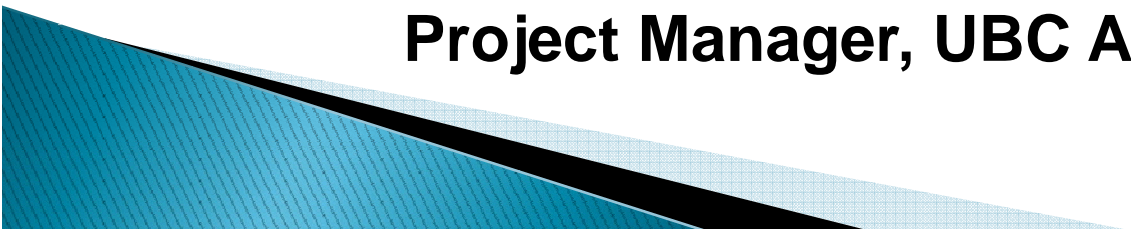


**From Vision to Practice:
Defining and Measuring Alumni Engagement
in a Public Campaign**

CASE DISTRICT VIII, 2011

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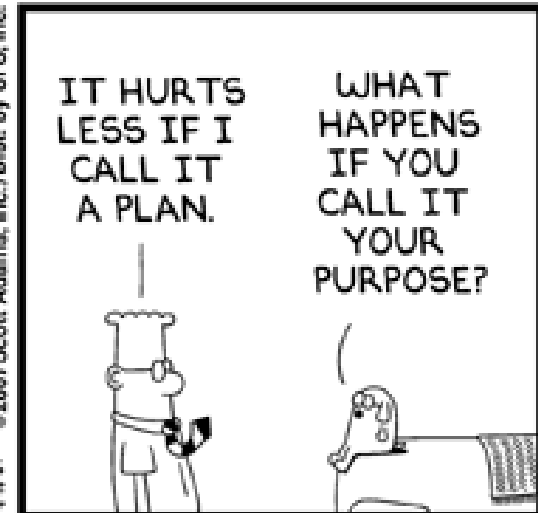
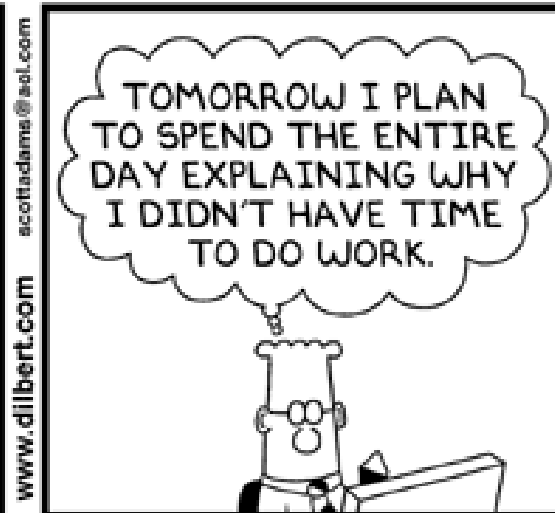




What We'll Cover Today



1. The Operational Challenge
2. Understanding Engagement
3. Setting the Target Market
4. A Full Program Review
5. Our Approach to Performance Management
6. Organisational Growth



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Strategic Planning

UBC's Case Study

The Challenge:

- UBC to launch campaign with alumni engagement goal
- Build on early success and ensure target meaningful

The Environment:

- Association est. 1917; added UBC alumni staff in 2005
- Currently over 35 central & faculty-based alumni staff
- Significant increase in alumni campus presence since 2005
- Traditionally low % of alumni supporters in community

The Opportunity:

- Leverage focus and resources of dual campaign
- Build new platform for alumni engagement at UBC

UBC's Challenge: A Campaign

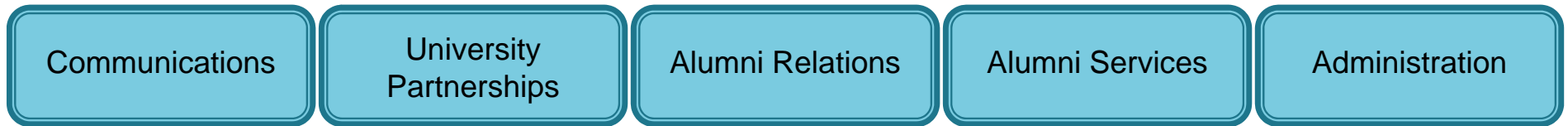
History at UBC

Pre-2005	Most activity initiated by alumni
2005	Alumni relations created w/in student portfolio; AVP alumni created Association remains independent
2006	UBC undertook Business Process Reengineering
2008	Integration of alumni & development VP DAE hired and central administration begins
2005-10	Engagement recognised as two-way street Some parameters for defining engagement
2009	Campaign tentatively includes engagement target

The Initial Breakout

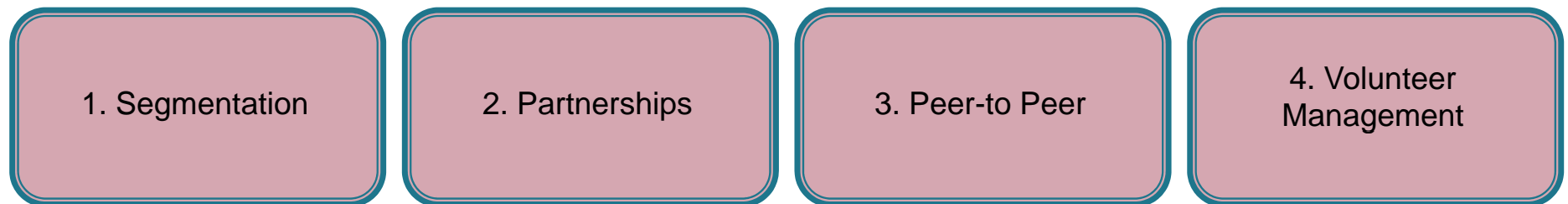
*Timeframe:
March 2010*

UBC Alumni Operating Units



The First Step:

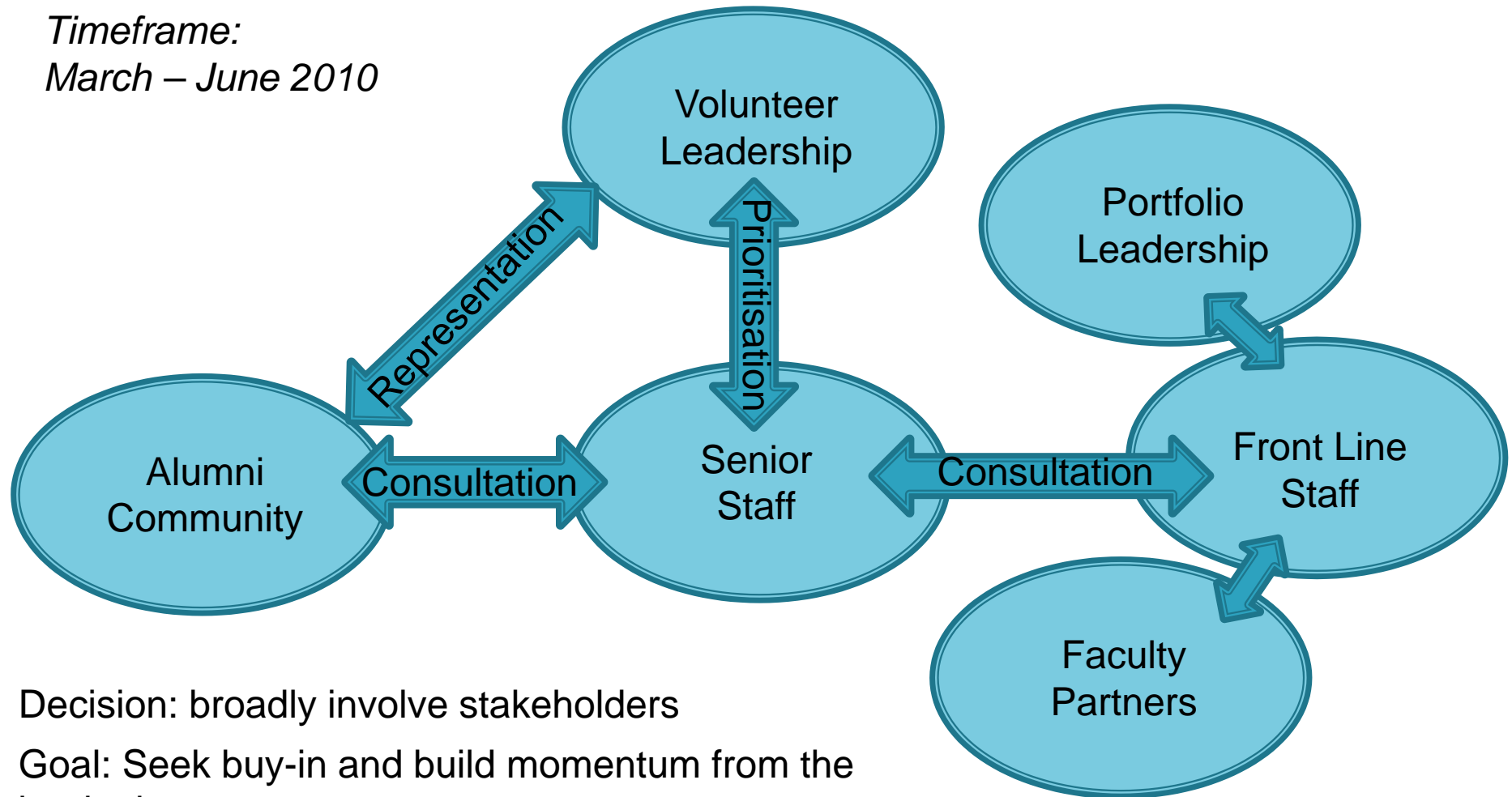
- A. Find strategic areas of focus
- B. Scalable and integration possible across all units
- C. Leverage resources greater than our own
- D. Use broad-based consultation



Resulting Breakout

It's About the Full Team

*Timeframe:
March – June 2010*



Decision: broadly involve stakeholders

Goal: Seek buy-in and build momentum from the beginning

The Value of Engagement

Value Proposition

<i>Alumni</i>	↔	<i>UBC</i>
<ul style="list-style-type: none">• Access to a ready network of fellow graduates• Opportunities for intellectual and personal growth• Chance to be part of group and institution fostering positive change in the world		<ul style="list-style-type: none">• Thousands of individuals actively promoting UBC• Vested interest in UBC• Alumni bringing peers, friends and community partners to table• Significant volunteer contributions• Inspiring philanthropy

Belief reciprocal benefit in relationship:

- UBC can and should enrich the lives of alumni
- Alumni can and should help UBC achieve its vision
- Together, UBC and its alumni are force for positive change

Engagement Continuum

Engagement Level	Extremely Low	Low	Medium	High
Descriptor	Casually Connected	Connected	Committed	Conveners
Estimated Known Alumni Population	90,000	77,000	19,000	3,000
In their words	"I went to UBC."	"I feel like I'm still a part of UBC."	"I look for opportunities to get involved with UBC."	"I create opportunities for people to get involved with UBC."
Their UBC Experience	<ul style="list-style-type: none"> Attended UBC but didn't get involved or didn't have a great student experience. Don't currently see relevance for UBC in their life. 	<ul style="list-style-type: none"> Enjoyed their time at UBC but didn't "bond" with UBC. Likes the brand of UBC. 	<ul style="list-style-type: none"> Enjoyed their time at UBC and really "bonded" with UBC. See UBC as very relevant to their lives today. Mid-career professionals with time to invest in worthwhile activities. 	<ul style="list-style-type: none"> UBC was transformative in their life Believe in the transformative role of UBC in society. Were student leaders/AMS/Res advisors/otherwise active. Community/business/social/cultural leaders.

"Sweet Spot"

Student Engagement (Alumni-in-Residence)	Casually Connected 30,000	Connected 13,000	Committed 3,400	Conveners 600
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The Strategic Pillars



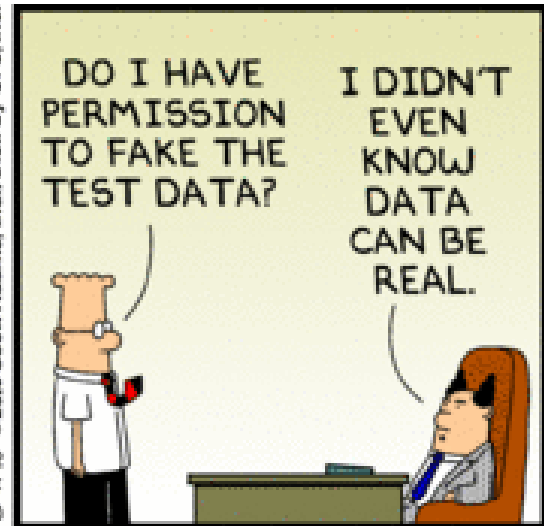
1. Foster the growth and development of UBC's alumni communities
2. Create access for all alumni to a ready network of peers and the UBC learning environment
3. Equip UBC students to make the most of their UBC networks



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Operational Review

Summer Program Review

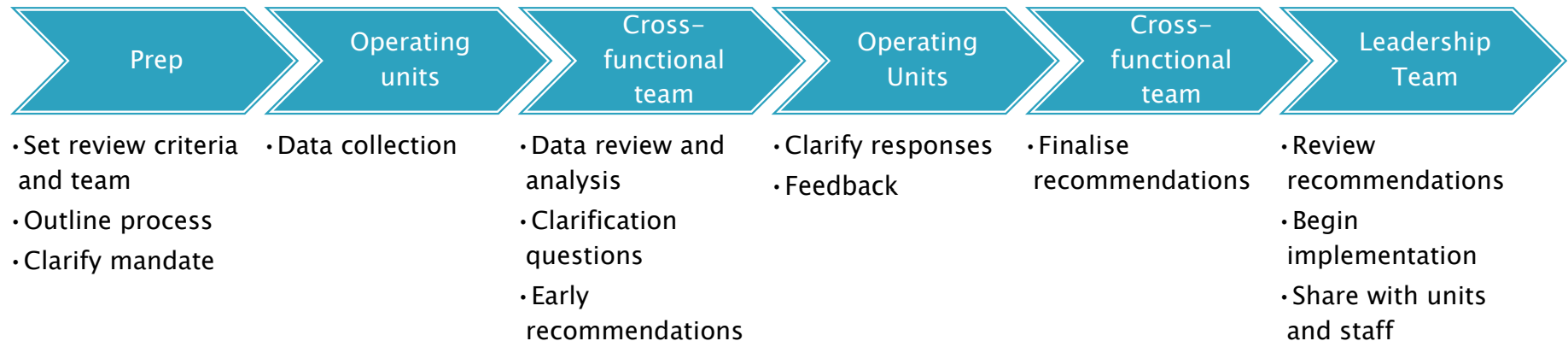
Timeframe:
July – Sept. 2010

Review Goals

1. Gain better understanding of programs and services
2. Review resource uses and deliverables
3. Develop staff competency in strategic decision making

Participants

- Cross-functional review team
- Full staff, in all units, including faculty partners



Program Review Samples

Book Club

Criteria	Measure
Points (Pts./hr)	581 (4.61)
Retention Rate	50 % repeats; most would return
% Satisfaction	98 %
Raises overall awareness	Limited
Potential volunteer leadership	Possible, w/ scalable option

Designed to suit all units
 Select from 31 criteria
 Quantitative and qualitative

Alumni Weekend

Criteria	Measure
Total Staff Hrs	2594
Points (Pts./hr)	1584 (0.61)
Retention Rate	75 % say they will return
Ongoing \$, not incl. staff \$	\$75,000
# Communities	55

What We Uncovered

- Some of our program assumptions were incorrect
- Our strategic focus wasn't necessarily mirrored in our resource use
- More opportunities to assign engagement measures in non-ARU activity
- Varying skill sets across the team, stronger recognition of front-line expertise
- Strong need to increase program knowledge across full team

Learning happened across the team – leadership, staff, and partners



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Performance Management

Managing Performance

- ▶ Knowing how we are progressing towards our goal(s) – division, unit, individual
- ▶ Demonstrates how all individual work contributes and reinforces place in organization
- ▶ Combines story-telling with hard data and statistics
- ▶ Validates success to others
- ▶ Enables celebrations with staff
- ▶ Supports decision-making

The UBC *Points* Model

- ▶ Events
 - Attendees receive Points
 - Track UBC/Assoc. vs. volunteer vs. faculties
- ▶ Volunteer Roles
 - We measure volunteer engagement by role type and committee/program
 - Values vary based on time commitment and role seniority
- ▶ Services/Activities
 - Travel programs, A-Cards, financial donations, cultivation meetings, etc.

Dashboard Indicators

Alumni Contributing to UBC's Success

of conveners
% of engaged alumni retained
% of alumni donors
of volunteers

Alumni Actively Engaging w/UBC

engaged alumni (POINTS)
unique visitors to Alumni Affairs website
% addressable living alumni

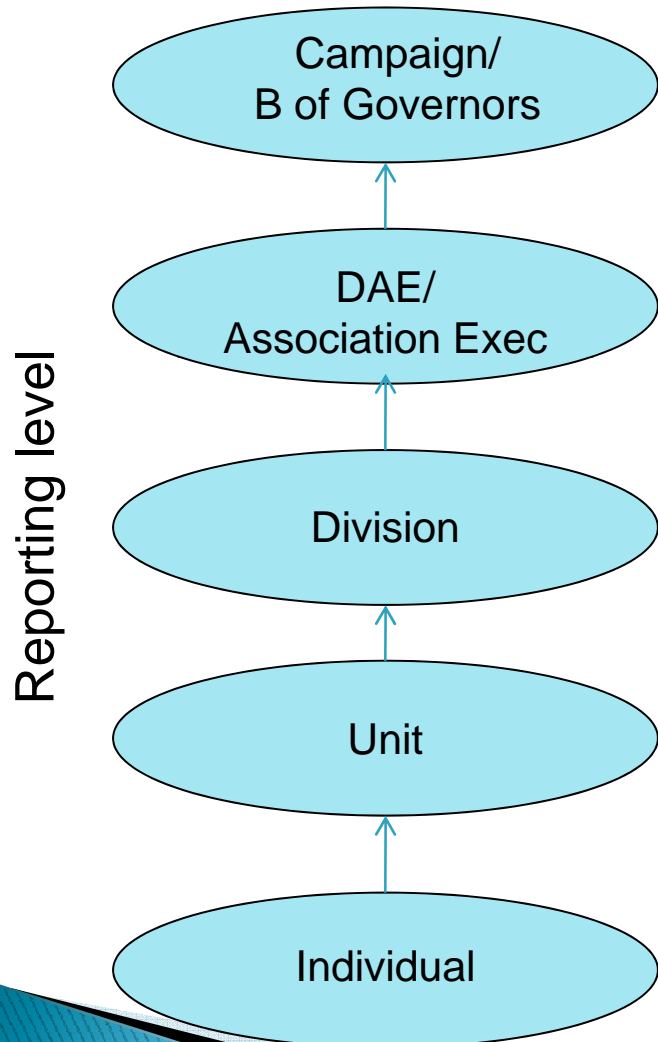
Positive Alumni & Student Feelings

% of alumni who report they are "net promoters" of UBC
% alumni with positive stakeholder experience at alumni service or event
students engaged in alumni programming
% new grads who appreciate lifelong relationship with UBC

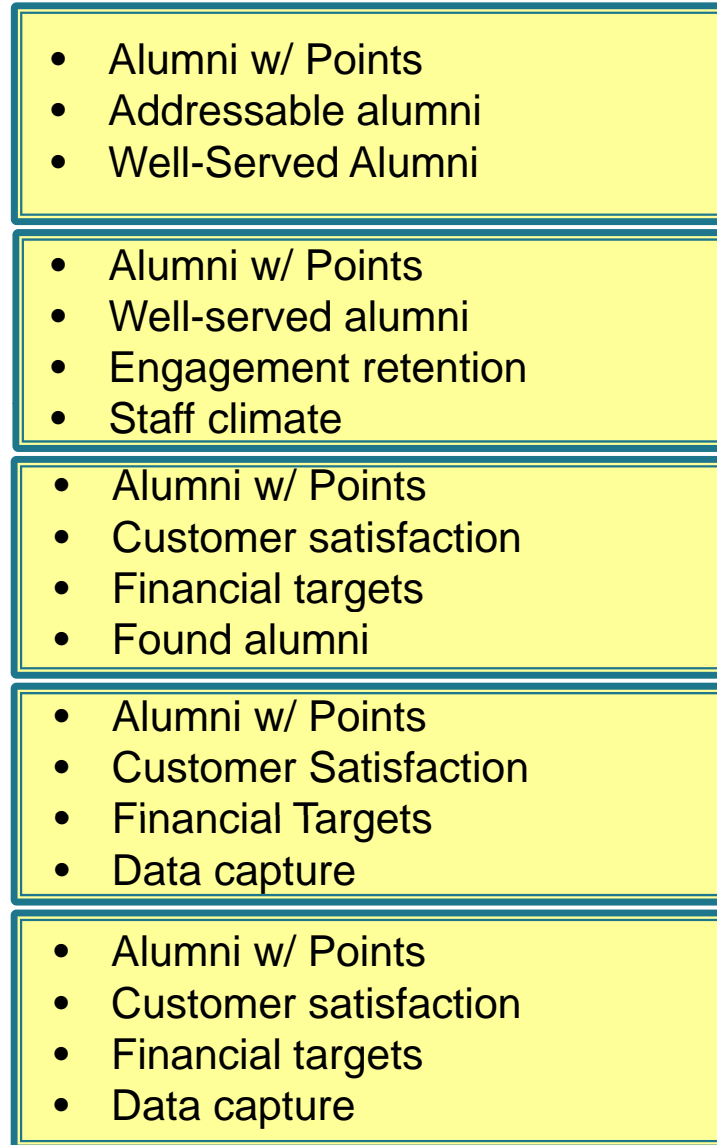
Partnerships & Communities

of campus partners with alumni and/or students
actively engaged alumni communities
of alumni engaged through peer-to-peer communities

Using a Metrics Map

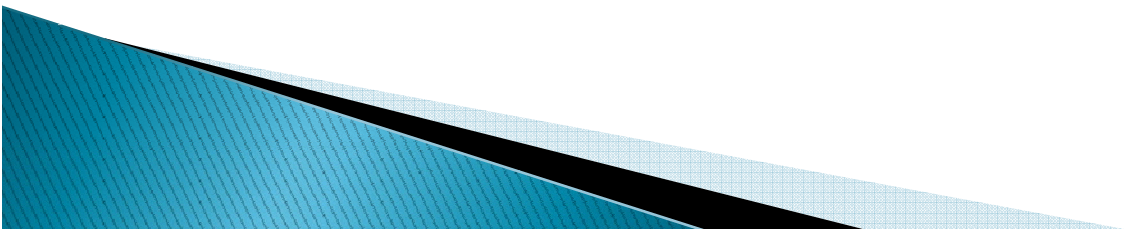


Sample Performance Measures



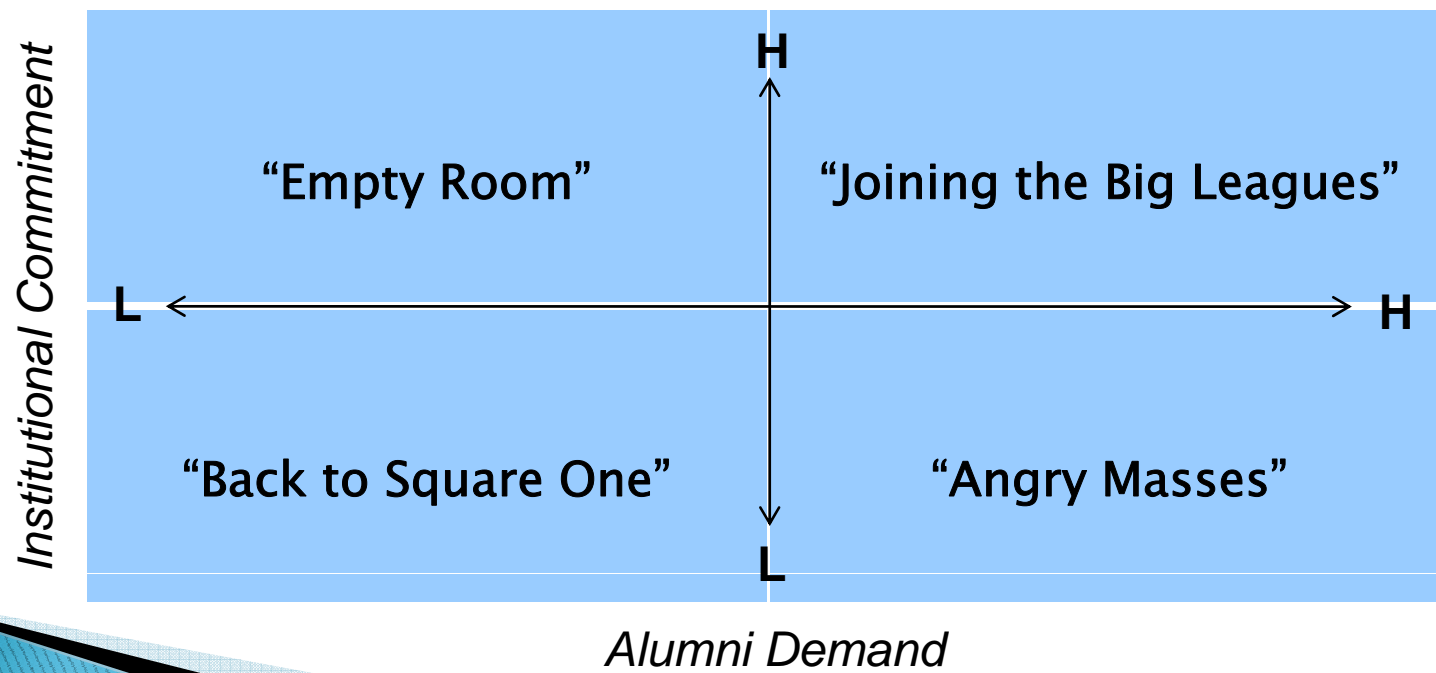


And so...what now?



Strategic Uncertainties

1. What is response of alumni to our enhanced offerings?
2. How do we convince alumni there is value in becoming an engaged?
3. Will institutional commitment be converted into action?
4. How do we convince university partners to support this strategy?



The Road Ahead

1. “Selling” the campaign target and approach
2. New AVP/ED started in fall 2010
3. Still work to be done in making difficult decisions
4. Building better business intelligence to accompany story-telling
5. Staying focused



Thanks for Listening

Questions and Comments?

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