



Accountability and Measuring the Work We Do

Panel Presentation and Workshop

**Marie Earl (UBC)
Karen McQuigge (McMaster)
Guy Larocque (uOttawa)**



Measuring Contributions to Institutional Advancement

Marie Earl
June 2007

University of British Columbia
Alumni Affairs



Beginning with the End in Mind

- Vision—ideal state of the future (our own, our unit, & that of the institution)
- Mission—the work we do
- Governing Objective—first priority when resource constrained



Customer Data

- Feelings
- Needs
- Behaviours



Cost/Impact Analysis

Stanford Alumni Association

3a. Activity Prioritization Strategies

Resource Allocation Implications

Impact	High	Reduce resources without harming impact	Increase resources to increase active support or alumni satisfaction, but watch for diminishing returns	Increase resources if it will increase active support or alumni satisfaction
	Medium	Reduce resources or increase resource efficiency	Maintain resources and explore how to increase impact or reduce resources without harming impact	Increase resources if it will increase active support or alumni satisfaction, but watch for diminishing returns
	Low	Reduce resources or manage for revenue rather than impact	Reduce resources or increase resource efficiency	Determine how to increase impact or maximize returns
		High	Medium	Low

Cost

Legend:
■ = Higher return activities
■ = Lower return activities

Source: 4/03 Survey, PostGrads Data, Marakon Analysis



Strategies

- 5-6 focus areas that will substantially contribute to achieving your vision, mission and governing objective
- For example:
 - Leveraging communications
 - Engaging today's students (especially student leaders)
 - Improving our knowledge of alumni
 - Partnering wherever possible



Priorities

- Up to 10 specific high impact initiatives that advance your strategies
- For example:
 - Launching an alumni advocacy program
 - Implementing a comprehensive student engagement strategy
 - Introducing the new president to 1,000 alumni connectors



Dashboard of Metrics

- Metric
- Rationale
- Baseline/Current
- Goal



Dashboard I - Alumni Feelings

- Alumni feel they are an integral part of the UBC community
- Alumni feel a personal responsibility to do what they can to help UBC remain strong



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Dashboard II - Engagement of Alumni

- Alumni email address capture
- Alumni to alumni connections in *TrekConnect*
- Unique visitors to alumni website
- Alumni with POINTS



POINTS=Alumni Engagement Index

- Tracks individual behaviour, including:
 - Event attendance
 - Updating contact information
 - Volunteer assignments
 - Gifts
- Segmented: Involved, Engaged, Highly Engaged



Dashboard III - Alumni Contributing to Advancing UBC Vision at Highest Level

- Engagement of Alumni “Connectors”— absolute # + “moves management”
- Alumni Volunteers
- Alumni Donating to UBC (five-year rolling average)



Dashboard IV - Engagement of Campus Partners

- Campus partners who set annual alumni relations goals
- Student leaders engaged in alumni activities
- Alumni “earning their place on the square”



Questions???

Thanks to Dianna DeBlaere, Project Manager,
for her help on the dashboard.



Building a Functional Metrics Programme

Karen McQuigge
June 2007

Director of Alumni Advancement
McMaster University



Alumni Program Metrics

- Matched to institutional priorities
- Key Success Factors
- Goals built around metrics
 - Director
 - Board/Volunteers
 - Staff



Reporting Performance

- How to report the metrics and to whom?
- Staff involvement
- What do the numbers tell you?
 - How do you report your successes?
 - How do you report your challenges?
 - Program health
 - Program direction



McMaster University Alumni Program Examples

- Director's Report to the Board
- M.A.C. Luncheon Series
 - Evaluation of program and results
 - Next steps with the program



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Thank you

Karen McQuigge
June 2007

Directory Alumni Advancement
McMaster University



Alumni Relations Performance Indicator Presentation

Measuring Student Relations Success

by Guy Larocque
**Director, Alumni Relations
Executive-Director, Alumni Association
University of Ottawa**



Context of Performance Indicator Case Study Design

- **In early 2005:**
 - **Final stages of 5-yr University-wide Strategic Planning**
 - Vision 2010 'Improving the student experience'
 - **Internal Alumni Relations Strategic Reorientation Plan**
 - **Alumni Relations, last but not least of Uni. Adv. reorg.**



New Alumni Relations Mandate Included:

- **Engage students**
- **Develop and support faculty-based alumni relations**
- **Improve relations with the Alumni Association**

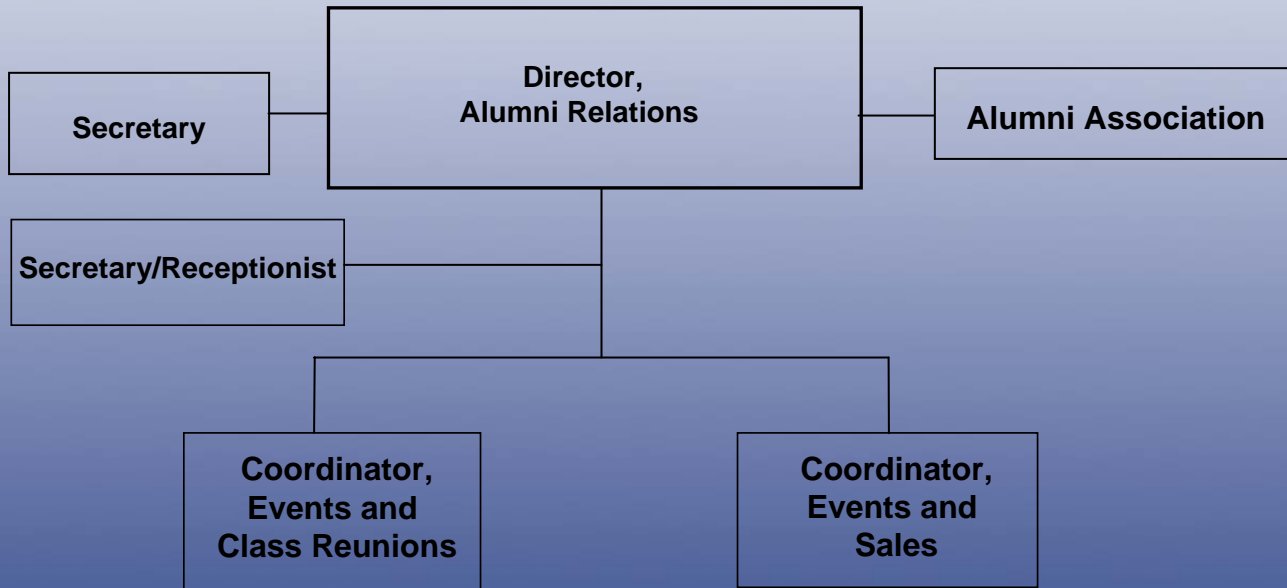


Student Engagement Challenges

- The Plan for Alumni Relations made no reference to communications
- Very limited resources (in spite of accrued budget and staff)
- Little or no alumni activity conducive to student engagement
- Enrollment Management database unable to assist
- Students targeted by other players
- Other players meeting with mitigated results

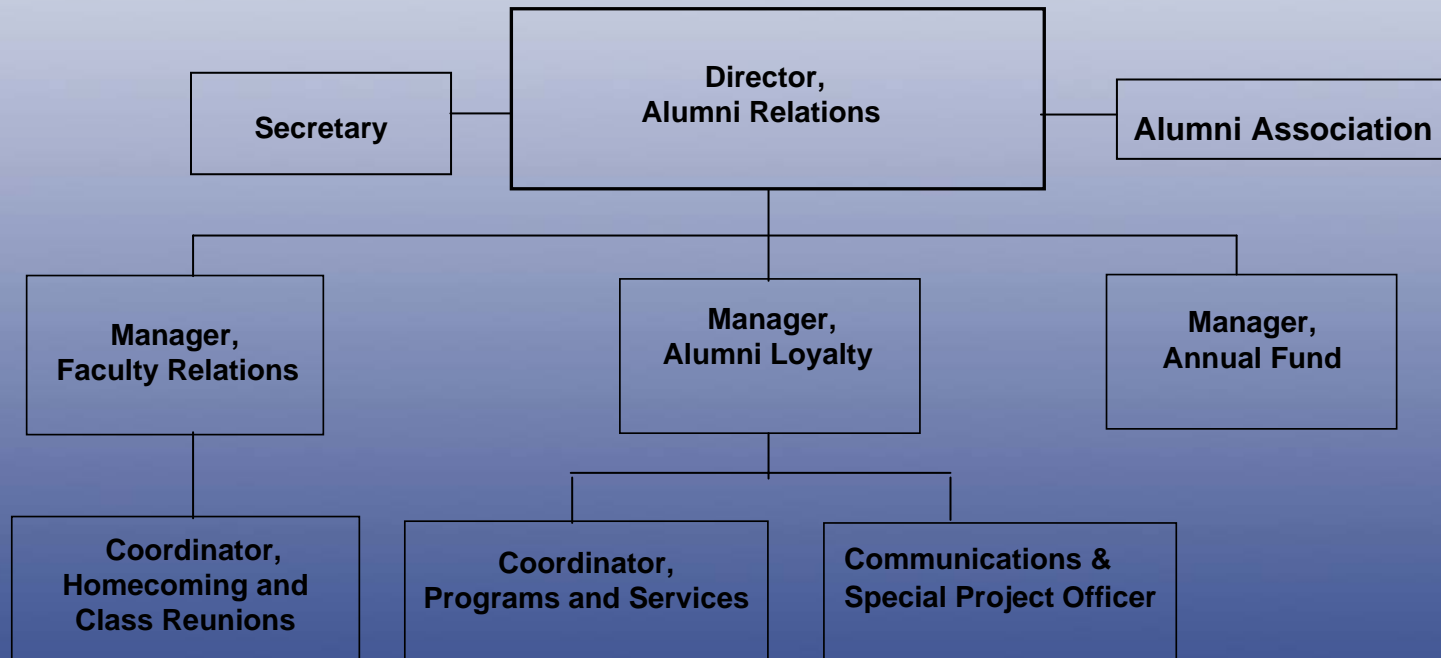


Alumni Relations Office Before...





Alumni Relations Office After...





Student Demographics

- **35,000 students**
- **2 linguistic communities**
- **10 undergraduate faculties**



Focus groups and Survey research told us:

- **Students are interested in career preparation**
- **They are interested in meeting alumni**
- **Nearsighted: Their conceptual horizon is close**
- **Attention span is short**
- **They are avert to commit (one-time shots)**
- **Traditional, formal, mass programming is a non-starter**
- **Whatever we do has to be fun**



Establishing goals

Assessing target (simplified method):

- 35 000 students
- Year 3 and 4 (little interest in after studies before that)
- $35\ 000 / 4 * 2 = 17\ 500$
- 17 500 - professional faculties (MD, LLB + Mgnt)
- $12\ 500 / 4 = 3125$
- Horizon = 5 years



Agency

Existing stakeholders:

- Mentorship Program
- Career Centers

Natural Partners:

- Student associations and clubs
- Alumni Association



Synergies and Cost-effectiveness

- Homecoming (Affinity reunions and more)
- Etiquette Dinner -> expand to Etiquette Series (quality, cost-recovery events)
- Alumni Association -> Funding for initiatives
- Grass-roots associations and clubs
- Complement existing activities



Methods

Awareness and partnership building:

- Meet student groups

Formulas: Career Panels, Student/Alumni mingles

Activity promotion:

- Word-of-mouth and facebook

Resources:

- Wherever possible, enrich instead of create

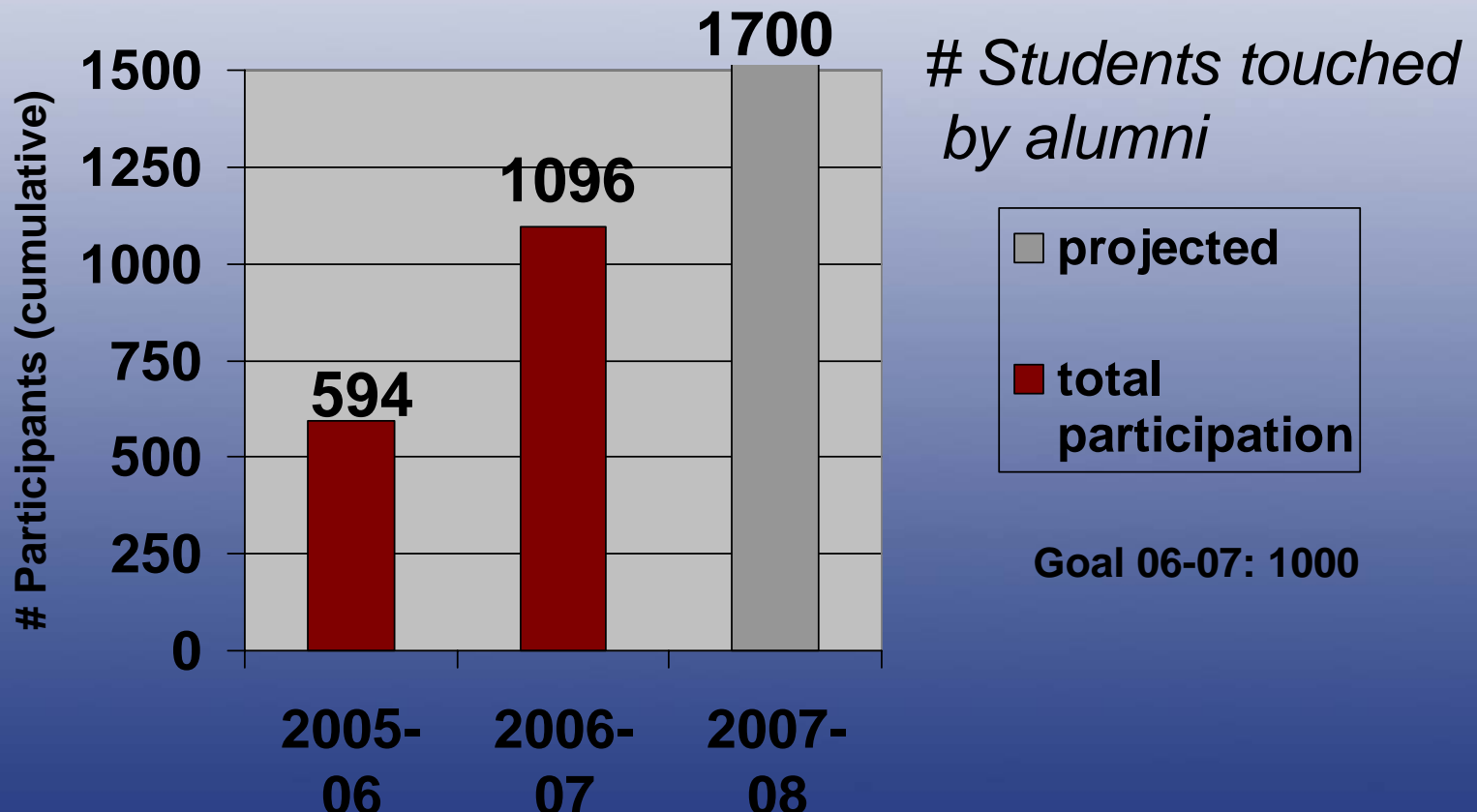


Measuring performance

- Meet with at least 2 student leaders monthly
- Report monthly on # of students 'engaged' by alumni
- Affect all non-professional faculties (6) yearly
- Ultimate aim for minimum student participation of 50
(10 events / undergrad faculty / yr $6*50*10 = 3000$)



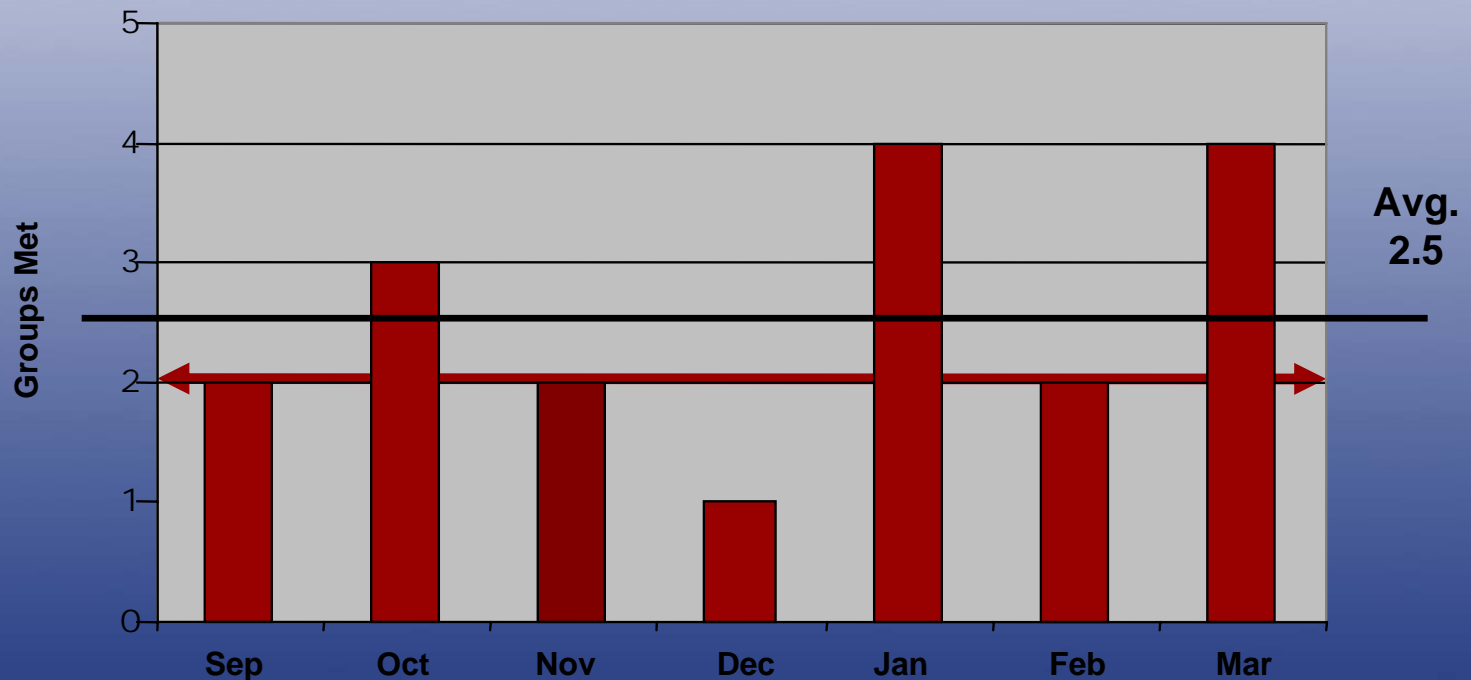
Showing Progress Ex. I





Showing Progress Ex. II

Goal: meet 2 new group or executive per month





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Thank you

Measuring Student Relations Success

by Guy Larocque
Director, Alumni Relations
Executive-Director, Alumni Association
University of Ottawa



Benchmarking Workshop

- 1. Goals: Identify a small set of possible *performance indicators***
- 2. Key parameters:**
 - Anonymity
 - For internal use only
 - Simple in concept (macro and with universal appeal)
 - Easy to compile
 - Meaningful for all (small + large shops alike)



Benchmarking Workshop

- **Groups to:**
 - Consider proposed roster
 - Provide additional suggestions
 - Report back
- **Timeline:**
 - Group discussions = 20 mn
 - Reporting = 20 mn in total = 5 mn each



Benchmarking Workshop

- **Proposed indicators:**

- *Engagement*

- # of engaged alumni against total addressable base

- *Support*

- # of solicited alumni who give

- *Engagement to Giving*

- # of engaged alumni who give compared to non-engaged alumni donors; and/or
- Average gift comparison between engaged and non-engaged donors



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Benchmarking Workshop

Next Steps:

- **Set of Volunteers**
- **Committee to review proposals**
- **Issue a formal recommendation to CCAE before next national conference**



Accountability and Measuring the Work We Do

***Very special thanks to
Marie Earl, Karen McQuigge, Don Jones
and to all session participants! 😊***