In his early days as director of alumni/ae and parent relations at Phillips Exeter Academy more than two decades ago, Harold Brown and his staff were puzzled by the lack of engagement by the independent school’s earliest female graduates, who matriculated in 1970. To find out why, Brown's staff hosted focus groups to identify the source of the disconnect. The answer, he learned, was simple.

"The women just didn't make as strong a connection to the school," Brown says. That stemmed from the women's days as students at the New Hampshire school, when it was slow to fully adopt women into the culture—so much so that the school had not even removed urinals from the girls’ dormitories. They felt similarly alienated as alumnae.

Brown realized that he needed to make some major changes to Exeter's alumni relations strategies. He and his staff discontinued a traditional London alumni event held at an all-male club, more purposefully recruited women for volunteer leadership positions, and added children's programming and family friendly events to annual reunions.

Today, women hold five of Exeter’s 20 trustee positions and several alumnae lead the school's regional alumni associations, including the two largest: New York City and New England.

"[Alumni relations strategies that] worked two years ago may not work now or two years from now," Brown says. "The programs that survive will be the ones that are the most nimble."

Brown’s anecdote is 20 years old, but such scenarios aren't foreign to alumni relations professionals today. "This is how we’ve always done it" used to be a common, acceptable rationale for sticking with traditional alumni programming choices. But in a world of tight budgets, increased accountability, and an evolution in the ways graduates want to connect with their alma mater, giving alumni what they want—and how they want it—is critical.
"We all need to be able to articulate a strategy that's effective for the institution and the alumni, and be able to talk about the impact. Every effort has to have a great return on investment," says Lisa Lewis, executive director of the University of Connecticut Alumni Association.

As Brown’s example illustrates, developing an effective engagement strategy begins with an open mind and an outstretched hand. It requires alumni professionals to reconsider how alumni identify themselves within the institution, relinquish some control of the planning and execution of programs, and meet alumni where they are—on terra firma or online. But most of all, it requires a willingness to change.

**Diagnose the problem**

How does an alumni professional find out what the institution’s alumni want? Ask. Solicit alumni feedback via surveys, post-event evaluations, and informal conversations. The results can be surprising.

For example, a 2012 study of alumni and students in their final year of study at eight European and African business schools by CarringtonCrisp, an education marketing firm, revealed that 58 percent of alumni stayed in touch with their school. But 33 percent said that they weren't involved in their alumni network—not because they didn't want to be but because they were unaware of the programs and services offered to alumni.

"[Alumni directors] thought they were doing a pretty good job, but they were really only scratching the surface," says Andrew Crisp, co-founder of CarringtonCrisp. The results prompted alumni professionals at several institutions to work to improve the effectiveness of their outreach to graduates.

UConn’s Lewis recently conducted the Performance Enhancement Group’s Alumni Attitude Study with the university’s graduates and found that alumni are most interested in career services, networking, and mentoring students. They are least interested in travel programs, homecoming, and reunions. Lewis and her staff eliminated custom alumni trips in favor of turnkey trips provided by third-party vendors. UConn created a new staff position to facilitate alumni support of students through mentoring, internships, and career assistance. They are also considering options for a smaller reunion program.

Surveys aren’t the only way to place a finger on the pulse of alumni needs and wants. If alumni aren’t attending events or participating in programs, that behavior speaks for itself. That was the situation Christopher Vlahos faced when he joined Case Western Reserve University as associate vice president for alumni relations two years ago.

"We were spending a great deal of money and getting very little return," Vlahos says. He worked with his staff to review previous alumni relations programming and develop a strategic plan for the year. It's a process that the alumni office at the Ohio institution now conducts annually and includes outlining goals, strategies, and projected outcomes for all programs. Some programs have undergone complete overhauls.

Vlahos points to Case Western’s alumni weekend, which traditionally drew small crowds. The program included an awards luncheon and events sponsored by individual schools. Not satisfied with the scant turnout, Vlahos and his team introduced a new model and scheduled it to coincide with homecoming and family weekend in the fall. The revamped event, Homecoming: A Celebration of Alumni, Families, and Students, involves alumni and parents in programs sponsored by different academic departments. Recent programming included a keynote lecture by two faculty members who are conducting innovative Alzheimer’s disease research and an arts-and-sciences discussion with an alumnus who is a cast member of the TV show Mad Men.

Attendance grew from 400 to 2,500 people in two years, and Vlahos looks forward to seeing even bigger numbers at the event’s third edition this fall.
Vlahos and his team also revamped Case Western's traditional senior send-off, an informal luncheon of hamburgers and beers after the commencement rehearsal. Every graduating senior's parting gift was a Case Western–branded umbrella, affectionately known as the "alumbrella."

To bring some gravitas to the program, Vlahos' staff worked with students to introduce Tempus Transitus: The Senior Ceremony. Taking its name from the Latin words for "time" and "change," the 45-minute program is held in the campus chapel and features several speakers who talk about the importance of staying connected to the university.

"Our a cappella group sings the alma mater, we give everyone an alumni pin, and by the end, the graduates are in tears. We have a champagne reception afterwards," Vlahos says. "It's a high-impact, low-cost event."

The change, Vlahos says, was well-received. When he tells graduating students about the previous version of the event, "they react with some surprise that we used to send them off with such an uninspired program."

Target your market

Just as the big three U.S. TV networks have given way to smaller, niche cable channels, mass-market alumni relations programs aren't quite as attractive to the masses anymore. Take the class-year reunion as an example. Matt Borowick, an alumnus of Seton Hall University and currently its associate vice president for alumni and government relations, says the university hosted class reunions for many years, but the events never were well-attended. In fact, Borowick freely admits he never attended a reunion of his own. In his early days as a staff member, he realized that the New Jersey institution needed to address the issue.

"We tried doing [class reunions] at different times of the year, doing a decade reunion—but there wasn't a large bump in attendance. That told us that our alumni do not primarily affiliate by class year," Borowick says. Meanwhile, "a number of affinity groups organized by the alumni themselves were already connecting with each other based on campus experience, whether that was social, academic, or extracurricular, so we felt that creating official alumni clubs [based on those informal groups] was the way to go."

Borowick first reached out to alumni of the students radio station and newspaper, which had the strongest networks, to explain the idea of creating university-sponsored alumni clubs. He offered his office's support to the groups' efforts by providing resources to help locate and communicate with alumni, reserve space for events on campus, and send invitations. In return, Borowick asked that the Seton Hall alumni staff be permitted to participate in their events to share the university's strategic messages.

Borowick's team drafted a document outlining requirements for an official club, and three years later, Seton Hall has nearly a dozen such clubs comprising about 1,000 people. Borowick realizes there's much work still to be done, but he and his staff are pleased with the progress they're making.

"The radio station club held a dinner and 350 people, including 50 [current] students, showed up. That attendance far exceeded [what we ever got for] a class reunion," Borowick says.

When Seton Hall stopped sending class reunion invitations in 2006, Borowick estimates he received only half a dozen calls from alumni. Those who contacted him were satisfied with his explanation of the university's plan to provide better opportunities for them to connect with their alma mater.

At Australia's Monash University, Louise McCarthy, director of alumni relations, also works to cater to smaller groups of alumni, but for slightly different reasons. Alumni
relations is very closely tied to fundraising, and Monash’s engagement strategies are built around targeting and cultivating small groups of influential alumni who can best help the university achieve its goal of becoming a world-renowned institution that is distinguished by a research-intensive, international focus by 2025.

Because these alumni are keenly interested in the academic products of the university, McCarthy’s office sponsors a speaker series—four or five events per year focusing on subjects of broad interest related to faculty research. One recent popular presentation featured three faculty members who spoke about the nature and effects of chronic stress.

"You have to be relevant to the alumni and align the programming with the university's goals," says McCarthy. "Our alumni want to feel valued, and they want to contribute."

**Turn over (some of) the reins**

Exeter's Brown found that transferring control of some programs from the institution to alumni resulted in increased alumni engagement. Exeter holds traditional class reunions, but in the 1990s, the Class of 1966 wanted to hold a Big Red Reunion (a reference to the school's sports moniker, the Big Red) for 1960s-era alumni. Brown says the 1966 alumni were "very strong, cohesive, and connected," but they realized adjoining classes weren't quite as close.

"Their motivation was to create a path for [those] classes to make connections among themselves and to draw them closer to Exeter," Brown says.

Alumni volunteers managed the event, and Brown pitched in by providing some Exeter materials and helping schedule faculty speakers. Five Big Red events took place between 1999 and 2006. When those events lost steam, 1960s alumni began to get more involved with the school's traditional reunion and other campus events.

Brown says that another group—the Class of 1943—has branched out on its own too. The class is sponsoring mini-reunions around the country to build excitement for its upcoming 70th reunion, which will be held on campus in May.

"I realized these volunteers are trying to do something good. … This is their school. The best ideas don't have to be generated by [the alumni office]," Brown says. "[Giving control to volunteers] had a huge impact on our mindset. We realized we had to be nimble."

A number of Exeter classes now do mini-reunions around the world, and Brown's office provides logistical support. The next step? Brown isn't sure, but he's certain technology will play a role.

"Prior to social media, alumni needed [alumni relations]. Today, they don't need us in order to connect, so reunions better be hyper-relevant," Brown says. "There are economic factors and there are alumni all over the world, so we better be finding other ways to make reunions count. I think we're going to have more cyber-reunions going forward."

**Engage on their terms**

Many alumni may have neither the time nor the inclination to read snail mail or attend events in person. Alumni relations efforts must include online components, among other options, to maintain a presence in the lives of graduates.

"There's absolutely an awareness that technology is disrupting our industry," UConn's Lewis says. "You have to figure out how to make it an asset. We are trying to be very thoughtful about how to engage alumni in ways that are valuable and relevant."

Offering online programs is an effective way to facilitate a connection with multitasking graduates, Lewis says. When UConn hosts panel discussions and other events, the university records and posts them online afterward as podcasts.
"Some schools experiment with live streaming, but that still means [alumni] have to do it at [a specific] time," she says. "Podcasts enable more people to watch, listen, and learn from a program when and where they want to. About a year ago, we emailed people who signed up for [one] event but didn't come, and we told them about the availability of the podcast. We had terrific feedback."

Online programs may also be the ideal way to reach people who don't have strong ties to the physical campus, such as fond memories of playing Frisbee on the quad or get-togethers at the campus pub.

"Distance learning is a growing trend, and you have alumni who have spent very little, if any, time on campus," Lewis adds. "They may love the education they got but didn't do anything on campus that created emotional hooks. You have to be aware [of] and thoughtful about the differences in student experiences."

Yet nothing can fully replace the experience of returning to campus to reconnect, which is a challenge that community colleges also encounter.

"Our alumni participate in many activities, but getting them back to campus is difficult," says Barbara Capsouras, alumni director at County College of Morris in New Jersey. She works closely with her alumni board to develop ideas for meaningful events and services and to promote them.

"[The alumni board members] talk to other alumni, so if they're interested, I trust that other alumni will be. Then [the alumni board] takes the responsibility of spreading the word," Capsouras says.

She cites as an example the college's alumni night theater events, which are held during the biannual productions staged by the performing arts department. About 20 to 30 graduates and guests attend each alumni night performance, achieving the difficult goal of bringing alumni back to the college.

Realizing that diverse alumni groups connect and communicate differently is just one critical piece of creating programming that succeeds in engaging an institution's graduates. Today's alumni professionals are in constant motion—planning, executing, reviewing, evaluating, and revising their programs and services. But they also must remember to take time to ask questions of and listen to their graduates to ensure they're working with their constituents' needs and wants in mind—and be ready to change plans accordingly.

"Very few things are etched in stone," Seton Hall's Borowick says. "We can't rest on our laurels. We always need to be responsive."

In Short

**Fine-tune your focus groups.** Holding a successful alumni focus group discussion isn't easy, but it doesn't have to be an ordeal. For pointers, revisit the September 2012 issue of CURRENTS to review "Can You Say More About That?" The article offers practical advice for planning, holding, and analyzing results from focus groups. One key point: Consider hiring an external moderator. Although professional moderators can be expensive, they know how to plan for and structure the session, keep conversations on track, ask probing questions, and bring out the kind of information that's critical to meeting your goals. An added bonus: Working with an impartial observer may make your alumni feel more comfortable sharing fully honest opinions, leading to more accurate results.

**Just add water.** Why do more work than you have to? Armin Afsahi, assistant vice chancellor for alumni affairs at the University of California, San Diego, asked that question at the 2012 CASE Alumni Engagement Strategies conference. Some of the most effective engagement programs build upon the communities students create for
themselves while in school. At UCSD, Afsahi said, one of the strongest alumni affinity groups grew from a student finance association that had amassed more than 450 members and three alumni chapters on its own before partnering with the alumni association. “You don't need control. You want impact,” Afsahi said. “[Alumni professionals] feel like we're the only ones able to reach alumni, but we're not.”

Survey says … In the 2012 Alumni Matters survey conducted by CarringtonCrisp, more than 2,500 alumni and students from eight European and African institutions discussed why they are involved in their alumni networks and what kinds of programs would improve their relationship with their alma maters. The answers to both questions are similar. The top five reasons for involvement are to build professional networks, find job opportunities, keep in touch with classmates, stay on top of the latest business thinking, and support the school. The top programs respondents would like to see implemented are online learning, stronger career services, enhanced access to research, and coaching and mentoring services. Read the report's executive summary.

Dealing with difficult decisions. Survey results, budgets, and participation numbers all can prompt changes in alumni programming, which aren't always taken well. In a presentation at the 2013 CASE-NAIS conference, Ann Kangas and Kathie Wachs of Maryland's Bryn Mawr School shared tips about how to prepare for and inform alumni about difficult decisions. Before making a change, ensure that declining attendance or negative feedback indicates a trend, not a one-time flop. Get buy-in from administrators and boards, and establish how you'll measure the success of your new or modified programs. Then explain to alumni the rationale for the changes and set a threshold for an acceptable amount of negative feedback. Change isn't always easy, Kangas and Wachs said, but it is manageable.

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