



# How to build an engagement scoring program

Gain insights and develop predictive giving from constituent data

**Jenny Jones**

Senior Principal Solutions Consultant  
in Advancement, Ellucian



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# You're tracking alumni engagement, but how good are your insights?



Today's alumni engagement managers need to know so much more than a donor's gifts over the last five years—alumni data now includes every email click, event attendance records, volunteer or board service history, and what campus swag was recently bought at the online shop. Attention to this data helps institutions improve email strategy on the fly, execute better events, connect with previously disengaged alumni, and prepare new grads for becoming loyal alums. And seasoned fundraisers use this same data to make predictions about each donor's readiness to donate again.

However, in an age of uncertain institutional sustainability, in cultivating millennial giving, or simply in sustaining dizzying million- and billion-dollar campaigns, advancement leaders know they're running out of people who can give transformative gifts. If you don't start building a pipeline for the next generation of donors—if you're not figuring out how to get the next generation to engage and make transformational gifts, a process that can take roughly 16 years of serious development for a targeted group—you won't have the next generation of transformative gifts that sustain your institution's future.

Today's institutions have begun to invest in CRM technology to store and improve their communication plans, but there is so much more they can do with that information.

## Enter: engagement scoring

Donations alone are no longer the best or only indication of a healthy and robust giving program. Thus, the rise of alumni engagement metrics: How do you know if your volunteer programs, event attendance, alumni-to-student mentorship programs, social media activity, and interactive alumni newsletters are having an impact? Advancement professionals know that all opportunities for engagement matter, but do they really know how much or how crucial each of these engagements really are?

Alumni engagement scoring is the way to take cumulative engagement data and turn it into predictive giving models that help you plan where best to invest your resources, learn what kinds of engagements actually matter most, discover new patterns in donor cultivation, and ultimately drive more donations.

Building an effective engagement scoring program from scratch requires a lot of teamwork and time, but getting things going is easier than you think.



# What is engagement scoring and how can it help my institution?

For years, the Council for Advancement and Support of Education (CASE) has called for standardization in alumni engagement, which they define as “activities that are valued by alumni, build enduring and mutually beneficial relationships, inspire loyalty and financial support, strengthen the institution’s reputation and involve alumni in meaningful activities to advance the institution’s mission.”

Engagement scoring is the practice of applying a predictive model to alumni engagement data, using values and weights for every engagement action based on correlated giving behavior indicators unique to each institution, to draw conclusions about the likelihood of an alumnus to make a donation. The higher the score, the more engaged an alumnus is. And if the predictive model works, a high score indicates a strong likelihood of donating.

**In short, engagement scoring measures the effectiveness of all your institution’s efforts to cultivate donors.**



## What can you gain from the engagement data you have on hand?

A basic engagement scoring method will put some science behind the value of everything your institution does to engage alumni. You already know that volunteer programming, event attendance, and strong engagement with alumni publications are solid indicators of an individual's engagement level. But do you know how well each of those engagement factors works together?

Is volunteer programming most effective with engineering graduates? Do you know what activity is more valuable, and therefore more worth focusing your efforts on: a donor who serves on a community alumni board, one who provides career mentorship to current students, one who volunteers twice each year, or one who does none of those things but has never missed a play at the campus theatre in 20 years?

Perhaps more interestingly, can you tell which negative engagement actions—such as leaving a negative survey evaluation—actually have positive correlations?

An effective scoring model helps you answer these questions to determine best-value efforts for fundraising, helps you learn behavioral patterns you couldn't see before, and helps you focus not just on who's most likely to donate, but which action you can take to have the highest-value impact.

Score value is different everywhere: What donor metrics matter most to your institution?

## Is your data ready for scoring?

Key to the effectiveness of a scoring model is a streamlined system for storing and maintaining alumni engagement data in a CRM or other database. Your institution may not be tracking everything it should, but that doesn't mean you don't have a place from which to start your scoring model. Again, the data you use must be clean and consistently maintained, and you've got to make sure you're actually collecting the data you need most, and doing so as efficiently as possible.

Any engagement activity that bears a correlation to giving belongs in the scoring model. And if you don't know if something correlates—it's time to start measuring and testing.



“What institutions really need is a system that captures the holistic relationship between alumni and the institution. There are people who are not giving now, but who are engaged—this matters, even if you can't currently show the connection. I think in advancement, we're at the tip of the iceberg in terms of what can be done with all of this data. My advice would be: just get started. You're going to learn through the process.”

**Terry Callaghan**, Assistant Vice President of Information Technology & Gift and Alumni Records, Rutgers University Foundation

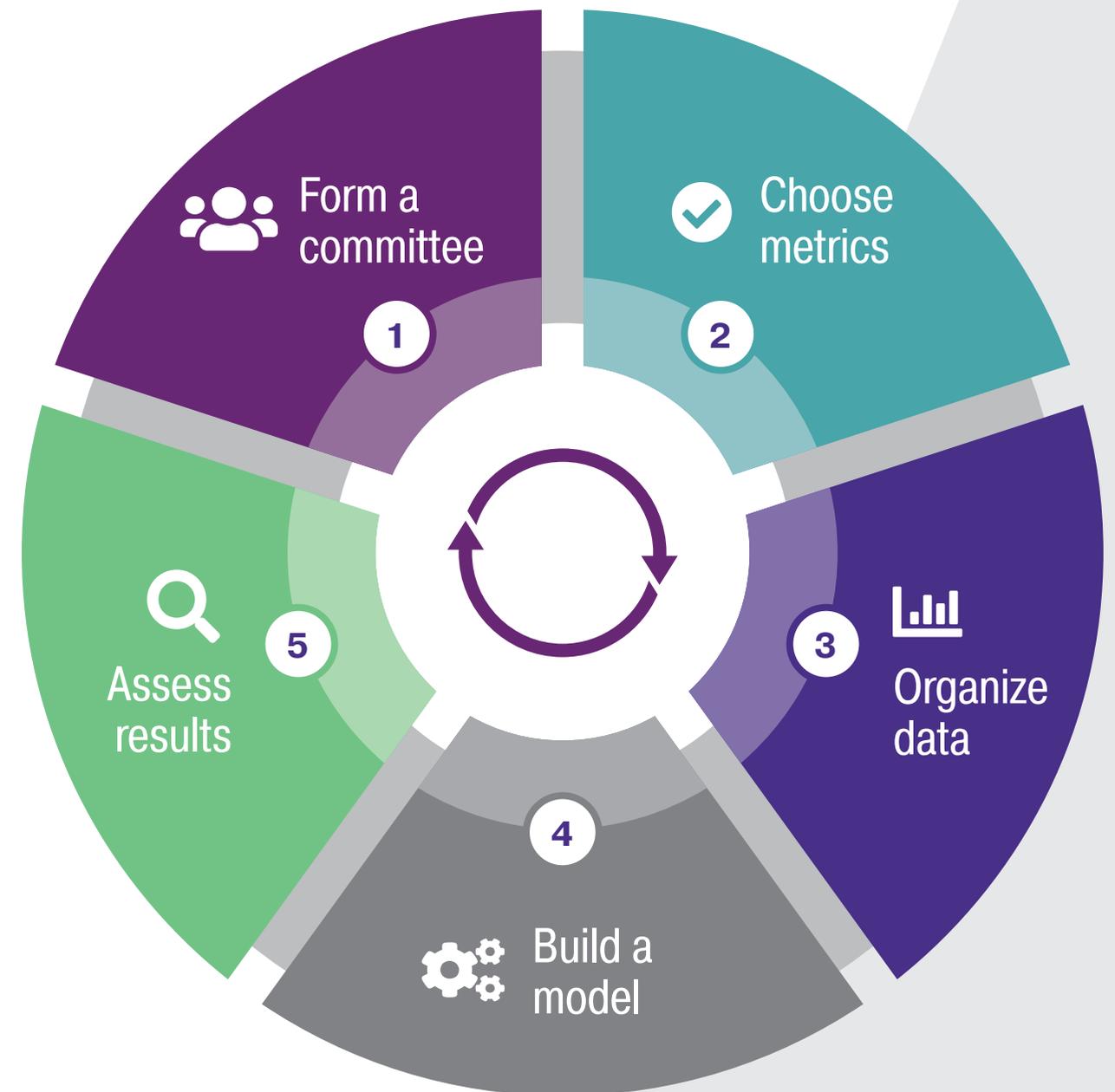
# Get buy-in, build a process

Like any campus initiative, a scoring program is much more likely to succeed if leadership buys into the work and it aligns with a strategic priority. Inherent in engagement scoring is a set of proof points for the effectiveness of all alumni outreach, at a deeper level than bottom-line revenue, representing an opportunity to improve the effectiveness and consistency of all efforts and to better manage budgeting for outreach. The following represents an outline for building a scoring program:

## 1 Form a committee

Members should include representatives from each aspect of your alumni operations (e.g. development, annual giving, alumni records, prospect management, campaign management, etc.), as well as folks from IT and faculty who might assist with the data modeling. Committee roles include sponsorship, oversight, data analysis, implementation, testing, and feedback—and you might tap volunteers to refine your data collection practices. When you're selecting members, try to find the folks who are already engaged by data.

Committee members will meet weekly and monthly to, at first, agree on the total scope of the project for the first year, while keeping expectations in mind for future years. Moving forward, the committee must work to remove roadblocks, enable the sharing of engagement data, and formalize a process for analyzing and sharing results—this work might include building a case for



implementing new systems, processes, or technology, or restructuring staff. And everyone on the committee should be clear on the purpose of the scoring program: delivering data-based insights that will be utterly integral to the future of giving at your institution.

## 2 Choose metrics and limits

It's recommended to limit your initial scoring program to no more than five years of data. Early in the process, everyone should list out the metrics that matter most to their work (e.g. event attendance, season ticket purchases, gift amounts), including those that lead to the strongest donor behaviors as well as engagements that might not seem valuable on their own, but clearly contribute to the overall development of alumni engagement. The committee won't—and shouldn't, at this stage—make all the right selections and estimates during the initial project phases, but must agree on the starting place (or how to get to a starting place, depending on the state of the data). If a key metric is necessary, but your data is critically flawed, there's too little of it, or it's riddled with outliers, then now might not be the time to implement it to the scoring plan. That said, the scoring plan must start somewhere—if you have alumni engagement data, you have a starting place.

## 3 Prepare data

Are all relevant metrics feeding into the same system? Is the process error-free, streamlined, and understood by everyone contributing information? Perhaps there's engagement data—such as social media tracking or alumni purchases from the online store—that your institution knows is valuable but doesn't yet have a practice for collecting and feeding into the system. In such cases, start planning now for how you'll eventually work this information into the scoring model. Run with the data you have now and prepare your systems for the data you don't yet have. Furthermore, while eventually you want to be able to integrate your entire database of donation history, when starting a scoring program it's a good idea to limit yourself to just a few years of recent data—a best practice is to start small and build as you and the team get more comfortable and more capable.



If your data is unwieldy and stored in multiple systems, aggregating everything into a CRM system is one of the best ways to get everything in one place, ideally a CRM system that includes analytics features and can integrate easily with other systems you may be using.

## 4 Build a predictive model

While there's much to be gained just by organizing your data into a scoring program, the real magic of engagement scoring lies in the use of a predictive, statistical model that evaluates how each type of engagement correlates to giving. The ROI-savvy folks on your team will find the insights that more or less jump out from the scoring model, but a predictive model will run algorithms that actually predict and prioritize the donors most worth cultivating. The predictive model effectively gives fundraisers a head start on who to contact next and what to engage them with—be it a friendly and informative email, a volunteer opportunity, an event invite, or a straight ask for donations.

## 5 Assess results

In weekly, monthly, and quarterly reviews, the committee should look at scoring results and emerging trends, and make adjustments to campaigns, budgeting, and alumni outreach accordingly. The ability to be proactive here is why the program exists, and it's where you'll harvest insights and breakthroughs from your data. Plus, it gives you the proof of concept you need.

## How do I develop a predictive model at my institution?



For an engagement scoring program, the predictive giving model is the secret sauce, and no two institutions will have the same predictive model, since its developed through each institution's unique alumni engagement data. A model that works well for a large public university might have little impact for a small, private liberal arts college.

### So, how do you develop a predictive model that will work for you?

**Step 1:** Make sure you have accurate, up-to-date data, and choose a sample size.

**Step 2:** Connect with a data scientist who can build a top-notch statistical, predictive model. It's not a bad idea to outsource the model development to an experienced analytics vendor, but first it's worth seeing if your institution already has someone—or a team—that you can partner with (try connecting with computer science faculty).

**Step 3:** Feed the model with your engagement data, test, determine how best to weigh each type of data point, refine the model, and iterate.

**Step 4:** Put the model to use, evaluate your results, and keep refining the model. The more data over time, the better the model.

## An ongoing process

Committees should meet regularly to discuss adjustments in the weight and value of engagement, and to discuss anomalies and interesting results found in week-to-week reports. Anomalies, by the way, might be a surprising correlation between having an institution's license plate frame and making a regular and higher-value annual gift; another surprise might be a low score for the institution's most generous and longest-running donor. In both cases, committee members need to share and discuss results, and adjustments should be made. No model starts out perfect—the best are constantly refined.

Monthly and quarterly, teams will discover new correlations, trends on metrics that work better than others in informing campaigns, as well as outcomes that require improvement in the model. You may not always have answers to questions that come up in your first six months of the program, but the program should always provide a method to test, measure, and find answers, while providing strategically significant data to share with leaders and constituents alike.



**Tip:** One of the very first things your committee might do to jumpstart discussions on what's working and what's not, is to survey constituents on how they'd prefer to engage with or be engaged by the institution.



# How to develop a scoring model

A typical scoring model, working in tandem with your predictive model, will produce a composite score—for example, from 0 to 100. A zero is your least engaged, least enthusiastic alum. Now, a 100 is someone who attends a larger number of alumni events, serves on a board, gives substantial and frequent gifts, mentors students, and/or has relationships with campus leaders. Or a high-scoring alum might volunteer frequently at charitable events, respond to every alumni survey and email, keep their online alumni profile up to date,

influence donations from other alumni, and engage regularly on social media. Each score should be directly tied to each donor's information within a single database or CRM program so that scoring can be automated and calculated for real-time viewing.

For a balanced and robust score, it's important to be able to rate alumni by using reliable data in each category.

## Scoring components

Based on component criteria recommended by CASE, a composite score should be comprised of at least four component scoring areas, with each component representing 25% of the composite score.

Engagement data should be distributed among these components accordingly:



### Give

How often and how much the alumnus contributes in gifts and memberships, or by making bequest intentions



### Help

Participation in volunteer opportunities, committees, boards, mentoring and career services, offering time to the alumni office or regional clubs



### Go

How often the alumnus attends reunions, regional events, virtual events, athletic or campus events



### Connect

Maintenance of up-to-date information, participation in surveys, interaction on social media, alumni website and email activity

While institutions may think it's a no-brainer to think of "Give" as the most important or highest-weight category, "Connect" is arguably the most valuable to an advancement team, as it's where advancement offices gain feedback and keep records up to date.

In fact, "Connect" is also a space where some of the more enlightening insights may emerge. Case in point: Rutgers University Foundation discovered that 45% of its negative "Connect" scores were actually from current donors—for those donors, a dissatisfied "Connect" score showed a positive donation correlation.

## Assigning value and weight

The committee should agree on a score for each engagement action, with strongly correlated actions carrying more weight (or score) than lesser actions—everything gets a value.

Scoring adjustments should be made frequently. And while scoring reports will help you share program success with leadership looking for monthly or quarterly progress updates, week-to-week reviews are an opportunity to discover anomalies, adjust values and weights, and introduce new criteria.

A good rule of thumb: if you find a data point with a correlation to giving and it fits into one of the four components, assign a weight and a value and work it into the model—anything that helps paint a complete picture of donor behavior is valuable, so long as its measurable.

## Testing

While it's crucial to discover anomalies and insights that lead to necessary refinements in your model, it's more fundamental to the program that, in general, your model shows alignment between high-scoring alums and those



"Mining our alumni engagement data for insights is invaluable to how our strategies evolve and how we spend resources. In general, we found a higher concentration of members with lower engagement scores. This wasn't disheartening news. In fact, it helped us see that alumni association outreach and engagement efforts were having a positive impact on previously unengaged alums. It helped show the value of alumni relations programming as a front door to the University for other alumni engagement—and over time we could see how nurturing the right alumni in the right way, at the right time, was leading to event attendance and giving."

**Greg Kapp**, Senior Associate Vice President for Development Operations,  
Purdue Research Foundation

who are consistently strong donors. Before debuting the program, it's best to conduct tests to make sure it works as intended. Start with a small sample size—2,000 records or so—before expanding to your entire database.

If scoring results seem skewed or incorrect, you can take a combination of actions: include data you may have missed, re-weight or re-score engagement activities that aren't carrying enough weight (or are carrying too much weight). And for what it's worth stating here, the purpose of the program is not to inflate anybody's efforts to engage alumni—it's to paint a useful, insightful, and true picture.

## Where should smaller advancement teams start?

It may take any institution a few years to develop a truly effective, time-tested scoring program, but any institution that simply starts wherever they can will yield useful and interesting results over time—it just takes discipline and consistency to keep improving the model, which also ensures the development of metrics and proof points to share with leadership along the way.

For smaller advancement teams with limited resources and only rudimentary data, it may be best to start simple: select a small sample of alumni, maybe 2,000 records or fewer, with established engagement behaviors, and run only the past 5 years of their data into a pared back scoring model that maybe only builds to a max of 20 points (5 per component).

Plan a scoring program, organize the data you want to work with, and partner with folks on campus who can help you build out the program. Run the program over the course of a year and see what engagement activities cause scores (and donations) to go up over time, unlocking insights into the unique giving behavior of your alumni along the way.



**Tip:** Even small institutions should consider the benefits of a CRM solution that makes their data more accessible, operations more streamlined, and reporting simpler.



## Visualizing an engagement scoring dashboard

This concept for an engagement score profile shows an alumna's total score, representing her likeliness to give as well as her value compared to other constituents. And by examining the total score in light of each component score, it's much easier to see the whole picture of how engaged each constituent is.

Person	Engagement Score	Score Created On	Donated This Year
Albert Arenado	55	10/1/2018	Y
David Tripp	50	10/1/2018	Y
Amy Cruz	100	10/1/2018	Y
Samantha Park	10	10/1/2018	Y
Lydia Adamant	18	10/1/2018	Y
Michael Laverne	8	10/1/2018	Y
Stephanie Grace	28	9/1/2018	Y
Maria Guajardo	6	9/1/2018	N
Louisa Hepler	24	9/1/2018	Y
Thomas Potts	11	9/1/2018	Y
Bernadine Webb	25	9/1/2018	N
Colin Liou	22	9/1/2018	Y
Teresa Powell	77	9/1/2018	N
Win Martin	10	9/1/2018	N
Avery Smith-Braddock	1	9/1/2018	Y



## Teresa Powell

### ENGAGEMENT SCORE: 77

- 10 give**  
 1 point per \$100 donated
- 35 help**  
 5 points per volunteer activity
- 12 go**  
 2 points per campus event attended
- 20 connect**  
 1 point per every two: constituent information update, online engagement, or survey taken

<b>Preferred Phone:</b>	(202) 555-0188
<b>Preferred Address:</b>	2001 Carolyn Drive Arlington, TX 76010
<b>Preferred Email:</b>	teresa.powell@test.test
<b>Preferred Contact:</b>	Any
<b>Date of Birth:</b>	08/03/1988
<b>Person Type:</b>	Constituent
<b>Status:</b>	Current
<b>Gender:</b>	Female
<b>Vocation:</b>	Engineer
<b>Last Donation:</b>	\$100.00
<b>Last Donation Date:</b>	09/22/2018

#### DONATIONS    OUTREACH    NOTES

- Fall Fundraising Call** | Date: 9/1/18  
 Duration: 6 min.
- Fall Solicitation** | Sent: 8/18/2018

# Scoring is key to developing the next generation of giving

The ability to run predictive, insightful analytics on a data-unified campus is today's defining, emerging game-changer for higher education. Advancement teams that invest in scoring programs that predict donations can make a significant contribution to their institution's sustainability.

Finding what works to engage new donors, re-engage lost donors, to build the pipeline for your next campaign: that's the goal here. Through a scoring program, you'll know so much more about how alumni are connecting (or not) to your institution, in ways that resonate with each individual. While it's great if your data shows you the ways you like alumni to engage, what's most valuable is seeing the ways they prefer to engage with you.

Year one of a scoring program will be filled anomalies and insights, arguments over weights and scores. As the program evolves, teams will be able to incorporate new indicators and data from new schools and different dean's councils, and advancement leaders just might create their healthiest, best-informed, and most productive programs ever. And there will always be more insights to gain, especially as institutions test and learn more about cultivating every generation or demographic of alumni, armed with answers to what works to improve giving.



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