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Measuring & Reporting With Impact in Alumni Relations

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AlumGrow Consultancy

Our reporting challenge as alumni professionals

We must continue to improve upon our ability to meaningfully demonstrate the worth of our profession and better educate our senior leaders and communities about the benefits that flow from great alumni programs.

= We need a stronger Case for Support for the alumni profession



And it all starts with THE plan...

You need a strategic plan that has clear, attainable and measurable KPIs for your program

= how else do you know what you need to report on?

= how do you know if you are being successful?

More than 1 in 3 alumni programs in Australia and NZ have no plan!

AND

only 31% use ROI to measure success

What alumni reporting methods do you use?

- Regular written reports
- Annual reports to community
- Personal outreach
- Roadshows and information events
- Dashboards
- Verbal briefings to senior leadership
- Other?





My reporting story
from long, long ago...

The importance of demonstrating ROI

- Alumni relations is a long-term investment strategy that requires patience and understanding by senior leadership.
- It requires constant education of senior leaders, boards and alumni.
- ROI helps you demonstrate in real \$ terms the impact and worth of what you do and the benefits that reside in your alumni program.
- Your role and future growth prospects of your program and the profession depend upon it – COVID has proven this.
- It's why nailing your alumni reporting is **sooo** vital!

The key benefits of demonstrating program ROI

1. Helps improve your alumni engagement strategy and tactics.
2. Improves program budget allocation decisions.
3. Gains buy in from key stakeholders.
4. Better understand team/unit/individual performance.
5. Justify, defend and increase budgets.
6. Simple to demonstrate and understand for leadership.
7. It educates and shows program impact in *real* terms.
8. It shows you the value of what you do.

The risks of reporting program ROI

There are some challenges that come with reporting ROI that can include:

1. Budget allocation decisions may considerably change which alumni programs are funded and which are not.
2. Using ROI engenders comparisons to past reporting periods – good and bad!
3. Adds an additional complexity to your reporting.
4. Can increase expectations around future program growth = more pressure.

When reporting program ROI:

- Think about potential issues ahead of time and seek to mitigate these in your reporting approach.
- Remain consistent and transparent in how you report.
- Ensure your reporting engages your intended audience.



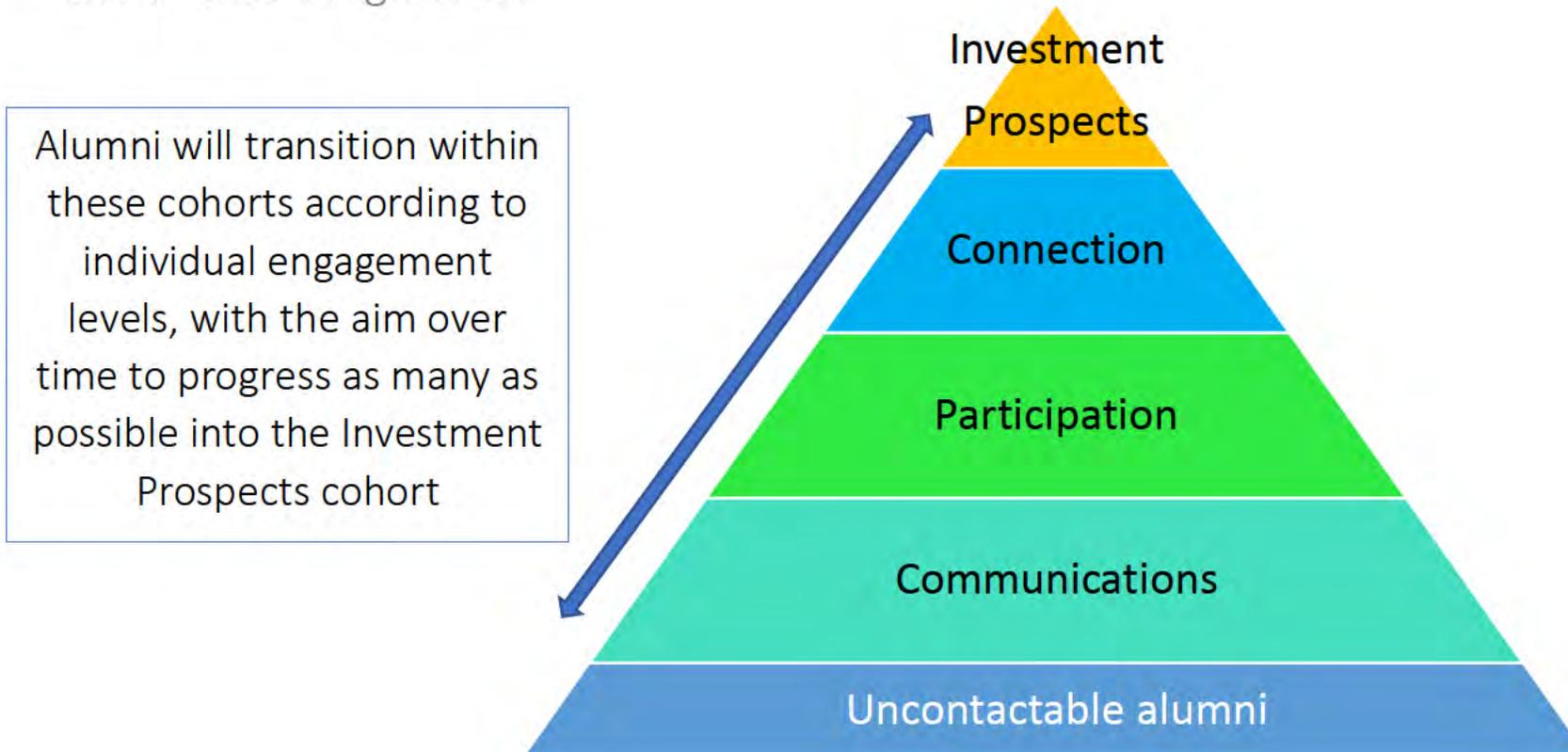
How to report on
alumni program ROI
more effectively AND
demonstrate impact

Use a Positive Alumni Engagement Index

- A tool that enables you to methodically track and report on alumni engagement.
- **Definition of positive alumni engagement: Something alumni do and not what you do.**
- Involves systematically recording the engagements of your alumni via your CRM.
- Every positive engagement is afforded one (1) index point for each engagement.
- You track this per alumni member and per total alumni population.
- Over time and with consistent outreach your institution should see growth.
- Requires diligent and consistent data management and tracking.
- The best programs have at least 4 average positive engagements per alumni per year.

Alumni Engagement Lifecycle

- This enables you then to plot your program Alumni Engagement Lifecycle and report on it.
- Here you take the positive alumni engagement data and allocate every alumni in your CRM into one of these segments:



Alumni Engagement Lifecycle

- Alumni will move up and down the lifecycle annually according to their engagement levels.
- You set the parameters as to when alumni move cohorts according to strategic priorities.
- Each cohort should have a set number of engagements to remain in the cohort, progress or transition backwards.
- The emphasis is on tracking and assessing individual engagement to identify alumni donor prospects AND assess if your alumni program is ready for fundraising.
- These prospects then move into the donor lifecycle for further research and action.
- Provides a highly effective way to demonstrate impact to senior leadership particularly around hard to quantify alumni engagements.

Other alumni ROI measures

- Sponsorships
- Fundraising
 - annual appeals
 - giving days
 - major giving,
 - planned giving and
 - transformational gifts
- Return business
 - Alumni returning to study
 - Alumni sending children/grandchildren to study
 - Facility hire by alumni



Placing a value on alumni volunteering

- Place a systematic \$ value on the hours worked by your volunteers.
- Using annual wage statistics published by Stats NZ or Australian Bureau of Statistics (ABS).
- Many CRM systems now have a module to assist you – it still requires you to track and record the hours worked by alumni volunteers, their work details and country wage statistics.
- Track and report per profession (more accurate) and/or by average wage (easier).
- Provides more meaningful data reporting to demonstrate program impact

Example:

Industry that volunteer is employed within*	Ave. weekly ordinary time earnings*	Ave. hourly rate @ 37.5 hrs per week	Volunteer hours worked	Total \$ value
Accommodation and Food services	\$ 1,179.20	\$ 31.45	5.5	\$ 172.95
Administrative and support services	\$ 1,554.00	\$ 41.44	4.5	\$ 186.48

How to construct effective alumni reports and leadership briefings



Use the **PACKO** reporting method for best results

Before undertaking any major report consider:

1. **P** = What is the **PURPOSE** of the report? Why should a board member spend time reading it?
2. **A** = Who is your **AUDIENCE**? What background and expertise do leadership possess? What do they need to know for effective governance vs what you want to share?
3. **C** = What is the **CONTEXT** for writing the report – what is the background, what has changed, what might change?
4. **K** = What **KEY MESSAGES** do you want to convey to board members to remember?
5. **O** = What is the **OUTCOME** you are hoping for? What are you asking leadership to do after reading your report. Make a decision? Note the key issues? Provide extra funding?

Other reporting tips and tricks of the trade

Some other key reporting tips :

1. **Keep it clear and concise - Remember $e = mc^2$.** Albert Einstein said - “If you can’t make it simple, you don’t know the content well enough.”
2. Ensure the report talks directly to the strategic plan and goals of your institution.
3. Fact check and revise – have a colleague read over it before submitting.
4. Make it timely – get proactive.
5. Send it to the right person.
6. Use PACKO to structure a regular update for your broader alumni community too.



Briefing senior management 101

- This is an area for advancement professionals that can often be an opportunity missed.
- Presents an additional ‘reporting’ opportunity to educate senior leadership and engage them.
- Helps disseminate knowledge and create program momentum and understanding.
- Helps you direct the narrative – assume nothing when it comes to leadership.
- Aim to brief regularly and get your timing right – get on the front foot.
- Less is more – keep it simple and on topic. Hint: 2 pages max.
- Have a briefing framework and stick to it (in consultation with leadership).



Briefing senior management: My secret formula

1. Always start with your recommendations/needs upfront = **what is it you want?**
2. State how the matter aligns with the strategic goals of your institution
3. Give a short summary (dot points) about the issues that your brief seeks to address
4. List the key stakeholders affected
5. Outline all key aspects of the matter
6. Provide proposed timelines
7. Outline any risks to the organisation and how these are to be mitigated
8. Outline key resource considerations inc. staff, budget, other?
9. List what steps are required to implement your recommendations/needs
10. Describe what internal/external collaborative efforts will be required

It's not all formal: Use personal outreach



- Schedule one on one meetings with each board member or senior leader.
- Send a semi-regular update by email including interesting profiles and impact stories (just don't overdo it).
- It can help you gain support for your program and key engagement initiatives.

Recap: My Top Tips for
Measuring & Reporting
in Alumni Relations



My Top Tips for Measuring & Reporting

1. Use the **PACKO** Method to keep yourself on track (**Purpose/Audience/Context/Key Messages/Outcome**).
2. Use reporting opportunities as a chance to educate, demonstrate and advocate (**EDA**).
3. Maintain your reporting standards – based on best practice.
4. Report the good *and* the bad to create trust and confidence.
5. Select and use consistent, meaningful, and relevant metrics = real dollar value.
6. Link your reporting to your institution's strategic plan and broader goals.

My Top Tips for Measuring & Reporting

7. Incorporate alumni and donor stories within your reporting – demonstrate impact whenever possible.
8. Regular roadshows are a great way to report to your community about your progress and program focus points.
9. Keep reporting clear, concise, and relevant to your audience – less is always more.
10. Embrace opportunities to present to your board and senior leadership.
11. Use industry benchmarking and standards to compare and educate.
12. Keep looking to improve on and develop your report writing skills.

A final thought...

“You can’t manage
what you don’t
measure.”

Peter Drucker (1909-2005)

US management consultant,
educator, and author



Presenter Details



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Questions & Discussion

A bit about AlumGrow



- Boutique firm based in Melbourne operating across Australia and New Zealand.
- Education advancement specialists assisting education providers to generate more alumni support, fundraising revenue and enrolment enquiries.
- Offer services in advancement project consultancy, market research, coaching and mentoring and masterclasses and workshops.
- Our **DevelopmentPro Growth Framework™** program contains the tools and strategies to create the support programs to build and grow community support to achieve financial stability by:
 1. Growing alumni affinity and support with time and referral networks
 2. Increasing revenue from high impact fundraising tactics
 3. Boosting enrolment enquiries through pipeline expansion
- Visit us at alumgrow.com.au (stall #40).

