

The background features a white central area where the title is located. This area is bordered by large, solid-colored geometric shapes: a dark blue triangle in the top right, a red triangle in the bottom left, and a dark blue triangle in the bottom left corner. The text is in a black, serif font.

# ALUMNI RELATIONS AND INSTITUTIONAL GIVING

FULRBIGHT BELGIUM  
WB CAMPUS  
FLANDERS KNOWLEDGE AREA

# I. BASICS OF ALUMNI RELATIONS

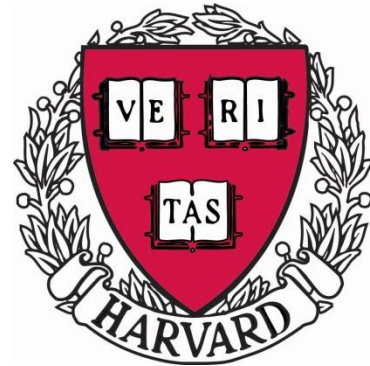
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- U.S. institutions all have a strong culture of alumni involvement
- Some French institutions have an alumni culture—some reframing it
- My African university had no alumni culture

## A. THE SIGNIFICANCE OF MODERN ALUMNI RELATIONS

Forget about “*support systems towards the alma mater and business contacts*”

An **alum** is not a former student: **a student is a future alum in the same community of belongings:** it is important for alumni to allow other young people to benefit from the same experience on the ground of common values

- Great classes
- Beautiful buildings and efficient services
- High technology
- Exceptional association such as a Glee club

# Identity is Key

*Alumni are a group with shared identity & values rooted in a common experience*

HENCE A SERIES OF DIFFERENCES

UNITED STATES VS. EUROPEAN UNION

PUBLIC INSTITUTIONS VS. PRIVATE INSTITUTIONS

OLD INSTITUTIONS VS. NEW INSTITUTIONS

DEVELOPMENT (RAISE FUNDS) VS. NETWORK (CONNECT PEOPLE)

# U.S /Europe: the undergraduate “experience”

## The specificity of the undergraduate experience

- Decisive in the U.S. but also true in Europe when one considers the “Grandes Ecoles”
- Undervalued in most European state universities which feature themselves as “centers of excellence for research” with low focus on student’s experience
- Undermined by the privilege given to graduate & doctoral levels in Europe
- Difficult to acknowledge university years as an “experience” per se in Europe
  - No commencement
  - No community experience from on-campus residential housing
  - No emphasis on “experience” when not part of “curriculum” even when structures allow it (ex the French “PIE”)




# U.S. / EUROPE: THE CULTURAL FACTOR

## Community experience in the U.S.

- Americans have a long tradition of “chosen communities” – the “school of democracy” (Tocqueville)
- U.S. universities have the distinctive identity of one of these communities
- “Giving back” empowers individuals in the U.S. and alienates them in Europe

## University as a function in Europe

- Some schools have a strong identity (ex. The French “Great Schools”)
  - In national systems, universities are just “branches” of the system with low intensity identification
  - In Europe one does rarely chooses one’s school
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# **U.S. / EUROPE: INTERNALIZATION OR EXTERNALIZATION OF STUDENTS' EXPERIENCE**

**In Europe an alumni is mostly the outcome of a policy**

- National policies
- Transnational policies (“Bologna Process”)

**In Europe the student's experience is externalized from the university**

- Role of the Unions as students' body
- Life & engagement outside universities

**In the U.S. a strong internalization**

- Cultural internalization: universities empower students individually and provides them with a culture of personal & local support
- Physical internalization: the campus model



# **PUBLIC / PRIVATE INSTITUTIONS**

**Not all U.S. universities are private**

**Few are profit based**

**“Private” however provides a more exclusive identification.**

- **Alumni as a club**
- **Necessity to raise funds independently from the state**

**Most public U.S. universities would be “private ones” by European standards**

**The sense of exclusivity can be retained in Europe in selective schools**



# OLD / NEW INSTITUTIONS

**By definition an old institution has more leverage into a population of alumni**

- Older and better placed individuals providing more effective support whether in terms of connections or funds
- Young alumni look for contacts their elders can provide (money or contact)
- Long standing identification through different generations

**Time is not the only factor. The alumni communities of the Sorbonne or of the University of Bologna are not very visible...**

**In Europe “old” is prestigious. In the U.S. too, but old can be a few decades...**

# NETWORK / DEVELOPMENT

**Network is the first outcome of a structured alumni community**

- Not necessarily a very active network (ex. Sciences Po)
- A community of reconnaissance (ex. ENS)

**The danger of “old boys networks”**

- Might become an ineffective community referring to the past and not transmitting to the future
- Might become a constituency hostile to change in a context requiring fast adaptation to new challenging contexts



# CONDITIONS OF SUCCESS

Networks are not structured spontaneously

- Takes significant institutional efforts (communication, planning, keeping records...)
- Takes personnel specifically dedicated to following up with alumni: 46 positions at Miami for instance in the development division

## **Development requires a very specific structure**

- High income alumni
- And/or a favorable tax environment

# CONCLUSION: WHERE TO START

**Be an old, private and selective institution in a favorable regulatory context or...**

**Develop alumni networks as your first goal**

- They do not require a specific regulatory context
- They are potentially highly visible
- They are networks of networks (degrees, classes of etc.)
- They are easily combined with traditional association structures
- They can be informal (ex. gr. Alumni reunions)

# DEVELOPMENT

## People give money

- if they can afford it
- If they feel good about it
- If there is a purpose: not raising funds but building
- If the regulatory environment is favorable
  - If the institution has the right to receive money (not always the case in Europe)
  - If individuals receive tax breaks
- The U.S. is the exception, not the model



# ALUMNI ARE THE MIRROR OF STUDENTS

Alumni networks are driven by entrepreneurial individuals who engage in a university goal, only if this university has given them an entrepreneurial culture in the first place

The best practice in the field of developing alumni networks is thus the development of a student's culture emphasizing engagement

- More internalization of the student experience
- More experiential learning
- More individual choices at the level of the curriculum and at the level of the class

**One becomes an alum on the first day of freshman year**



## C. STRUCTURE AND FUNDING OF ALUMNI ASSOCIATIONS

### Traditional options for funding sources includes

- dues (monthly/annual or one time alumni membership dues for access to association's resources)
- service fees, university or foundation funding
- annual fund support,
- student fees (monthly/annual or one time student membership fees for access to alumni resources)
- affinity relationships (with local companies or corporations) and more

**Metrics matter.** Alumni relations is increasingly being defined as part of the “engagement funnel,” the entry point in a lifecycle of activities (beginning with students) and ideally converting engagement to giving.

## C. STRUCTURE AND FUNDING OF ALUMNI ASSOCIATIONS

In the NAPA survey, the percentages of institutional funding for alumni relations varied widely.

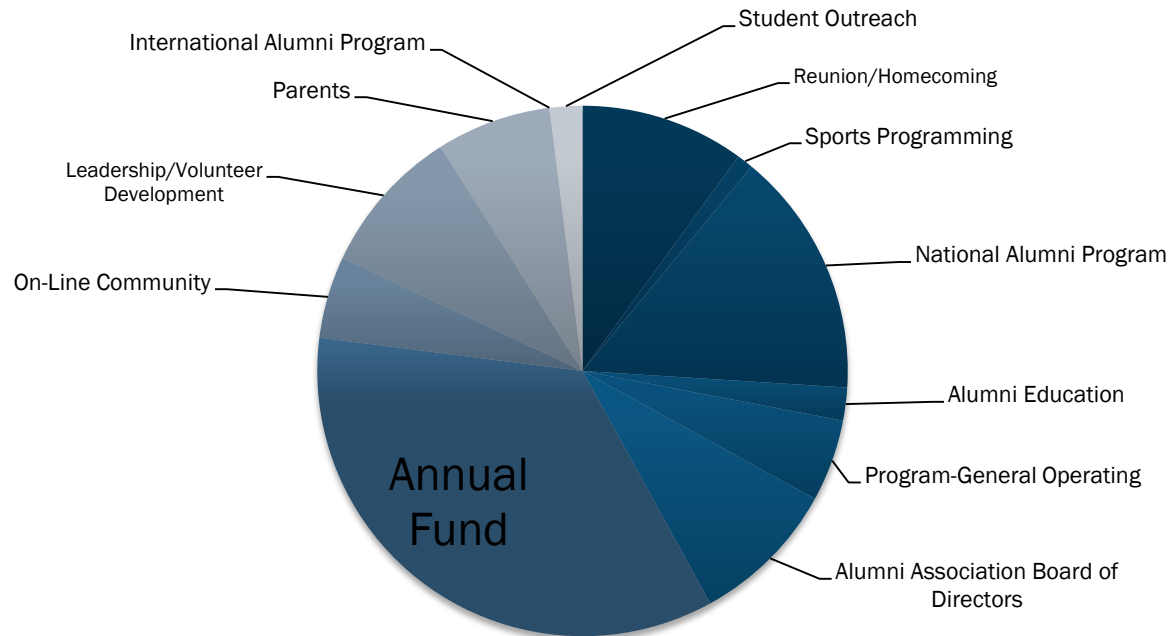
- Mills College, the alumni relations office is funded 100% by the central administration
- Lehigh University, the association (no alumni membership dues) receives about 85% of its revenues from the university (with events and affinity programs supplying the rest)
- Chico State, university support is 50%
- Oregon State, a dues association, university funding is less than 20%

Several alumni associations have built endowments from membership dues, especially lifetime memberships, and rely on that income for operating expenses.

Increasingly they are adding dedicated fundraisers to their own operations to build their own revenue-generating programs that are different from those in the development office (such as association-funded student scholarships or overall endowment growth for various programs and needs).

## C. STRUCTURE AND FUNDING OF ALUMNI ASSOCIATIONS:

### WHERE DOES ALL THE MONEY GO?



2012 Alumni Relations Expense Distribution by Program

## D. THE ACTORS AND FACTORS IN ALUMNI RELATIONS

Alumni Associations of universities in the United States involve various individuals of the institution's community to propel alumni relations and development efforts.

- **Professors** can connect to alumni as resources of professionals in a variety of fields. These alumni-community relationships strengthen the bonds of the institution, instill pride, and motivate further future involvement.
- **Students** can be directly connected to alumni through a student alumni association, which is an organization or club designed for current students to coordinate with the alumni and alumni relations office specifically for programming that fosters student-alumni relationships.
- **Local businesses** can become partners or have affinity relationships with the alumni association or with the different clubs and classes.

## D. THE ACTORS AND FACTORS IN ALUMNI RELATIONS

- The **boards of trustees** in a majority of American institutions are often composed of alumni. Sometimes, certain positions are specifically designed for alumni input. Alumni are a primary resource in the trustees' decision-making process.
- **Admissions staffs** contact alumni for assistance in connecting with other schools especially in locations farther away from the home institution.



Source: Mira Strategy, External Relations

# A. THE SIGNIFICANCE OF MODERN ALUMNI RELATIONS

Why is alumni development important?

- Sustainability
- Global reach
- Advancement

Where did the “alumni” concept originate and how has it transformed?

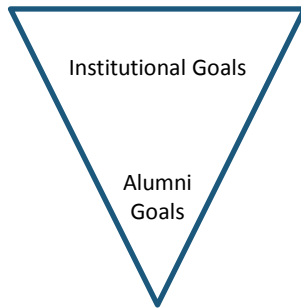
**Alumni association** is an organization whose members have attended the same institution and whose shared educational experience is the foundation out of which a mission, vision and set of goals shall arise.

# B. THE INSTITUTION & THE ALUMNI RELATIONS STRATEGIC PLAN

## Developing a Strategic Plan:

- Evaluating the current state of an institution
- Utilizing the association's goals to determine near to medium term objectives
- Mapping out a path for how the association

The overall structure of the association should support and advance the institution's mission through serving and reaching out to alumni and students.



- **Vision:** What the Alumni Association aims to become
- **Mission:** What the alumni association strives to become; the vehicle by which the association's goals are attained
- **Goals:** what an alumni association will do to achieve its mission, helps on association's focus



## B. THE INSTITUTION & THE ALUMNI RELATIONS STRATEGIC PLAN

- **There is no “one size fits all” for alumni programming or funding.**
- Yet alumni offices are setting priorities and delivering services to their broad constituencies through a smart blend of high-tech and high-touch activities.
- **The umbrella theme that unites all these activities is “the case for investment” – sustainable funding for alumni relations.**
- The common denominator for success is a thorough understanding at the university level of the importance of the role of alumni

### Strategic Focus on Priority-Setting

1. Creating and Articulating Value
2. Positioning for Relevancy
3. Ensuring Return on Investment as defined by the interests of alumni in each institution

### Market-driven Focus

1. Understand what alumni need and want in their relationship with alma mater
2. Connect alumni programming more closely to institutional priorities

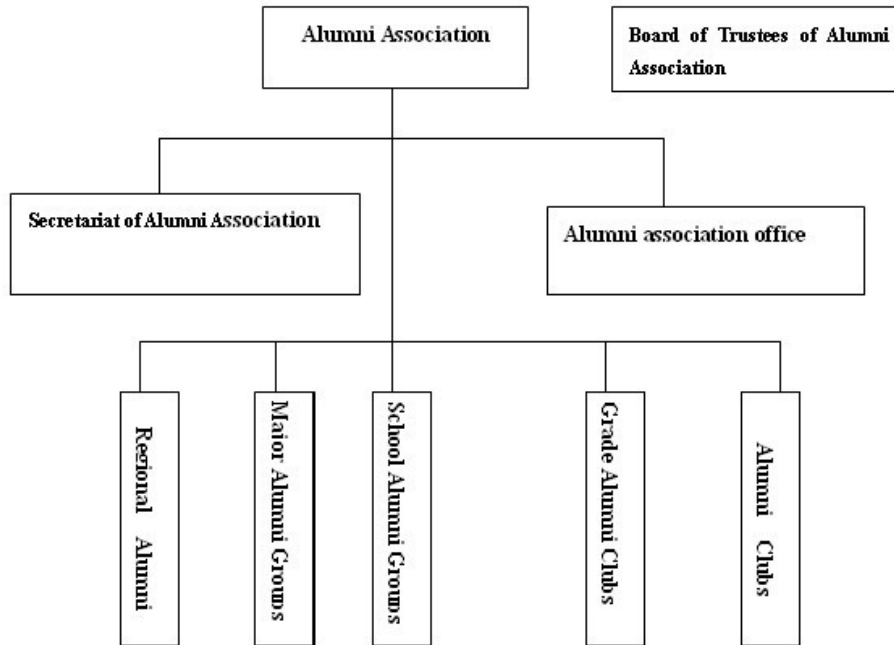
## C. STRUCTURE AND FUNDING OF ALUMNI ASSOCIATIONS

A good example of how developing the “case for investment” has paid off is the University of Tennessee Alumni Association, which undertook a year-long strategic planning project in 2009-2010.

Key wins of this comprehensive project include:

- greater alignment and role definition between the central association and decentralized campus alumni offices
- new investments in technology at the system level for the benefit of all to enhance databases for segmented alumni audiences and affinity groups and eventually eliminate “shadow” databases
- a new senior-level position for alumni and development communications and enriched collaboration with the central university Public and Government Relations office
- new short-term funding from the university administration along with a plan for achieving long-term institutional support

## C. STRUCTURE AND FUNDING OF ALUMNI ASSOCIATIONS



- An alumni association has its own office, staff and budget in coordination with the institution's development and communications offices
- Total operating budget and the level of institutional involvement can vary depending on size, organization and type of the institution
  - Interdependence
  - Independence
  - Dependence