WHITE PAPER SERIES

Sharing Data to Enhance the Student Lifecycle from Prospect to Alumni

Sharing Data to Enhance the Student Lifecycle from Prospect to Alumni

Tim Coley, Ph.D. (lead author) | Chrissy Coley, Ph.D. | Jenny Jones, M.Ed.
Will Kartsimas, M.Ed. | Jennifer Latino, Ed.D.

Two critical concerns for higher education continue to be effectively managing declining enrollments and maintaining financial stability. The need to attract, enroll, and support students remains a top priority, as does the necessity of fostering a lifelong relationship with alumni.

A major hindrance to student recruitment, persistence, completion, and loyalty is the silo mentality of administrative and academic departments around data and information. As a department collects data, there is often a tendency to focus on the narrow application and use of the data for that department alone. Departments frequently develop practices for responsible data ownership and access rights, but generally do not invest in efforts to understand the data needs of colleagues who work in another silo.

A key question for higher education executives is, "What data and information are needed to improve service to prospects, students, and alumni?" Often, this data is obtainable but unintentionally hidden in a silo.

This paper addresses the silo mentality and demonstrates the benefits of sharing data across the three stages of the student lifecycle: prospect, student, and alumni. For each stage, there are examples of innovative practices of engagement, ideas for effectively sharing data outside of the historical silo, and key questions to consider for enhancing the transition from one stage to the next.

The higher education prospect stage of the student lifecycle

Enrollment is the lifeblood for any college or university. Acquiring, converting, and yielding students enables and perpetuates the student lifecycle. Small private liberal arts colleges and large state universities alike cannot afford to miss their budgeted enrollment numbers for consecutive semesters. As a result of the extra emphasis on recruitment and admissions, college administrators tasked to recruit undergraduate, graduate, and all students in-between must become adept practitioners in the art and science of end-to-end enrollment management through the deployment of innovative practices, utilization of better data, and reflecting on lessons learned to reposition for the future.

Innovative practices for the transition from prospect to student

For far too long, admission rank-and-file, who keep the admission operation moving forward, have been sheltered and protected from external market forces of innovation. Seasoned enrollment vice presidents say that "demand for higher education is inelastic." Meaning, as tuition and cost of attendance increases, and expected family contributions remain the same or decrease, higher education will still be in demand. This belief has lulled many admission operations into a false sense of enrollment safety and security, which discourages innovation.

In 2017, there are still admission offices printing applications, utilizing file folders and post-it-notes to review applicants, and creating direct-mail pieces to tout a regionally top-ranked social media and marketing graduate program. The world in the next 20 years will be controlled by Alexa Voice, Alexa Skills, augmented reality, virtual reality, and things we can't even describe to-date—iPhones are only 10 years old. If college admission offices don't start to practice and hone their Facebook ad and messaging skills, and create Instagram and Snapchat stories, how will they have the skills to compete in a world where other admission operations have the confidence and ability to connect with prospective students in a 2030 environment?

Recruitment staff communication

Innovative recruitment staff communication outreach requires the admission team to believe that there is not one magic method. The admission team must try as many old and new communication methods as possible: deploying Facebook ads, direct-messaging prospects on Instagram, creating Snapchat filters, and retargeting admitted students with value-driven content, just to name a few. Yes, measuring ROI and conversion is important. But there is something else in play: the admission staff is learning how to learn. They are learning how to deploy innovative engagement strategies using today's technology platforms.

First-year success programs

During the first year of enrollment, students are looking for their institution to deliver on the promises that were made during the recruitment process. It is important that the first year be designed with ongoing orientation and ample support as students acclimate to their new role as independent learners. Effective first-year experience programs address many facets of the transition to college. While there is no perfect recipe for a comprehensive first-year success program, institutions that display excellence in the first year emphasize specific resources including but not exclusively:

» Advising through a central advising center
» Common experiences
» Core curriculum/general education
» First-year seminar
» Leadership programs
» Learning communities
» Orientation programming
» Peer leaders/advisors
» Service initiatives
» Academic support initiatives (learning centers; supplemental instruction) *(Barefoot et al., 2005)*

Institutions looking for a checklist of the resources that are most critical to student success should consult the Association of American Colleges and Universities (AAC&U) High Impact Practices. These teaching and learning practices impact the experiences of students from a variety of backgrounds. These practices are appropriate for first-year learners and can be used to formulate a comprehensive first year success program.

» First-year experiences
» Common intellectual experiences
» Learning communities
» Writing-intensive courses
» Collaborative assignments and projects
» Undergraduate research
» Diversity/global learning
» Service learning, community-based learning
» Internships
» Capstone courses and projects

Institutions that apply these practices and embrace new ways of reaching out to today's learners, addressing their changing needs, will be more competitive in the effort to retain students through degree completion.

Better constituent relationship management data for the transition from prospect to student

It's hard to capture and curate clean and concise data. It's even harder to use that data to predict the acquisition, conversion, predictability, and reliability when the majority of prospects are between the ages of 17–24. Utilizing a single constituent relationship management (CRM) system that integrates with the institution's enterprise resource planning (ERP) system helps capture that data and connect student and institution.

The transition from admitted student to enrolled student involves students' connecting with the academic and social culture of the institution. The recruitment process does not end at the point of admission but rather continues through connecting new students to existing campus resources.

Academic data

One of the earliest associations students have with the academic mission of an institution is their connection with their academic advisor. The relationship between student and academic advisor is unique as it allows students to connect with an academic representative of the institution in an out-of-the-classroom arena. Establishing this relationship is critical to students understanding the academic expectations of the institution and the mechanisms in place to support them throughout their academic journey.

Advisors who are familiar with students' prior academic achievement are more effective and can connect with students more quickly and effectively. Sharing students' pre-college academic credentials is an important step in helping a student transition from applicant to student. Metrics such as standardized tests, high school GPA, GPA specific to key subjects (math, English), and other academic indicators (International Baccalaureate, AP, honors courses) can be very informative for academic advisors as they assist students with degree exploration, course selection, and academic planning.

When these data are shared beyond the admissions office, advisors and faculty can tailor the advising experience for each student. Sharing these data allows for a more productive advising experience and allows new students to feel that they are known and supported by faculty and staff institution-wide.

Social data

The social transition for a new college student can be challenging. Students who feel connected to a peer group are more likely to find satisfaction with their experience and thus remain enrolled at the institution. This "sense of belonging" is credited as

NM STATE

New Mexico State University in Las Cruces, NM is harnessing progressive technology to provide strategic student success interventions at its campuses across the state. Sparked by an Integrated Planning and Advising for Student Success (IPASS) grant obtained by NMSU-Doña Ana Community College, the NMSU system has mobilized a cross-system, cross-hierarchical team of campus functional and technological leaders to create a strategic campaign of just-in-time student communications to keep students informed and on track toward program completion. Additionally, the team has created a precision early alert calendar, implemented at NMSU's four community colleges, which prioritizes and aligns proactive caseload work of advisors. Although the work is in its early stages, students are responding to the outreach of emails and phone calls that are helping drive their connection with academics and college life.

one of the more critical factors of student retention, so institutions must find ways to help students find peers, faculty, and staff they connect with.

One way to facilitate these connections is by helping students find activities that matter to them. Admissions often has information about students' pre-college activities, such as athletics, civic organizations, and interest groups. Connecting students with those types of activities can aid in establishing a sense of belonging on campus. If a student played tennis in high school, but is not a varsity tennis player for the institution, there may be opportunities for the student to play tennis on an intramural league. Connecting this student with the campus recreation department to learn more about this opportunity is important. Students who were members of their local civic organization may be interested in courses with a service learning distinction or Greek organizations with philanthropic purposes.

Data about the specific interests of entering students is often shared on applications and housed in admissions. However, moving the data to a variety of student services areas is overlooked or not considered. Establishing a process for sharing these data can assist in the social transition and early engagement of new students.

Reflection questions for the transition from prospect to student

Consider these questions:

» What can your recruitment and admission operation learn from companies that have successfully implemented a social media program?
» What is the cost of maintaining the status quo for your institution? Does your admission operation believe that what got them to the present will not get them to the future? Why?
» Can your admission operation be a major player in the social environment of 17-year-olds (in the case of traditional undergraduate student recruitment) and 27-year-olds (in the case of continuing education student recruitment)? What would it take to change course?
» What innovative practices are you currently using on your campus to aid in the recruitment of new students?
» Compile an inventory of the resources and programs already in place to support the transition from admitted student to enrolled student. What points of this transition are the most seamless and understandable for your students? Where are the gaps or unclear points in this process?

The higher education student stage of the student lifecycle

Institutions that excel in building thriving relationships with their students understand the importance of actively engaging with them from the moment they become a prospect for admission through graduation and beyond. Results from the *National Survey of Student Engagement* and the *Community College Survey of Student Engagement* demonstrate that successful institutions implement high impact practices to actively engage students in educationally purposeful activities and integrate them in their academic, social, and professional communities throughout their entire student experience. In addition, students find meaningful engagement in initiatives such as intrusive academic advising, undergraduate research, study abroad, student organizations, internships, and capstone courses.

Institutions that pay serious attention to student engagement do not allow this to happen haphazardly or make engagement optional. Rather, “they provide clear expectations and pathways that prompt and guide meaningful involvement” (Felten et al., p 81, 2016). Many institutions have found success in accomplishing this through integrating high impact practices in required coursework, such as participation in supplemental instruction, service learning, job shadowing, or peer and alumni mentoring. Another significant trend is ensuring all students have access to degree pathways with clear course maps and sequencing that ensure on-time completion. Other institutions are taking this a step further and experimenting with block registration where students register for an entire year’s coursework, or even their entire two or four-years of coursework, at one time. While these institutions may vary in their methods, they all share a purposeful, data-informed approach to ensuring their policies, processes, and curricular and co-curricular experiences are focused on student engagement, learning, and success, with an eye on timely degree completion.

One of the greatest threats to fostering an active and thriving alumni base is getting students to the finish line in the first place. This is especially relevant as student demographics shift, and colleges and universities increasingly enroll historically under-represented students, a considerable percentage of whom are low-income, first-generation, and may lack similar levels of academic preparation and family support that serve as a foundation for college success. The National Center for Education Statistics details enrollment trends by student demographic and the Western Interstate Commission for Higher Education’s (WICHE) projects high school graduate demographic changes through 2023.

There is a growing body of research documenting the achievement gaps among student demographics. The National Student Clearinghouse examined six-year educational outcomes of the students who began college in Fall 2010 (whether enrolling at a two-year or four-year institution, or at full-time or part-time status) and found that while 62% of White students had completed a degree at their starting institution or a different institution, only 45.8% of Hispanic students and 38% of Black students had done so (2016).

Additionally, institutions have historically focused their resources on first-time, full-time students, which is a dwindling population as more students enroll part-time or as transfers. Many students are falling through the cracks before they have even attended their first class at the institution.

» In Fall 2015, 23% of students at four-year institutions were part-time and 61% of students at two-year institutions were part-time (National Center for Education Statistics, 2017).
» In Fall 2008, 37% of the 3,629,429 new students who enrolled in college (whether two-year or four-year, full-time or part-time) transferred at least once, including those who transferred from a two-year institution after receiving a credential. 36.6% of the students who transferred did so in

their second year and 24.4% did so in their third year (National Student Clearinghouse).

While these demographic and enrollment trends present challenges, research conducted by the Education Trust has found that high-performing institutions have been able to close achievement gaps through committing to the success of all students, engaging students in high impact practices, and using data to inform decision-making and track performance.

Institutions committed to engaging low-income students in educationally-purposeful activities must also consider how to help these students fund these opportunities. According to PayScale's April 2017 research, low-income college students earn significantly less than their peers after graduation. Their hypothesis is that low-income students do not experience college the same way as more affluent students. Many have little money or time for unpaid internships, study abroad, campus activities, or undergraduate research. This negatively impacts their ability to build a professional network and gain valuable experience, thus hindering their career prospects and future capacity to give back to their institutions.

MERCY COLLEGE

Recognized by the U.S. Department of Education as an Hispanic Serving Institution, Mercy College's Personalized Achievement Contract Program (PACT) has been recognized by the National Association of Colleges and Employers (NACE), the American Council of Education (ACE), and University Business. PACT pairs each student with a professionally trained mentor from initial enrollment to graduation. Mercy officials consider PACT so important that they expanded the program to include transfers in addition to incoming freshmen. While retention rates are a primary metric for the PACT program (with first-year retention rates having increased by 20 percent in PACT's first seven years), Mercy focuses on graduation rates and career landing paths, as well. For more information, see **https://www.mercy.edu/student-affairs/pact.**

Innovative practices for the transition from student to alumni

Unfortunately, at many institutions, student affairs and academic affairs operate separately from advancement and alumni relations. These silos result in missed opportunities to not only enhance current student engagement leading to desired educational outcomes, but also to cultivate a practice of stewardship for future graduates. However, some institutions are innovating promising practices to create a more seamless experience for the student to alumni transition. Examples of these practices include:

- Establishing strategic enrollment management councils that represent the entire student lifecycle from prospects to students to alumni, thus enhancing collaboration on programmatic initiatives, constituent engagement, and data-collection and sharing
- Co-sponsoring student events between student affairs and advancement, such as career fairs, senior gift campaigns, and student organization fairs
- Teaching all students about the importance of philanthropy from their first year, so they understand the value of any size gift and what it goes toward
- Involving student organizations in crowdfunding for special initiatives, such as reaching out to ask alumni of those student organizations to donate time, talent, or treasure for special projects
- Providing guidance to students as they create professional social media profiles (LinkedIn, Twitter)

- Creating opportunities for students and alumni to engage, whether at campus events, in classroom sessions, job shadowing or mock interviews, or through virtual communities

The dearth of information that has been collected and stored in the student system, beyond general demographic information typically collected upon application and the academic transcript, presents one of the greatest challenges to engaging alumni. Most institutions fail to capture information on student organization involvement, leadership roles, athletic participation, or volunteer efforts outside decentralized shadow systems, if at all. The lack of these data impedes efforts to engage in personalized ways with alumni after graduation, which is increasingly important to today's alumni.

Better constituent relationship management data for the transition from student to alumni

An intentional focus on deploying data-informed resources and integrating these into each student's experience differentiates high-performing institutions from the rest. The Education Trust explains that successful institutions review and use their data to launch initiatives, foster broad-based commitment to student success, and remove obstacles, especially for low-income, first-generation students (2016). However, academic and administrative units often work in isolation, their programmatic initiatives and communications fragmented and compartmentalized, and their staff lacking awareness in how their actions impact other areas (Felten et al., 2016). Institutions must eliminate these data, system, and departmental silos to effectively move the needle on student success.

In the recent publication, "Learning from High-Performing and Fast-Gaining Institutions," the Education Trust found that effective institutions focus on the following data questions:

- How many students are lost, not only between the first and second year, but from term-to-term across the entire three-year or six-year completion span? How do students' attrition patterns differ based on sex, race, and ethnicity, as well as other key demographics? How can these data inform targeted initiatives and interventions for these specific populations?
- What percentage of second-year students have achieved sophomore status? (Their research indicates that a high percentage of second-year students have not actually completed 30 credit hours, putting them off-track for timely degree completion.)
- What are the highest risk courses based on DFW rates? How can institutions redesign these courses and offer supplemental instruction to achieve higher levels of success?
- How do completion rates vary between students who have not declared a major in their first year and those who have?
- Are students graduating with too many credits or enrolling in courses that do not count toward their majors, thus delaying their completion?

Actively monitoring these data are critical for institutions with a commitment to get students to the finish line. This is essential for students' future professional success, civic engagement, and personal well-being. Additionally, it is essential for institutional effectiveness as colleges and universities depend upon active alumni support to continue to thrive.

Reflection questions for the transition from student to alumni

As you search for opportunities to enhance your institution's engagement of students and support their transition into active alumni, consider these questions:

- How effectively do your admissions, student affairs, academic support, career services, and advancement and alumni relations departments currently collaborate, coordinate initiatives and events, and share relevant data?
- How much does your institution invest in student philanthropy efforts? CASE survey results indicate institutional investments in these efforts yield greater levels of alumni involvement and giving.
- How does your institution actively involve alumni in volunteer and social activities, connect them as mentors to current students, and support them through career services?
- What data are most important to measure recruitment, retention, and alumni success? How are you capturing, storing, and reporting these data? Have you established effective data standards? How do you use data for decision-making and resource allocations?

The higher education alumni stage of the student lifecycle

The student experience is one of the most powerful factors affecting a graduate's relationship to his/her alma mater. Alumni affairs, student affairs, and career center staff, along with faculty and staff in offices that offer support services (financial aid, registrar, counseling, etc.), all need to work closely together to ensure students have a positive experience while they attend school. When students have a negative collegiate experience, even those institutions that plan and implement wonderful events, have amazing alumni websites, and a strong social media presence will have only a slight chance of overcoming negative alumni attitudes.

Why should institutions of higher education worry about their graduates' perceptions when they exist to educate current students? While the focus of most faculty and staff tends to be on improving factors that will influence regional and national rankings, the overall student experience can have profound impact on brand perception, philanthropic support, and the general public's overall opinion of an institution.

Graduates of the institution are the largest group of stakeholders and the only permanent constituent group. Students attend for a set amount of time; faculty and staff come and go; but once individuals receive their degree, they enjoy lifelong status as alumni.

The alumni field has changed profoundly in recent years. Alumni populations are growing, donor counts are dropping, and alumni are increasingly unresponsive to their alma mater's traditional engagement efforts. As a result, the question of how to engage alumni and encourage their institutional support, both as champions and donors, is challenging advancement staff across higher education.

The term engagement means different things to institutions. In general, it is a focus on the continuum of involvement an individual has with an institution from the time they are recruited, to when they first step foot on a campus or log-in for an online class, to graduation, and beyond. The process begins as soon as a student enrolls (if not before) and extends throughout that person's life.

The Council for Alumni Association Executives (CAAE) defines engagement as "connecting people as individuals based on their interests and passions, continuously and over time, with a measurable impact on philanthropy, advocacy, and/or volunteerism." Given that definition, true engagement programs should serve all stakeholders who are interested in being part of a lifelong network with an institution regardless of donor or membership status.

There are multiple ways for alumni to both be engaged with and support their alma mater. They can attend events, volunteer, share skills via tutoring, mentoring and professional consultation, and of course, they can give. Alumni can also help attract top students for enrollment, serve as digital ambassadors, support student initiatives and projects, assist with internships and apprenticeships, act as annual fund volunteers, speak to classes, or serve on panels. The options for engagement and involvement are virtually endless.

What is most important for the majority of institutions is that graduates serve as strong brand ambassadors. This can include visibly displaying their affiliation by wearing branded clothing, talking about the institution in many different forums, and sharing social media content. Many institutions have formalized volunteer roles to feed alumni information about initiatives, programs or fundraising goals, while encouraging them to spread the word about their alma mater.

However, it should be no surprise that, when asked, the number one way graduates want to connect with their alma mater is through contact with current students. Alumni have millions of choices for where they can focus their energy through use of their time, talent, and treasure. For that reason alone, a top goal of advancement offices should be regular engagement with their constituents. Their first priority is not asking for financial support, but learning how to maintain and deepen connections to stakeholders in order to create lasting, mutually beneficial relationships.

What benefit do alumni gain from engaging with their alma mater? They gain a sense of belonging—they belong to a unique group of people who shared similar experiences because they attended the same institution. Graduates tend to have an emotional connection to their alma mater formed from experiences that occurred while they were students—friendships made with fellow students in residence halls, classes, and student organizations, and bonds made through mutual experiences, such as attending an athletic event, concert, lecture, etc. According to PRNewswire data (2015):

- Nearly half of donors (49%) say they feel "very close" to their alma mater, compared to just 16% of non-donors

- 47% of respondents donate to their alma mater because of deep school pride and 44% give to feel more involved
- 84% of donors believe their alma mater values their opinion
- 40% of donors say their alma mater was "very important" to landing their first job, while many non-donors believe their college played little or no role
- 80% of donors say they have benefitted from their association with their alma mater

It also helps to remind alumni that they are beneficiaries of degree equity—their diploma increases in value as their alma mater becomes higher ranked and its reputation grows.

Innovative practices for the alumni stage

To adapt to the changing world of higher education and advancement, innovative institutions are developing ways to meet the engagement needs of their graduates, while fostering a seamless transition between engagement and giving. According to a survey completed by the *Chronicle of Philanthropy*, "three-quarters of millennials surveyed said they would donate to other organizations over giving to their colleges or universities, and less than half made donations to their alma mater" (O'Neil, 2014).

As there were 13.1 million millennials with four-year degrees according to the 2013 Census, forward thinking institutions are facilitating high-impact engagement through digital programming and targeted volunteer opportunities. "There is also an inclination among millennials to want their donations to benefit students with experiences similar to their own. A little more than half of those surveyed said they would direct their donations to scholarships and aid for current students, while 29 percent said they wanted their money to go to support specific departments or majors" (O'Neil, 2014).

Many institutions have also developed strategic organizational procedures that enable and encourage alumni and development staff to communicate, collaborate, and, in some cases, consolidate their processes (developing invitation lists or entering comments and moves).

Innovative alumni departments are starting to think strategically about the events, programs, and opportunities they provide graduates. This begins when staff identify goals prior to the start of planning and ensure they relate back to the larger strategic initiatives and KPIs, building out engagement efforts for the express purpose of achieving set goals. Importantly, their goals go beyond mere attendee satisfaction and turnout, aiming instead at strategically-critical division and institutional priorities. Working with alumni, staff can help fill the enrollment pipeline, support student and alumni career development, boost alumni advocacy, and further the advancement office's fundraising efforts.

Forward thinking institutions have also come to realize the importance of educating students about philanthropy, and the role they are expected to fulfill as alumni, as soon as they step on campus. These colleges and universities create continuity between the student-donor experience and the alumni-donor experience. Hence, institutions are implementing senior class giving programs, general student philanthropy programs, giving days, crowdfunding initiatives, and sustainer programs for current students. The hope is that increased activity among student giving programs will allow institutions to keep pace with alumni donor counts, which are rising rapidly, and therefore alumni participation rates.

Most alumni are busy individuals with little free time. They want fast, efficient ways to connect with their alma mater on their time and in ways in which they are comfortable. It's all about individual preferences. Institutions need to collect a comprehensive view of their alumni and donor populations and ask them what's important in their lives, how they want to be involved, the best way to reach out to them, and what kind of time commitment, if any, they would be willing to give their alma mater. These data need to be collected in a central advancement database—and used. The vast majority of alumni look to their alma mater for little more than quick, one-off touches. Institutions need to offer proactive, user-friendly, and straightforward methods of engagement for multiple populations, and pay attention to trends.

Better constituent relationship management data for the alumni stage of the student lifecycle

The Director of Communications for Northeastern University's Office of Alumni Relations said it best: "Without data, engagement is a qualitative buzzword that can't be defined and definitely can't be measured" (Group, 2010). A successful approach to alumni engagement and development depends on good data. There is no way staff can strategize how to connect with and engage graduates if there is no data to assist them in understanding what those individuals' interests and passions are, as well as how they would like to be involved. Were they members of the student government association, or a fraternity or sorority? Do they love the arts? Are they more likely to volunteer for a senior send-off at an off-campus venue, travel to campus for an event or meeting, or serve as a digital ambassador spreading the word through social media?

Information, data management, and analytics are becoming critical success factors for market-focused advancement programs. Institutions need to focus on segmenting data to provide a more individualized, personalized experience for graduates and donors. Instead of sending a mass communication to the entire constituent base during the annual giving campaign, staff need to at least communicate in a way that is targeted (class year, student group, residence hall, major, etc.), if not individualized (use of nickname). This demonstrates that even if the institution doesn't know a nickname, they do know something about the individual and that person isn't just a number in a database. To achieve this level of personalization, a wide variety of data points are needed. The more information the institution knows about an individual, the better.

Institutions need to consider the following:

- How effectively does their institution use constituent engagement data to inform decision-making, assess effectiveness, and allocate resources?
- What data is currently in their advancement database that can be used to personalize engagement experiences and communication for constituents?
- What data can be used to show ROI for alumni engagement and fundraising? Most institutional leaders expect to see statistics that support defined engagement and fundraising goals.
- How does the institution currently define, measure, monitor, and report progress?
- How do staff know they are engaging alumni or soliciting the right constituents in the right way?
- What data are collected and interpreted, relating to email responses, event registrations, and social media likes, shares, comments, and click-throughs?

Advancement staff need to focus their efforts on activities, programs, and initiatives that have the greatest impact for their institution. They should rely on data to segment programs and make informed decisions in using staff time and monetary resources.

- Which events or volunteer opportunities motivate an alumnus or donor to give talent or treasure?
- What types of engagement are triggers? Emails? Phone calls? Social media posts? Student outreach?
- How many engagements does it take to move someone from event attendee to volunteer or donor?
- Are advancement staff producing events for people who never give talent or treasure? If so, how much is this costing the institution?

- Are advancement staff producing events that attract new attendees? Or do the events attract the same attendees over and over (and is this producing additional donations of time, talent, or treasure)?
- Does each program area provide a compelling customer service experience at events and during a volunteer term? If not, how can that be fixed?
- Do advancement staff segment constituents for alumni events, annual fund appeals, college and department events, and campaigns?
- Is there a regular and ongoing system in place to prioritize, sort, and filter constituents to plan for engagement of those most likely to have a relationship with the institution and/or give back?

Tracking engagement, however it is defined by the institution, in the advancement database offers staff a snapshot of how constituents are engaged with the institution, and where and what they have a passion to support through philanthropy. Engagement can also be used to report ROI of communications, events, and outreach. Alumni staff and development officers should have target engagement goals built into their yearly KPIs (calls, emails, event attendance, etc.) that can be viewed as queries or reports generated by the advancement database.

Reflection questions for the alumni stage

Finally, ask yourself (and other advancement staff) these questions:

- Has your institution clarified a shared vision of how to engage alumni, both recent and mature graduates? If so, how has that vision been communicated and used?
- How effectively do your admissions, student success, and advancement and alumni relations departments currently collaborate, coordinate efforts, and share data?
- Who are your institution's key segments of constituents?

ELON UNIVERSITY

Elon University has excelled with the Elon Experiences Transcript (EET), which documents student participation in leadership, service, internships, global engagement, and undergraduate research. Official copies of a current or former student's Elon Experience Transcript can be ordered along with official academic transcripts through the registrar's office. Not only does this transcript emphasize the importance Elon places on student engagement in educationally purposeful activities, but it also certifies these activities for students to use in graduate school and job applications, as well as captures these data in the student information system so they can be used to engage alumni in relevant ways based on their curricular and co-curricular involvements. More information can be found at **http://www.elon.edu/e-web/students/elon_experiences/transcript.xhtml.**

- Have you developed a clear written communication and early engagement plan for each key segment?
- Are you able to effectively set up alerts to identify prospects, students, and alumni who need timely attention to stay engaged?
- Do you understand how your prospects, students, and alumni want to engage with the institution and each other?
- How do you define engagement?
- Do you have goals and KPIs established to measure alumni engagement and philanthropic success? Do they directly relate back to division and institutional strategic goals?

Conclusion

A key strategic initiative for most colleges and universities is to obtain better data for improving their efforts to more fully engage with prospects, students, and alumni throughout the entire student lifecycle. Despite the increasing amount of data being generated, many higher education leaders remain entrenched in their silos, resulting in the following challenges to achieving their desired state:

- Resistance to change and lack of trust among units, fostering a culture of data ownership rather that stewardship
- Decentralized data systems and practices, as well as an under-utilization of the ERP system as the official system of record, preventing easy access to role-based data for decision-making
- Lack of common data standards and effective data entry practices serving as roadblocks to trusted, timely, and actionable data
- Lack of effective reporting and CRM for higher education tools to collect, analyze, and report data so the right people get the right information at the right time

In its *Doing Academic Analytics Right: Intelligent Answers to Simple Questions*, the EDUCAUSE Center for Applied Research notes that success starts with support from senior administration to clarify a shared purpose for the data, establish, and enforce common reporting and governance standards, and cultivate a culture of user collaboration and adoption (2011). Once these success factors are in place, it is much easier for an institution to effectively implement and use systems that can enable cross-functional data sharing and use.

Having the right tools to collect, analyze, and report data is essential; however, the key is establishing the critical process of sharing data throughout the institution and across the student lifecycle stages. The strategies and examples offered in this paper can support institutions in improving their engagement efforts and optimizing results for recruiting, persistence, completion, and alumni loyalty.

Resources

Barefoot, Gardner, Cutright, Morris, Schroeder, Schwartz, Siegel, & Swing (2005). *Achieving and sustaining institutional excellence for the first year of college.* Jossey-Bass. San Francisco.

Bureau, U. S. C. (2013). Retrieved from https://www.census.gov/hhes/socdemo/education/data/cps/2013/tables.html

Executives, C. o. A. A. Retrieved from http://www.alumniexecutives.org/about

Education Trust. Using Data to Improve Student Outcomes: Learning from Leading Colleges, May 23, 2016 https://edtrust.org/resource/using-data-to-improve-student-outcomes/

Felten, Gardner, Schroeder, Lambert, & Barefoot (2016) *The Undergraduate Experience: Focusing Institutions on What Matters Most*.

Group, T. N. (2010). *Association Funding Models: Summary Findings from 20 Universities*. Retrieved from 39 Pearl Court Novato, CA 94947: http://www.napagroup.com/pdf/Alumni Association Funding Survey.pdf

National Center for Education Statistics, The Condition of Education, May 2017 https://nces.ed.gov/programs/coe/indicator_ctr.asp

National Student Clearinghouse Signature Report 9 on Transfer and Mobility https://nscresearchcenter.org/signaturereport9/

National Student Clearinghouse, Signature Report 12 Supplement: Completing College: A National View of Student Achievement Rates by Race and Ethnicity – Fall 2010 Cohort (April 2016) https://nscresearchcenter.org/signaturereport12-supplement-2/

O'Neil, M. (2014). Colleges Are Inventing New Ways to Attract Recent Graduates to Donate. *Chronicle of Philanthropy*. Retrieved from The Chronicle of Philanthropy website: https://www.philanthropy.com/article/Colleges-Are-Inventing-New/152677

PRNewswire (Producer). (2015, 2016). Checking in on Alumni Sentiments: Corporate Insight Survey Reveals Link Between Alumni Engagement and College Fundraising. [Web News Article] Retrieved from https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&cad=rja&uact=8&ved=0ahUKEwj3zb_eirvUAhUERiYKHfVmCSwQFggoMAA&url=http%3A%2F%2Fwww.prnewswire.com%2Fnews-releases%2Fchecking-in-on-alumni-sentiments-corporate-insight-survey-reveals-link-between-alumni-engagement-and-college-fundraising-300182861.html&usg=AFQjCNFjO2Qouge8UUxqd3WayxHOr29log&sig2=-s8OiFjKLhjFnMrMiT4nmgg

ellucian®

Ellucian is the world's leading provider of software and services that power the essential work of colleges and universities. More than 2,500 institutions in nearly 50 countries rely on Ellucian to enhance operations and enrich the student experience for over 18 million students.

Headquarters: 2003 Edmund Halley Drive, Reston, VA 20191, USA
Phone: +1 (800) 223-7036

www.ellucian.com