Annual Giving efforts have been relatively successful over the past few years. The phonathon is the most successful component, leading to the majority of converted donations. As the school only recently started sending direct mail letters, contacts explain “it is too soon to comment on the success or failure of these efforts.” Other colleges across the university report that the introduction of direct mail solicitations had a significant impact on the number of new donors. Contacts expect a similar response from SCPS alumni. Additionally, the school’s Advancement team is in the process of launching a targeted e-solicitation campaign for SCPS alumni in hopes of cultivating new nontraditional alumni donors.

*“At a college for adult learners like SCPS, by and large alumni don’t identify with their class, so we do not do reunions.” – Regional Director,
University Advancement*

Reunions for Nontraditional Alumni – The School of Continuing and Professional Studies does not currently organize reunion events for former adult students. As Institution F has historically been a commuter school, contacts state that this is an issue that the Advancement staff has grappled with for years. The idea of a reunion at Institution F in general is different from what an institution with a largely residential population would typically offer.

Soliciting Current Students:

Contacts report that SCPS does not solicit donations from current students: “It was an internal decision based on our campus culture not to ask current students - especially those who are working full-time or are in the SCPS - for financial contributions. At Institution F, the majority of students are first generation college students, often struggling to afford school in the first place, so we do not solicit donations from them.” Despite this current policy, contacts acknowledge that the university may eventually be open to reversing its stance on soliciting current students for financial contributions. Other universities in the Chicago area (e.g., Northwestern University) have begun asking seniors to donate to the annual fund, but as contacts note, that is an institutional decision: “You have to look at your climate and decide whether or not that is something your students would appreciate.” Advancement officers suggest working with the student government association when discussing how such a campaign would be received by students.

Understanding the Alumni Perspective:

Like officers at many of the other institutions contacted for this report, members of the Advancement staff at Institution F highlight the importance of understanding each segment of the alumni population’s perspective of the institution. Institution F accomplishes this by conducting a series of informational interviews with distinguished alumni. According to contacts, these one-on-one conversations are held with graduates who are specifically chosen to participate based on various criteria detailed on the following page.

Understanding the Alumni Perspective (cont'd):

According to contacts, these one-on-one conversations are held between high-level members of the university administration and key graduates. Distinguished alumni are specifically chosen to participate based on criteria, such as:

- *Past Giving* – Contacts note that alumni who consistently donate to the university, even a modest amount, demonstrate that they have an interest in, and affinity for, the institution.
- *Financial Capacity* – The Advancement staff researches public financial information available to identify the university's wealthiest alumni.
- *Participation in Alumni Events* – Those graduates who frequently attend receptions and volunteer activities are often tapped for these informal interviews.
- *Interested Alumni* – In order to avoid excluding other alumni who somehow did not meet the above criteria, the Advancement office also sends university-wide mailings, asking all graduates if they would like to participate. Contacts explain, "If they respond, they are demonstrating that they care and are interested in the future of the university."

The individual colleges' dedicated Development officers contact alumni who fit into any of the aforementioned categories and directly invite them to become more actively involved with the university through volunteer work, contacting fellow alumni, or increased giving. Before assigning a point-person to the School of Continuing and Professional Studies, the program's outreach efforts were fairly unsuccessful. Contacts argue that this is due to the fact that SCPS lacked a dedicated Development officer to follow up with interested alumni who may have been too busy to respond to general solicitations. The university hopes that the combination of direct, personalized outreach and a specific staff member to pursue leads will result in increased interest and involvement from SCPS alumni in future interview campaigns.

Messaging:

After conducting surveys and interviews with prominent alumni, Institution F is able to gain a better sense of how graduates from a particular program identify with their alma mater. According to contacts, each school and college uses customized messaging which is tied into the broader university mission. The dedicated Development officers work closely with the college deans to understand the college-specific vision, which is intertwined with information gleaned from alumni interviews about their connection to the college to create outreach publications tailored to that unique population. Contacts emphasize the importance of personalizing letters, so that graduates recognize that the college values their input: "Alumni are honored to have their voices heard, so you need to message outreach that way – 'the dean is considering doing X, but first wants to get your feedback.'"



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