

Engage young alumni.

a whitepaper by

switchboard

Summary

Demographic shifts and the swift evolution of social media and online platforms have made young alumni engagement more complex, and more important, than ever.

We reached out to five professionals from various backgrounds to discuss their schools' most successful young alumni engagement strategies. Those interviews evolved into this whitepaper.

Kean University is a large private university, Oklahoma State University is a large public, Willamette University is a small private university, Phillips Exeter Academy is an independent high school, and Williams is a small liberal arts college. Willamette and Williams are both Switchboard customers; Kean, OSU, and Exeter are not.

Though each school is different, they share a similar set of challenges when it comes to engaging young alumni. We hope that you and your team will find the diversity of perspectives and programs featured in this whitepaper informative and useful.

Though the schools in this whitepaper are currently focusing on alumni career development, engaging students before graduation, and making engagement measurable, remember the advice of Kean University's Stella Maher: "Always be sure to view best practices through the lens of your institution's alumni."

–Team Switchboard



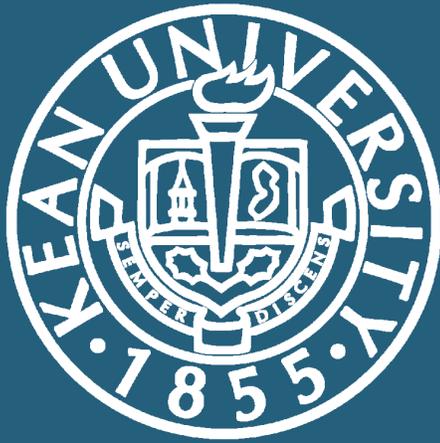
KEAN
UNIVERSITY



WILLAMETTE
UNIVERSITY

Phillips Exeter
ACADEMY

Williams



KEAN UNIVERSITY

UNION, NJ

16,200 STUDENTS

74,000 ALUMNI

We all want to do more for our alumni. The question is: Where do we start?

Setting institutional priorities means balancing the desires of our alumni, the needs of existing programs, and the resources required to develop new ones.

We asked Kean University's Director of Alumni Relations, Stella Maher, to share what her team's priorities are.

COULD YOU DESCRIBE KEAN'S ALUMNI ENGAGEMENT STRATEGY?

STELLA MAHER: Kean has over 89,000 alumni predominantly living locally in driving distance to the University.

We offer a number of reunion opportunities, especially around affinity groups such as greek organization, athletic teams, and specific departments/majors on campus, which we find resonate more with our alumni than class year reunions.

We also offer a menu of volunteer options to fit the desires and availability of our alumni, whether they can give one day to speak to a class, or 4 years to serve a term on the Alumni Board. Kean has changed a lot over the years, so it is important for us to get alumni back to campus and on a tour to see the Kean of today.

STELLA MAHER

DIRECTOR OF ALUMNI RELATIONS



THIS YEAR, YOU'VE BEEN FOCUSING ON ONLINE ENGAGEMENT AND ALUMNI CAREER DEVELOPMENT. WHY DID YOU CHOOSE THOSE PRIORITIES?

MAHER: Our immediate priorities are engaging alumni in their professional and career development. When they are unemployed or under-employed, it is harder for them to be able to return to campus for events or volunteerism.

We are providing tangible benefits where they can say specifically, "The Alumni Association gave this to me, or helped me in this way," such as online networking.

While most of our alumni live nearby, that doesn't mean they want to battle the campus traffic and parking for brick-and-mortar events. We offer online networking nights where alumni can connect with one another from their couch, office, or coffee shop. With campuses in Tom's River, NJ (Kean Ocean) and Wenzhou, China (Wenzhou-Kean), this will grow Kean's global presence as our alumni demographic shifts.

It's still fairly early in the year to discuss how this focus is going, but we had strong attendance at our first online networking night and good survey results that alumni enjoyed the opportunity and want more.

Now that we are through some of the major in-person events, I hope to spend more of the winter term focused on webinars and getting more of our programs up online so we can build this resource for alumni. If you're doing an in-person panel or discussion already, it makes sense to record it and share that out so it becomes a living resource and will be another tangible benefit we can direct our alumni to utilize.

'ENGAGEMENT' CAN BE PRETTY ABSTRACT. HOW DOES KEAN MAKE ENGAGEMENT MEASURABLE AND TRACKABLE?

MAHER: Our staff spent FY15 developing our alumni engagement rate and going through the process of coding all of the necessary data to start out with a benchmark. We began with the 3 basic criteria espoused by Chris Marshall of GG&A that are becoming a standard in our field: donors, event attendees, and volunteers.

In addition, we have added other engagement areas we are able to code: one-on-one visits with our staff, social media engagement, and purchasing memberships such as the gym or the museum. We obtained the number for each category, then removed duplicates that becomes the number of unique engaged alumni. For our base year, we coded 3,194 engaged alumni,

which makes the rate 4.3% (of mailable alumni).

It's hard to illustrate where that rate falls compared to other similar institutions, since the idea of calculating alumni engagement is still new to the field, and many schools aren't able to accurately code these criteria.

Over the next few years, I expect we will see more and more schools that are doing the calculations so we can start to have conversations about where we are relative to our peers, like our advancement colleagues have with giving rates.

IF YOU COULD IMPART ONE PIECE OF WISDOM TO SOMEONE DEVISING A NEW ALUMNI ENGAGEMENT PROGRAM, WHAT WOULD IT BE?

MAHER: The biggest lesson I have learned this past year in re-invigorating a program is to pick your priorities and create a few strong programs first versus trying to do a little bit of everything. I had to look at what I felt we must be doing (reunions, events, volunteer committees, communications, professional development) first and be patient for things I would like to be doing (travel program, regional chapters/clubs, legacy admission events, student alumni association) a little further down the road.

With newer programs, it is important to remember no two schools are the same and adapt your strategy to fit your alumni.

At prior institutions, we would build a packed 3-4 day reunion or homecoming weekend expecting alumni to fly in from out of town and anticipating they wanted something to do the entire time. At Kean, I've found when we plan those multi-event weekends, sometimes our alumni have to pick and choose because they are local and don't want to get baby sitters both nights, or only feel like driving to campus once.

Review best practices and absorb what you can at conferences, but always be sure to view them through the lens of your institution's alumni.



35,000 STUDENTS

190,000 ALUMNI

When you're tasked with engaging over 200,000 alumni, it doesn't take long to figure out what works and what doesn't.

The Oklahoma State University Alumni Association does that every day—but it doesn't just engage alumni. The OSUAA team has also adopted a highly effective alum-from-day-one strategy that engages students as early as their freshman year.

We asked the OSUAA's Director of Communications and Marketing, Chase Carter, to share some insight on young alumni engagement.

COULD YOU DESCRIBE THE OSU ALUMNI ASSOCIATION'S YOUNG ALUMNI ENGAGEMENT STRATEGY?

CHASE CARTER: We have seen the most impact in engaging with young alumni by starting the process even before they graduate.

In 2011, we rebranded our Student Alumni Association and began offering a student life membership option within it that allows students to make payments each semester toward a life membership through their bursar account. If they begin the payment process their first semester freshman year, they graduate as a fully paid life member (at a discounted \$600 rate as well).

The program has done very well, and we have been signing up more than 500 student life

members each year since we launched, compared to only a few hundred annual memberships we would normally sell at graduation.

This process has a number of benefits. First, it allows us to begin communicating with students and educating them about the mission of the Alumni Association early on in their collegiate career. By doing a life membership, we also take the pressure off annual renewals and acquisition post graduation.

It took many years to put the program together and ultimately was made successful through a strong partnership between our alumni board

CHASE CARTER DIRECTOR OF COMMS. & MARKETING



chair and the university president. The support and cooperation of the Office of the Registrar was also key to modify the bursar payment system to allow for the \$75/semester charge.

ATHLETICS PLAY A SIGNIFICANT ROLE IN THE OKLAHOMA STATE BRAND AND ANCHOR THE OSU COMMUNITY. WHAT HAVE YOU LEARNED FROM ENGAGEMENT AROUND ATHLETICS THAT TRANSFERS TO OTHER ENGAGEMENT EFFORTS?

CARTER: There are very few things that bring together and excite our alumni as much as OSU athletics.

We have a wide variety of programming centered especially around football game days that include a three-hour event and pep rally inside the OSU Alumni Center, watch parties nationwide with OSU Alumni Watch Clubs and a carefully choreographed stream of posts on our social media channels.

We play off this passion for sports by having programming year-round that promotes alumni engagement with the help of athletics. One example is our Cowboy Caravan—a series of 10 summer events hosted by OSU Alumni Chapters across Oklahoma that provide an opportunity for local alumni networking and a Q&A session with a prominent OSU head coach.

We recently expanded our two largest Caravan events this summer in Oklahoma City and Tulsa when we moved them to the respective OSU branch campuses in both cities. This partnership not only showcased the branch campuses to alumni in those communities but also provided us a new venue to host community food trucks, have inflatables for children and generally host a more family friendly event, which was very well received.

IS THERE ANYTHING YOU'VE LEARNED ABOUT YOUNG ALUMNI ENGAGEMENT THAT SURPRISED YOU?

CARTER: I mentioned earlier our success with student life members in our Student Alumni Association. We have struggled to gain traction with this group on Facebook but found they respond very well to posts on Instagram.

It's important to use the specific media your target demographic is responding to when trying to connect with them. Our Office of Undergraduate Admissions has had wild success using Snapchat—so much so that we've considered it for student and young alumni engagement as well (if only we had more staff resources).

Our alumni always respond well to nostalgic pieces and beautiful pictures of campus. Those of us in alumni communications and marketing always need to remind ourselves that although we work every day on a college campus, a vast majority of our constituents do not—and they love reminiscing with photos and videos from their alma mater.

IF YOU COULD IMPART ONE PIECE OF WISDOM TO SOMEONE DEVISING A NEW YOUNG ALUMNI ENGAGEMENT STRATEGY, WHAT WOULD IT BE?

CARTER: Do your research.

We are not nearly as far along on a young alumni engagement strategy as we should be, but I know some of our peer conference schools like Iowa State University are doing it well after years of research and planning.

We have worked hard in building up a strong network of engaged student members, and our next step is to leverage this group when we begin to expand our young alumni engagement programs. But we still have a lot of research to do to find out what exactly these young alumni are interested in from their alumni association.



WILLAMETTE UNIVERSITY

SALEM, OR

2,800 STUDENTS

27,000 ALUMNI

Sometimes, alumni engagement is more art than science.

That art requires a deep understanding of and affinity for your alumni community. So who better to engage that community than alumni themselves?

Willamette University in Salem, Oregon has taken that point to heart. Willamette succeeds in engaging its young alumni by leveraging the generosity of its broader alumni network.

We asked Devin Bales, Willamette's alumni and parent relations associate, and a Willamette alumnus himself, to shed some light on Willamette's most successful strategies.

WHAT IS WILLAMETTE'S YOUNG ALUMNI ENGAGEMENT STRATEGY?

DEVIN BALES: We want to let young alumni know that we, the alumni office and the alumni association, have their back.

We strive to keep them engaged in the capacity that works best for them, so we create opportunities that offer them value. We put on career building lectures, formal and casual networking opportunities and virtual tools for connecting with older alumni and job opportunities.

WHAT TOOLS DOES WILLAMETTE USE TO ENGAGE YOUNG ALUMNI?

BALES: We use volunteers, social media, Talent Marks webinar services, and Switchboard.

Volunteer callers get in touch with every new grad a few months after they graduate to welcome them to the alumni association and to connect them with other alumni in fields they are interested in.

Switchboard is the ultimate engagement tool because it empowers young alumni to reach out and market themselves, presents them with career opportunities shared by members of the community, and lets more seasoned alumni offer the guidance that young alumni need.

DEVIN BALES
ALUMNI & PARENT RELATIONS



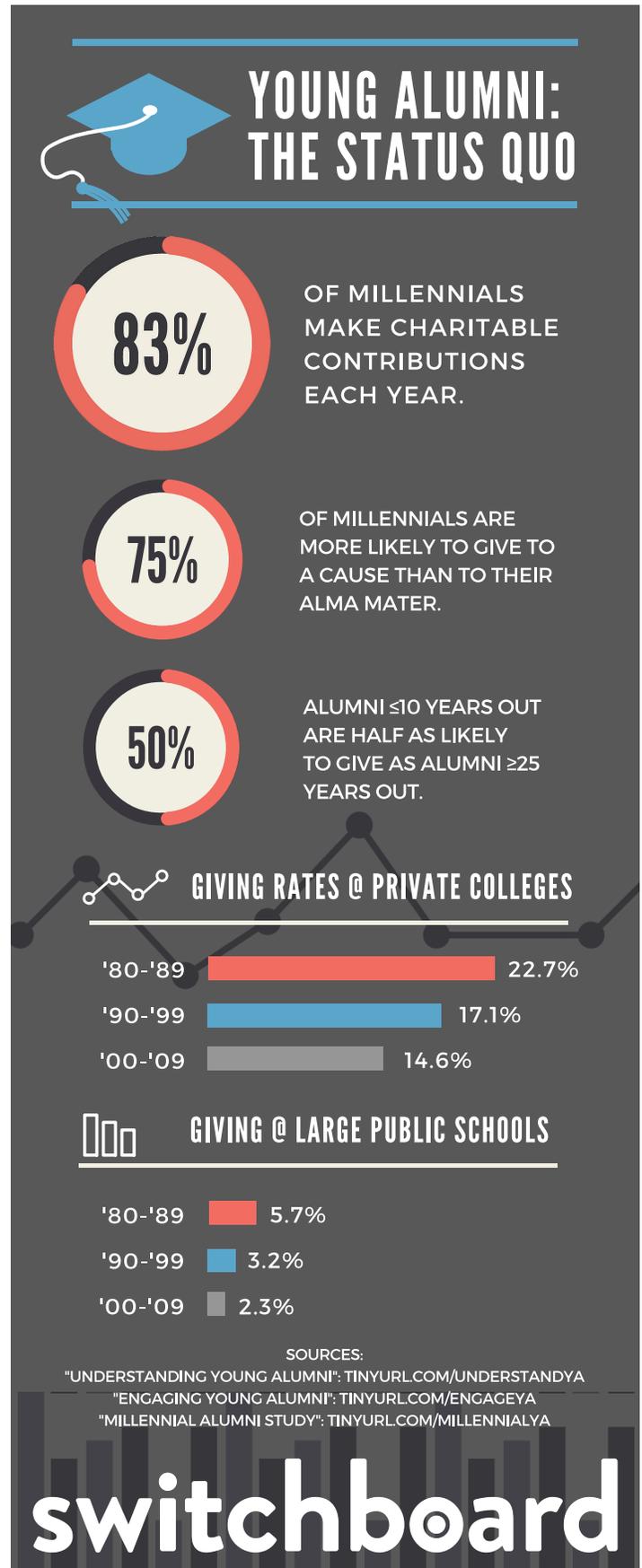
HOW DOES YOUR PERSPECTIVE AS A YOUNG ALUMNUS HELP YOU IN YOUR WORK?

BALES: As a young alumnus, I understand the emotional roller coaster recent graduates go through when thinking about their alma mater. “I loved my experience! But I owe so much money.” “I need a job, maybe my school can help me get a job?” “Who would I talk to? And how?” It is really a time in life when you are redefining your identity, and there is a lot going on.

Knowing this helps me create effective strategies for getting young alumni to listen and take advantage of what we offer. Whether they have advice coming from multiple sources or are completely lost, by offering platforms where they can casually interact with alumni, virtually or in person, we can put them in control of building their network and eliminate the intimidation factor of reaching out to a random “successful professional.”

IF YOU COULD IMPART ONE PIECE OF WISDOM TO SOMEONE DEVISING A NEW YOUNG ALUMNI ENGAGEMENT STRATEGY, WHAT WOULD IT BE?

BALES: Make engagement easy for new graduates, and offer opportunities that have value to them now. Make connecting with successful alumni low pressure and present opportunities to give back that aren't monetary. Keeping young alumni engaged is more efficient and effective than trying to re-engage them later in life.



Phillips Exeter

ACADEMY

EXETER, NH

1,060 STUDENTS

21,000 ALUMNI

Independent schools face a unique set of challenges when it comes to engaging young alumni.

For one, their alumni graduate four years younger than their post-secondary counterparts'. It takes another four years for their graduates to begin giving in an adult capacity.

It is the task of these schools' alumni relations offices to keep alumni engaged in the interim.

We asked Phillips Exeter Academy's Assistant Director of Student and Young Alumni Programs Michelle Curtin to discuss Exeter's strategy for keeping young alumni engaged.

WHAT IS EXETER'S YOUNG ALUMNI ENGAGEMENT STRATEGY?

MICHELLE CURTIN: Our strategy is to start the engagement process before they leave campus. Over the past several years, we have focused on building a student engagement program that dovetails with our young alumni program.

Our hope is to connect with students and educate them on what it means to be an alum, the benefits of staying connected and the impact of philanthropy. Our goal is to engage, excite and educate students about becoming alumni before they actually become alumni.

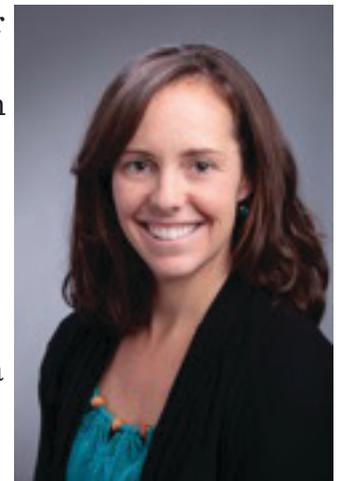
Some of our programs include an annual alumni/senior dinner, an annual "Thank A Donor Day," mailing the alumni magazine to seniors

MICHELLE CURTIN

STUDENT & YOUNG ALUMNI PROGRAMS

starting in the fall of their senior year, alumni induction ceremony, and an alumni online directory registration event each spring.

In addition, members of the institutional advancement office advise a student club dedicated to raising awareness about the impact of donor support and thanking alumni, parents, and friends who support Exeter's annual fund.



COLLEGES FACE CHALLENGES ENOUGH TRYING TO KEEP YOUNG ALUMNI ENGAGED. EXETER'S GRADUATES ARE EVEN YOUNGER. HOW DO YOU OVERCOME THIS CHALLENGE?

CURTIN: I'm not going to say that we are beyond the challenges that many of our peer schools face. We encounter the same challenges of keeping alumni connected and engaged throughout their college years; however, because we start the engagement process early (before they leave campus), we have seen an increase in our ability to connect with and maintain engagement with young alumni after they graduate.

EVERY ALUMNI OFFICE EXCELS AT SOMETHING. WHAT DOES YOUR TEAM DO BEST?

CURTIN: At Exeter, we strive to make it easy for alumni to be engaged.

We help organize and execute a lot of regional events world-wide. These events range from annual receptions with the principal and faculty to casual happy hours or baseball games with local alumni and just about anything in between. Our goal is to keep alumni connected to each other and to the academy so we strive to bring Exeter to our alumni when and where we can.

We also have a strong social media presence and our communications team works hard to put out newsletter every month in addition to our alumni magazine that is mailed quarterly. We try to have a lot of opportunities for alumni to stay connected with Exeter regardless of if they can attend or help organize an event.

IF YOU COULD IMPART ONE PIECE OF WISDOM TO SOMEONE DEVISING A NEW YOUNG ALUMNI ENGAGEMENT STRATEGY, WHAT WOULD IT BE?

CURTIN: Start small and start simple.

Find a way to connect with students before they become alumni. Focus on the 3 E's: engaging, exciting, and educating. At Exeter we have found success in educating students about philanthropy through stewardship and donor relations. Our message to students is always, "let's thank those who make all this possible" rather than, "let us tell you about why we ask alumni for money."

If you can steer the conversation towards how it impacts them as students and the experiences they are having now, you have a better shot at getting their attention and at helping them understand the impact of philanthropy and its value to the educational experience they are receiving. The focus should be on building a foundation of engagement for the future.

4 COMPLAINTS LODGED BY

YOUNG ALUMNI

Young alumni giving rates are low. Here are their four most commonly cited reasons for not giving.



1 YOU ONLY CALL WHEN YOU WANT MONEY

Many young alumni feel like they only hear from their alma mater when they're being solicited.



2 I ALREADY PAID YOU WHAT I OWE

Young alumni with large student loans often feel bitter when they're asked to give.



3 WHAT ARE YOU DOING FOR ME?

Young alumni who donate want to feel like they're getting something in return. They aren't always motivated to give out of duty to their alma mater.

4 I DON'T KNOW WHERE MY MONEY IS GOING

Young alumni want to know what impact their gift will have. When they know how they're contributing, they feel more connected to their alma mater.



switchboard

WWW.SWITCHBOARDHQ.COM

Williams

WILLIAMSTOWN, MA

2,100 STUDENTS

27,000 ALUMNI

It's no surprise that the college with the oldest alumni association in the country should continuously top the list of schools with the highest alumni giving rates.

And we weren't surprised to see the Williams Switchboard flourish as soon as it launched in August 2014.

In the 15 months since then, more than 1,800 Williams students, alumni, staff, and parents have signed up to post more than 900 asks and offers.

The Williams Switchboard has become the go-to place for Ephs of all ages to exchange advice, look for places to stay, and find rides to and from campus for reunions and breaks.

We asked Williams's Assistant Editor & Social Media Specialist Francesca Shanks about Williams's success.

TELL US A LITTLE ABOUT WILLIAMS. WHAT DO YOU LOVE ABOUT IT?

FRANCESCA SHANKS: Williams is a private, residential liberal arts college with around 2,000 students in Williamstown, Mass., 135 miles from Boston and 165 miles from New York City. We're surrounded by the Berkshire Mountains, and there are beautiful vistas almost everywhere on campus.

Though our views are scenic, there's no short-

age of culture here, which is something I love—we have three fantastic art museums, annual film and theater festivals and a thriving performing arts center.

WHY IS SWITCHBOARD RIGHT FOR THE WILLIAMS COMMUNITY?

SHANKS: The Williams community is passionate, supportive and respectful; Switchboard helps set that tone online and helps us get the word out about interesting community events, ask for and offer advice about careers and internships and connect with one another in a useful, meaningful way.

FRANCESCA SHANKS
ASST. EDITOR & SOCIAL SPECIALIST



WHAT WERE YOU USING AND DOING BEFORE SWITCHBOARD? HOW DOES SWITCHBOARD HELP NOW?

SHANKS: Before Switchboard, there was no inclusive online way to seek apartment rentals, ask for ride shares and sell your stuff—we had a bulletin board that was mostly student-oriented, but it hadn't been very active in recent years.

We have an active career center (career counselors regularly meet one-on-one with students) and a place for student job listings, but it's great to have Switchboard as another, sometimes more open-ended option.

SO FAR, HOW HAS THE WILLIAMS COMMUNITY RESPONDED? DO YOU HAVE FAVORITE SUCCESS STORIES?

SHANKS: The community has responded positively—we have nearly 2,000 people signed up, mostly alumni and staff members, with a few hundred students. You can see from our SB success stories that having Switchboard emphasizes the best things about our community—we're a group of people with diverse interests and experience, and we all use those interests and experiences to help others when possible:

"I received several offers for rooms to rent in a shared home environment. I was fortunate to settle in a perfect place walking distance from campus. This is an awesome tool to connect. So glad I was turned on to it."

"I had wanted to purchase a trombone for my daughter and was able to locate one through Switchboard in under a week! My daughter is now playing along while listening to the Glenn Miller Orchestra playing 'In the Mood'... Switchboard made this easy!"

WHAT IS YOUR VISION FOR THE WILLIAMS SWITCHBOARD'S FUTURE?

SHANKS: We're happy with the progress we've seen in just over a year. There are new posts and signup requests every week, and we plan some outreach in 2016 to boost enrollment further.

switchboard

ENGAGE YOUNG ALUMNI

Recent graduates want to form deep, long-term relationships with their alma mater. Use these tips to engage young alumni the right way at the right time.



IDENTIFY THEIR NEEDS

"Stop assuming you know what's best and start asking them what they actually want."
-Ben Seewald, Alumni Officer, Queen's University

COMMENCEMENT

After commencement, grads need guidance. Know what they need before they leave so you can engage them later.



YOUR FIRST ASK

Show your young alumni that you care about them before you invite them to give.



OFFER THEM VALUE

"You have to give, give, give, and then ask." -Tim Bograkovs, Director of Alumni Engagement, Michigan State



SHARE THEIR IMPACT

Make alumni feel like they're part of something bigger than themselves. Tell them what impact their gifts will have.

WHEN THEY GIVE

Young alumni give because they want to play a part in their alma mater's story.



BEYOND THE GIFT

Offer alumni other ways to give back to their community.



GET THEM INVOLVED

According to the 2015 *Millennial Impact Report*, 86% of young alumni want to volunteer for their alma mater.

switchboardhq.com

About Switchboard

From the beginning, Switchboard has been our passion project. We started as a group of alumni and students with a simple purpose: to bring true engagement to student and alumni communities.

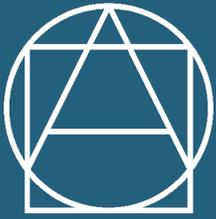
Since its inception, Switchboard has spread to schools across the United States and Canada. The connections that Switchboard has forged have launched careers, changed lives, and strengthened the bonds between students, alumni, and their alma maters.

On Switchboard, students and alumni ask for and offer whatever matters to them. They get what they need. You earn their gratitude. Switchboard is the perfect solution for schools working on young alumni engagement, alumni mentorship, and alumni career services efforts.

We partner with over a dozen institutions—from small liberal arts colleges to large universities—to generate meaningful, recurring alumni engagement. Other platforms achieve an average of 5% community adoption. Switchboard sets a higher standard. Our customers see adoption upwards of 30%.

We'd love to hear what you're doing to engage your community and share what we can do to help. Visit our website or contact us using the information below to learn more.

–Team Switchboard



ANTIOCH
COLLEGE



CONCORDIA
UNIVERSITY
PORTLAND • OREGON

Kenyon College

OBERLIN

COLLEGE & CONSERVATORY



Portland State
UNIVERSITY

REED COLLEGE



S|A|C
St. Andrew's College



University
of Portland



WILLAMETTE
UNIVERSITY

Williams