Best Practices in Alumni Engagement and Data Collection

October 2019

In the following report, Hanover Research presents the results of a best practices analysis of trends in alumni engagement and data collection.
Executive Summary
Best Practices in Alumni Engagement and Data Collection

Recommendations
Based on an analysis of best practices in the field, Hanover recommends that University A:

1. Use social media platforms to collect alumni contact data. By embedding easy-to-use email sign-ups into its social media posts – for example, about networking opportunities, university life, or other graduate news – the alumni office can incentivize graduates in its network to volunteer personal data – if they want to receive similar content or invitations to future similar events.

2. Coordinate with academic registrars, student organizations, and local alumni associations to circulate up-to-date alumni data. As alumni become more transient and rely less on landlines and permanent residences, maintaining current information is more difficult. In addition to increasing its efforts to attract new alumni relationships, The institution must also consider how to maintain its existing contacts in good order.

Key Findings

The average alumni organization can communicate with 85 percent of its alumni constituents. According to a 2017 survey, the average alumni organization has the email addresses of 56 percent of the institution’s graduates. Half of alumni organizations have a mailable address for at least 80 percent of their alumni constituents.

The most common alumni engagement platforms are Facebook, email, websites, and printed magazines/newsletters. Each of these platforms is used by more than 90 percent of alumni organizations among institutions with over 100 thousand alumni. Other common platforms include Twitter (88 percent), LinkedIn (85.9 percent), direct mail/postcards (81 percent), digital magazines (69.6 percent), and YouTube (51.1 percent).

To collect alumni data, institutions often rely on a mixture of direct collection methods. These methods include online surveys, direct mail, interviews, focus groups, alumni websites, and social media. The university should look to ensure all alumni website links are up to date and consider creating a social media account for alumni only.

To facilitate accurate, current database information, alumni offices should coordinate with academic registrars, student organizations, and local alumni associations. When graduates contact the registrar to request a transcript, or attend the event of a student organization or local alumni group, information should be forwarded to alumni database managers.

Social media platforms can be used for a range of data collection purposes. Social media platforms are an increasingly important aspect of alumni engagement practice – for example, nearly three quarters of senior alumni professionals check Facebook daily. As a data collection tool, these platforms can be used to verify online survey data, narrow the focus of prospective surveys based on what alumni are talking about, or compliment survey data with additional demographic information.

As a more limited way of collecting contact information, social media can help alumni offices to connect with graduates and begin a relationship.

Fast Facts

85%  Average share of alumni with which alumni organizations can communicate

73%  Proportion of senior alumni executives that use Facebook daily

40%  Proportion of senior alumni executives that use LinkedIn daily

36%  Proportion of senior alumni executives that never use Twitter
Research Questions and Methodology
Best Practices in Alumni Engagement and Data Collection

Methodology

To help University A as it strategizes how to keep in touch with graduates, Hanover conducted a best practices analysis of emerging and successful approaches to alumni engagement and data collection. The analysis aims to assist the university as it seeks to learn how its alumni population is developing and where these graduates are within their careers.

The following analysis is based on a review of information drawn from publicly available data sources.

Overview

Higher education trends, such as heightened transparency in post-graduate outcomes and increasing educational costs, have driven an expansion of alumni data collection and engagement strategies. Moving toward data transparency in alumni outcomes can help demonstrate an institution’s economic value, and utilizing effective alumni engagement techniques can increase fundraising and promote student-alumni connections that may be valuable to employment prospects.

Alumni associations are increasingly using alumni data to answer strategic questions, such as “Where is our greatest value? What should be our priorities? What do we stop doing? How do we increase our relevance to our alumni and to the university?” This trend has necessitated a larger effort towards data collection and analysis.

Research Questions

What approaches to alumni data collection are most commonly used among Canadian and global institutions?

What trends exist in the area of alumni engagement and new ways of online engagement?

What are the most popular platforms to engage and communicate with alumni?

Are any universities implementing innovative, unique, or state-of-the-art alumni data collection strategies?
Alumni Contact Information

The average alumni organization can communicate with 85 percent of its alumni constituents. According to a 2017 survey of over 500 alumni organizations in the United States, Canada, and around the world, the average alumni organization has the email addresses of 56 percent of the institution’s graduates. About half of alumni organizations (47 percent) have a mailable address for four out of five of their alumni constituents.

About one-in-ten students generally opt out of alumni communication. Survey data indicate that the average opt-out rate, including alumni listed as “Do Not Call,” “Do Not Contact,” “Do Not Solicit,” etc., is 10.3 percent for all organizations – a figure that rose from 2016 to 2017.

Average Contact Rates

Institutions generally send 25-35 alumni-wide emails per year. According to survey data, the average alumni organization sends 28 emails to “most or all of their alumni” each year, while the larger schools of the U.S. “Power 5 Conferences” send an average of 36 emails per year. About one-fifth of surveyed institutions send less than 1 email per month to “most or all of their alumni.”

On average, institutions send 3.8 gift solicitations to alumni within year of graduating. This figure was higher for associations that were dues-paying compared to those with no dues (4.32 vs 3.85).

### Popular Engagement Platforms

Most common channels used by alumni relations organizations to engage alumni/ae (n=590)

<table>
<thead>
<tr>
<th>Platform</th>
<th>&lt;100K Total Alumni</th>
<th>100K+ Total Alumni</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>98.4%</td>
<td>100.0%</td>
</tr>
<tr>
<td>Email</td>
<td>99.5%</td>
<td>100.0%</td>
</tr>
<tr>
<td>Website</td>
<td>96.2%</td>
<td>97.8%</td>
</tr>
<tr>
<td>Printed Magazine/Newsletter</td>
<td>83.7%</td>
<td>95.7%</td>
</tr>
<tr>
<td>Twitter</td>
<td>70.7%</td>
<td>88.0%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>85.9%</td>
<td>85.9%</td>
</tr>
<tr>
<td>Direct Mail/Postcard</td>
<td>46.7%</td>
<td>79.3%</td>
</tr>
<tr>
<td>Digital/Electronic Magazine</td>
<td>36.4%</td>
<td>51.1%</td>
</tr>
<tr>
<td>YouTube</td>
<td>52.2%</td>
<td>47.8%</td>
</tr>
<tr>
<td>Student Call Center/Phonathon</td>
<td>27.2%</td>
<td>31.5%</td>
</tr>
<tr>
<td>Exclusive Online Community</td>
<td>15.2%</td>
<td>29.3%</td>
</tr>
<tr>
<td>Other Social Media App</td>
<td>14.7%</td>
<td>23.9%</td>
</tr>
<tr>
<td>Dedicated Mobile App</td>
<td>2.7%</td>
<td>16.3%</td>
</tr>
<tr>
<td>Web Chat</td>
<td>12.0%</td>
<td>14.1%</td>
</tr>
<tr>
<td>Blog</td>
<td>2.7%</td>
<td>14.1%</td>
</tr>
<tr>
<td>SMS (Text) Messages</td>
<td>7.1%</td>
<td>10.9%</td>
</tr>
</tbody>
</table>

Source: Alumni Access
Data Collection and Engagement Methods
Best Practices in Alumni Engagement and Data Collection

Types of Direct Data Collection

- Online Surveys
- Direct Mail
- Interviews
- Focus Groups
- Alumni Websites
- Social Media

Alumni Contact Information

Direct engagement efforts often require an up-to-date alumni database. In addition to containing necessary contact information, these resources let alumni offices subdivide graduates into relevant populations. For example, offices may wish to target alumni who they know have the means to donate or who have a history of engagement with the university. In other situations, they may seek to target alumni in a particular geographic region or who work in a specific industry. Crucially of course, alumni databases, are “only as good as the data that reside within them,” and maintaining current data has become increasingly challenging as alumni become more mobile and rely less on landlines and permanent residences.

To facilitate accurate, current database information, alumni offices should coordinate with academic registrars, student organizations, and local alumni associations. For example, when a graduate contacts the academic registrar to request a copy of his or her transcript, the academic registrar may forward the graduate’s address, phone number, and any other contact information to alumni database managers. The office can similarly ask student organizations and local alumni associations to collect information from their events. Many institutions also encourage alumni to update their contact information with a visible, direct link on the main alumni web page.

Online Surveys

Online surveys can provide a regular way of collecting alumni data. Institutions are able to deliver online surveys in a variety of ways, such as embedded in an email or via a link on the institution’s alumni relations website. Online surveys can focus on a variety of areas, including:

- Measuring satisfaction with the educational experience
- Measuring interest in making contributions to the institution
- Measuring earnings and career progression – question types typically include multiple choice and open-ended options to discover short- and long-term earnings and career satisfaction

Alumni surveys are the third most common tool used by institutions to measure the effectiveness of communication and engagement efforts. They are a primary assessment mechanism of 55.7 percent of all institutions and 62.8 percent of institutions with more than 100 thousand alumni. Hanover will work to incorporate these focus areas and best practices in the survey of current students and alumni of the three-year degree program.

Direct Mail

Direct mail surveys can sometimes reach a wider audience than online surveys. Direct mail surveys generally seek to measure the same components as their online counterparts. Notably however, many educational institutions have only a small percentage of their alumni’s email addresses, and these are often heavily skewed towards more recent graduates. Because of these concerns, mail surveys which are also shared over email and through social media are sometimes the best choice for reaching the widest span of alumni.

Both online and mail-form surveys contain certain risks. Despite their ability to reach alumni from varying years, direct mail surveys have some of the same limitations common to online surveys, namely out-of-date alumni addresses, self-reporting errors (e.g., exaggerating income), and sample bias.

To limit the potential negative impact of these factors, universities should consider how their survey layout, packaging (e.g., return postage), and personalization may impact response rates for direct mail.
Data Collection and Engagement Methods

Best Practices in Alumni Engagement and Data Collection

**Interviews**

Interviews can be effective at gathering in-depth alumni data. Interviews provide the space to probe and explore questions in full detail, and their personal contact can often elicit richer responses than alternative formats. Based on an alumni office’s technological abilities and interviewer preferences, the process can also be conducted over several media.

Despite their usefulness in collecting detailed data, interviews suffer from being a lengthy and resource-consuming process, and from yielding a far small volume of personal alumni details than other methods (e.g., contact information, employment information).

**Focus Groups**

Focus groups can provide a richer set of interview data. The ‘group’ aspect, in contrast to an interview, presents unique challenges, such as scheduling a convenient time for each interviewee and navigating intergroup dynamics, but also has several unique advantages.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
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<tbody>
<tr>
<td>• Effective at gathering in-depth attitudes and beliefs from several stakeholders at a time</td>
<td>• Requires staff time to set up and facilitate</td>
</tr>
<tr>
<td>• Group dynamics can generate more ideas than individual interviews</td>
<td>• Requires staff time to identify and schedule participants</td>
</tr>
<tr>
<td>• Effective at focusing-in on the details of issues identified through surveys or other data collection methods</td>
<td>• Requires strong facilitator to guide discussion and ensure participation by all members</td>
</tr>
<tr>
<td></td>
<td>• Usually requires special equipment to record and transcribe discussions</td>
</tr>
</tbody>
</table>

Source: University of Washington

**Alumni Websites**

Alumni websites may present an underused opportunity for institutions to collect alumni data. Through websites, universities can embed surveys, solicit for interviews and focus groups, or track user traffic and information using tools such as Google Analytics. The Napa Group states that “as alumni seek meaningful relationships with their universities, alumni organizations are positioning themselves as ‘portals’ between alumni and alma mater, through programming and communications.” As the primary entry point for alumni, these websites should enable alumni’s continued connection to the institution, including by soliciting contact data.

In its suite of possible strategies for data collection, EAB notes several possible website-related prompts:

- Student Information Portal Quick Poll
- Alumni Affairs Homepage Ask
- Ticket Giveaway on Athletics Homepage
- University Homepage Campaign
- Mobile-Friendly Update Website – millennials in particular expect their experience “to be consistent across online, store or mobile.”
- Quick-Entry Website Fields

Alumni websites should make it convenient to share contact details. For example, as universities build a page and URL address to collect emails, they should ensure the form only asks for necessary information (e.g., not asking for a home address if the graduate is just signing up for email communications) and that the page is easily navigable. Universities should also consider whether their URL is easy to remember (e.g., schoolname.edu/alumni/email). Indeed, nearly nine-in-ten graduates who “go online to join, give or make a purchase would abandon their shopping carts during checkout if the process was too difficult.”

The existence of the email collection page should be communicated to the advancement team to encourage greater use.
Data Collection and Engagement Methods
Best Practices in Alumni Engagement and Data Collection

Importance of Social Media

Social media platforms are increasingly prominent in the field of alumni engagement. Millennials in particular are far more likely to be “influenced by blogs and social networking sites than the general population,” and social media amplification metrics are the second most common measure alumni organizations use to measure the effectiveness of engagement methods.

- 73% Of senior alumni executives use Facebook daily
- 40% Of senior alumni executives use LinkedIn daily
- 36% Of senior alumni executives never use Twitter

Uses of Social Media

Social media platforms give universities a range of new opportunities for data collection. For example, alumni personnel can ask directed questions, post surveys, and engage in interviews or more informal Q&A sessions. According to Insights in Marketing, it is particularly important for firms to define objectives for social media use at the outset – in order separate useful data from chatter.

Social Media Data Collection Strategies

Alumni independently engage with each other through social media. According to The Napa Group, social media platforms allow alumni to independently engage with each other, reducing the central role of “alumni magazines, alumni directories and events.” Instead, alumni offices are increasingly learning to play a “relational” role where online managers coordinate content for different groups.

A similar role may be necessary for data collection, where alumni relations professionals embed links to online forms directly into social media pages, giving alumni easy access to “forms for contact information updates, event registrations, general feedback, and more.”

LinkedIn alumni group managers can post a sign-up link and call to action message at the top of the group’s feed – this can include a sign-up for notifications about future networking opportunities. LinkedIn has previously announced a feature that allows students and alumni to add their university affiliation by clicking a button either in an alumni email or on a university’s website.

Facebook pages offer several possibilities for data collection. In addition to the common “Donate Now” button – which drives alumni to a donation page on – Facebook also offers other button options like “Book Now,” “Contact Us,” or “Sign Up.”

Alma Mater Trivia Contests offered through websites like Polldaddy give alumni offices the chance to request information like names, class years, and email addresses of participants. More difficult quizzes can be offered only in return for email signups.

YouTube, Storify and Instagram provide platforms to post footage of events that can be accompanied with links to sign up for notifications about future similar events.

Source: Insights in Marketing
Appendix: Other Considerations
Best Practices in Alumni Engagement and Data Collection

Most Effective Alumni Engagement Channels

According to survey data, eight-in-ten alumni organizations report that “blogs, social media and e-newsletters” have the largest impact on alumni engagement, compared to 71 percent who say “clubs, chapters and reunions” are the most impactful. When rating the most effective new member acquisition channels, alumni organizations are most likely to stress person-to-person interactions.

When rating the most effective current member retention channels, alumni organizations are more likely to bring up Facebook and other social media platforms.

Coordination Role
Tools used to measuring the effectiveness communication and engagement efforts

- Social Media Amplification (e.g., shares, re-posts) 75.0% 89.5%
- Digital Response Rates (e.g., opens, clicks, views, visits, likes) 69.8% 82.6%
- Alumni Survey 51.7% 62.8%
- Net Promoter Score Surveys 17.4% 40.7%
- Return on Investment (amount spent vs. revenue) 27.9% 33.7%
- Data Matching Back to Alumni Database 18.0% 26.7%
- A/B Testing or Split Marketing Test 6.4% 22.1%
- Predictive Analysis 6.4% 19.8%
- None of the above 13.5% 7.0%
- Analyzing Lifetime Value 11.6% 2.3%

Source: Alumni Access