Welcome!

[Measuring Impact: Lessons Learned Creating Alumni Engagement Metrics](#)

Only one rule!

#1. Eliminate distractions, make data the hero!

Creating an Alumni Engagement Metrics System

1. Advancement at the U
2. Project Purpose and Team
3. Areas of Measurement
4. Data Sources
5. Reports, Evolution of Project, and Building Collaboration
6. Reflections

Quick Poll:
Alumni Metrics System

- Have a system implemented
- Developing a system
- Investigating the ROI of a system
- Talking about it, but uncertain about the future
- No current discussions

University of Minnesota (the U)

477,000 TC Alumni (Living)

5 Campuses

50,000 Students

62% in MN

36% across U.S.

2% abroad

Advancement at the U

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ALUMNI ASSOCIATION

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FOUNDATION

Colleges /
Departments

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Purpose

From the Beginning - FY14

To determine <u>how</u> many alumni are demonstrating loyalty or interest in maintaining a relationship with the University of Minnesota

Project Team

Jim Aagaard - VP of Information Systems, UMF
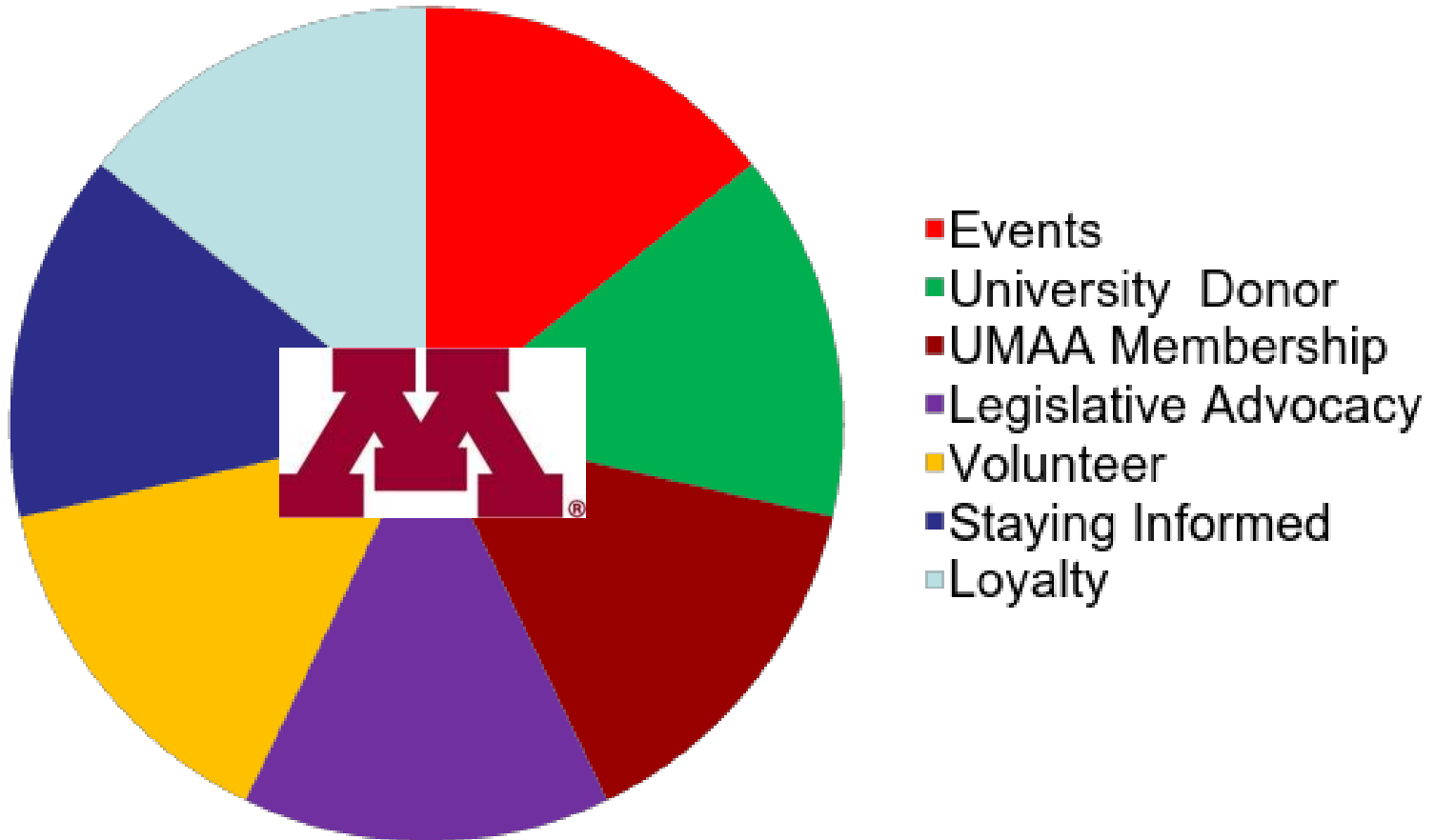
Beth Beck – Metrics Specialist, UMAA

Caryn Korman - Senior Project Manager, UMF

Mike McNaughton - IT Manager, Reporting & Data Analytics, UMF

Areas of Measurement

- Events
- University Donor
- UMAA Membership
- Legislative Advocacy
- Volunteer
- Staying Informed
- Loyalty

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Other Considerations

- Student Involvement
- Social Media
- Continuing Education
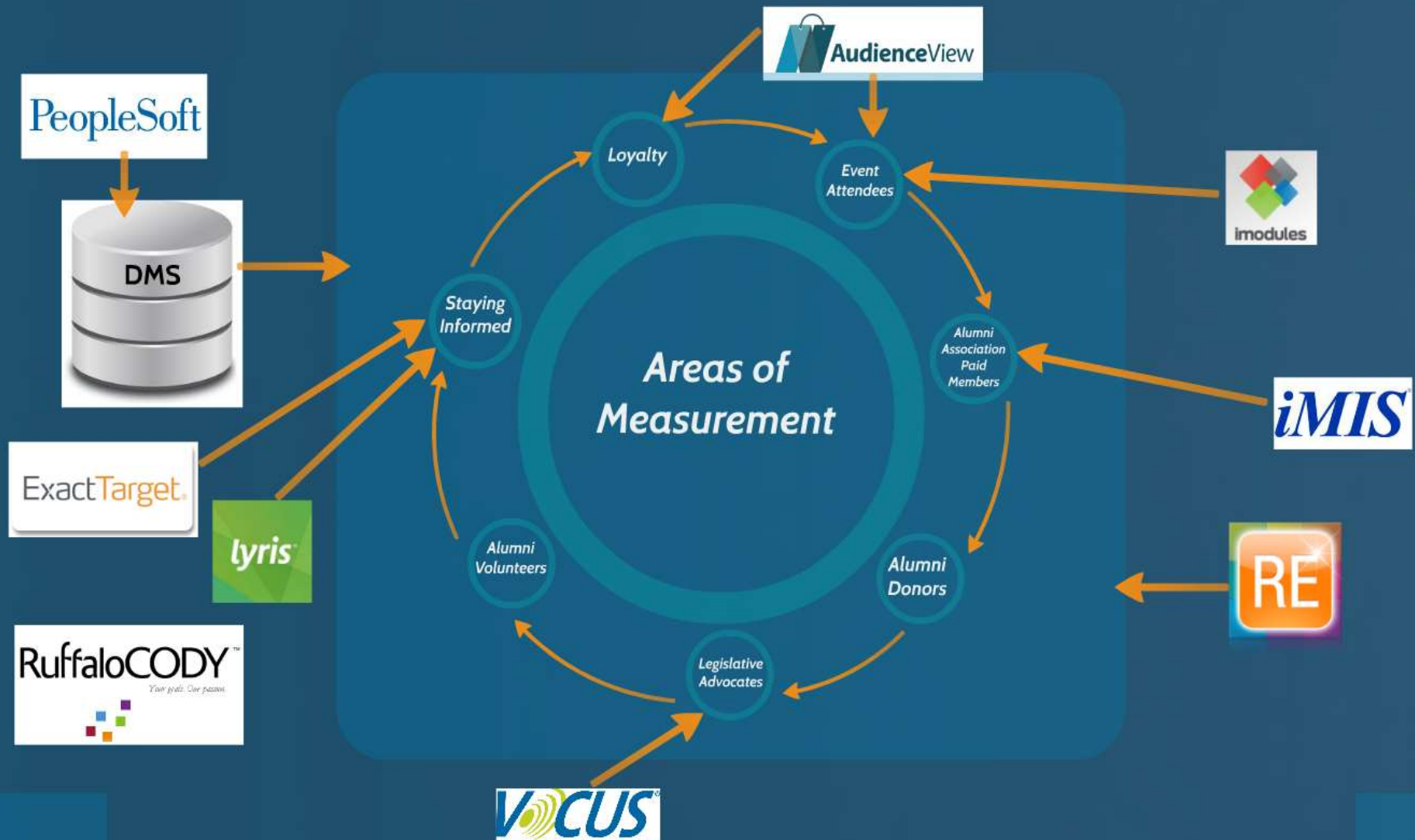- Non-Alumni Supporters/Friends

How is your relationship with your Database?

1. Do you have one central database?
2. How long has it been on your campus?
3. Who on campus "owns" it?
4. Who on campus has access to it?
5. Who on campus puts data into the database?
6. Who sets the policies/data guidelines for the database?

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Areas of Measurement & Data Sources

FY14 Report

| Number of alumni engaged | Areas of Measurement | | | | | | | | Areas of | Distinct |
College or Unit	Event Attendance	UMAA Member	University Donor	Legislative Advocate	Volunteer	Staying Informed	Loyalty		Measurement Composite	Grand Total
Allied Heath Programs, Center for	40	324	542	4	16	1,382	167		2,495	1,677
Carlson School of Management	1,827	4,560	5,675	106	702	29,247	2,797		44,914	31,545
College of Biological Sciences	180	865	1,067	43	91	6,418	335		8,999	6,863
College of Continuing Education	170	570	641	23	74	3,596	366		5,440	3,954
College of Design	950	760	1,123	18	367	6,514	498		10,230	7,175
College of Education and Human Development	878	4,623	6,180	116	269	23,358	3,172		38,596	27,360
College of Food, Agricultural and Natural Resource Sciences	507	1,990	2,555	41	190	11,716	846		17,845	12,825
College of Liberal Arts	2,224	8,468	10,487	261	951	53,612	4,649		80,652	59,292
College of Pharmacy	72	730	816	8	15	3,344	223		5,209	3,615
College of Science and Engineering	641	4,486	5,632	90	394	28,339	1,778		41,560	30,730
College of Veterinary Medicine	157	382	547	7	27	2,140	93		3,353	2,396
Humphrey School of Public Affairs	327	297	632	5	96	2,679	134		4,172	2,814
Law School	654	1,205	2,635	25	233	7,394	668		12,814	8,084
Medical School	494	1,901	2,968	30	170	9,169	1,006		15,739	10,623
School of Dentistry	94	1,285	1,166	16	43	3,616	430		6,650	4,348
School of Nursing	156	844	1,176	8	51	3,764	365		6,366	4,436
School of Public Health	191	766	686	16	75	4,100	296		6,332	4,514
Grand Total	9,763	34,056	44,731	819	3,766	200,388	17,843		311,366	222,250

Percent of alumni engaged									Percent Engaged	Total living Alumni
Allied Heath Programs, Center for	1%	8%	13%	0%	0%	33%	4%		40%	4,235
Carlson School of Management	3%	8%	10%	0%	1%	49%	5%		53%	59,200
College of Biological Sciences	1%	6%	7%	0%	1%	45%	2%		48%	14,400
College of Continuing Education	2%	6%	6%	0%	1%	36%	4%		40%	9,879
College of Design	6%	5%	7%	0%	2%	43%	3%		47%	15,264
College of Education and Human Development	1%	6%	8%	0%	0%	31%	4%		37%	74,319
College of Food, Agricultural and Natural Resource Sciences	2%	7%	9%	0%	1%	44%	3%		48%	26,913
College of Liberal Arts	2%	6%	7%	0%	1%	36%	3%		40%	147,560
College of Pharmacy	1%	12%	14%	0%	0%	55%	4%		60%	6,039
College of Science and Engineering	1%	7%	9%	0%	1%	43%	3%		47%	65,402
College of Veterinary Medicine	3%	8%	12%	0%	1%	46%	2%		51%	4,703
Humphrey School of Public Affairs	8%	7%	15%	0%	2%	64%	3%		67%	4,201
Law School	5%	9%	21%	0%	2%	58%	5%		63%	12,825
Medical School	2%	8%	12%	0%	1%	37%	4%		43%	24,841
School of Dentistry	1%	14%	13%	0%	0%	39%	5%		47%	9,292
School of Nursing	2%	8%	11%	0%	0%	37%	4%		43%	10,247
School of Public Health	2%	8%	9%	0%	1%	41%	3%		45%	9,946

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What do we know about Jane Alumna?

CSE graduate

Volunteered as a mentor

Traveled with Alumni Association

Donated $1000 to the University

Served on the CSE Society Board

Purchased season volleyball tickets

Did not open any email messages

Became an Alumni Association life member

	Event Attendee	Alumni Donor	UMAA Paid Member	Legislative Advocate	Alumni Volunteer	Staying Informed	Loyalty
Annual	Y	Y	Y	N	Y	N	Y

Lesson Learned

We don't collect data the same way (and sometimes not at all)!

Opportunity!

- Improved Standardize Coding
- Review Data Input
- Create Trainings
- Provide Value
- Speaking Tour
- Formalizing Expectations

Presentations

- Development Officers & CDO's
- Senior Advancement Staff
- Alumni Relations Officers
- University Relations
- Annual Fund & Stewardship
- Prospect Research
- Extension & 4H
- Continuing Education
- College Staff (Communications/Development/Alumni)
- Departmental Level Staff Meetings
- Coordinate Campuses

Care and Feeding of the Data

- Daily and ongoing process
- Mindset that this is a constant priority
- Change in work process at the unit level
  - When creating an event/volunteer opportunity, how will you capture participation?
  - Gathering and tracking participation post-event
  - Staffing considerations and student workers
  - Collecting data from others within the unit who host events (DOs, departments)
  - Challenge of capturing certain kinds of data

Creating Motivation

- Data shared with college deans, U Regents
- Show value of having the data for future event planning, targeted communications
- Competition among units
- Challenge - data can't be used to track individual alumni relations officer performance or engagement with specific unit

Project Evolution

FY14

Objective: To determine **how many alumni** are demonstrating loyalty or interest in maintaining a relationship with the University of Minnesota

FY15

Objective: To determine **what level** alumni are demonstrating loyalty or interest in maintaining a relationship with the University of Minnesota

Annual & Lifetime Engagement

- Annual– a snap shot of recent engagement

- Lifetime – a comprehensive view of past engagement

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Search for DMS page   Search

Joelle Larson

Detail Links

- Maintenance
- Main
- Contact Info +
- Documents
- Donor Info +
- Groups +
- Personal Info +
- Report A Duplicate
- Links +

Constituent Profile

Enter a Searchable Criteria

| 140428741 🔍 | Joelle B Larson 🅼 | Go |
| 430095907 | Oliver Larson | Cancel |

Quick Facts

Birth Date	Deceased Date	Student/Staff ID	Donor	Prospect	Prospect Manager	Alumni Engagement Score	UMAA Member Status
01-AUG-1980	Not Deceased	2974739	Yes	No	No information	Annual: High Lifetime: High	UMAA Annual Membership (Single) (Expires 31-MAR-2018)

Preferred Contacts

Alternate Address (Current)	Home Phone	Campus Email Address (Current)
229 19th Ave S Minneapolis, MN 55455 - 0415	161-262-6180	jblarson@umn.edu

Primary Employer

Name	Occupation / Job Title	Matching?
University of Minnesota	Postsecondary Teachers / University Faculty	No

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Alumni Engagement Score*

The alumni engagement score was established to determine at what level alumni are demonstrating loyalty or interest in maintaining a relationship with the University of Minnesota.

Annual   High

Lifetime   High

*This score was developed in collaboration with the Alumni Association and is not a score provided by PD.

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Now what do we know about Jane Alumna?

Attended 5 chapter events

CSE graduate

Volunteered as a mentor

Traveled with Alumni Association

Purchased tickets at Northrop

Donated $1000 to the University

Returned for homecoming & attended Ski-U-Mania

Did not write to her legislator

Served on the CSE Society Board

Purchased volleyball season tickets

Did not open any email messages

Became Alumni Association life member

	Event Attendee	Alumni Donor	UMAA Paid Member	Legislative Advocate	Alumni Volunteer	Staying Informed	Loyalty
Annual	High	Mid	High	None	High	None	High
Lifetime	Mid	Low	High	Low	Mid	None	Mid

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UMAA Engagement Analysis
Twin Cities

Number Contactable	429,616	
Engaged Annual	215,183	50.09%
Engaged Lifetime	313,200	72.90%

Unit	Annual Engagement Score				Lifetime Engagement Score				Contactable
	Not Engaged	Low	Medium	High	Not Engaged	Low	Medium	High	
Allied Heath Programs, Center for	51%	28%	16%	5%	27%	39%	23%	11%	3,863
Carlson School of Management	42%	31%	20%	7%	21%	38%	28%	13%	57,434
College of Biological Sciences	45%	32%	20%	4%	22%	43%	27%	8%	14,577
College of Continuing Education	54%	26%	16%	4%	30%	41%	21%	8%	9,784
College of Design	49%	29%	18%	4%	25%	41%	25%	9%	14,718
College of Education and Human Development	56%	25%	15%	4%	32%	40%	20%	8%	67,231
College of Food, Agricultural and Natural Resource Sciences	50%	27%	17%	5%	27%	37%	25%	11%	25,768
College of Liberal Arts	53%	27%	16%	4%	30%	41%	21%	8%	141,313
College of Pharmacy	27%	41%	25%	7%	12%	42%	31%	15%	6,148
College of Science and Engineering	48%	28%	19%	5%	24%	40%	26%	10%	63,483
College of Veterinary Medicine	41%	33%	20%	5%	20%	37%	30%	13%	4,640
Humphrey School of Public Affairs	27%	37%	28%	8%	11%	37%	36%	15%	4,325
Law School	31%	31%	28%	10%	13%	31%	34%	22%	12,941
Medical School	49%	27%	19%	5%	30%	32%	27%	12%	24,656
School of Dentistry	47%	29%	18%	6%	20%	39%	26%	15%	8,787
School of Nursing	48%	28%	18%	5%	23%	40%	26%	11%	9,811
School of Public Health	40%	31%	23%	6%	22%	37%	29%	12%	10,207
Twin Cities Overall	50%	28%	17%	5%	27%	39%	24%	10%	429,616

Note: This analysis includes contactable constituents only.

UMAA Engagement Analysis
Humphrey School of Public Affairs

Number Contactable	429,616	
Engaged Annual	215,183	50.09%
Engaged Lifetime	313,200	72.90%

Annual Engagement

		Not Engaged	Low	Medium	High	Total Engaged	Total
Twin Cities	Count	214,433	120,506	74,832	19,845	215,183	429,616
	Percent (%)	49.91%	28.05%	17.42%	4.62%	50.09%	100.00%
Humphrey School of Public Affairs	Count	1,187	1,603	1,199	336	3,138	4,325
	Percent (%)	27.45%	37.06%	27.72%	7.77%	72.55%	100.00%

Lifetime Engagement

		Not Engaged	Low	Medium	High	Total Engaged	Total
Twin Cities	Count	116,416	168,955	103,172	41,073	313,200	429,616
	Percent (%)	27.10%	39.33%	24.01%	9.56%	72.90%	100.00%
Humphrey School of Public Affairs	Count	487	1,605	1,567	666	3,838	4,325
	Percent (%)	11.26%	37.11%	36.23%	15.40%	88.74%	100.00%

Notes: 1) This analysis includes contactable constituents only.
2) "Total Engaged" indicates constituents with an engagment score of 1 or more (out of a possible score of 30)

Unit Filter
Humphrey School of Public Affairs

4 levels in Scale

Donor

Annual Engagement Definitions			
Not Engaged 0 Points	**Low** 1 Points	**Medium** 3 Points	**High** 5 Points
Non-donor in the current fiscal year and the previous fiscal year	Donor in the previous fiscal year, but non-donor in the current fiscal year	Donor who gave one time in the current fiscal year	Donor who gave multiple times in the current fiscal year or Cumulative giving of $1000 or more

Measurement Rules

30 = Highest score
0 = Lowest score

3%-5% of your population highest loyalty group

Scores of 9 - 30 = Highly Engaged

Ongoing Support

- Care and feeding data sources and calc engine
  - New initiatives @ Minnesota
    - Campaign Launch - campaign volunteers
    - New technologies - crowdfunding volunteers
    - Missed items - UM - Duluth assured seating
    - Deprecated email system

Reflections

- Create Competition
- Build Consensus – Focus Groups
- Talk, talk, talk & talk more about it
- Mid-Year Report
- All Levels – President/Deans/Dept Heads
- Take the Time – Phased Plan (War Room)

Future of Alumni Engagement

- Quantifying Alumni Work
- It is a Science, not just an Art
- Better understanding of our alumni (better data) = better alumni/customer relations
- Standardization in the Industry

"We want to be like Amazon – know our alumni and provide them the best experience and connection to the U. "

Questions/Discussion

Ours is a world of challenge and possibility. And we are the driven.

#UMNdriven

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Bill Venne