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A STUDY OF THE PRACTICES OF  
SUCCESSFUL ALUMNI ASSOCIATIONS

by  
Maggie Wilt

A Thesis Project

Submitted in partial fulfillment of the requirements of the  
Master of Arts Degree in the Graduate Division  
of Rowan College  
June 20, 1995

Approved by \_\_\_\_\_  
Professor

Date Approved June 20, 1995

## ABSTRACT

This study identified through secondary research the criteria necessary to operate a successful alumni association. Successful in this context refers to the ability to get alumni involved in the association and to maintain their interest and support.

This secondary research uncovered six areas of alumni association management. These criteria are: career development, techniques of communication, alumni gatherings, alumni benefits and bonuses, management and resources and special interest groups. These were applied to the primary research by forming the structure of the alumni association survey.

The alumni association survey involved contacting 16 alumni directors whose organizations have high involvement rates and giving percentages. The directors were chosen from *U.S. News and World Report's* list of top colleges and universities. Directors from schools of various sizes and geographic locations were surveyed to obtain methods and techniques applicable to many institutions.

The survey results yielded many helpful ideas successful alumni directors use to generate and maintain alumni support. Alumni directors many use this study as a reference guide when they look for new ideas to incorporate into their own associations. The methods and techniques contained in this paper represent ideas that work.

#### MINI-ABSTRACT

This study identifies through secondary research the criteria necessary to operate a successful alumni association. These criteria formed the structure of a survey sent to alumni directors whose organizations have high involvement and giving percentages. The survey results yielded many helpful ideas other directors can incorporate into their own associations.

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## Chapter 1

### Introduction

Alumni associations are vital organizations to institutions of higher learning. Colleges' and universities' existence depends upon the support of their alumni for survival. In 1992, financial contributions from alumni constituted the single most important source of voluntary support to higher education.<sup>1</sup>

Strong relations between alumni associations and their graduates motivate alumni to make these donations. Henry Heald was Ford Foundation President during the golden age of higher education. He understood the important role alumni associations play in the survival of the institutions. According to him,

New generations of alumni provide the continuity that perpetuates a university. Its officers come and go, its faculties change, its programs and buildings are replaced, but its alumni maintain a lifelong relationship with the university. They are the keepers of the tradition, preferred stockholders of the enterprise, the mark of its accomplishment.<sup>2</sup>

Robert Hesse says that alumni are often passive viewers of their alma mater. They may reflect on their college experiences, but they make no effort to remain active.<sup>3</sup> Alumni need to realize the mutual dependence that exists between them and their alma mater. The value of their degrees is measured by the survival of the institution.<sup>4</sup>

Relations between alumni and their alma mater depend upon many things. It is true that alumni involvement relies partly on the reputation of the institution. Alumni may be more likely to contribute if their alma mater has a high reputation. Graduates may also take into account the experiences and memories they carry with them from their college days.<sup>5</sup> Alumni associations must keep these factors in mind when approaching their alumni. Each relationship must be nurtured according to each graduates needs and images of the school.

Robert Reichley affirms that too little research has been devoted to the factors that inspire alumni to invest time or money into their alma mater. He says,

Alumni programs are the ultimate source of satisfaction and motivation for both volunteers and staff. If it is true that support follows involvement, or that the two are inextricably linked, then alumni programs are the heart of the enterprise.<sup>6</sup>

Alumni directors need guidance to practices and programs that will stimulate alumni involvement. A compilation of methods applied by successful alumni associations would satisfy that need.



### Importance of the study

The purpose of the alumni association is to inform people.<sup>7</sup> Alumni associations are the main source of information for alumni. This is their primary link to the college. But, good relations is a two-way process. This means alumni associations also need to keep up with what alumni are doing. The alumni association has a responsibility to be aware of accomplishments, opinions and needs of its graduates.<sup>8</sup> Two-way communication is the basis for a sound relationship.

Good relations between alumni and their alumni maters generate the graduates' moral and financial support of the institution. Consistent communication aids in cultivating alumni to create these relations. Alumni associations cannot make contact with alumni only when they want donations. According to Herbert G. Kavabara, a UCLA fund raising volunteer, "you can't have not had contact with an alumnus for 20 or 30 years and then just ask for a check."<sup>9</sup>

Keeping in touch with alumni is the first step in cultivating good relations. According to Richard Emerson, Vice-President of the Council for Advancement and Support of Education, involvement is a key ingredient of a sound alumni relations program. "If we keep alumni close to the alma mater, we make it possible for them to offer service and support to keep it strong."

Alumni associations motivate graduates' involvement in various ways. They offer their alumni incentives to become involved in the association. Some services offered include career and financial services; travel benefits; medical insurance and retirement investments.<sup>11</sup> They sponsor reunions, homecomings and special events, all valuable programs which create emotional ties from graduate to alma mater.<sup>12</sup>

Benefits and bonuses entice alumni to become active with their alumni association. They make alumni feel like they are getting something from the schools. Once alumni are involved, they will be less resistant to the schools' appeals for money.<sup>13</sup> John Kabara, Associate Director at the University of California at Los Angeles says he couldn't care less if graduates of UCLA joined his alumni association because of its special discounts and programs. "Alumni become members to get those service but once we get our hooks into you, that's not all you're going to be doing."<sup>14</sup>

Discounts, benefits and bonuses are just small parts of successful alumni associations. Success demands a strange but necessary mixture of ingredients: commitment on the part of the institution; a set of mutually acceptable objectives; a program of information designed to generate understanding, involvement and support; and direction from strong leadership.<sup>15</sup> Strong alumni associations apply the proper combination of these ingredients and others necessary to foster effective alumni relations.

### Statement of the Problem

College and university alumni associations are relentless when it comes to appeals to their graduates for donations. Many schools invest in telemarketing systems and direct mail firms, making sure they reach all their alumni. They gain access to graduates' financial histories and prepare answers to their objections.<sup>16</sup> Alumni associations have turned alumni relations into impersonal communication. It isn't surprising that many alumni dodge phone calls from their alumni associations, saying they are not home or screening with their answering machines.

Donations come from alumni who have a strong attachment to and pride in their alma maters. Alumni with animosity toward their school are not likely to become yearly donors. One alumni director put it simply: "No one has ever given a dime to a place he didn't care about."<sup>17</sup>

To get alumni involved, colleges and universities need to first focus on cultivating good feelings. Once good relations are established, then the alumni association can begin making appeals for donations. James E. Stofan, UCLA at Irvine's Alumni Association Executive Director, confirms this theory. He says that once they get alumni involved in the association, it will bring donations to the university.<sup>18</sup>

Unfortunately, many alumni associations fail to see the importance of first creating a favorable impression on their alumni. Eustace D. Theodore, chairman of the Commission on Alumni Relations at the Council for Advancement and Support of Education says colleges and their alumni associations should think about their mission and then evaluate money-making venture in light of those institutional values.<sup>19</sup>

### Delimitations

This study was limited to the responses from alumni directors from 16 colleges and universities across the country. These schools were chosen on the basis of the success of their alumni associations. They were schools who ranked the highest in alumni satisfaction and percentage of alumni donations in the *U.S. News and World Report's* ranking of the top colleges. The author chose the schools to represent various sizes and regions of the country. They are not necessarily the top 16, per se.

The study was limited to responses on the following criteria: (1) career development; (2) techniques of communication; (3) alumni gatherings; (4) alumni benefits/bonuses; (5) management/resources; and (6) special interest groups. Each alumni director of the 16 selected schools received a survey dealing with these criteria.

### Purpose of the Study

The purpose of this study was to identify necessary criteria to operate a successful alumni association. Successful in this context refers to the ability to get alumni involved in the association and to maintain their interest and support. Obviously there are different methods of managing alumni associations. By surveying alumni directors whose organizations have high involvement rates and giving percentages, the best ideas can be extracted.

The information generated through these surveys will serve as a basis for a reference guide for college and university alumni associations. This reference guide will include ideas and examples of organization procedures, communication techniques, programs and benefits from the top alumni associations in the country. The results will be a guide suitable for use by alumni associations of various sizes, budgets and staffs.

### Procedure

To uncover the criteria necessary for an alumni association to operate, the study began with secondary research. The author investigated the operations of alumni associations. The investigation included magazine and journal articles, books, dissertations and conversations with the alumni director of her own school.

The author compiled a list through these sources and her own experiences working for an alumni relations office. The list contained criteria used by alumni associations to aid in the cultivation of their alumni. The list included functions, programming and organizations of alumni relations offices.

A survey was written to send to alumni directors at 16 reputable institutions with successful alumni associations. The survey included questions regarding career development; techniques of communication; alumni gatherings; alumni benefits/bonuses; management/resources and special interest groups. A great amount of time was devoted to the survey to ensure the questions would yield quantifiable answers.

Directors were requested to include samples of publications, direct mail contacts and anything else they would be willing to share that would be relevant to this study.

### Definition of Terms

**Alumni** - Graduates who earn bachelor's, master's, doctoral and professional degrees.

**Development Office** - College office devoted to the advancement of the institution. Involved with major fund raising events and other activities that provide financial support to the college.

**Career Development Services** - Services offered by schools to aid their graduates' job searches. These include local services such as resume banks, job listings, job fairs and networking files and national services such as SkillSearch, Job Bank U.S.A., and University Pronet.

**Council for the Advancement and Support of Education (CASE)** - Non-profit education association which develops and fosters sound relationships between member educational institutions and their constituencies; provides training programs, products and services in the areas of alumni relations, communications and philanthropy and provides a strong force for the advancement of education worldwide.

**Networking File** - A computerized system that identifies alumni willing to serve as contacts for informational interviews and networking leads.

## Chapter 1

### Notes

1. Robert A. Baade and Jeffrey O. Sundberg, "Identifying the Factors That Stimulate Alumni Giving," The Chronicle of Higher Education, 29 Sept. 1993 B1.
2. Robert A. Reichley, "The Alumni Movement: An Overview," Handbook of Institutional Advancement, ed. A Westley Rowland (San Francisco: Jossey-Bass, Inc. 1977), 275.
3. Robert A. Hesse, "Organizing the Alumni," Handbook for Emerging Alumni Associations, (Washington D.C.: Confederation of Alumni Programs of SUNY), 13.
4. Robert G. Forman, "A-L-U-M-N-I doesn't just spell M-O-N-E-Y," Building Your Alumni Program. The Best of CASE Currents, eds. Virginia L. Carter and Patricia A. Alberger, (Washington D.C.: Council for Advancement and Support of Education, 1980), 18.
5. Baade and Sundberg, B2.
6. Reichley, 304.
7. Forman, 19.
8. Gusler, Thomas A., A Survey of Recent Alumni: Design & Processing Considerations (ERIC, E225 492, 1982), 2.
9. Julie L. Nicklin, "Wooing Minority Alumni," The Chronicle of Higher Education, 23 Feb. 1994 A30.



10. Richard Emerson, "The Effective Alumni Association," Building Your Alumni Program. The Best of CASE Currents, eds. Virginia L. Carter and Patricia A. Alberger, (Washington D.C.: Council for Advancement and Support of Education, 1980), 26.
11. Goldie Blumenstyk, "Deals for Alumni," The Chronicle of Higher Education, 20 Apr. 1994, A45.
12. Emerson, 26.
13. Nicklin, A29.
14. Blumenstyk, A42.
15. Hesse, 14.
16. Janny Scott, "Some Schools Won't Take No for an Answer," New York Times, 19 June 1994, E3.
17. David G. Gearhardt, "Alumni Associations are too Often Isolated and Ignored in College Fundraising Efforts," The Chronicle of Higher Education, 15 Nov. 1989, B2.
18. Nicklin, A29.
19. Blumenstyk, A42.

## Chapter 2

### Literature Review

This study involved an extensive literature search. The secondary research consisted of inquiry through computer databases such as ERIC, CD ROM and other computerized card catalogs. The author searched for books, articles, dissertations and other documents related to college and university alumni associations. The author used keywords such as "alumni associations," "college graduates," "colleges," "universities" and "alumni."

A great deal of information is available regarding college and university alumni associations. These writings range in topics. Magazine and journal articles, newspaper articles and chapters cover specific programming, unique aspects, guides for starting an alumni association and fundraising techniques.

These writings help alumni directors improve their associations. Reading about successful organizations gives insight about management and programming techniques. Directors can obtain solutions to specific problems in their organizations.

Secondary research served two purposes. First, the author verified the importance of the topic and the need for the study. The author gathered background information on alumni associations and their workings. The author formed particular general hypotheses about college and university alumni associations. As research continued the author found evidence proving the hypotheses regarding particular and general aspects of alumni associations.

The author's basic hypothesis is that if alumni associations concentrate their efforts more on cultivating their members, their fund raising efforts need not be so intense. Alumni who are pleased with their university contact will donate relatively easily. But alumni need to feel as if they are getting something out of their school support.

Therefore, the author is compiling a guide of ideas to better serve alumni and keep donations flowing easily into the school. The ideas in the guide will come from successful alumni associations who know how to keep strong ties and obtain consistent financial support from their graduates. Schools of various sizes and from different regions of the country will be able to apply these ideas to their associations. They will greatly benefit by acquiring the ability to better serve their alumni and in turn, increase the rate of donations coming into the association.

The problems alumni directors face usually deal with a lack of alumni involvement. These organizations' dependency on alumni involvement makes these problems imperative to solve. Alumni directors need to know the best ways to get and keep alumni involved in the alumni association.

Alumni directors can benefit from a guide to aid them in increasing alumni involvement. Presently, nothing is available to give directors specific examples of programs and ideas to incorporate into their associations. This type of guide would also help directors to see why present programs are not working. This guide will help incorporate new programs, giving step by step instructions, initiation to execution.

The author found pertinent information in both educational and business publications while conducting secondary research. These articles offered insight to the ingredients belonging in a successful alumni association. The Handbook for Institutional Advancement included a few chapters dealing specifically with alumni relations. The Council for Advancement and Support of Education were also helpful through their monthly publication, CASE Currents. These main sources of information provided the backbone of the author's secondary research.

CASE Currents, a publication of the Council for Advancement and Support of Education, published a compilation of articles 1980 from this publication dealing with alumni associations. It is entitled "Building Your Alumni Program. The Best of CASE Currents."

There are 80 articles in the collection divided into the following sections: (1) The Association: Building Your Base; (2) Finances: Making Ends Meet; (3) Activities: Bringing 'em Back; (4) Chapters and Clubs: Reaching Alumni Far and Near; (5) Continuing Education: Life After College; (6) Alumni Travel: Going a Long Way; (7) Volunteers: Tapping Alumni Talent; (8) Involving Students: The Future is Now; and (9) Keeping Records: Your Tie to Alumni.

This collection of articles was probably extremely helpful in 1980. The articles cover topics such as programming, alumni benefits and fund raising, but some go back as far as 1975. Though some information may still be helpful and relevant, this is too outdated for consultation in 1995. An updated account of what alumni associations are doing now would be much more pertinent to those seeking information on how to better run their alumni associations.

The Handbook of Institutional Advancement is intended for all departments of institutions of higher learning. It is a practical guide to college and university relations, fund raising, alumni relations, government relations, publications and executive management for continued advancement. This handbook fosters the professional growth of people active in institutional advancement, and informs beginners in the field and students preparing to enter this profession. It contributes to the growing unity of people and programs striving to enlarge public understanding and support for colleges and universities.

Robert A. Reichley wrote Part Three of this Handbook. This section includes five chapters: The Alumni Movement: An Overview; Volunteers: Who Are They?; The Staff in Transition; Alumni Programs and Alumni Clubs and Reunions. Reichley carried out extensive personal communication during 1975-76 to secure information about the various alumni programs and activities at institutions across the country.

In his overview, Reichley presents a history of alumni organizations and discusses their growth. Alumni association budgets have increased significantly since their infancy, and continue to grow each year.<sup>20</sup> An article written by Baade and Sundberg in 1993 entitled "Identifying Factors That Spur Alumni Giving," identified that both public and private universities are finding the need to become increasingly active fund raisers.<sup>21</sup> Alumni association staff size has also increased, positively benefiting these organizations.<sup>22</sup>

Reichley presents various quotes from alumni administrators describing their views on the importance of alumni programs.<sup>23</sup> James H. Frey, a contributor to "Building Your Alumni Program. The Best of CASE Currents," agrees. In his article, "Make Your Survey Scientific," he reports that although some programs do not appear to benefit the university on the surface, they serve to cultivate the alumni.<sup>24</sup>

Another article, written by Robert G. Forman, The Executive Director of the University of Michigan's Alumni Association, reports that programs should concentrate on bettering graduates' lives through their alma maters.<sup>25</sup> H.J. Seymour puts it best:

Alumni programs are the ultimate source of satisfaction and motivation for both volunteers and staff. If it is true that support follows involvement, or that the two are inextricably linked, then alumni programs are the heart of the enterprise.<sup>26</sup>

The nature of programs that a particular alumni association offers is determined by many factors. Alumni programming depends on the type of institution, the faculty, the students and the organization of the association. Programming must coincide with the goals and objectives of the institution and its budget.<sup>27</sup>

In Chapter 19 Reichley focuses on alumni support. He discusses the importance of realizing the diversity of each group of alumni, which makes it difficult to talk about them as a whole. Reichley discusses how some directors attempt to inspire support from their alumni.<sup>28</sup> "Wooing Minority Alumni," an article by Julie L. Nicklin, supports this concept, stating that establishing separate groups for graduates makes them feel better about their alma maters.<sup>29</sup>

Reichley mentions different reasons alumni remain uninvolved. Involvement depends on many things, including the alumni's involvement while at school and their experiences resulting from their education at the particular institution.<sup>30</sup> Baade and Sundberg link alumni involvement to institution reputation.<sup>31</sup> Thomas E. Gusler, author of "A Survey of Recent Alumni: Design and Processing Considerations," says that it is up to the university to make sure their contacts with students does not end with graduation.<sup>32</sup>

Many alumni directors discuss the importance of alumni volunteers. Reichley reports that volunteers are found among those who love the university and are interested in higher education. They should understand and accept the institutions' goals and objectives.<sup>33</sup> Richard Emerson, CASE Vice President in 1979, advises alumni associations to involve students in its programs to cultivate future alumni leaders.<sup>34</sup>

Reichley's comments in these areas give a decent background on the organization of alumni associations. This research, although helpful, may also be outdated. He does not offer great detail in any area, something that is done in this study. He gives few examples from various schools. This study includes more recent information and probes deeper to reveal more specific information and examples. It produces a sort of ideal state for alumni associations.

The secondary research was also used to prepare a survey to compile the primary data needed. Based on commonalties found in the literature search among alumni associations, six criteria were isolated. These criteria were the basis for the survey sent to successful alumni directors.

These criteria were found through a periodical search. Among other publications, The Chronicle of Higher Education contained many articles dealing with alumni associations. The most helpful of these were "Deals for Alumni" and "An Answer for Job Hunters?" These two articles discussed alumni services such as savings on mortgages, medical insurance, airfare discounts and career services.



" wooing Minority Alumni," also from The Chronicle of Higher Education, gave a lot of information regarding minority alumni and fundraising to special interest groups. Another publication that addressed minority alumni was Black Enterprise, suggesting that these alumni be separated. Giving groups special attention works well in cultivation tactics.<sup>35</sup>

Fundraising and development were also discussed in the Chronicle's "Identifying the Factors that Spur Alumni Giving." Other criteria were found in articles in publications such as the New York Times, U.S. News and World Report, The Journal of Career Planning and Employment. A number of papers dealing with alumni associations were found through the Educational Resources Information Center (ERIC).

## Chapter 2

### Notes

20. Robert A. Reichley, "The Alumni Movement: An Overview, Handbook of Institutional Advancement, ed. A Westley Rowland (San Francisco: Jossey-Bass, Inc. 1977), 275.
21. Robert A. Baade and Jeffrey O. Sundberg, "Identifying the Factors That Stimulate Alumni Giving," The Chronicle of Higher Education, 29 Sept. 1993 B1.
22. Reichley, 304
23. Reichley, 284
24. James H. Frey, "Make Your Survey Scientific," Building Your Alumni Program. The Best of CASE Currents, eds. Virginia L. Carter and Patricia A. Alberger, (Washington D.C.: Council for Advancement and Support of Education, 1980), 19.
25. Robert G. Forman, "A-L-U-M-N-I doesn't just spell M-O-N-E-Y," Building Your Alumni Program. The Best of CASE Currents, eds. Virginia L. Carter and Patricia A. Alberger, (Washington D.C.: Council for Advancement and Support of Education, 1980), 18.
26. H.J. Seymour quoted by Robert Reichley, "The Alumni Movement: An Overview, Handbook of Institutional Advancement, ed. A Westley Rowland (San Francisco: Jossey-Bass, Inc. 1977), 275.
27. Reichley, 301
28. Reichley, 292
29. Julie L. Nicklin, "Wooing Minority Alumni," The Chronicle of Higher Education, 23 Feb. 1994 A30.

30. Reichley, 287.
31. Baade and Sundberg, B2.
32. Thomas A. Gusler, A Survey of Recent Alumni: Design & Processing Considerations (ERIC, E225 492, 1982), 2.
33. Reichley, 275.
34. Richard Emerson, "The Effective Alumni Association," Building Your Alumni Program, The Best of CASE Currents, eds. Virginia L. Carter and Patricia A. Alberger, (Washington D.C.; Council for Advancement and Support of Education, 1980), 26.
35. Donette Dunbar, "Back-to-school-daze," Black Enterprise, March 1991 P17.

## Chapter 3

### Study Design

The secondary research was used to acquire a vast knowledge of the workings of alumni associations. This research yielded information regarding opinions of the importance of alumni associations to the institutions they represent. The research also uncovered commonalties among alumni associations. These criteria were the basis of the survey which attempted to gather information from alumni directors from schools across the country.

The survey was compiled and sent to alumni directors at 16 reputable schools with successful alumni associations. These schools were chosen based on their rankings in the *U.S. News & World Report's* list of top universities and colleges. The schools were chosen to represent various sizes and regions of the country. They are not necessarily the top 16, per se. These schools held high percentages in alumni donation rates and alumni satisfaction.

Once the 16 schools were chosen, the author referred to the CASE directory for names of the directors of alumni at the respective institutions. Each name and address was verified by telephone. The author then sent an introductory letter to each of the 16 directors. This letter explained the importance of the study and why that particular school was chosen.

Directors were assured that the name of their school would remain anonymous in the thesis. The author informed the directors that they would receive the survey in a few days, noting how their participation would be appreciated. They were told that they would receive a copy of the completed thesis.

This letter was carefully prepared to achieve maximum response to the survey. The author felt that mentioning their appearance in *U.S. News & World Report* would generate proud feelings on behalf of the alumni director. Also, each was one of only 16 chosen for the project. The author was confident that all directors would respond.

#### The Sample

The sample was stratified. The schools were selected on the basis of their organization's success. The results of evaluating the data received through the surveys are therefore non-probable. The sample was not randomly or scientifically chosen. It was chosen according to geographical location and reputation of alumni association.

The sample chosen represented schools from the northern, southern, mid-western and western regions of the country. Four schools were picked from each region. The sample was further specified by school size. Four schools from each region represented approximate sizes of 900 to 2,000; 4,000 to 11,000; 15,000 to 19,000; and 26,000 to 43,000. Each region had one school from each of these ranges.

The author chose a diversified sample indicative of alumni associations at schools of various sizes and in various regions of the country. Directors can refer to this study and can find themselves typified in the sample chosen.

### The Survey

The survey was sent a few days after the introductory letter. The author included a self-addressed envelope with the survey. Another letter reminded the particular director about the project. They were told again how they were selected, that they would remain anonymous and the importance of their responses. They were asked to answer the survey questions as completely as possible and to send back any relevant materials they would feel comfortable sharing. The author's phone number was given for questions. The directors were thanked in advance for their cooperation.

The survey included the common criteria uncovered in the extensive literature search conducted by the author. The survey asked questions in the specific areas of career development, techniques of communication, alumni gatherings, alumni benefits/bonuses, management/resources and special interest groups.

The survey was eight pages. The first page dealt with alumni surveying and fundraising. Respondents had to complete a grid for each topic asking their methods for each medium (phone, mail, face-to-face interviews, suggestions cards, other). They were also asked the frequency of these efforts (quarterly, twice-annually, annually, other). Last they were asked to rate the effectiveness of each compared to the others.

Page two dealt with techniques of communication. One grid asked directors the frequency with which they send alumni newsletters, use direct mail, call alumni and dispense special events information. They were asked the frequency of their contact (monthly, quarterly, twice-annually, annually, other). A space was left to add other communication vehicles not listed.

Two open-ended questions followed this grid. The first asked the most effective medium for informing alumni of special events. The second question asked the most effective one for donation appeals.

Another grid asked directors how they obtained feedback and which was the most effective way. The choices of feedback techniques included an 800 number, response card, telephone interview, face-to-face interview and space to add other alternatives. The frequency choices were monthly, quarterly, twice-annually and annually. There was also space for directors to rate the effectiveness of the choices.

Page three dealt with national career development services. The directors were given a list of national organizations including SkillSearch, Job Bank, U.S.A., KiNexus, University Pronet and space to name anything not listed. This was followed by a large grid in which the directors were to list three things they did to initiate the program, a brief description of operation, three positive results and three negative results of having implemented that particular program.

Page four was similar to page three except that it focused on career development services on a local level. This referred to on-campus activities offered by the school such as job fairs, networking files, job listings and additional on-campus services. Directors were given two grids to discuss two services offered. The grid asked for: three things done to initiate the program; a brief description of operation; three positive results and three negative results of offering these services.

Page five covered alumni gatherings. A six-square grid offered space for descriptions of reunions, receptions, class meetings, sports events and cultural gatherings. Directors were asked to report how often they hold these events and briefly to describe them.

Page six dealt with alumni benefits and bonuses. Directors were asked to list the special offers alumni could take advantage of and how they promote the special offers. The next question asked about the problems or virtues associated with offering these services. Directors were asked which offer was used most.

Next, directors were asked what campus facilities were available for alumni use. The author listed parking, library, computer lab, student center, gym and space for additional privileges. Directors were again asked to comment on the problems and virtues of these privileges and to name which one was used most.



Page seven covered management and resources of alumni associations. First, there were questions on the internal workings. Directors were asked to list the alumni staff member titles and functions. They were asked what special skills and attitudes they consider best for alumni office employees. Next there were questions regarding the relationship between the alumni office and the development office. Directors were asked what the relationship was (whether they work above, beneath, or with that office), if they are satisfied with their present relationship, and what would be their ideal relationship.

Under external workings, questions asked about volunteer groups, what activities they participate in, and whether the particular alumni association has regional captains. Directors were then asked about the organization and functions of the alumni board. The last question on this page asked, "What percentage of your success (as an alumni association) can be attributed to the reputation of your school, as opposed to your organization's efforts?" An example of 80 percent due to school reputation, 20 percent due to alumni association's efforts, was given.

Page eight, the final page, first asked questions regarding special interest groups within the alumni association. These groups could be anything from sports groups to multi-cultural groups. Directors were asked what sub-groups exist within their alumni association. They were then asked if these groups arose on their own or by the association's initiative. Last, they were asked if they sponsor, cultivate or serve the activities of these groups.

The second half of this page asked directors to rate the six criteria in order of importance for generating support from alumni. The six criteria listed were career development, techniques of communication, alumni gatherings, alumni bonuses and benefits, management and resources and special interest groups. The last question asked directors if they would be willing to answer follow-up questions by telephone.

### Treatment of Surveys

The author received 13 out of 16 completed surveys from alumni directors. One more survey was sent to make the total 14. The author contacted the additional director by telephone and sent a letter with the survey thanking them for their participation. However, this director failed to respond, bringing the total number of respondents back to 13.

The author compiled the data from the 13 surveys and looked for answers that would need clarification by the respondents. The directors answers were clear enough that no further contact was necessary. The author then took each question and compiled the answers. Each survey question is reported separately.

The author compiled the grid answers by medium and frequency. The author had requested that each director rank the methods used in the categories of alumni surveys, feedback and fund raising. These rankings would start with "1" as the most effective method used. The scale would go as high as the number of methods used. For example, if a director uses phone, mail and face-to-face for funds raising, he or she may rate face-to-face as "1," mail as "2," and phone as "3."

However, many directors did not use the ranking system requested. Therefore, the rankings were not reported fully, only in situations where a trend was visible. To ease reader comprehension, frequencies found among the open-ended question were also put into charts as well as text.

Criteria ratings were put into a chart showing how the directors rated career development, techniques of communication, alumni gatherings, alumni benefits/bonuses, management/resources and special interest groups as to their importance in generating alumni support. The chart shows the total under each rating, and the number of directors who rated each criterion.

## Chapter 4

### Data Analysis

The information obtained through the alumni association survey was compiled and translated into text and charts. In the areas of alumni surveys, feedback, techniques of communication and fund raising grids were used to obtain data. Directors completed grids which showed the methods they use, the frequency with which they use them, and their effectiveness in comparison to the other methods.

Many directors did not complete the grids as the author requested. This created difficulty in translating the data into statistics. The author reported the findings as they were received, although they were not what was originally sought.

## Alumni Surveys

Alumni directors completed a grid regarding how often they survey alumni and the methods they use. They were also asked to rank each method according to its effectiveness in comparison to other methods used. A ranking of "1" would indicate the most effective method. Table 4.1 shows the methods and their frequencies and frequencies and percentages of respondents to this grid.

	Face-to-Face		Suggestion Cards		Telephone Interviews		Mail	
	N	%	N	%	N	%	N	%
Annually	1	14	2	33	0	0	2	20
2X Annually	0	0	1	17	0	0	1	10
Frequently	2	29	0	0	1	20	1	10
Occasionally	0	0	2	33	0	0	2	20
Rarely	1	14	0	0	0	0	0	0
Other	3	43	1	17	4	80	4	40
Total	7	100	6	100	5	100	10	100

Table 4.1

Three directors ranked telephone use for surveys. These ranks were two, three and five. Four directors ranked mail surveys. These included three number "1" rankings and one number "4" ranking. Face-to-face surveys received two number "2" rankings and one number "1" ranking. Suggestion cards received two number "3" rankings and one number "4" ranking. One respondent uses all four media and ranked each with a plus sign.

One school uses mail twice-annually and ranks it as its number "1" method. Their second most effective method is phone surveys, which they do not use regularly. They also use phone surveys, again irregularly, and rank it as their fifth most effective method.

Another school uses mail irregularly and rates it as the most effective method. Their second most effective is annual face-to-face surveys. Third is phone surveys, used irregularly. This school's fourth most effective method of alumni surveying is annual suggestion cards. Another combination comes from a school using the same four media, all irregularly. The most effective method is face-to-face, followed phone surveys, suggestion cards and mail.

Of the respondents who completed the alumni survey grid, ten use mail, seven use face-to-face, six use suggestion cards and five use phone interviews. Most respondents reported using a frequency other than those provided. They did not specify the frequency, they just checked the "other" box.

Other survey methods used include surveys in the alumni magazine six times a year, ranked 2; an alumni directory once every five years, ranked 2; hospitality and football games, ranked 1; alumni chapter leadership workshops and executive committee discussions, both not rated.

## **Fund raising**

A fundraising grid asked respondents how frequently they use the telephone, mail or other methods to raise money from alumni. Rankings were requested here, with the same results as the other questions. Table 4.2 shows the frequencies and percent of directors who reported using the listed media.

	Phone		Letter	
	N	%	N	%
Annually	3	50	5	63
2X Annually	1	16.6	2	25
Frequently	1	16.6	1	12
Other	1	16.6	0	0
Total	6	100%	8	100

Table 4.2

Six respondents use the phone. Three use it annually, one each use it twice-annually, frequently and other. Four directors gave it a ranking of "2," one gave it a "1" and one director said "very effective."

Letters are used by eight of the directors surveyed. Five use them annually, two use them twice-annually and one uses them frequently. Rankings given to this medium were one number "1," two number "2," two number "3" and one number "4" ranking. One director did not rank mail usage but reported that it is less effective than phone.



Respondents were asked to name other methods they use to fund raise that were not mentioned on the grid. Two schools mentioned one-on-one and personal solicitation throughout the year. Both schools ranked this method as their most effective. One school uses membership renewals and one uses dues. One school reported that it has plans to start soliciting memberships at events.

Two schools mentioned that they use reunions to fund raise. Other events used were pre-game, donor "thank you" events and homecoming. One school specified that it never holds events in which a donation is part of the event.

One school uses monthly direct mail and ranks it as its most effective method. These solicitations go out on the members' anniversary of their gift.

Five schools refrained from completing the fund raising section of the survey. One reported that it is separate from resources. One replied that it cultivates alumni, not raises money. One reported that it is not a fund raising alumni association.

## Techniques of Communication

A techniques of communication grid asked the frequency with which directors communicate with their alumni through newsletters, direct mail, telephone and special events information. Again they were asked to rank these items but few did. The answers given are in text form. Numbers and percentages of directors using the listed media are presented Table 4.3.

	News-letter		Direct Mail		Telephone		Special Event Info.	
	N	%	N	%	N	%	N	%
Annually	2	13	1	11	1	12.5	1	7.5
2X Annually	2	13	1	11	1	12.5	2	17
Quarterly	7	47	1	11	0	0	3	25
Monthly	0	0	1	11	0	0	2	17
Bi-Monthly	4	27	0	0	0	0	0	0
Frequently	0	0	0	0	3	37.5	1	7.5
Occasionally	0	0	1	11	1	12.5	0	0
Rarely	0	0	0	0	1	12.5	0	0
Other	0	0	4	45	1	12.5	3	25
Total	15	100	9	100	8	100	12	100

Table 4.3

Newsletters are used by all the respondents. Two use them annually, two, twice-annually, seven, quarterly and four, bi-monthly. One school sends different newsletters at different times; therefore, responses appear in three categories: annually, twice-annually and quarterly.

Direct mail is used by nine directors. Four gave a frequency answer of "other," not specifying how often they send it. One answer each fell under the categories of annually, twice-annually, quarterly, monthly and occasionally.

Eight respondents use the telephone to communicate with alumni. Three directors use it frequently. One each use it annually, twice-annually, occasionally, rarely and other.

Eleven directors reported using special event information to communicate with alumni. Usage falls into categories accordingly: one, annually, two, twice-annually, three, quarterly, two, monthly, one, frequently and three, other. One "other" was "through direct mail." Two "other" responses were not specified.

Other techniques of communication offered by respondents included the alumni magazine, ranked with a "2," electronic mail, capital campaign newsletter, university newsletter and alumni chapter meetings, all not ranked.

What is the most effective medium for informing alumni of special events?

Twelve directors responded to the question regarding the most effective medium for informing alumni of special events. Of these, 66% answered "direct mail" as the most effective method. Directors described this method as direct mail and special mailings. One small school is able to send invitations first-class and follow up with phone calls increasing the average response 10%.

The next most effective media are alumni magazines and newsletters. These media are used by 50% of the alumni associations surveyed. Most directors listed more than one method, but direct mail, magazines and newsletters were mentioned most frequently.

Other media mentioned were flyers and brochures, radio during athletic events, and mass mailings from regional clubs.

What is the most effective medium for donation appeals?

- 4 Telephone
- 4 Face-to-face
- 3 Direct mail
- 5 Do not engage in fund raising

Of the thirteen schools surveyed, five alumni associations do not engage in fund raising, so this question was not applicable. The eight schools whose alumni associations fund raise gave one or two effective ways.

Of the eight schools, telephone and face-to-face were each mentioned four times. One school uses the telephone for smaller donations. Two schools reported that face-to-face was the most effective medium for larger donations. Direct mail was mentioned three times. Another school reports that keeping alumni informed and using "very special events" are effective fund raisers.

## Feedback

The feedback grid asked alumni directors how often they use 800 numbers, response cards, telephone and face-to-face interviews to obtain feedback from alumni. Again, directors were asked to rank each method but there was not enough information to compile, so the author simply reported the findings in the text. A ranking of "1" means the most effective of all methods used. Table 4.4 reflects directors' responses.

	800 Number		Response Cards		Telephone		Face-to- Face	
	N	%	N	%	N	%	N	%
Annually	1	20	2	29	1	25	2	50
2X Annually	0	0	0	0	0	0	0	0
Frequently	4	80	3	43	1	25	0	0
Occasionally	0	0	1	14	0	0	0	0
Rarely	0	0	0	0	2	50	1	25
Other	0	0	1	14	0	0	1	25
Total	5	100	7	100	4	100	4	100

Table 4.4

Two users of the telephone interview ranked it as the most effective. No one else ranked it. Four users of face-to-face ranked it the most effective. One other director gave it a "2."

The 800 number, used by six of the respondents, was ranked by five directors, receiving three number "1" and two number "2" rankings. Of the seven response card users, five ranks were given: three number "1," one number "2" and one number "4."

One school uses a combination of face-to-face irregularly, ranked "1," and a daily 800 number its second most effective method. It also uses response cards at reunions, ranking the technique as its fourth most effective method.

Of the feedback grid respondents, five use an 800 number, six use suggestion cards, five use telephone interviews and ten use mail.

Other feedback techniques included information forms sent with every newsletter and birthday cards. Also mentioned was electronic mail, ranked 2, evaluation forms, reunions and workshops. One school uses constant communication through all means on a continual basis.

One director reported that method effectiveness is measured by the organization's success. Two directors abstained from answering the feedback grid.

## **National Career Development Services**

### What national career development services do you offer alumni?

Alumni directors were asked what national career development service, if any, they offer to alumni.

Of the thirteen schools surveyed, seven do not use a national career development service. Two schools currently use Job Bank, USA, and one director reported that the association dropped the service after 18 months. One school uses Skill Search and one uses University Pronet.

Directors who use a national career development service were asked to provide information on the initiation and operation of these programs. They were also asked to mention positive and negative results of subscribing to these services.

One school, using Job Bank, U.S.A., listed as "initiation" procedures: (1) direct mailing to a select group; (2) putting out information sheets everywhere; and (3) placing an advertisement in the alumni magazine. "Operation" was defined as entering alumni information into a database. The director listed the following three positive aspects: (1) alumni need the service; (2) alumni see the service as a benefit; and (3) the service solves developing problems with alumni. The negative aspects are: (1) there are not enough jobs in the database; (2) alumni want jobs in certain areas; and (3) alumni think that the association needs to do more.



Only one survey respondent uses University Pronet. This service involves all the academic departments on campus working to obtain jobs for graduates. To initiate this program, the director talked to the deans of the different schools on campus and to the membership standing committee of its board of directors. Then a nice flyer was designed about the program.

Some positive results of this program included increased alumni membership, good will with the deans of the larger schools, and increased reputation of the alumni association among students. One negative result was that several deans became upset that their students or graduates were not included.

One school uses Skill Search as its national careers development service. Initiating this program involved first talking to the Skill Search representative. Next, the alumni association investigated the service through other associations offering the service. Then, it signed on with the program.

Under operations, direct mail was used to inform alumni 3 to 30 years out of school about the program. Skill Search handles all the inquiries, surveys, etc. The director listed two positive results of this program; (1) the alumni organized it; and (2) 2,000 alumni joined the program. Only one negative respondent resulted from the program.

In addition to these national services, one small school uses alumni volunteers on a national level. Their career development orchestrates most of their network's operations system for the alumni.

## **Local career development services**

### What local career development services do you offer alumni?

Alumni directors were next asked about the local, or on-campus, career development services they offer alumni.

Twelve directors responded to this section of the survey. Most of the directors who answered this question use a combination of two or three methods. Of the twelve, two reported that they do not engage in any local career development services. Of the ten who do, six reported using job fairs.

Two schools, one small and one large, reported the procedures of implementing and operating job listings. The smaller school (under 1,000) initiated the program by having the career office make job listings on the networking file available to alumni. A positive result is that the association publicizes this service in the alumni newsletter and magazine.

The larger school initiated that service by listing the jobs in the alumni magazine. Three negative aspects of this service are: (1) the time lag; (2) not enough space in the magazine; and (3) it is viewed by alumni as ineffective. A positive result is the public relations the association receives. Another school initiated job listings by informing vendors that the program existed.

Six schools use job fairs as a local career development service. One of the smaller schools (under 1,000), initiated the fairs with area alumni and the event is now run by the career office.

One large school uses a combination of job fairs, networking and job listings. The alumni association provides funding for the careers center, which assists new graduates as well as alumni who graduated more than one year ago. The alumni association underwrites these costs.

Six schools use forms of networking. One small school created a student/alumni phone contact program. It started this program with the career development office which then took on the program. It surveyed alumni and created a pool of over 2,000 alumni who advise students entering the job market. It helps about 500 students a year find jobs. This represents approximately half the students from this particular school. A negative aspect of this service is that most alumni never get called to advise the students.

Other local services mentioned were placement services, career counseling, a career library and newsletters of advice and job listings. One school is in the developing stage of a mentoring program.

## Alumni Benefits and Bonuses

### What special offers can alumni take advantage of?

- 9 credit cards
- 5 insurance benefits
- 4 rental car discounts
- 3 travel benefits/programs
- 3 hotel discounts
- 2 souvenir/memorabilia discounts

Alumni directors were asked about the special offers available for alumni (e.i. hotel and rental car discounts, financial services, travel benefits, credit cards, etc.)

Of the thirteen schools surveyed, nine reported special offers available to alumni by the association. All nine schools offer credit cards to their alumni. Six of these schools reported that credit cards are the offers most used by alumni. At one school over 5,000 alumni (11% of the association) have the credit card.

Four schools offer discounts on rental cars. One school reports that this offer, along with credit cards and telephone discounts, are the offers most used by alumni.

Travel benefits/programs are offered by three schools. One director reported that the school is currently studying such programs. One school offers ten to twelve trips a year. Hotel discounts are also offered by three schools. Five schools offer insurance benefits; two specified life and health insurance.

Two schools mentioned offering souvenirs/memorabilia discounts to alumni. One reported this as the offer most used by alumni. Two schools also offer special deals on football tickets, reporting that these tickets are the most used offer by alumni.

Other special offers include moving discounts, license plates, financial services, continuing education and scholarships, affinity and special holiday promotions. Other answers were the alumni magazine and information.

How do you promote these?

8	direct mail
2	newsletters
2	brochures
1	alumni magazine
1	displays at special events

When directors were asked how they promote their special offers, eight out of nine said they use direct mail. Of the thirteen, four did not answer. Others use newsletters (mentioned twice) and one advertises in the alumni magazine. Two used brochures, one mentioned that they mail them. One uses displays at special events to promote special events.

What are the problems and/or virtues of these benefits and privileges?

Four of the thirteen directors responded to the question regarding virtues of special offers. Two directors mentioned the money these offers produce. One specified that the generated money helps underwrite programs for the association.

Another director says that a virtue of these offers is the assurance that the products are of quality--making certain that all problems are immediately addressed. Last, one director reports that the benefits increase the school's "holding power" with its donor base. This director says that special offers "strengthen the overall relationship, if done right."

Only two directors responded to the question asking for problems found through offering special benefits to alumni. One school mentions few problems, but some alumni just do not want what is offered. A school offering an insurance program reports that the program causes many problems because once people are enrolled, the association can never stop the program.

What campus facilities do alumni have access to?

- 10 Library privileges
- 7 Gym
- 6 Student center
- 3 Parking

Eleven alumni directors of the thirteen schools surveyed responded to this question. Ten of the respondents offer alumni library privileges. Two report that it is among the most used by alumni. Other findings included student center use, six, and gym use, seven. One specified that the pool was also available to alumni.

Two schools reported that alumni pay for the use of campus facilities; one specified the gym and the library. Three schools offer alumni parking, and at one school there is parking for trustees only. One school offers parking and reports that although it is the most used campus facility by alumni, it is expensive.

Other privileges mentioned include the campus bar, public lectures, performances, a week-long academic symposium, use of the alumni house and store discounts. Larger schools offered such privileges as a credit union and free admission to museums.

What privilege do alumni most often take advantage of?

Only four responded to the most often used facility. Two said the library, one said the hospitality center. Also mentioned were lectures and performances.

What are the problems and/or virtues of these benefits and privileges?

Only three directors offered responses for problems associated with the offering of campus facilities. One director mentioned cost; alumni have to pay to use any campus facilities. One director said that facilities alumni want to use are not offered to them. Another director said that only local alumni can take advantage of campus benefits.

Directors offered no answers on the virtues of campus facilities.

**Management/Resources**

Please list the alumni staff member titles and functions

Three directors did not participate in this question. Seven of the ten who did answer use the actual title of alumni director.

The schools surveyed, being different sizes, had varied numbers and combinations of alumni employees. One respondent's office has only a director and a part-time secretary, while another has a 42-member staff.

The following combinations were found among the schools surveyed. Only one school gave a detailed description of what each staff members' duties include.

1) Director	Program Assistants (6)
Associate Director	Printers (2)
Director, Service	Records Clerks (3)
Director, Records	



- 2) Director Coordinator (1)  
 Senior Associate Director Administrative Assts. (2)  
 Associate Directors (3) Secretaries (3)  
 Assistant Directors (4)
- 3) Director (1) Alumni Board, Leadership training weekend for  
 volunteers, most Alumni Clubs, campus committees, liaison to  
 Development, Budgeting.

Associate Director (1) Homecoming/reunions, 50-year club,  
 Educational Travel Program, 3 alumni clubs, Student alumni  
 association.

Office Supervisor (1) Manages support staff workloads;  
 handles budget management; plus performs some duties of other  
 staff.

Staff Assistants (3) (support staff) Each manages/advises  
 2 reunions, 1 class officer (current-students) group, one  
 person does all invitations (pagemaker) another writes Class  
 Notes for magazine, and support for director and associate  
 director projects.

- 4) One director responded that its staff was 42 members.
- 5) Director Alumni Coordinator  
 Executive Director-Finance Program Coordinators (2)  
 Membership Coordinator
- 6) Director Records Administrator  
 (lists and labels)  
 Associate Director Secretary/Receptionist  
 Assistant Director Secretary  
 Editor, Alumni Bulletin Assistant Editor  
 Assistant to Executive Director/  
 Reunion Coordinator
- 7) Director  
 Administrative Assistant  
 Staff Assistant  
Annual Fund  
 Director of Annual Fund  
 Alumni Fund Assistant  
 Program Operations Specialist  
Magazine  
 Director of Alumni Publications  
 Assistant Editor/Alumni Publications

Maintain Alumni Database

Director of Administrative Services and Records

Alumni Records Assistant

Accounting Clerk III

Alumni Information Clerk

Secretary/Receptionist

Work with 113 Alumni Chapters

Director of Chapter Development

Alumni Chapter Representative

Alumni scholarships

Alumni Scholarship

Program Assistant

Special Events

Director of Special Events

Secretary of Special Events

- 8) Associate Director  
Assistant Director (2)  
6 1/2 support staff performing various duties to include one person who is the class columns/obituary editor for the alumni bulletin.
- 9) Director  
Part-time secretary
- 10) Acting Assistant Director                      Program Coordinator  
SAA/Reunions/Chapter Relations              Bookkeeper  
Secretary    Receptionist  
Executive Director - overall management

What is your alumni office's relation to the development office?

- 7      Work with development  
         (5 report satisfaction)
- 3      work separately  
         (1 separately but cooperative)
- 1      works under development

Alumni directors were asked to specify their relationship to development, if they were satisfied with this relationship and what the ideal relationship would be. One director did not respond. Seven reported that they work with the development office. Five of these respondents stated that they were satisfied with the relationship and would not change it. The other two schools did not specify whether they were satisfied with the arrangement or not.

Three directors said the alumni association was separate from the development office. One simply said that the association was independent from development, satisfied with this relationship and would not change it. Another director reported that the two offices work as separate functions with structured, organized interface of certain programs. They are satisfied with the current relationship.

Another director described the relationship with development as "separate but cooperative." "It's pretty good these days, communication is always a difficulty." They think this relationship is pretty close to ideal.

One director whose alumni office works with the development office made the following comment:

"Their successes are our successes and vice-versa. I believe we know more about their operation than they do about ours - if so, we need to do a better job of education."

This director reported that the association is satisfied with the relationship. Their joint bottom line is serving the interests of the university and they keep each other pretty well informed. The director said that the relationship is as good as one would hope for. The autonomy of each is well understood and is respected.

One director reported that the director of alumni reports to the vice president for development and the president of the national alumni association.

What special skills or attitudes are best for an alumni office employee?

- 5 Customer service
- 4 Organizational skills
- 2 Public relations skills
- 2 Verbal and written communication skills

Eleven directors responded to this question. The skills most mentioned were those related to dealing with people. The top responses were customer service with five and organizational skills with four. People skills, "people personality" and public service were also mentioned. Two directors put public relations skills on their lists. One director specified human skills because management skills can be taught. Also mentioned were positive, helpful, courteous, considerate, energetic and enthusiastic.

Directors also mentioned functioning skills such as intelligence, computer skills, ability to make decisions on their own, good team player and informed about association activity. Two directors mentioned good verbal and written communication skills.

Other skills mentioned were a love for the school and an understanding of attachment to university/college.

One director gave the following response:

Our alumni association is in the relationship business. Everything we do should serve to strengthen the relationship between our university and her alumni. Important traits for alumni employees: open, approachable, creative, helpful, interested, willing, positive, etc. Alumni expect this of us because it is our part of the relationship.

What volunteer groups do you have? What do they participate in? Do you have regional captains? How is your alumni board organized? What are the board's major functions?

Ten directors reported having volunteer groups for their alumni association. Two did not respond to the question and one director replied "too gory."

Answers to this question range from a short comment to a breakdown of clubs and councils. One director of a large school said "we have over 4,000 volunteers in everything from clubs to a travel advisory group." Another big school reported having volunteer groups, a board and 125 clubs. Another has 204 local clubs with community service coordinators.

A medium-size school (17,000) also reported having many volunteer groups. Among them were student recruitment, 60 regional chapters, class reunions, annual fund, career counseling and mentorship programs. A smaller school (11,000) listed an alumni association board, club leaders, reunion/class officers leadership, admission interviewers and an alumni magazine editorial board.

One smaller school (7,000) also reported having many volunteer groups. Listed were: senior alumni council, women of the university and the reunion committee (their largest group). They also have regional vice-presidents on the board.

One school reported having an executive board, committees and a student alumni association, as well as chapters. Another large school (18,000) made the following comment:

We have a board of directors known as the Executive Committee. Our (501C3) association is a separately chartered entity. The Executive Committee approves our budgets, sets our policy and priorities. They do real work and make real decisions. They are chosen from geographical regions both in state and out of state.

Six directors report chapters within their alumni associations. Of these, one small school specified that its alumni association is organized into ten "districts" with district officers and club officers in each.

One small school (2,000) segmented its volunteer groups and touched upon what it does. The Alumni Council (Board), with seven standing committees, advise/oversee volunteer programs in admission, development, career, club activities, select award recipients, travel program and minority concerns.

The Metro Councils (Alumni Club Boards) plan and implement all events (25 cities). These volunteers are elected by all alumni for several campus committees. This school's board of trustee members include the present council president and past president, who are also college trustees.

What percentage of your success can be attributed to the reputation of your school as opposed to your organization's efforts?

Directors were given an example of 80 percent due to school reputation, 20 percent due to the association's efforts. Only six directors responded, five giving percentages. Two schools gave the reputation 60%, and their efforts 40%. The highest for reputation was 80%, with efforts only 20%. Another school gave reputation 75% and efforts 25%.

Another school split it evenly--50% reputation, 50% efforts. It included the three things its alumni love about their school: (1) the strength of the academic programs; (2) the beauty of the campus; and (3) success in athletics.

Lastly, one director said that it was difficult to assess. "If the University fails, then we have failed. Our alumni are part of, and reflect their pride in their alma mater, and her successes."

### **Special Interest Groups**

#### What sub-groups exist within your alumni association?

Most directors reported having at least a few subgroups within their alumni association. One small school director said:

We have only one alumni association. We do have a board committee for minority concerns. There is a volunteer group for athletic fundraising managed by development."

Another director reported:

We feel that there should be one alumni association and that all alumni (and friends) should be a part. This includes everyone - young/old, black/white, gay/straight, male/female, everyone. Everyone is invited to participate. Thus far we have avoided sub-groups and feel it has been the right way to go.

Quite a few alumni associations have sub-groups separated by ethnic groups. Five directors reported having African American sub-groups. Also mentioned were one Latin, one Hispanic and one Latino/Chicano. One director just reported having ethnic groups.



A few directors also reported having academic sub-groups such as Business, Law, an MBA and an Executive MBA group. Three schools have alumni band groups, and one has a musical and literary group.

Two directors said they have Greek alumni groups. Other groups included alumnae council, senior alumni council, graduate alumni council and an affinity group by school or special interest. One director simply replied "we have many sub-groups" and one said they had regional clubs. And one director reported their sub-groups were informal.

Did these groups arise by your initiative or by that of the group?

Three directors reported that these groups arose by initiative of the group. One director specified that the first group expressed interest and was used as a prototype to develop other groups. Four directors said that both the group members and the association initiated the specific groups. Two director initiated the sub-groups themselves.

Another director reported:

There is a black group that wishes to stay separate, though we have invited it into our overall association. It is not very active. There is also a gay/lesbian group. But I have not heard from it in a couple of years.

Three directors did not answer this question.

How do you sponsor/cultivate/serve the activities of these groups?

Of the thirteen directors, three did not answer this question. Most directors offer some form of assistance to the sub-groups within their alumni associations. Responses ranged from vague to somewhat specific.

One director merely stated that yes, they do sponsor groups. Most alumni associations assist groups financially and with mailings. Six directors mentioned assisting groups with mailings. Three said that it provides staff support. Financially, one reported providing a budget; one said that it provides financial resources for operations, graphics and mailings; one said it pays for mailings; and one said it will financially support some gatherings and newsletters.

Directors also assist the sub-groups with their activities. One provides coordination as appropriate, one staffs the committees, one coordinates meetings and sponsors activities and one helps with special events and publicity. One director specified that the school makes announcements for the groups' events and supplies them with tents for homecoming and other events.

One schools' sub-groups, when chartered, are represented (seated) on the alumni association board of directors which meets twice a year.

One director reported that the association administration is not happy with their successes. They will financially support some gatherings or a newsletter. The committee of the African-American sub-group created a welcome party for new students and send-off for seniors, which is now run by the office of minority student life. Few alumni attend the event. They have never found the right committee members.

Please rate the following as to their importance in generating alumni support. 1 = most important for generating support

CD = Career Development

AB/B = Alumni Benefits/Bonuses

TC = Techniques of Communication

M/R = Management/Resources

AG = Alumni Gatherings

SIG = Special Interest Groups

RATING	CD		TC		AG		AB/B		M/R		SIG	
	N	%	N	%	N	%	N	%	N	%	N	%
1	2	22	2	22	8	67	1	9	1	11	1	9
2	1	11	5	56	3	25	0	0	1	11	2	18
3	1	11	0	0	1	8	6	55	1	11	2	18
4	2	22	0	0	0	0	2	18	3	33	0	0
5	2	22	0	0	0	0	2	18	3	33	2	18
6	1	11	2	22	0	0	0	0	0	0	4	36
N/R	3	-	3	-	0	-	1	-	3	-	1	-
TOTAL	12	100	12	100	12	100	12	100	12	100	12	100

Table 4.5

Directors rated six criteria as to their importance in generating alumni support. Table 4.5 represents the directors' responses. Twelve of the thirteen directors responded, ranking the criteria with a rating of "1" being the most important.

The column percentages are based on the total number of respondents for each criteria. These criteria, found through secondary research, were reported as important in managing an alumni association.

According to the responses by directors, the most important is alumni gatherings, receiving eight number "1" ratings. Second is techniques of communication with five number "2" ratings. Third is alumni benefits/bonuses, with six number "3" ratings. Last place was special interest groups with four number "6" ratings.

## Chapter 5

### Summary and Interpretation

The data obtained through surveying alumni directors ranged from barely usable to overwhelmingly helpful. The author was initially pleased to receive 13 of the 16 surveys sent, an 81 percent return rate. Slight problems with the survey became evident after tabulation and analysis.

First, the survey was lengthy, perhaps too long for some directors' liking. One director commented on the front of the survey, "You probably won't find this helpful. I found your survey too lengthy to complete." Apparently (and fortunately) not all respondents felt this way.

The scope of this study called for a lengthy survey. The sample size was small, making it necessary to obtain significant data from each respondent. The survey covered a range of topics, adding to its length.

Overall, the responses were sufficient to fulfill the study's purpose. The author wished to compile a reference guide for college and university alumni association directors. The alumni directors surveyed represent the most successful organizations in the country.

The author attempted to find patterns in the areas of alumni surveying, feedback, techniques of communication and fund raising. Surveys showed that alumni directors do not follow a strict pattern when conducting business in these areas. Many methods, with many variations, are used by each director surveyed. The tables in Chapter Four reflect the use and frequencies of the four areas.

In all areas on the survey, responses varied from director to director. These differences are due to alumni association size, staff and budget. All alumni associations use their resources differently, and make the most of what is available.

The question regarding basing success on reputation versus the associations' efforts revealed a definite relationship between the two. Larger, more reputable institutions find alumni cultivation comes easy. Smaller, less known schools work hard for alumni support and donations.

Another factor affecting alumni support is the offers presented to alumni. Two schools mentioned offering football tickets to alumni. At one school it is the offer most taken advantage of by graduates. Of course, this type of offer is only possible if tickets for sports events are in demand. Cultivation comes easy to an alumni association whose school's sports teams are popular.

This study compiled many methods used by alumni directors to obtain and maintain alumni support of the association. The areas covered yield a guide suitable for use by alumni directors looking for new ideas.

The information obtained was consistent with research done by the author when compiling criteria for the survey. The directors' ratings of the six criteria show that they have different levels of importance for different schools. No additions to the list were made by the directors.

This study found that there are many variations of methods in alumni work. Many directors use direct mail to contact alumni, but they use different approaches. Materials and publications have different formats and are mailed with different frequencies. Alumni association directors must work with the staff and budget available.

Although methods vary among directors, this study presents a handy reference for directors seeking new ideas and techniques. Of course, alumni associations' capabilities depend upon their resources. Any new methods will include trial and error, and alumni directors can then tailor new techniques to suit their associations' needs.

One evident problem with the alumni association survey was the ranking system used in alumni surveys, fund raising, feedback and techniques of communication. The directions may not have been as clear to the directors as they were to the author. In a replication study, directions would need to be much clearer to obtain the desired results.

To generate more information, the author could also have chosen a larger sample. Many assumptions were made about the sample taken. The author assumed that all directors would complete the survey as desired and return the survey with supplemental material. Some assumptions were not borne out.

First, not all the directors returned the survey. Second, not all the surveys returned were completely filled out. Third, only a few directors included supplemental materials. No report could be done on additional information because the resources were insufficient.



### Recommendation

Further research on this topic could include alumni associations who have trouble with cultivation and support. Surveying those alumni associations with low success rates would provide definite insight for alumni directors. However, it might be difficult to obtain negative information from alumni directors.

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## APPENDIX

Maggie Wilt  
7 Eben Street  
Glassboro, NJ 08028  
(609) 863-8629

December 15, 1994

Dear (alumni director):

I am a graduate student in the public relations program at Rowan College of New Jersey (formerly Glassboro State College). I am working on my thesis--an evaluation of alumni associations. It should be a guide for those involved with such organizations, revealing criteria for successful alumni associations.

I was compelled to include your school in my study because of your excellent rating in U.S. News & World Report's ranking of U.S. college and universities. (Name of school) will not be identified by name in my thesis. I can assure total anonymity for your school.

You will receive my survey in a few days. Kindly answer the questions as completely as you can. Your responses will benefit me as well as other alumni directors.

Because you are a part of a representative sample, your responses are consequential to the success of my study. I appreciate your participation. At the conclusion of this project, I will send you a copy of my completed thesis.

Sincerely,

Maggie Wilt  
Rowan College of New Jersey

Maggie Wilt  
7 Eben Street  
Glassboro, NJ 08028  
(609) 863-8629

December 15, 1994

Dear (alumni director):

Here is the survey I wrote you about a few days ago.

Thank you for completing this survey. It will help me complete requirements for the master's public relations program at Rowan College. It will also produce guidelines for alumni coordinators across the country to conduct successful organizations.

I compiled a list of criteria to evaluate the workings of alumni associations. I obtained this list through an extensive literature search of alumni associations. I selected your school as one of 16 included in the U.S. News and World Report's ranking of U.S. colleges and universities list of best schools.

Please answer the survey questions as completely as you can. Any additional comments you could offer in any area on the survey would be helpful. Although it is not a part of the survey, I would appreciate any other relevant materials you would feel comfortable sharing with me. Please return the survey and other materials in the self-addressed stamped envelope provided.

I appreciate your help with this study. Again, I assure you that (name of school) will not be identified in my thesis. Should you have any questions about completing the survey please call me as (609) 863-7315 or write to me at the above address. At the conclusion of this project, I will send you a copy of my completed thesis.

Thank you for your participation.

Sincerely,

Maggie Wilt  
Rowan College of New Jersey

## **ALUMNI ASSOCIATION SURVEY**

Thank you for answering this survey. Your answers will be used to compile a guide for managing a successful alumni association. Please answer the questions as completely as you can. I would appreciate any additional comments you could offer in any area on the survey. Also, any additional materials (publications, direct mail contacts, annual reports) you feel comfortable sharing would add to the quality, scope and success of my study. Please return all materials in the self-addressed, stamped envelope provided.

## ALUMNI SURVEYS

How often do you use the following media of communication for surveying alumni regarding suggestions and criticisms? Check all that apply. What is the effectiveness of each medium? Rate effectiveness with "1" being the most effective.

	Quarterly	Twice-annually	Annually	Other	Effectiveness
Phone surveys					
Mail surveys					
Face-to-face interviews					
Suggestion cards					
Other					
Other					

## FUNDRAISING

How often do you use the following fundraising methods? Check all that apply. What is the effectiveness of each method? Rate effectiveness with "1" being the most effective.

	Quarterly	Twice-annually	Annually	Other	Effectiveness
Phone					
Letter					
Events (please explain below)					
Other					
Other					



## TECHNIQUES OF COMMUNICATION

How frequently do you use the following used to inform or get in touch with alumni?

	Monthly	Quarterly	Twice-annually	Annually	Other
Alumni newsletter					
Direct mail					
Telephone					
Special events info					
Other					

What is the most effective medium for informing alumni of special events?

Which is most effective for donation appeals?

How do you obtain feedback? Rate effectiveness, "1" being most the effective.

	Monthly	Quarterly	Twice-annually	Annually	Effectiveness
800#					
Response cards					
Telephone interview					
Face-to-face interview					
Other					

## CAREER DEVELOPMENT SERVICES

Which of the following national career development services do you offer alumni? Check all that apply.

\_\_\_\_\_ SkillsSearch \_\_\_\_\_ University Pronet \_\_\_\_\_ Job Bank, U.S.A. \_\_\_\_\_ KiNexus  
 \_\_\_\_\_ other \_\_\_\_\_ other \_\_\_\_\_

Using the grid provided, please give: (1) Three things you did to initiate the program; (2) brief description of operation; (3) three positive results and (4) three negative results.

Initiate	Operation
Positive	Worst

Which of the following **local** career development services do you offer alumni? Check all that apply.

☐ Job Fairs
 ☐ Networking File
 ☐ Job listings
 ☐ other \_\_\_\_\_

Using the grids provided, please give: (1) Three things you did to initiate the program; (2) brief description of operation; (3) three positive results and (4) three negative results for each service offered.

Initiate	Positive
Worst	Different
Initiate	Positive
Worst	Different

## **ALUMNI GATHERINGS**

What types of special events are held for alumni? How often are they held? Please describe operation in brief detail.

**Receptions**

**Reunions**

**Class meetings**

**Sports events**  
(ex - old timers' game)

**Cultural gatherings**

**Other**

**Other**

**Other**

## ALUMNI BENEFITS/BONUSES

What special offers can alumni take advantage of? (hotel and rental car discounts, financial services, travel benefits, medical insurance, retirement investments, credit cards) List and describe briefly.

How do you promote these?

What are the problems and/or virtues of these benefits and privileges?

What single offer do alumni most often take advantage of?

What campus facilities do alumni have access to?

\_\_\_\_\_ Parking

\_\_\_\_\_ Library

\_\_\_\_\_ Computer Lab

\_\_\_\_\_ Other

\_\_\_\_\_ Use of Student Center

\_\_\_\_\_ Gym

\_\_\_\_\_ Other \_\_\_\_\_

\_\_\_\_\_ Other \_\_\_\_\_

How do you promote these?

What are the problems and/or virtues of these benefits and privileges?

Which privilege do alumni most often take advantage of?

## SPECIAL INTEREST GROUPS

What sub-groups exist within your alumni association? (ex. Alumni of Color Organization, sports alumni groups)

Did these groups arise by your initiative or by that of the group?

How do you sponsor/cultivate/serve the activities of these groups?

Please rate the following as to their importance in generating alumni support.

1= most important for generating support

\_\_\_\_\_ Career Development

\_\_\_\_\_ Alumni Benefits/Bonuses

\_\_\_\_\_ Techniques of Communication

\_\_\_\_\_ Management/Resources

\_\_\_\_\_ Alumni Gatherings

\_\_\_\_\_ Special Interest Groups

\_\_\_\_\_ Other

\_\_\_\_\_ Other

Would you be willing to answer follow-up questions by telephone? \_\_\_\_ Yes \_\_\_\_ No