

STUDENT AFFAIRS LEADERSHIP COUNCIL

**Tracking Student and Alumni Data:
Leveraging Social Media, Historical Data, and Alumni
Relationships to Build Robust Databases**

Custom Research Brief



**RESEARCH
ASSOCIATE**
Nalika Vasudevan

**RESEARCH
MANAGER**
Katie Sue Zellner

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**THE ADVISORY BOARD COMPANY
WASHINGTON, D.C.**

I. RESEARCH METHODOLOGY

Project Challenge

A member institution approached the Council with the following questions:

Scope of Data and Metrics: What categories of information do other institutions collect about students and alumni that are considered to be essential or baseline? What discretionary data do other institutions collect about students and alumni? Which university departments manage this process for alumni engagement, and alumni and student data collection?

Methods for Data Capture and Maintenance: What methods, processes, or technology tools do other institutions implement to capture and input discretionary student and alumni data? How do other institutions ensure that data is accurate and current? What software applications do universities use to store information about students and alumni? How do other institutions use these software applications to collect essential and discretionary data on alumni?

Estimated Costs of Data Management: What are the incremental costs to creating a discretionary alumni or student database? What additional resources are required to create and maintain these databases? Have other institutions identified potential value, savings, or revenue benefits of maintaining databases on alumni and students?

Alumni Data Analytics: What type of historic student information do administrators at other institutions correlate to student or alumni achievements? How do other institutions apply the information they collect? What institutional practices have changed because of data tracking? Have administrators at other institutions observed correlations between categories of essential and discretionary student data to alumni success and long-term university engagement?

Project Sources

- Education Advisory Board's internal and online (www.educationadvisoryboard.com) research libraries
- National Center for Education Statistics [NCES] (<http://nces.ed.gov/>)
- Institutional Web sites
- HootSuite Plans and Pricing Web site (<http://hootsuite.com/plans>)
- Sprout Social Pricing Web site (<http://sproutsocial.com/pricing>)

I. RESEARCH METHODOLOGY

Research Parameters

The Council interviewed academic officers at the following institutions:

A Guide to the Institutions Profiled in this Brief				
Institution	Region	Carnegie Classification	Approximate Total Enrollment (Total / Undergraduate)	Type
University A	Northeast	Research Universities (very high research activity)	20,900 / 13,900	Private
University B	South	Master's Colleges and Universities (larger programs)	4,300 / 2,900	Public
University C	Pacific West	Research Universities (very high research activity)	23,800 / 19,600	Public
University D	Northeast	Master's Colleges and Universities (larger programs)	15,800 / 13,200	Private
University E	Midwest	Master's Colleges and Universities (larger programs)	5,300 / 4,100	Private
University F	Midwest	Research Universities (very high research activity)	12,000 / 8,400	Private

Source: National Center for Education Statistics

The council also interviewed representatives from the following software vendors:

A Guide to the Vendors Profiled in this Brief			
Vendor	Primary Function	Type	Parent Company
iModules Encompass	Alumni Online Community	Third-party, For-profit Firm	SunGard Banner
Radian6	Social Media Monitoring	Third-party, For-profit Firm	Salesforce

Definition of Terms

The acronym *CRM* refers to constituent relationship management, a term typically applied to software tools.

II. EXECUTIVE OVERVIEW

Key Observations

- ❖ **Institutions typically collect the following types of essential student information: admissions data, demographics, transcript information (e.g., GPA), and financial data.**
- ❖ **Although institutions differ in the extent to which they collect discretionary student information, typical categories of discretionary information include student activities, student engagement survey responses, and graduate school test information.** Contacts explain that discretionary student information is rarely routinely collected, unless students are receiving a scholarship for participating in a particular activity.
- ❖ **Alumni offices prioritize the following essential data: alumni contact information, employment information, and records of participation in events.** Additionally, alumni offices typically link all historical student records to alumni records. Several contacts indicate that the alumni office also seeks discretionary data on alumni family members, student activities, and hyperlinks to alumni social media profiles.
- ❖ **Contacts explain that student information is owned by several offices on campus and that consolidating this information into a single database can be challenging.** At University D, the alumni office became the ‘office of record,’ and currently collects essential and discretionary data on all students and alumni. In the interest of developing a robust database, contacts at University D recommend searching through university records and educating faculty and staff about the role of the alumni office in order to encourage data sharing.
- ❖ **Most institutions use *Banner* and *PeopleSoft* to track student information and use *Banner Advance* and *Talisma* to track alumni information.** Contacts indicate that student and alumni data is rarely stored within the same database; however contacts at University F state that the alumni office plans to use *Talisma* to store student and alumni information in a single location.
- ❖ **Most institutions host an institution-specific online community through vendors like *Harris Connect* or *iModules Encompass*.** These communities feature alumni profiles and facilitate the collection of updated contact information. Several contacts also stress the importance of monitoring popular social media sites to collect additional information on alumni and students. Social media monitoring tools profiled in this report include *HootSuite*, *Sprout Social*, *Radian6*, and *Meltwater Buzz*. These tools allow users to manage university-themed social media groups and comb social media content via a single platform.
- ❖ **Contacts indicate that tracking students and alumni requires a significant staffing investment.** Furthermore, contacts suggest that additional staff allow offices to manually search through university and online resources for student and alumni information. For example, alumni office at University D employs an electronic communications specialist and the alumni office at University A employs a social media strategy team consisting of three staff members.
- ❖ **In order to produce helpful reports, contacts suggest that university administrators first consider the university’s mission and goals and then develop metrics that measure achievement relative to specified goals.** Whereas institutional research offices will often produce reports to measure student achievement on an *ad hoc* basis, alumni offices typically correlate alumni metrics with alumni gifts and alumni participation in events.

II. EXECUTIVE OVERVIEW

Key Recommendations:


- **Consolidate all student and alumni data into a single database.**
 - Ensure that the CRM can store all profiles (student and alumni) in a single system and import data from other sources, such as a university-sponsored online community.
 - Consider *Talisma*.
- **Designate one office to collect a *database of record*.**
 - Direct all university administrators and faculty to share student and alumni information with this designated office and help eliminate shadow databases.
 - Determine and communicate clear guidelines around the information you want to collect, such as contact information, professional information, participation in extra-curricular activities, etc.
 - Educate all university administrators about the institutional value of consolidating information in a single database.
- **Hire staff members to collect information and monitor social media sites.**
 - **Collect Historical Data:** First assign one to two student interns to search manually for information on students and alumni through yearbooks and class rosters, and then charge interns with coding this information into the database.
 - **Monitor Social Media:** Assign one full-time staff member to manage electronic communications, monitor data collected through online tools, and review university-sponsored social media sites. This person should also input student and alumni data gathered through social media into a database.
- **Consider a comprehensive social media monitoring tool, such as *Radian6* or *Meltwater Buzz*.**
 - Determine what information administrators wish to gather from social media sites; when using a tool, spend an initial two or three weeks identifying search terms that retrieve the aforementioned target information. Example key word searches might include the institution's name, alumni names, students' names, sport team names, specific university organizations, etc.
 - Using the monitoring tool, develop social media "profiles" that track and display online activity related to specific, notable alumni.
- **Encourage alumni to update their contact and employment information on the university-sponsored online community.**
 - Give students access to the alumni database and educate them about the importance of updating their contact and employment information.
 - Include reminders and links to the online community in all electronic communication.
 - Offer incentives to alumni who complete their online profiles, such as prizes or raffles.

III. OVERVIEW OF STUDENT AND ALUMNI DATA

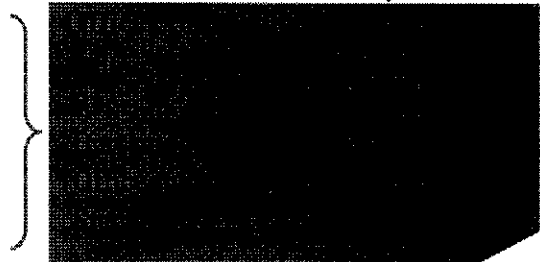
Contacts explain that information collected through the admissions process is essential student data; accurate contact, employer, and degree information is essential alumni data. Additionally, alumni offices track participation in alumni events and fundraising campaigns. Across profiled institutions, contacts report several types of discretionary information collected by different offices.

Information Collected about Students

Contacts at **University A**, **University B**, **University D**, and **University F** describe the following categories of essential and discretionary student data collected by university administrators.

 ly stored using the university CRM tool. Across profiled institutions, contacts report that the following categories of information are collected for every student:

- ✓ **Admissions data:** test scores, high school GPA
- ✓ **Demographic information:** gender, race, first generation student status
- ✓ **Academic information:** courses, grades, GPA
- ✓ **Financial data:** FAFSA information, transactions



Discretionary Student Data

At several profiled institutions, university administrators collect three categories of discretionary or non-essential information on students:

- ✓ **Student Activities:** Contacts at **University B** report that the office for institutional research tracks all students who receive a scholarship for participating in an activity, such as athletics, band, or chorus. At **University A**, contacts indicate that student records include student participation in sponsored athletics teams or clubs but that other student activity information is not routinely entered into the student information database. The alumni office pulls the student activity information from this database into its alumni database.
- ✓ **Student Engagement Survey Responses:** Contacts at **University D** report that the student affairs data includes results from three student surveys, including the Noel-Levitz Student Satisfaction Inventory, the Noel-Levitz College Inventory Survey for incoming freshmen, and the National Survey of Student Engagement (NSSE). Similarly, NSSE results are stored in the main CRM at **University C**.
- ✓ **Graduate School Testing:** At **University B**, administrators maintain data on students who take graduate school exams (e.g., GRE, GMAT, CAAP, etc.). The university tracks participation both in practice exams and the official test.

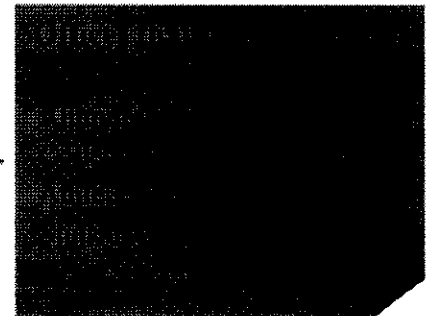
III. OVERVIEW OF STUDENT AND ALUMNI DATA

Information Collected about Alumni

Although the alumni office bears the primary responsibility for collecting information about alumni, contacts report that several additional offices keep track of alumni who participated in alumni events and served as volunteers or mentors. Contacts indicate that the fundraising and advancement mission of the alumni office informs the type of data the office collects. Three of the four profiled alumni offices employ staff dedicated to fundraising and alumni giving. Therefore in addition to contact information, alumni offices seek data that help fundraising officers solicit donations and gifts.

Contacts at **University A**, **University D**, **University F**, and **University E** report that the alumni office aims to collect the following alumni information:

- ✓ **Current contact information:** address, email, and phone number
- ✓ **Employment information:** employer, position, address, email, and phone number
- ✓ **Student Data:** degree, year of graduation
- ✓ **Alumni Participation:** participation as donors, as attendees at alumni office events, or as volunteers through the alumni office (as mentors or event leaders).



All contacts report tracking alumni participation.

Discretionary Alumni Data

Most contact institutions do not routinely collect discretionary data on alumni, although the alumni office at **University D** attempts to collect any and all available information on students and alumni. Along with contacts at **University D**, several additional contacts suggest that the following categories of discretionary alumni information are especially helpful:

- ✓ **Alumni Family Information:** The alumni office at **University F** collects names of alumni's spouses and children.
- ✓ **Student Activities:** The alumni office at **University D** actively seeks out information about the student activities in which alumni participated (e.g., athletics, student clubs, etc.). Similarly, contacts at **University A** report that if an activity was logged for a student in the CRM, the information will carry over to the alumni office's database.
- ✓ **Social Media Profiles:** The alumni office at **University A** stores the URLs for alumni social media accounts, such as Facebook, Twitter, and LinkedIn.

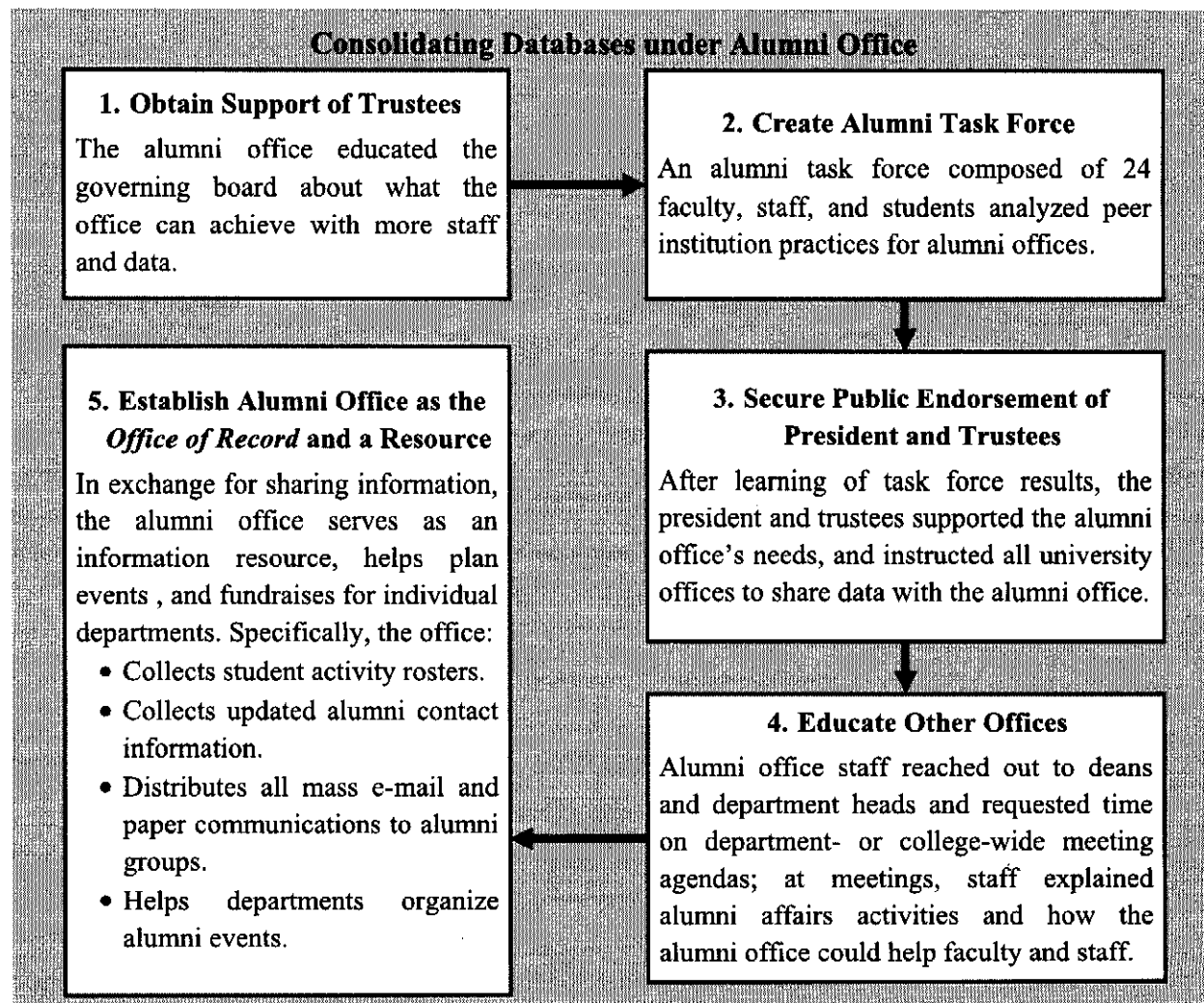
IV. COLLECTING AND CONSOLIDATING EXISTING UNIVERSITY DATA

Contacts report that valuable student and alumni information is collected and stored by various university offices; for this reason, consolidating student and alumni information into a single database is difficult. This section identifies strategies and sources of information that help administrators build a robust student and alumni database.

Consolidating University Databases at *University D*

Contacts at most institutions report that several university offices, such as the registrar, bursar, admissions office, and institutional research office, have access to a single database that stores student information but the alumni office and development office have limited access to this central database. Similarly, contacts at **University E** explain that academic departments maintain separate alumni records and often do not notify the alumni office of department alumni events or updated contact information because department faculty and administrators do not want to violate alumni privacy.

At **University D**, the alumni office worked with senior university leaders to dispel all shadow databases (i.e., databases maintained by multiple offices) and consolidate all student and alumni discretionary information within the alumni office's database. Contacts report that the office followed the process below to garner campus-wide support and expand the alumni office's staff and data.



IV. COLLECTING AND CONSOLIDATING EXISTING UNIVERSITY DATA

Strategies for Collecting Discretionary Student and Alumni Data

Although contacts concede many challenges associated with collecting discretionary information on students and alumni (e.g., student activity participation), at **University D**, alumni office leaders attempt to collect as much discretionary data on students and alumni as possible because alumni engage more frequently with the university through the activities they participated in as students (e.g., athletics, student government, etc.). Contacts recommend that university administrators populate student and alumni databases with discretionary information using the following resources available on campus:

At the **University D**, the alumni office collects discretionary information on students, as well as alumni, because the office can access current student discretionary information more easily. In turn, when the student graduates, most discretionary information is already coded in the alumni database.

The alumni office at the **University D** hired students to search through university yearbooks and code alumni in the database according to their participation in specific student activities. Contacts report that within a 10-week period, student workers were able to code 10,000 athletes, including the specific sport each alumnus/a played.

Alumni office staff at **University D** built relationships across the university's colleges and departments by organizing presentations and one-on-one meetings dedicated to encouraging faculty and staff to share student activity rosters. Additionally, the university president requires all offices and departments to annually forward student participants lists to the alumni office. Contacts report that university offices became more willing to share information, such as complete student rosters, as the alumni office became a more valuable resource with current and complete contact information.

Contacts at **University D** report that both the institutional research office and the alumni office document attitudinal survey results in their student and alumni databases respectively. Additionally, contacts indicate that the alumni office collects more than attitude scores through its surveys: the office collects additional discretionary information through questions about participation in student activities.

V. LEVERAGING SOFTWARE AND ONLINE TOOLS TO COLLECT AND STORE DATA

This section outlines software tools to store and collect data, including historical data from university databases, self-reported alumni data, and data collected from social media Web sites. Social media and networking tools have expanded the ways in which students and alumni engage with an institution; as a result, university administrators have a greater variety of student and alumni information at their disposal.

Traditional Constituent Relationship Management (CRM) Tools Maintain Student and Alumni Information

Contacts describe four traditional constituent relationship management (CRM) tools that store student and alumni data. Although these CRM tools typically have the ability to sync with one another, contacts explain that student and alumni data are typically maintained in separate databases.

Databases for Student Information

Administrators use the following databases for storing student information:

Banner: At University B and University C, university administrators store student information on *Banner*. Contacts report the following considerations for institutions using the CRM tool:

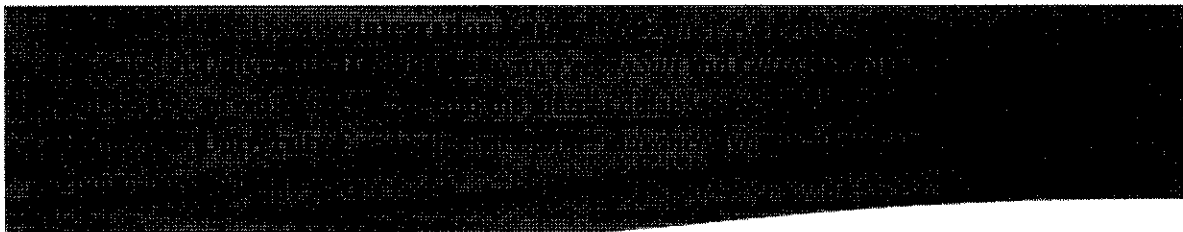
- Considerations for Implementing Banner:**
1. Can Banner can sync easily with the institution's CRM and reporting tools?
 2. Which departments should have full or read-only access to Banner?

PeopleSoft: Another popular CRM tool is *PeopleSoft*; the central administration at University A currently uses *PeopleSoft*, and administrator are transitioning towards *PeopleSoft* at University D. At University D, the central administration will also use *Oracle Business Intelligence Enterprise Edition (OBIEE)* in conjunction with *PeopleSoft* to construct dashboard reports.

Databases for Alumni Information

Contacts suggest the following databases for storing alumni information:

Banner Advance: At University D and University E, the alumni office uses *Banner Advance* to store alumni data.



Talisma: Contacts at University F report that the alumni office uses *Talisma* to store alumni data and would like to use the system to track students through the entire student process, from admissions, to enrollment, and finally graduation and alumni status. Contacts note the following features of *Talisma*:

- Stores both student and alumni data
- Exports data to Excel
- Manages email communication and marks email communications in profile histories

V. LEVERAGING SOFTWARE AND ONLINE TOOLS TO COLLECT AND STORE DATA

University-Administered Online Communities

Contacts at several profiled institutions explain that the alumni office continues to engage with alumni and collect information from alumni through online communities. Online communities allow alumni to update their own profiles and post information about themselves to share with other alumni and the alumni office. At four of the six profiled institutions, contacts explain that the alumni office uses an online community to engage alumni.

University online communities offer the alumni office a source of valid information.

Key Features of Online Communities

For Alumni:

- Update contact information, submit class notes and photos, advertise business, or post a resume
- Choose to add or remove their names from the alumni listing (depending on university settings)

For University Administrators:

- Store profile information
- Send mass e-mails through communication tool
- Sync with CRM

Vendors that Support Online Communities

	<i>iModules Encompass</i>	
University A University D	University F University E	<p><i>iModules Encompass</i> syncs alumni and student data through:</p> <ol style="list-style-type: none"> 1. Import/export functions 2. Encompass API 3. SunGard's Connector for Banner

Incentivizing Alumni Engagement through University-Administered Online Communities

Contacts report that because these online communities compete with popular social media and networking tools, such as Facebook and LinkedIn, it can be difficult to encourage alumni to update their profiles and engage with the university through these online communities. Contacts at **University F** recommend the following strategies:

- ❖ **Provide Access to Students:** Students at **University F** can access and update their alumni profiles during their senior year. On the other hand, only alumni can access their online profile at **University A**.
- ❖ **Notify Students and Alumni to Update Profile:** Contacts at **University F** explain that several email notifications are sent to students during their final year to remind students to update their online profiles. Additionally, all email notifications sent to alumni contain a link to the Web site with a reminder to update the profile.
- ❖ **Design Contests and Raffles:** Alumni office administrators at **University F** are considering incentivizing students and alumni to update their profiles with fun prizes; contacts suggest hosting contests or raffles for those who update their profiles.

V. LEVERAGING SOFTWARE AND ONLINE TOOLS TO COLLECT AND STORE DATA

Social Media Monitoring Tools for Collecting Student and Alumni Data

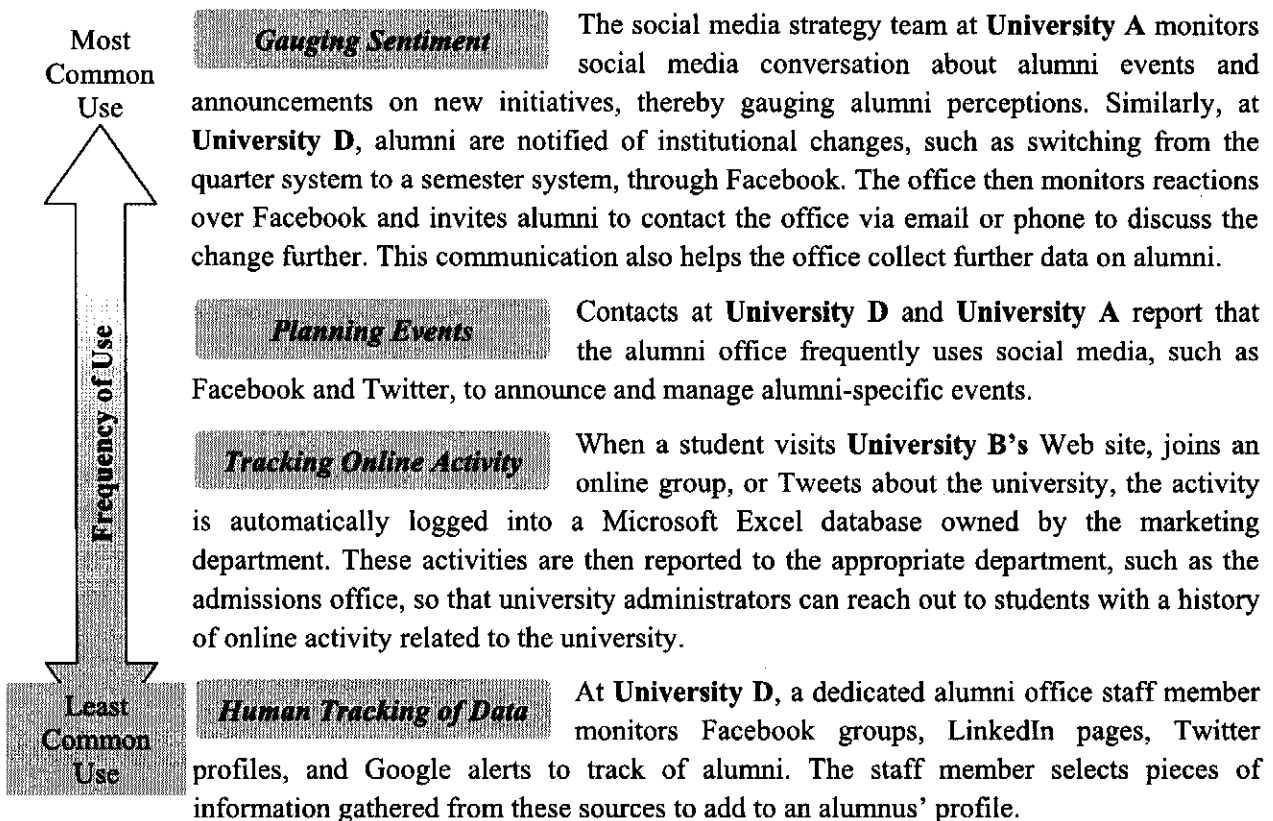
Social media monitoring tools allow users to manage all social media and networking profiles on one platform and automatically search and monitor data from social networking and news sites based on specific key word searches.

Considerations for Using Social Media to Collect Student and Alumni Data

Contacts explain that social media monitoring tools are useful for gathering information about specific individuals, but indicate that there are limitations to using these tools. (Across contact institutions, no administrators use a software program to automatically populate a database with information mined electronically from social media sites).

Primary Uses of Social Media Monitoring Tools

Contacts report the following primary uses for social media monitoring tools:



Challenge of Collecting Data from Social Media



Contacts from **University A** explain that social media tools are structured to protect privacy. For example, extracting member names from a Facebook group is difficult. Additionally LinkedIn has very strict privacy policies and allows very few third party vendors to extract data. However, contacts at **Radian6** indicate that the social media monitoring tool will launch an updated product that allows for limited data mining of LinkedIn (see following section).

V. LEVERAGING SOFTWARE AND ONLINE TOOLS TO COLLECT AND STORE DATA

Social Media Monitoring Tools for Collecting Student and Alumni Data

Ethics of Information Privacy

Contacts at **University A** explain that because social media, networking sites, and monitoring tools are relatively new, there are few clear guidelines on what information is publically available and what information is considered private. Therefore, contacts suggest that administrators exercise caution when mining student and alumni data from social media sites. Contacts suggest the following:

-  ***Separate social media information from university property.***
By storing all social media information on *Meltwater Buzz*, **University A** is not liable for owning personal information about alumni.
-  ***Use social media information as a guide not a source.***
University A alumni office stores URLs for social media profiles and uses social media content to guide them towards alumni interests, rather than populate the CRM with information.

V. LEVERAGING SOFTWARE AND ONLINE TOOLS TO COLLECT AND STORE DATA

Functionality of Social Media Monitoring Tools

One out of the six profiled institutions uses social media monitoring tools; the alumni office at **University A** uses two social media monitoring tools, *Meltwater Buzz* and *Sprout Social*, which are profiled below. Additionally, two other products well-known in the higher education industry, *Radian6* and *HootSuite*, are profiled.

Categories and Features of Social Media Monitoring Tools

Two categories of social media monitoring tools emerge. The first category allows users to manage multiple university-sponsored and university-related social media groups on one platform. The second, in addition to allowing users to manage multiple social media groups, helps users to build in-depth profiles designed to track specific alumni and perform key word searches. Additionally, contacts describe a growing need to monitor multiple university-related social media groups as users create several university-themed groups via each social media site. Further features and examples are described below:

<i>Social Media Profile Management</i>	<i>In-Depth Social Media Monitoring</i> Examples: <i>Radian6</i> , <i>Meltwater Buzz</i>
<p>Key Features:</p> <ul style="list-style-type: none"> ✓ Manages multiple university-sponsored or university-related social media groups on one platform ✓ Monitors who follows or re-tweets Web site ✓ Recommends profiles to follow ✓ Performs key word searches[†] ✓ Hosts RSS feeds* ✓ Compares online presence to presence of other institutions 	<p>Key Features:</p> <ul style="list-style-type: none"> ✓ Manages multiple university-sponsored or university-related social media groups on one platform ✓ Monitors who visits Web site, re-tweets posts, and if the visit resulted in an action ✓ Performs key word searches[†] ✓ Hosts RSS feeds*Compares online presence to other institutions ✓ Dashboard analytics to gauge negative and positive web content ✓ Builds in-depth social media profiles on students and alumni

<i>Sources of Information at Radian6</i>
<p>Contacts at <i>Radian6</i> report that the social media monitoring tool collects information from the following sources:</p> <ul style="list-style-type: none"> • Facebook • MySpace • YouTube (95 percent of videos) • Mainstream news (over 50,000 sites) • 200 million blogs • Aggregator sites • Form and form replies • Buy and sell sites (e.g., EBay, etc.) <p>Contacts also report that <i>Radian6</i> will release an updated product that can crawl more content on LinkedIn in March 2012.</p>

[†] Users can enter key words or phrases into the software tool, which then combs through online content and compiles a list of Web sites that mentions the key words or phrase, similar to a Google Alerts.

*The tool posts via its interface articles published to specific user-selected Web sites using an RSS function, similar to Google Reader.

V. LEVERAGING SOFTWARE AND ONLINE TOOLS TO COLLECT AND STORE DATA

Contacts indicate the following pricing models for social media monitoring tools:

Approximate Costs of Profiled Social Media Monitoring Tools	
Vender	Reported Approximate Cost
	<p>Two Pricing Plans:</p> <ul style="list-style-type: none"> • Free to manage five groups and two RSS Feeds • \$5.99 per month to manage unlimited social groups and RSS feeds, includes additional analytics features
	<p>Basic plans range from:</p> <ul style="list-style-type: none"> • \$9 per month to manage 10 groups • \$39 per month to manage 20 groups • \$59 per month to manage 40 groups • \$899 per month to manage unlimited groups
Radian6	Minimum Cost: \$600 per month (\$100 per user and \$500 per topic profile [†]) (Organizations with 501(c)(3) status receive a 50% discount.)
Meltwater Buzz	<p>Costs vary depending on the contract.</p> <p>Contacts at University A report that this product will cost at least \$1,000 per year.</p>

* "Plans and Pricing," *HootSuite*, accessed 14 February 2012, <http://hootsuite.com/plans>.

** "Pricing," *Sprout Social*, accessed 14 February 2012, <http://sproutsocial.com/pricing>.

[†] A *topic profile* organizes information collected by the software around a specific topic (e.g., university alumni). Users customize *topic profile* by designating key words, media sources, time frames, languages, and region of interest.

Exporting Data from Social Media Monitoring Tools

Although most social media monitoring tools allow users to monitor social media profiles only by specifying individuals' names, contacts at *Radian6* report that it is possible to pull and aggregate alumni profile information (e.g., name and interests) out of the main *Radian6* dashboard, which displays all university-related social media and online content on one page in real-time. Contacts report the following syncing and data export capabilities:

- **Syncing Data with CRM Tools:** Contacts at **University A** report that the alumni office does not sync information from *Meltwater Buzz* with their main CRM tool, *PeopleSoft*. Conversely, contacts at *Radian6* state that all information can be integrated with *Salesforce* CRM. Additionally, if an institution uses a different CRM tool, *Radian6* administrators can release the software codes to university IT professionals, so that *Radian6* will automatically sync with that CRM.
- **Export Data:** Contacts at *Radian6* report that all information available on the dashboard is exportable, and information can be downloaded into Microsoft Excel spreadsheets.
- **Push Data to Internal Parties:** Through the *Radian6* platform, specific pieces of information from individual profiles or an entire profiles can be 'pushed' or sent to other university administrators as an e-mail attachment. For example, if a *Radian6* user observes a potential university applicant, the *Radian6* user can email the student's profile to the admissions office to follow up with that student.

VI. STAFFING NEEDS AND OPERATIONAL CONSIDERATIONS FOR TRACKING STUDENT AND ALUMNI DATA

Across profiled institutions, contacts report that the most significant costs associated with tracking student and alumni data are the staff members needed to collect and manage this information. Contacts report that new or existing staff must assume the following responsibilities in order to develop a robust and useful database:

Contacts explain that additional staff members and staff time are necessary to collect discretionary student and alumni data. For example, the alumni office at **University D** was able to expand their staff to accommodate their goal of collecting greater amounts of information on students and alumni. Additional staff can help fulfill the following two roles:

◆ **Manually Assembling Historical Student and Alumni Information**

The alumni office at **University D** hired student workers who worked throughout the academic term and searched through university yearbooks to identify the student activities in which alumni participated. Student staff then coded these activities in the database.

◆ **Coordinating Data Collection across Campus**

Contacts at **University D** suggest contracting the time of administrators across campus to help collect and share student and alumni data. For example, the alumni office hired a baseball coach to help organize all alumni events for athletes. Because of the baseball coach's experience with organizing athletic alumni events and cultivating healthy relationships with other coaches, the coach regularly provides updated team rosters to the alumni office. Similarly, a program coordinator in the career services office facilitates alumni volunteer programs.

Dedicated Time for Leveraging Software and Online Tools

Significant staff time is needed both to learn and use software tools that collect and store student and alumni data. Job responsibilities should include:

◆ **Customizing and Overseeing Use of CRM Tools**

Contacts at **University D** report that the institution is transitioning towards a new CRM tool to store student data. This transition has required significant labor from the IT department, which is responsible both for customizing the CRM for the institution's needs and training staff members across departments to use the new CRM. Contacts report that the IT department is developing an online tutorial to teach staff how to navigate the new CRM. Once trained, alumni staff members must integrate the CRM into its data-collecting and data-storing mechanisms.

◆ **Monitoring Social Media Requires Additional Staff Time and Manual Work**

The alumni office at **University D** hired an Electronic Communications Specialist to monitor social media and online sources and oversee the office's online presence. Similarly, at **University A**, one member of the social media strategy team oversees their social media monitoring tools. Despite the aid of social media monitoring tools, such as *Meltwater Buzz* and *Social Sprout*, contacts at **University A** explain that because of the wealth of information available on the internet, searching for alumni data can be a labor-intensive and inefficient process.

One staff member to monitor social media

VI. ANALYZING THE DATA: ACCURACY AND REPORTING

After collecting data, contacts suggest several methods for analyzing the data to both ensure its accuracy and help inform institutional practices that encourage student success and long-term university engagement.

Strategies for Ensuring Data Accuracy

Contacts at several profiled institutions indicate that university administrators enlist several formal and informal methods to ensure that student and alumni data is accurate:

1 *Enlist Information Management Tools to Identify Inaccurate Data*

Contacts at **University B** and **University D** explain that the office of institutional research runs software applications to identify any obvious errors in the student databases. For example, contacts at **University B** explain that if a student profile is missing information or if the profile lists two contradictory programs, then the CRM tool creates a report to identify the mistakes.

2 *Compare Data to National Databases*

At **University E**, alumni office staff verify the information they collect on alumni by cross-checking their data with national databases.

3 *Monitor E-mail and Mailing Notifications*

The alumni office administrators at **University F** suggest that university administrators monitor e-mail and U.S. postal service notifications, such as bounceback e-mails or forwarding notices, in order to identify incorrect contact information.

Considerations for Developing Metrics and Analytics

Contacts at the **University D** suggest that specific metrics and analytics will vary depending on the university's mission and goals. The graphic below describes how administrators at **University D** produce reports to address institutional goals:



VI. ANALYZING THE DATA: ACCURACY AND REPORTING

Common Analytics and Reports Completed on Student and Alumni Data

Contacts indicate that many reports are completed on an *ad hoc* basis and depend on the requested topic. For example, contacts at **University B** explain that the office for institutional research produces specific reports for requesting partners (e.g., the athletics department might request a report analyzing grade point averages of athletes and later submit the report to the National Collegiate Athletics Association (NCAA)).

Reports on Student Data

At **University B**, **University C**, and **University D**, the administrators frequently request reports that feature the following student data:

- GPA
- Grades by course or college
- Demographics
- Student learning outcomes
- Rates of persistence, graduation, and retention

Reports on Alumni Data

Contacts at **University A**, **University D**, **University E**, and **University F** stress that the primary objective of the alumni office is to encourage alumni to participate in alumni events and donate to the university. Therefore, the alumni office's reports highlight connections between a single metric and either long-term alumni engagement or gifts to the university. Administrators analyze the overall level of alumni engagement by the following metrics:

- Correct contact information and location of alumni
- Number of donors and donations
- Number of participants in alumni events
- Number of members in online community
- Number of alumni volunteers and mentors
- Majors and graduation year of alumni
- Participation in student activities (generally or sometimes in specific activities)

Applying Alumni Data

Contacts report that identifying correlations between alumni engagement and the metrics above help the alumni office improve alumni events and raise money. Although several contacts indicate that improved alumni data could serve career service goals by connecting current students with alumni working in students' fields of interest, alumni administrators at most contact institutions have reportedly not yet built collaborative relationships with career services office. Several examples of the aforementioned and current outcomes of improved alumni data follow:

**Improve
Events**

Contacts at **University D** found that appealing to an alumnus' student activity led to increased engagement and therefore began planning events around specific activities, such as participation on the basketball team.

**Raise
Money**

Similarly, **University F** analyzes engagement by graduation year, and staff designs alumni events according to suit the age cohort of the alumni.

PROFESSIONAL SERVICES NOTE

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