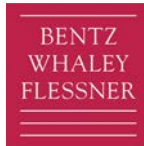


Stevens Institute of Technology

Alumni Relations Program Review Report

August 7, 2015

*This report is confidential and should not be copied or shared without permission
from Stevens Institute of Technology and Bentz Whaley Flessner.*



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MESSAGE FROM THE REVIEW TEAM

In the spring of 2015, Bentz Whaley Flessner was engaged by the Stevens Institute of Technology to conduct a review of the university's alumni relations program and relationship with the alumni association.

We have enjoyed working with the Stevens Advancement team and Alumni Association leadership during this exercise and have been impressed by:

- Their belief in the university and commitment to its success.
- Their willingness to explore new opportunities that build on recent accomplishments.
- Their ability to work collaboratively toward a shared vision.

We appreciate the partnership with Stevens staff and volunteer leadership who assisted with this project while carrying out their regular responsibilities.

This report includes our findings, conclusions, and recommendations for Stevens to consider as it lays the foundation for future growth in engaging increasing numbers of Stevens alumni.

Bentz Whaley Flessner

Christopher A. Clark

Jamie L. Hunte

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Process



- Stevens Institute of Technology engaged Bentz Whaley Flessner to conduct a review of the alumni association and the connected alumni relations program.
- BWF's assessment included a review of the activities, staffing, and resources that support Stevens' engagement goals and objectives.
- BWF interviewed 12 senior leaders and selected advancement staff and 20 volunteer leaders from the Stevens Alumni Association.
- BWF conducted a benchmarking study of peer alumni relations programs and a survey of over 8,000 alumni.
- BWF reviewed the findings, drew conclusions, and made the recommendations in this report.

Overview

- Our review focused on finding new or additional ways Stevens and the SAA can efficiently and effectively work together to meaningfully engage alumni and advance the institution.

- The November 2014 Memorandum of Understanding states:
 - The SAA's mission is to establish, maintain, and cultivate among its members a sentiment of regard for one another and of attachment to the institution, and to promote in every way the interests of the institution.
 - The Institute supports SAA's activities through the Institute's Alumni Office.
 - The Trustees and the SAA wish to replace a September 1987 "Memorandum of Understanding" between the parties to better define and clarify the roles and relationships between the two organizations and further enhance communications so as to facilitate working together as "one."

Continued

Overview

- The recommendations in this report are informed through an understanding we developed by listening to volunteer leaders, staff, the broader alumni population, benchmarking with similar institutions, and our extensive knowledge from work with colleges and universities.
- The expansion of the curriculum and increased size of the student body have clearly transformed Stevens as an institution. The Stevens of today is in many ways a new school, and the alumni association and alumni relations focus and activities must change to meet the current needs.

Summary of Findings by Category

Category	Best Practice	Client Status
Working Relationship of University, Development, and Alumni Association Leadership	Effective alumni associations integrate with and advance the mission of the institution. The alumni association board is informed on the strategic direction of the university. The board works collaboratively with university leadership to engage the alumni community in the life of the institution.	The Alumni Association Executive Council members have great passion for Stevens. However, that does not mean they are aligned with university leadership, or with the broader association interests. The SAA has the potential to strengthen Stevens in ways that do not currently happen.
Alumni Association Governance	The association is transparent in its structure and decision making. Board meetings result in progress toward stated goals in alignment with the board's mission. Limited numbers of in-person meetings take place per year, so geographic diversity and representation are possible. Recruitment and terms support a healthy cycle of leadership. Board members understand their roles and feel engaged and useful in fulfilling them.	The SAA has committees, trustees, and membership structures that are complex and difficult for alumni to understand. Council meetings happen often with expected attendance limiting council member potential. Fresh perspective is critical to a program evolving with the school and the times, but many who were interviewed felt this is limited by the lack of understanding of terms and process for appointment to volunteer leadership positions.

Summary of Findings by Category

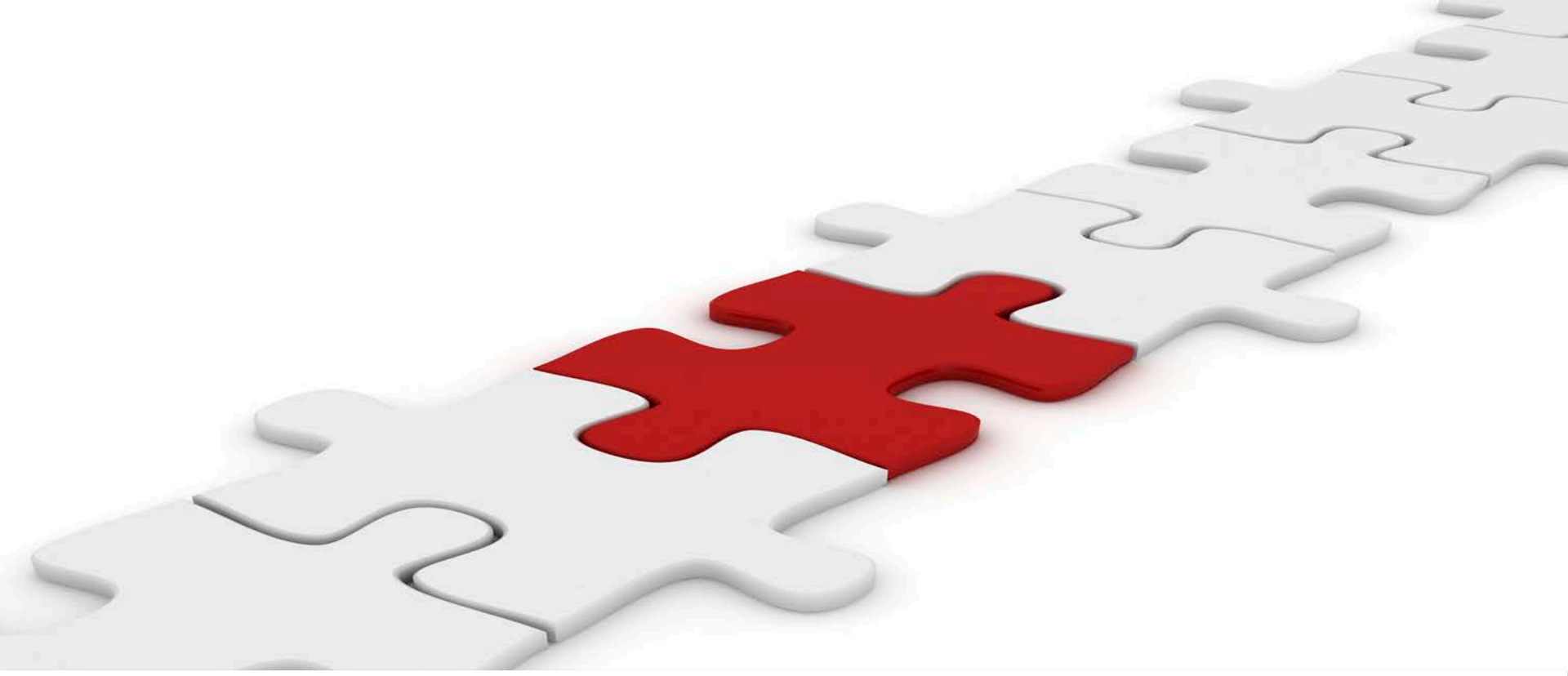
Category	Best Practice	Client Status
Programming	Effective programming targets alumni at critical points in their lives, acknowledging the focus and value is different depending on where alumni are in the lifecycle.	Stevens has focused on traditional, primarily social events often lacking a connection to the university's mission and objectives. Alumni attendees are tracked, but a deeper look at who is attending and who is missing needs to take place.
Resources	Human and budgetary resources are sufficient to engage broad and diverse groups of alumni. Communications meet the alumni where they are, creatively using all channels.	Stevens has not dramatically shifted the staffing levels in the alumni office for many years. Volunteers can play a larger role in generating alumni interest in events and promoting attendance. Staff need to consider new delivery channels, not just face-to-face events.
Alignment of Alumni Relations and Development	Alumni Relations and Development have a symbiotic relationship. Alumni Relations engages alumni every step of their lives. Development builds on the engagement with opportunities for philanthropy.	The development and alumni offices at Stevens acknowledge each other, but do not take advantage of the opportunities and overlaps that naturally take place.

Streamline the alumni association's governance structure to increase the ability to make decisions and foster innovation.

- Ensure that the association is in alignment with the university's strategic objectives. Consider dissolving the alumni association as a 501 (c) (3) in favor of becoming a more integral part of the university.
- Whether as a 501 (c) (3) or as a vibrant component of Stevens, work as one with the Stevens administration to focus energies and resources on shared objectives such as career development and networking, admissions recruiting, giving participation, enhancing the university's reputation, and building pride and camaraderie among alumni.

Rationale

- Stevens is missing too many engagement opportunities because of time spent managing cumbersome structures.
- Alumni perceive the University, Development Office, and Alumni Association as all part of Stevens.
- Twenty-one percent of alumni survey participants indicate their association with the alumni association is strong. Three times as many participants indicate their association with the university is strong.



Findings and Conclusions

Stevens and the SAA alignment is not maximized.

- Alumni survey respondents indicate they are interested in helping Stevens, but their involvement has been limited. More engagement opportunities could be offered in collaboration with departments outside of the alumni program.
- Young alumni are great advocates for admissions, but as a group they are not currently being offered this opportunity.
- Recent graduates from both undergrad and graduate programs see value in their degree through career networking. Helping others is the first step in getting them to be financially supportive of Stevens.
- Peers that have optimal alignment between the school, alumni program, and development office employ a well-developed planning process that integrates institutional, development, and alumni goals.

Executive Council Structure/Processes

- The current executive council structures and processes don't allow for Stevens to engage greater numbers of alumni as volunteer leaders.
 - Executive Committee structure and roles don't allow for new leadership frequently enough.
 - Required attendance at too many meetings. With survey respondents indicating time constraints are their primary limitation to volunteering, time must be used efficiently to make the opportunity accessible and perceived as worthwhile.
 - Regional representation is limited with so many meetings required.
- The nominating process should be updated. Alumni interest in voting on a council that they don't have much affiliation with is low.
 - For most peers, nominations are gathered from university and alumni stakeholders (alumni board and committee members, advancement staff, etc.), and an alumni board committee nominates candidates for the board to consider and appoint.

Strategic Planning

- The Stevens Alumni Association began a strategic planning process several years ago but diverted its attention to more pressing issues.
- With the university on the rise, it is an appropriate time to begin developing a plan for the next three to five years.
- Interviewees indicated that they are ready to move forward, focused on the needs of the present and future and leave the past behind them.
- Peers that employ a strategic planning process and follow through with their plan realize greater alumni engagement, and a stronger sense of accomplishment for members of their alumni boards.

Programming

- Compared to peers, Stevens offers many of the same programs and services. Key differences are career services and professional development programs, which are in high demand among alumni in general, particularly among younger alumni. Stevens has the opportunity to expand programming in this area, which naturally allows for increased collaboration with volunteer leaders, faculty, and key partners on campus.
- Activities should be accessible from all regions, so alumni located anywhere can take part. Opportunities include:
 - Webinars
 - Networking Events
 - Lifelong Learning Programs
- Fifteen percent of survey respondents indicated that it is unclear how they can get involved. To help educate alumni, Stevens can:
 - Deploy volunteers to reach out to those who are not engaged.
 - Ensure email and mail contact information is up to date for alumni to receive existing communications.
 - Highlight opportunities to volunteer or participate in alumni programming in SAA and university communications.

Programming—Regional

- The interest in current regional programs is there, but relatively low. Stevens should think differently about regional engagement and invest in programming to make it more attractive and accessible.
- Regional programming is very reliant on the individual volunteers. Events that reach a critical mass have higher success rates. Stevens needs to work on the recruitment and training process for regional volunteers.
- Through a solid regional volunteer network, Lafayette College has a strong regional presence and is able to secure a high percentage of alumni participation in events.

Programming—Demographics

- Young alumni state they are quite interested in getting involved: Of the survey participants who answered they are interested in increasing their involvement with Stevens, almost half graduated in the last 15 years.
- There is a limited window of opportunity with recent graduates to effectively engage. Stevens should strengthen its focus and efforts to engage this demographic by adjusting its communication and meeting style to make them more appealing and approachable for this audience.
- Most peers have a young alumni council that has been nurtured over time to be an effective tool for engaging and cultivating future leaders and donors.
- Effective use of a young alumni council or committee enables the university to:
 - Demonstrate its commitment to engaging and serving that population.
 - Learn what strategies will be effective in reaching young alumni.
 - Cultivate advocates and ambassadors who help increase affinity for Stevens among their peers.
- Segmenting the alumni population by degree type, 57% of the alumni base consists of graduate alumni.
 - While alumni loyalty is generally strongest among the undergraduate population, Stevens should consider to what extent its current programming can be geared toward the graduate alumni population.

Alumni programs are universally constrained by human and budgetary resources. Finding and keeping talented staff and providing the program budget to be successful is challenging.

- There is an opportunity with Stevens hiring a new Assistant Vice President for Alumni Engagement/Annual Giving and Executive Director of the Stevens Alumni Association. This position will be able to strategically allocate resources for the two interrelated programs.
- Utilizing volunteers and technology are techniques to stretch the budget. Stevens could increase its use of LinkedIn and its connection with campus partners.

The alumni and development offices at Stevens have unmet potential to work together to foster stronger engagement, drive alumni participation, and build a culture of philanthropy.

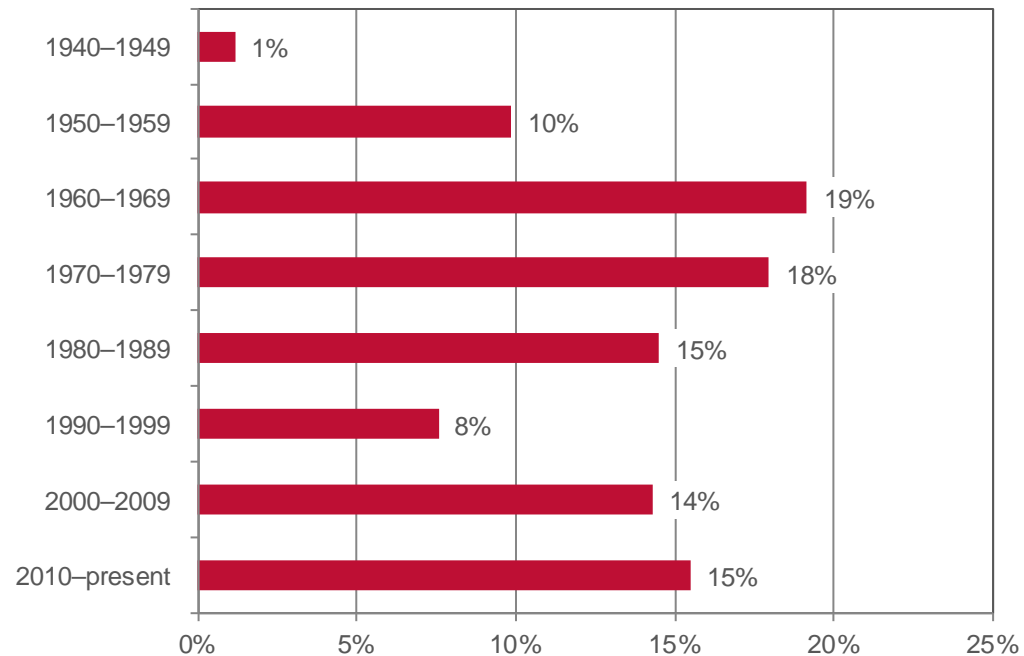
- Stevens needs to track attendance, engagement, and financial support down to the individual level. This will allow segmentation and personalized acknowledgment that currently is not possible, and ultimately, it will pave the way for increased support from the alumni community.
- According to the survey respondents, some alumni draw a firm distinction between the work of the alumni program and the work of the development office, with fundraising perceived as too pervasive at Stevens. This opinion is not universally held or even a distinction made by more recent graduates, but those that feel it make overcoming the concern a difficult challenge.
- Peers indicated that collaboration increased with university partners when communication improved and priorities aligned. For alumni relations and development in particular, the collaboration succeeds because the expectation is ingrained within the culture of their organizations and reflected in their organizational structures.



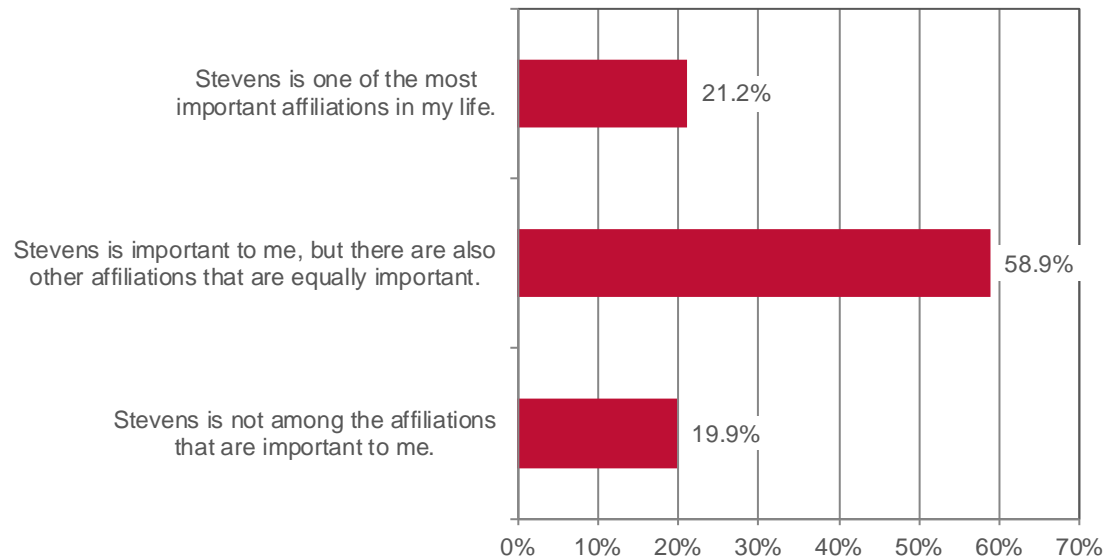
Alumni Survey Findings

Survey Findings

There was relatively even distribution among survey respondents by decade. Compared to the distribution of graduates, the older classes are over-weighted and the younger classes are under-weighted.



Affiliation to Stevens in general was “normal,” with one in five indicating Stevens is one of their most important affiliations.

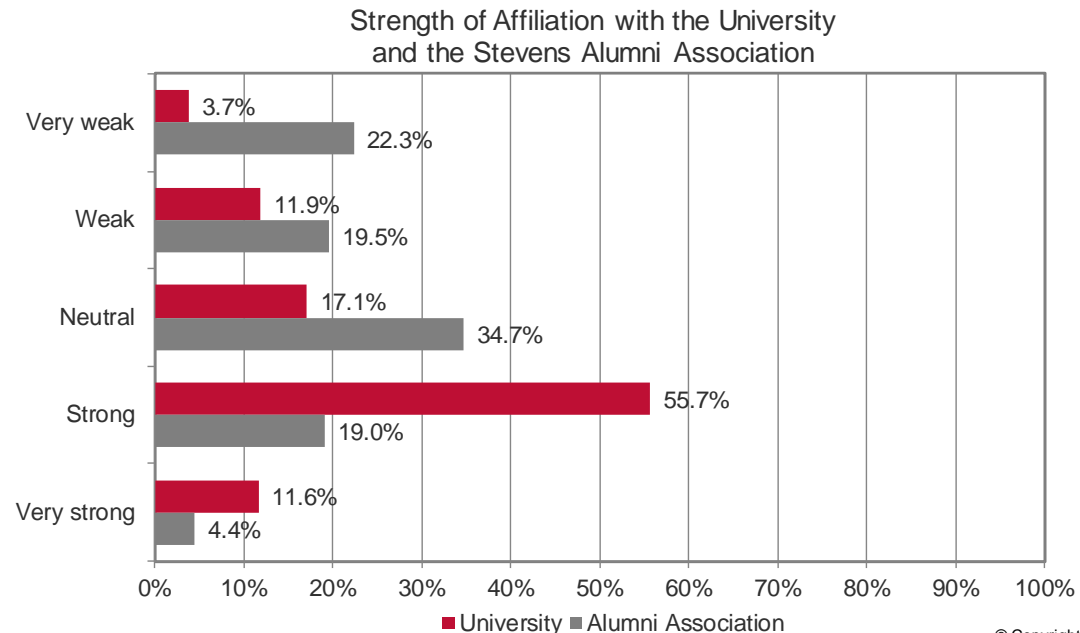


Stevens seems to be in good standing with its alumni.

- Ninety percent of participants would recommend Stevens to a potential student.
- The strength of alumni loyalty to Stevens was nearly 4, on a scale of 1 to 5, where 5 was “very strong.”
- Over two-thirds classify their association with Stevens, as “strong” or “very strong,” with about 1 in 10 indicating they are a vocal supporter and involved stakeholder.

Participants' affiliation with the Alumni Association is not as strong, however.

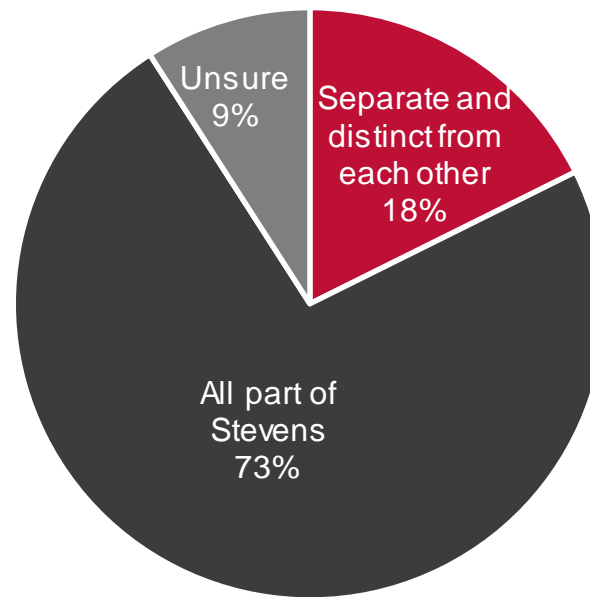
- The strength of alumni loyalty to the Stevens Alumni Association was just over 3, on a scale of 1 to 5, where 5 was “very strong.”
- Just under one-quarter classify their association with the SAA, as “strong” or “very strong,” with only 4% indicating they are a vocal supporter and involved stakeholder.
- Over 40% of alumni indicate they rarely or never think about the Alumni Association.



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Survey Findings

Alumni do not discern a difference between the Stevens Alumni Association and the university's alumni program, as the majority of participants perceive Stevens, the SAA, and the development program as all a part of Stevens.

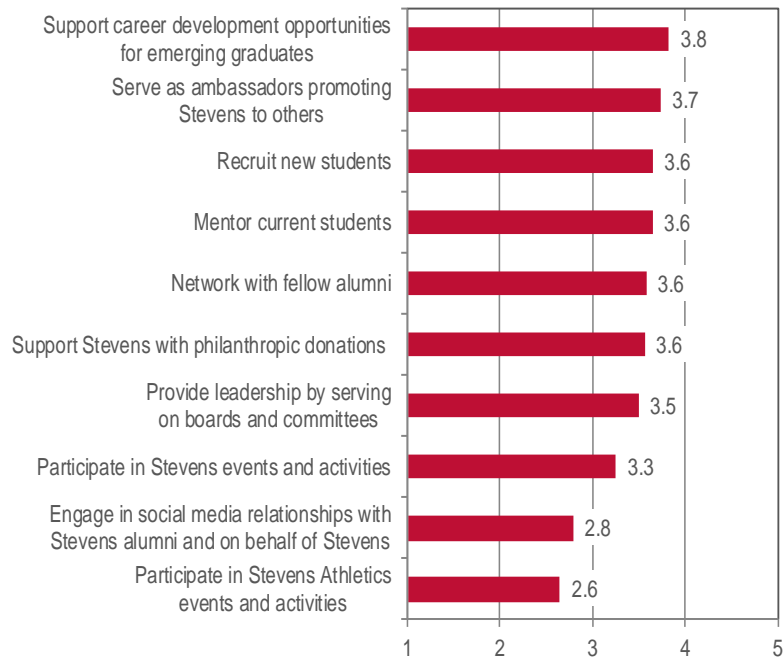


Alumni are most interested in staying connected to Stevens by receiving communications, but many indicate their willingness and likelihood to be involved through programming.

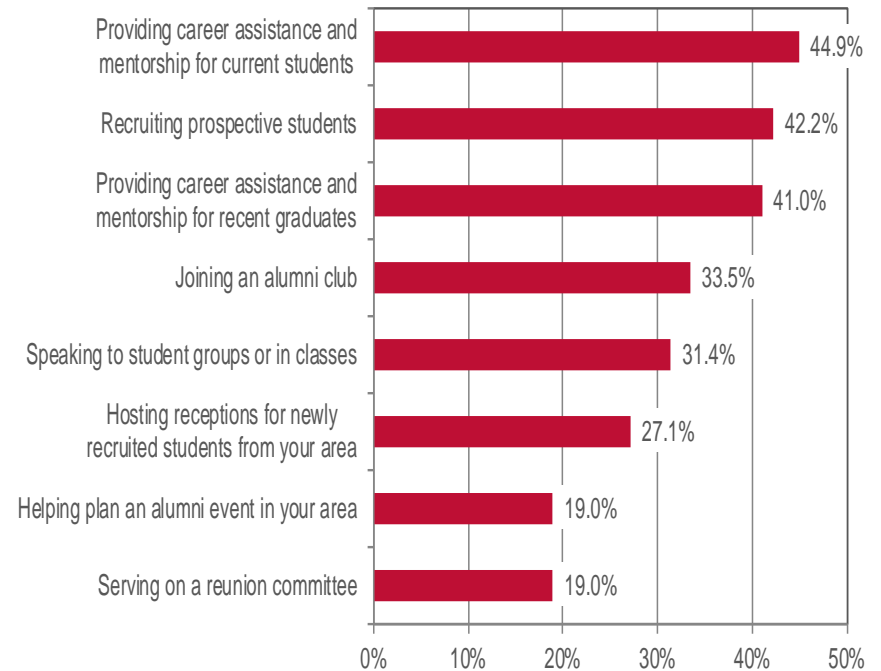
- The Castlepoint and NewsPoints e-newsletters were the most desired vehicles for staying connected (67% and 66% interest).
- About one-third were interested in class reunions and alumni weekend.
- While not as highly rated, regional activities and other affinity-based reunions were identified as desirable by 1 in 4 and 1 in 5 participants, respectively.

Participants feel strongly that alumni should be of service to the university and its students.

Survey Question 12: How important is it for Stevens alumni to do the following, where 5 is "very important"?

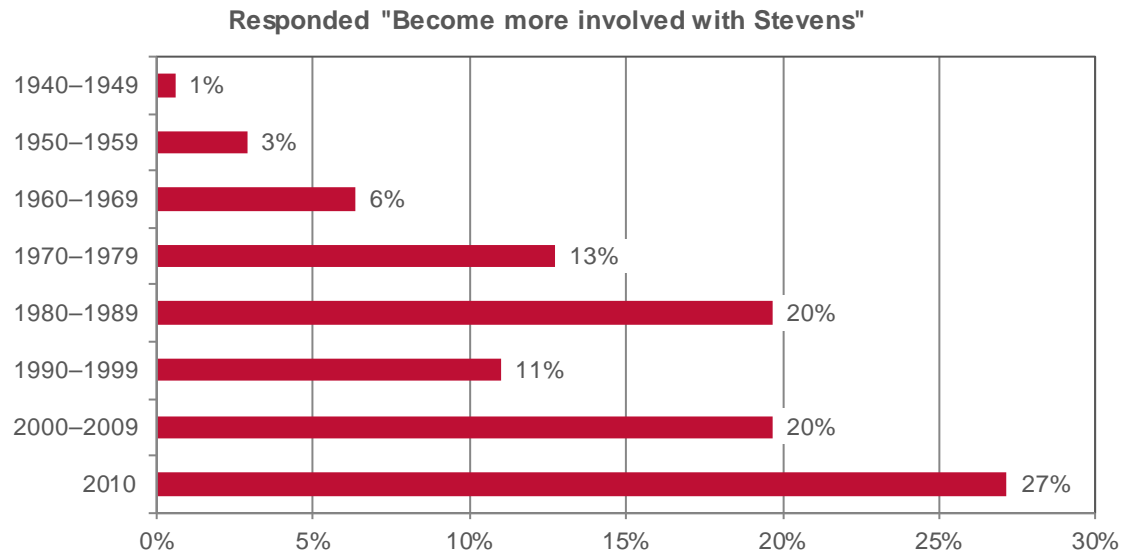


Survey Question 16: Which of the following volunteer activities would be of potential interest you to?



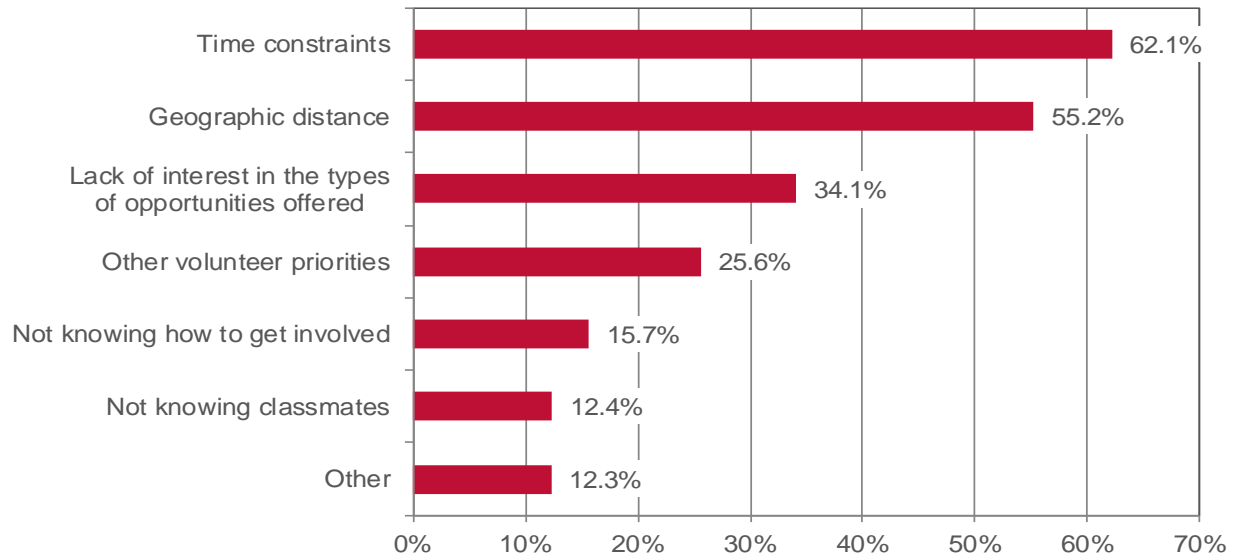
The majority of respondents want to maintain their current level of involvement. Just over 20% would like to increase involvement.

- Interestingly, the demographic with the strongest interest in increasing their involvement are those who graduated since 2000. Taking advantage of this interest now could yield long-term benefits for the university's advancement efforts.

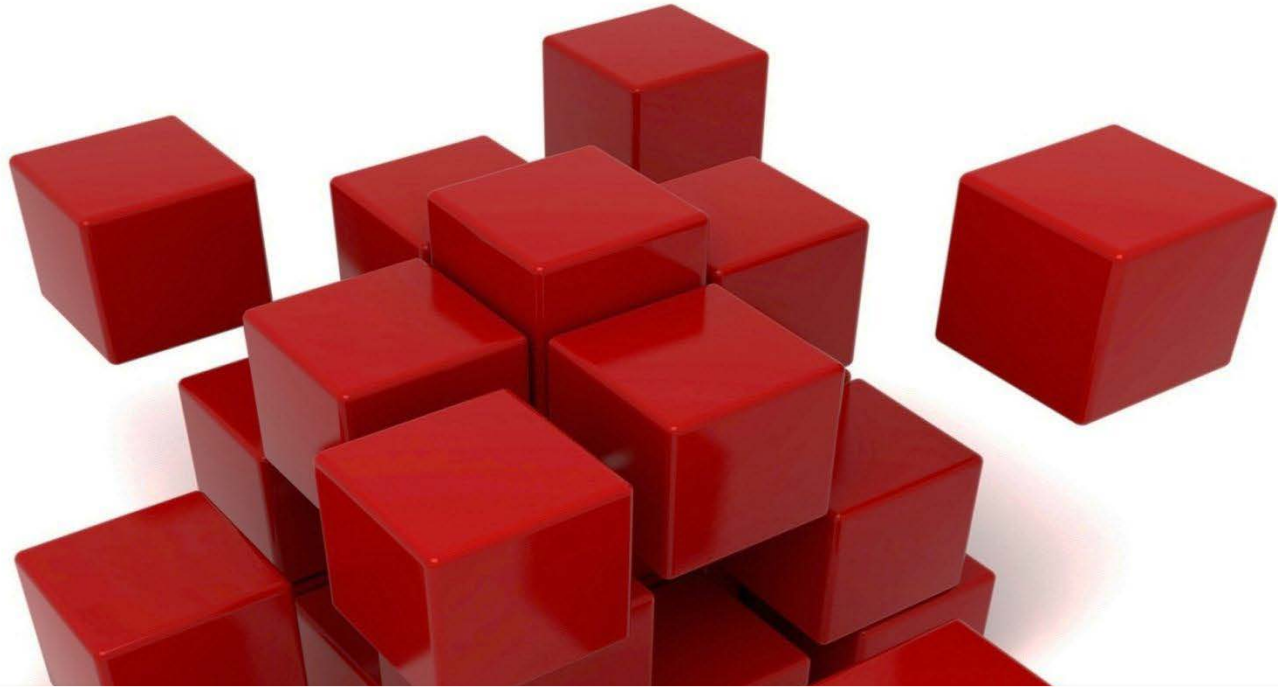


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Time constraints are the primary limitation to becoming more involved with Stevens.



- One-third are not interested in the current opportunities for involvement.
- Many of those who selected “other” indicated a lack of interest as a reason for not becoming more involved with Stevens.



Recommendations

Primary Recommendation

Streamline the alumni association's governance structure to increase the ability to make decisions and foster innovation.

- Ensure that the association is in alignment with the university's strategic objectives. Consider dissolving the alumni association as a 501 (c) (3) in favor of becoming a more integral part of the university.
- Whether as a 501 (c) (3) or as a vibrant component of Stevens, work as one with the Stevens administration to focus energies and resources on shared objectives such as career development and networking, admissions recruiting, giving participation, enhancing the university's reputation, and building pride and camaraderie among alumni.

Rationale

- Stevens is missing too many engagement opportunities because of time spent managing cumbersome structures.
- Alumni perceive the University, Development Office, and Alumni Association as all part of Stevens.
- Twenty-one percent of alumni survey participants indicate their association with the alumni association is strong. Three times as many participants indicate their association with the university is strong.

Recommendation #1: Align the Alumni Association with the Institute and Advancement strategic plan.

- The Alumni Association must recognize that it is essential for its mission and the university's mission to be aligned for success.
- Develop clear and concise strategic plans that support Stevens' vision. Implement a three-year operating plan for continuity.
- Initiate an inclusive process involving the AVP for alumni relations and annual giving and alumni association board members for determining the strategic plan for the alumni association board.
- Integrate work plans between the alumni association and alumni relations department.

Recommendation #2: Simplify the Alumni Association governance structure. Increase the transparency of the structure, the membership, and the committees.

- Reduce the number of representatives on the Executive Committee. Continue term limits for officers and board members to maintain governance vitality and a broader engagement among alumni.
- Align board members/committee roles and responsibilities with the strategic plan.
- Consider reducing the overall number of alumni association board members to a target number of 24 or fewer.
- Review the terms and committee structure for the alumni association board.

(Continued)

Recommendation #2: Simplify the Alumni Association governance structure. Increase the transparency of the structure, the membership, and the committees.

- Reduce the number of meetings for the alumni association per year. Alumni boards typically meet 3 times a year.
- Implement committee check-in calls or other communication strategies that allow for geographic diversity of membership.
- Review alumni data to determine representative numbers/percentages of members from decades, geographic locations, and career fields.

Recommendation #3: Establish new practices to enhance the productivity and value of the board.

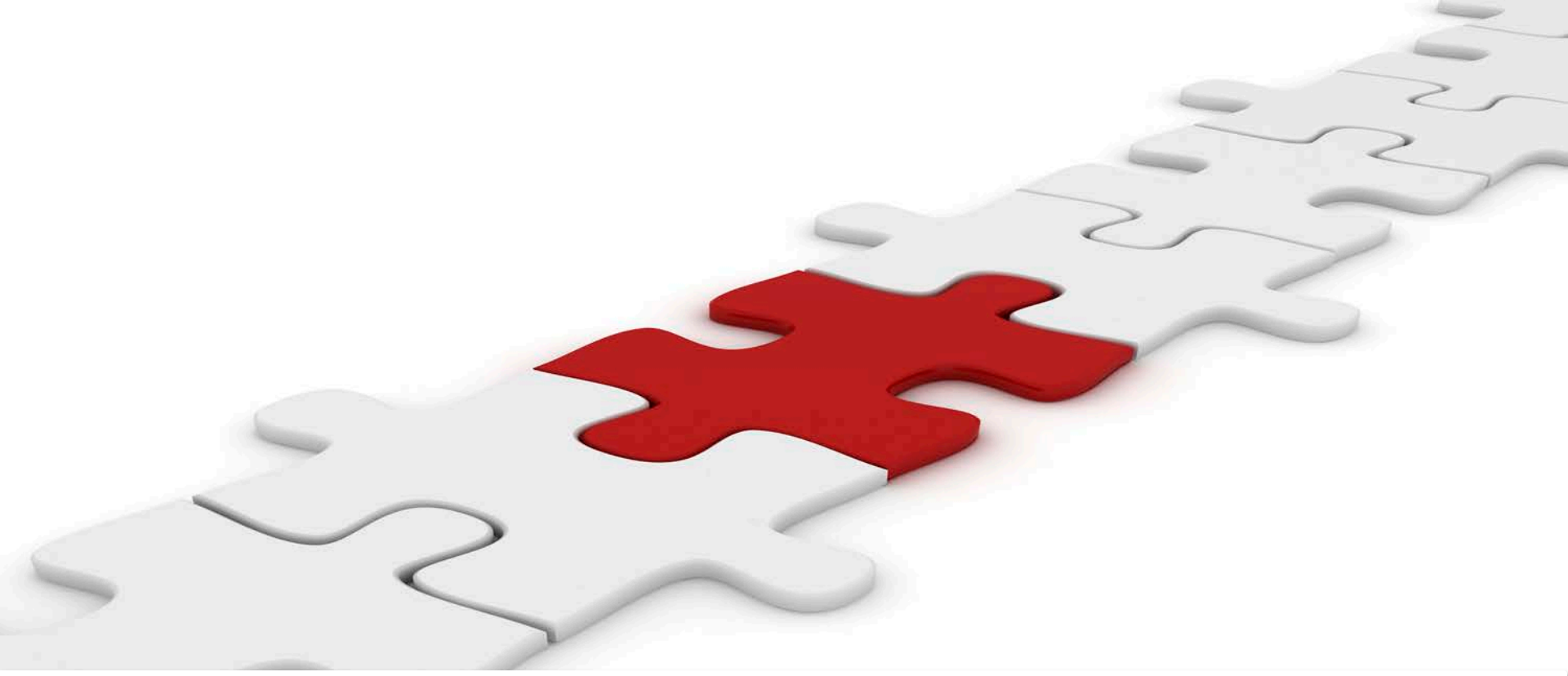
- Create concrete and measurable goals for committee work plans.
- Structure meeting time to be work time and limit committee sharing by sending board members the reports written as pre-reading for board meetings.
- Communicate board accomplishments regularly to the Stevens community, including the staff, faculty, and the university's Board of Trustees.
- Articulate actionable outcomes that are measureable and benchmarked.
- Increase the importance of individual annual financial support to the Stevens Fund.

Recommendation #4: Broaden the scope of G.O.L.D. Committee. Consider evolving it into a Young Alumni Leadership Council. These members should serve outside the alumni board with representation on the alumni board.

- Invite members to help define the need and interest of those alumni 10 years out from graduation and less.
- Have the group take ownership for event ideas to bring energy, excitement, and attendance (both physical and virtual).
- Invite the members to be online Stevens Ambassadors, communicating with peers in ways consistent with how they would regularly communicate.

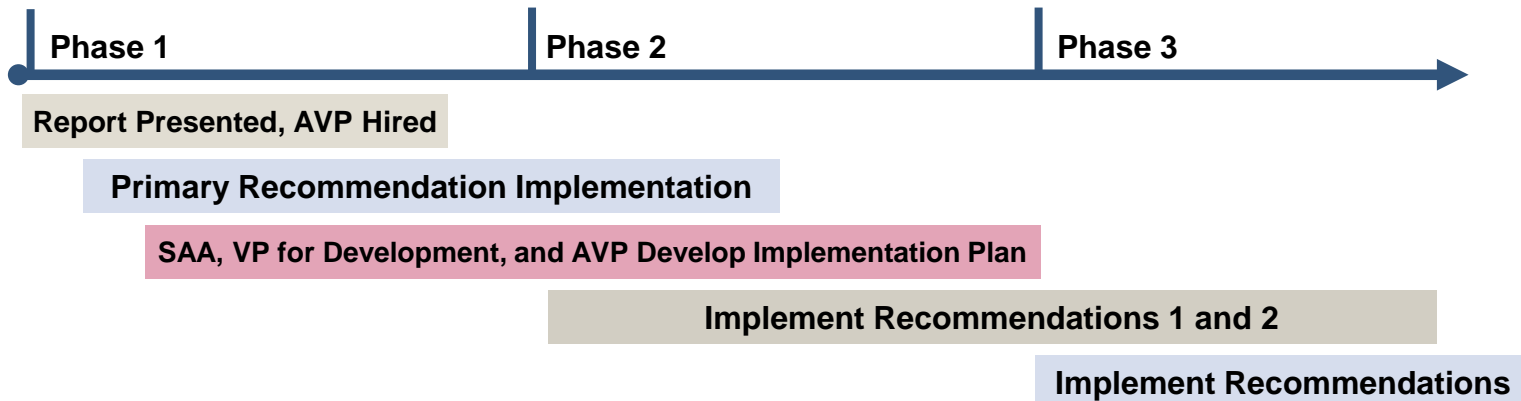
Recommendation #5: Increase and improve collaboration with development and other units.

- Create a shared calendar of events, and provide a venue for development and alumni to be briefed regularly on their events.
- Communicate alumni relations staff roles and responsibilities so development staff know who to contact for collaboration.
- Improve internal infrastructure, allowing for and promoting teamwork, synergy, and communication between alumni relations and development staff.
- Develop a joint strategic plan for alumni relations and annual giving that is aligned with the university's strategic plan.



Next Steps

Next Steps



In considering the next steps as outlined above, it will be important to move with a sense of urgency on governance reform, streamlining the organization and identifying the elements of the university's strategic plan that the alumni association can focus on with a sense of determination.

August 2015

- Deliver report to the SAA leadership and senior staff.
- Discuss broader presentation and roll out.
- Discuss glide path for major recommendations.



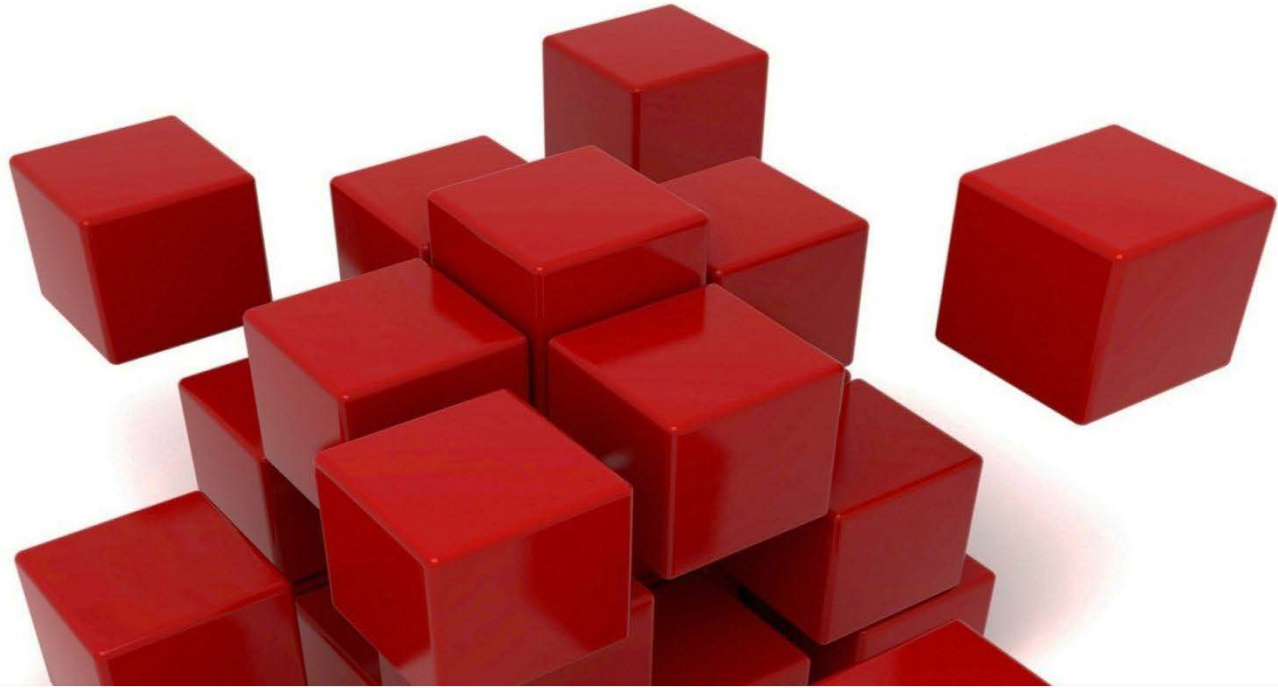
Appendices

Appendix A: Interviewees

Appendix B: Alumni Survey Report

Appendix C: Alumni Relations Benchmarking Survey

Appendix D: Alumni Relations Benchmarking Survey Open-Ended Comments



Appendix A: Interviewees

Appendix A: Interviewees

Alumni Association

Tom Moschello, 1963, Immediate Past President

Joe DiPompeo, 1998, President

Dave Manhas, 1988, Second Vice President

John McDonnell, 1972

John Abom, 1965

Kendra Appleheimer, 2011

Victoria O'Connor Blazeski, 2011

George Blazeski, 2010

Cindy Chin, 2005

Leo Collins, 1959

Chris Ferreri, 1977

Sunil Garg, 1974

Owen Jappen, 2012

Joe Llano, 2001

Dick Magee, 1963

Paul Magnone, 1988

Lauren Maye, 2012

Marty Valerio, 1968

Vicky Velasco, 2004, First Vice President

Dave Zimmerman, 1996

Stevens Leadership, Staff, and Trustees

Nariman Farvardin, President

Annmarie Rizzo, 1986, Trustee

J. Scott Swensen, 1974, Trustee

Joe Garvey, 1971, Trustee

Beth McGrath, Chief of Staff

Ken Nilsen, Dean of Students

Marybeth Murphy, Vice President for Enrollment Management and Student Affairs

Ed Stukane, Vice President Communications and Marketing

Brodie Remington, Vice President for Development

Melissa Fuest, Director of Annual Giving

Dawn da Silva, Assistant Vice President, Development

Amy Krause, Assistant Vice President of Development Services



Appendix B: Alumni Survey Report

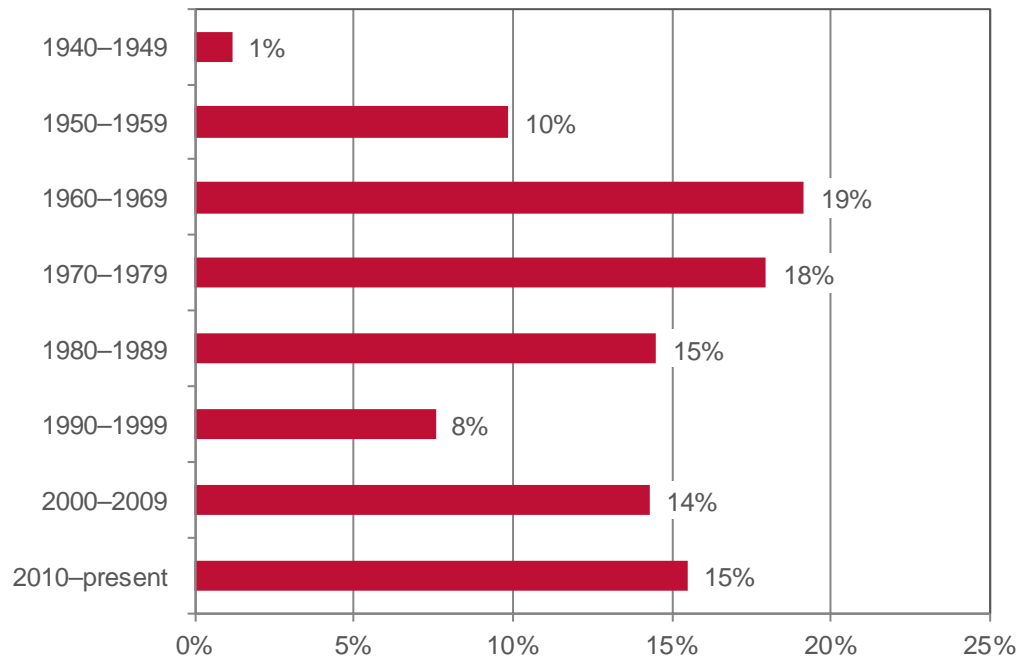


Summary

Bentz Whaley Flessner conducted the survey of Stevens Institute of Technology Alumni in late June–early July 2015, with 768 complete responses. The survey was sent to 8,828 individuals with a participation rate of 9%, within the range of expected response rates for this size survey.

Summary

Survey Respondents by class year:

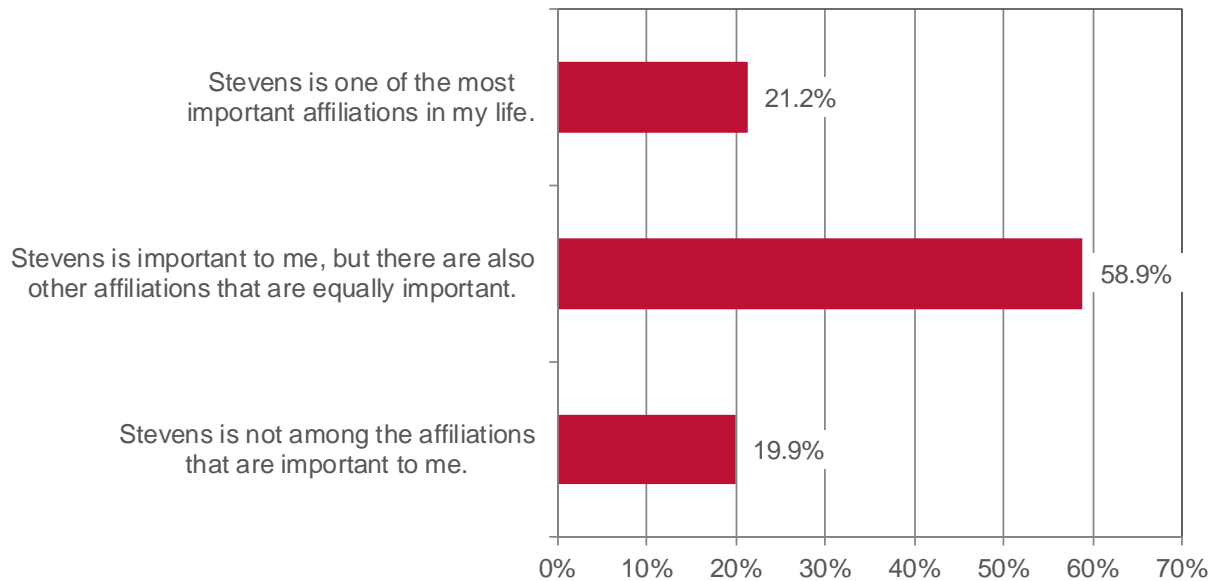


Summary

Survey Respondents by state:

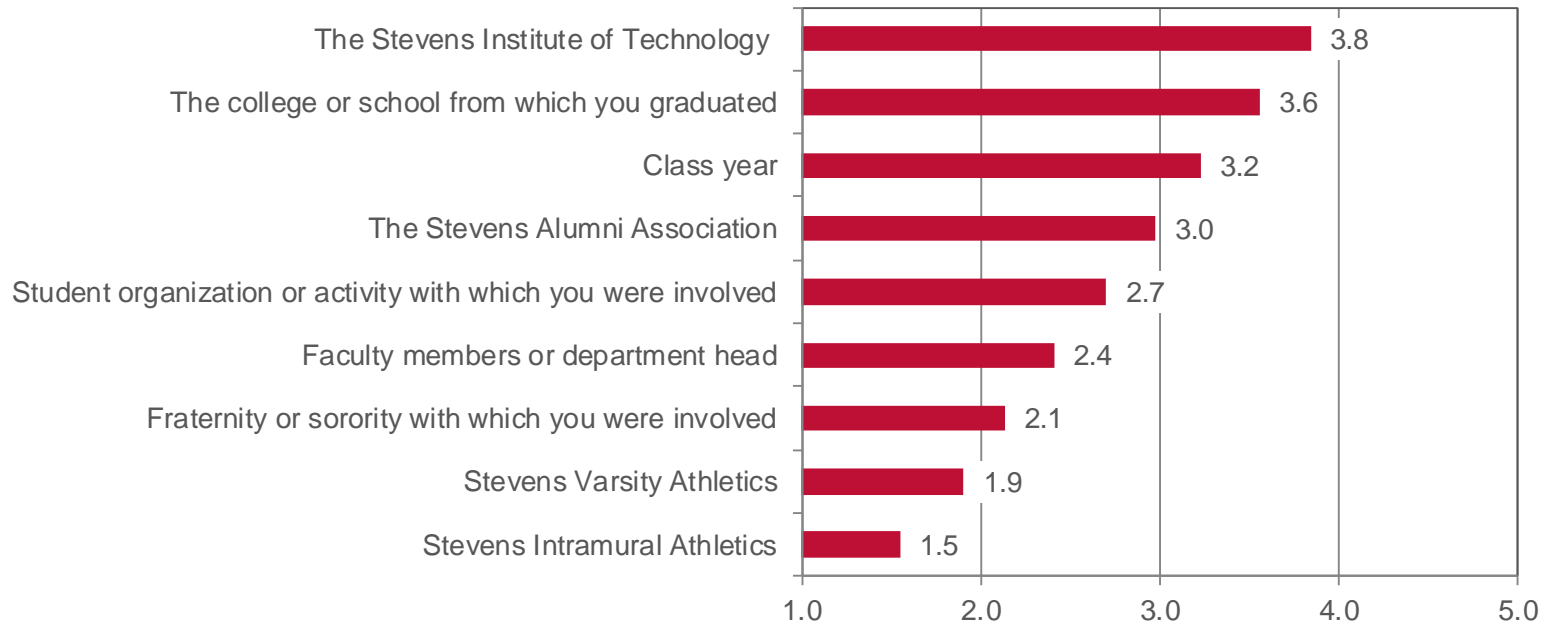
NJ	42%
NY	11%
PA	5%
FL	5%
CA	4%
MA	4%
VA	4%
TX	3%
MD	3%
CT	3%
Other and Not Listed	17%

Q1. Which of these statements best describes how you feel about Stevens today?



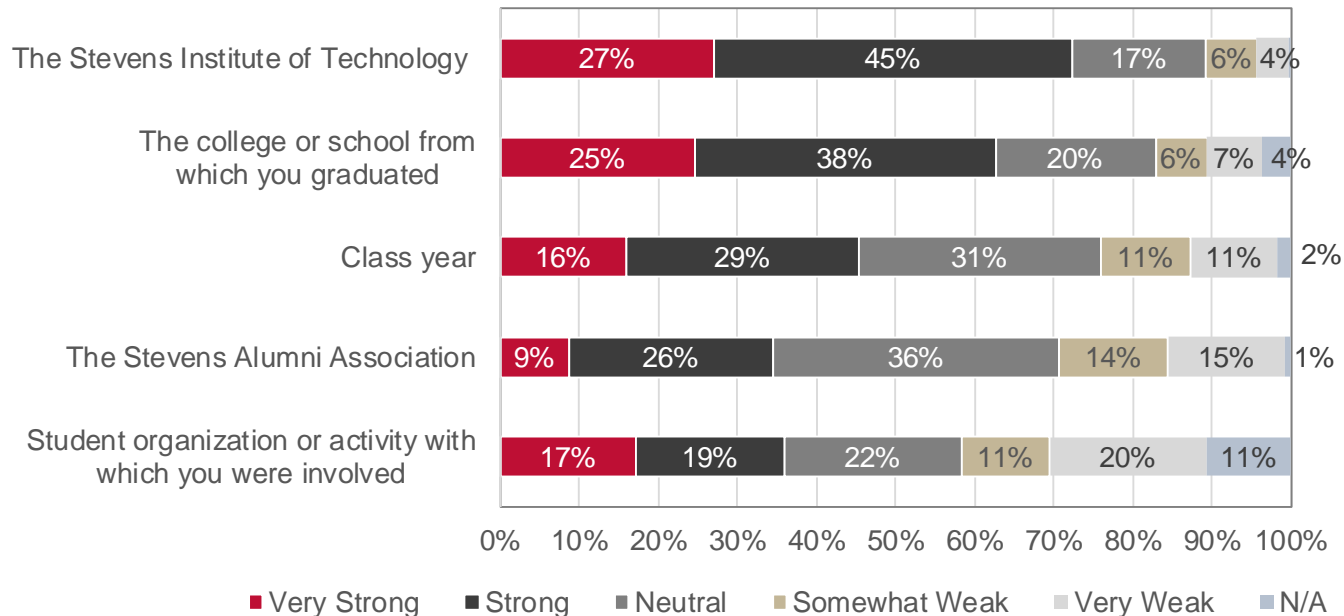
- A majority of respondents (59%) indicated that Stevens is an important affiliation, but there are other affiliations that are equally as important.
- One in five respondents indicated that Stevens is not an affiliation that is considered important.

Q2. Please indicate the strength of your loyalty to the following.



- The Stevens Institute of Technology overall had the highest loyalty rating followed by college or school and class year.
- Athletics, both intramural and varsity, had the lowest strength ratings.

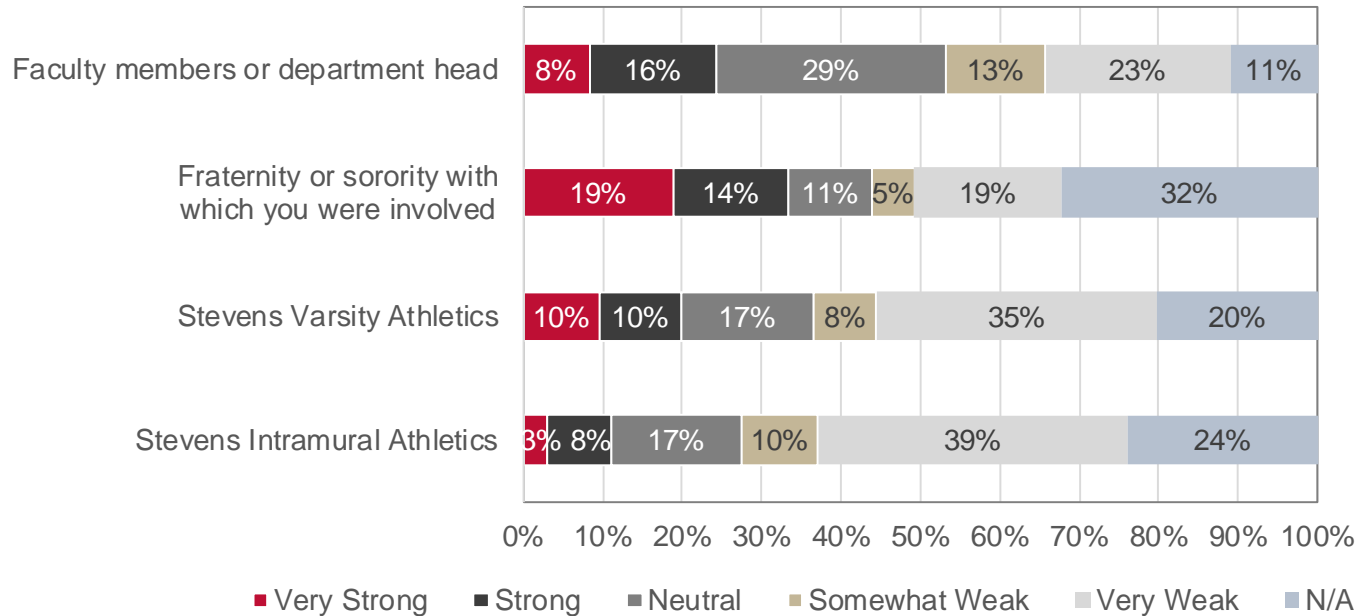
Q2. Please indicate the strength of your loyalty to the following.



- Almost three quarters of respondents (72%) indicated that their loyalty to Stevens was either strong or very strong.
- Thirty-six percent of individuals indicated they were neutral on their loyalty to the Stevens Alumni Association.

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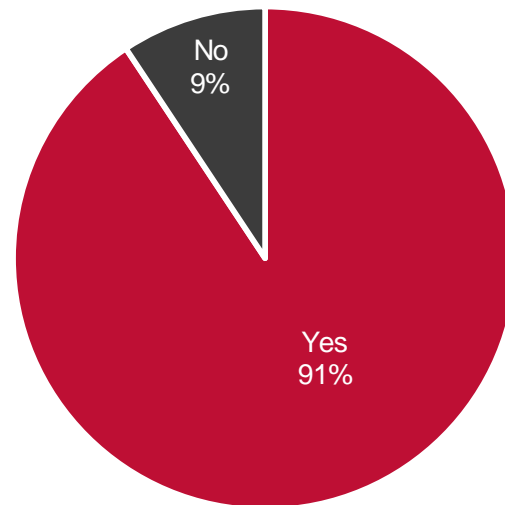
Q2. Please indicate the strength of your loyalty to the following.



- A third of respondents indicated their loyalty to their fraternity or sorority is strong or very strong.
- Twenty-nine percent of individuals indicated that they are neutral towards their faculty members or department head.

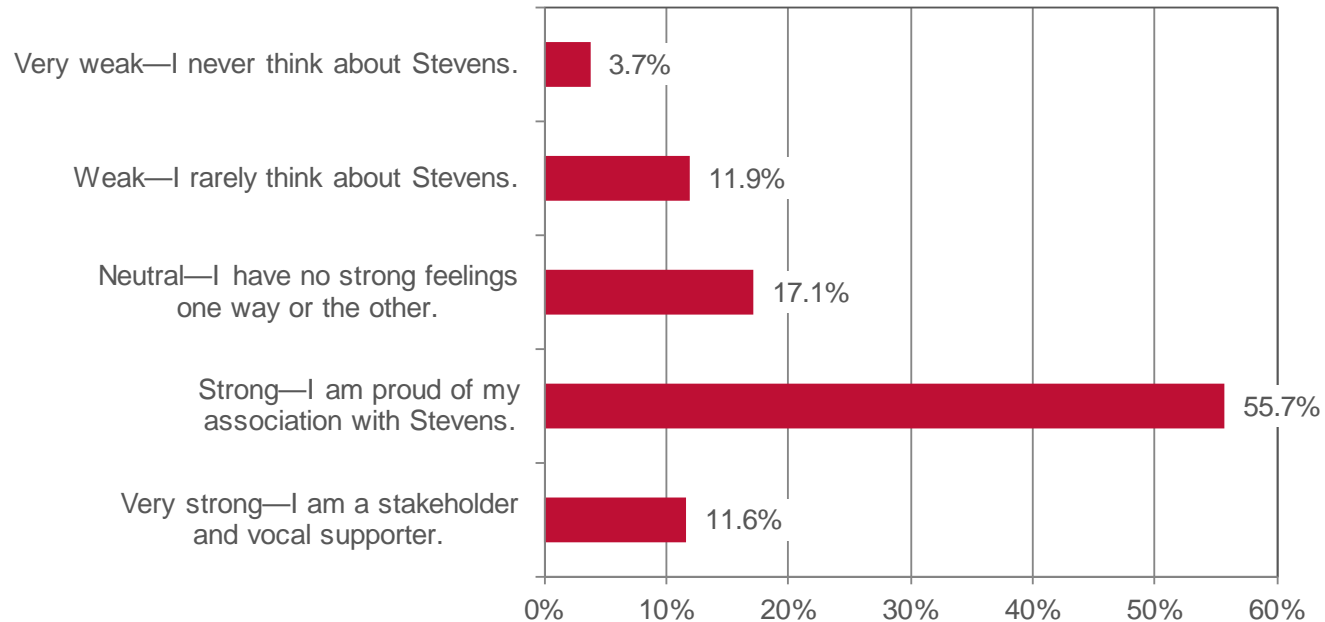
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Q3. Would you recommend Stevens to a potential student?



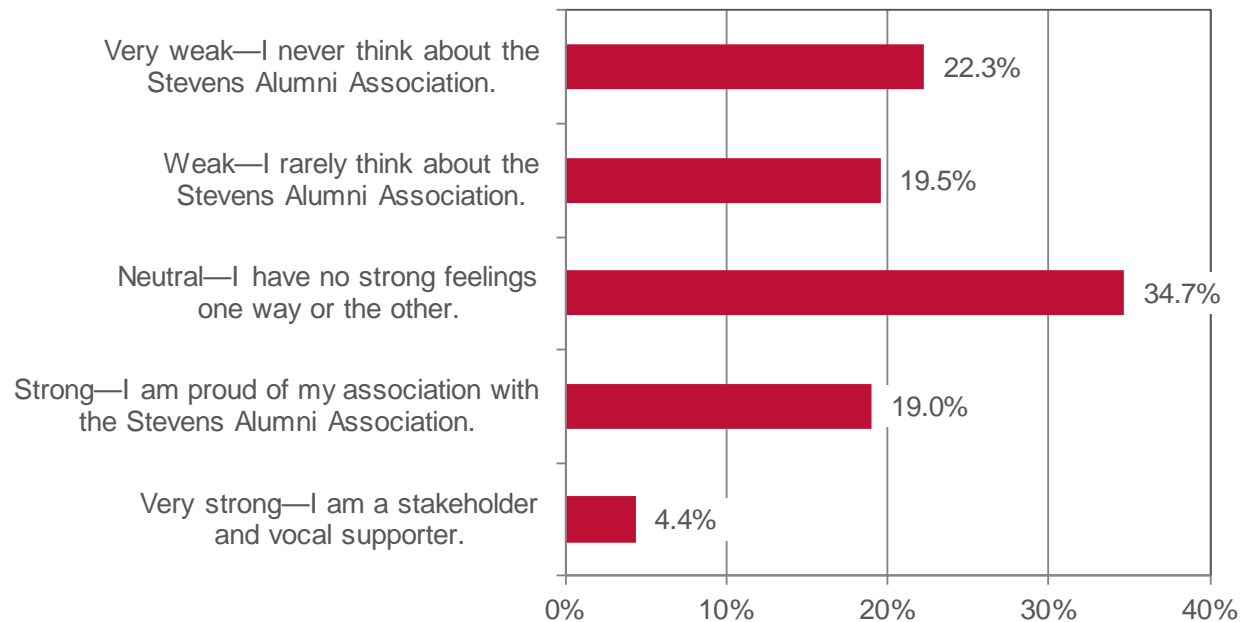
- An overwhelming majority of 91% of respondents indicated that they would recommend Stevens to a potential student.
- Many of the respondents who answered no referenced increasing tuition costs as their rationale (Question 4).

Q5. How would you describe your association with Stevens in general?



- Over two-thirds (67%) of individuals indicated that their association with Stevens is strong or very strong.
- Sixteen percent of respondents describe their association with Stevens as weak or very weak.

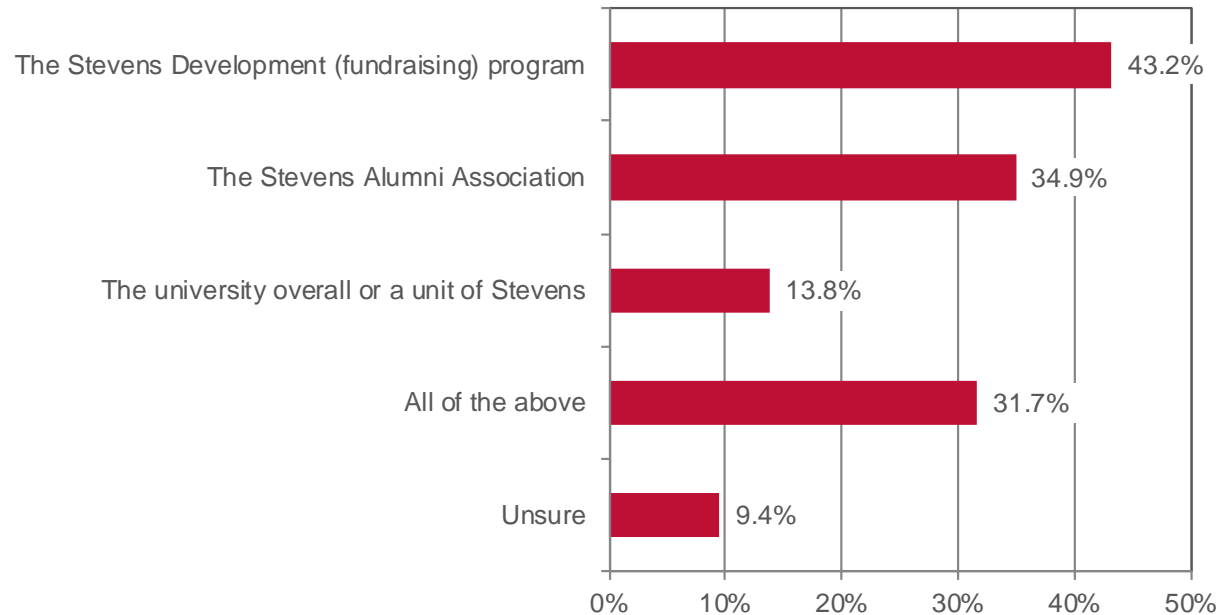
Q6. How would you describe your association with the Stevens Alumni Association?



- Over a third (35%) of respondents feel neutral towards their association with the Stevens Alumni Association.
- Forty-two percent of individuals consider their association with the Alumni Association weak or very weak.

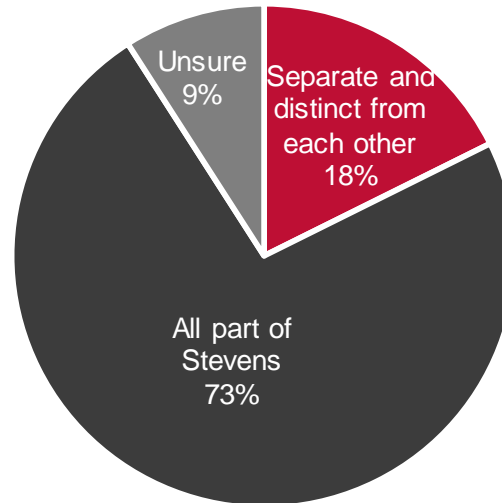
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Q7. When Stevens sought to engage you in the past, did you perceive the approach(es) as coming from...?



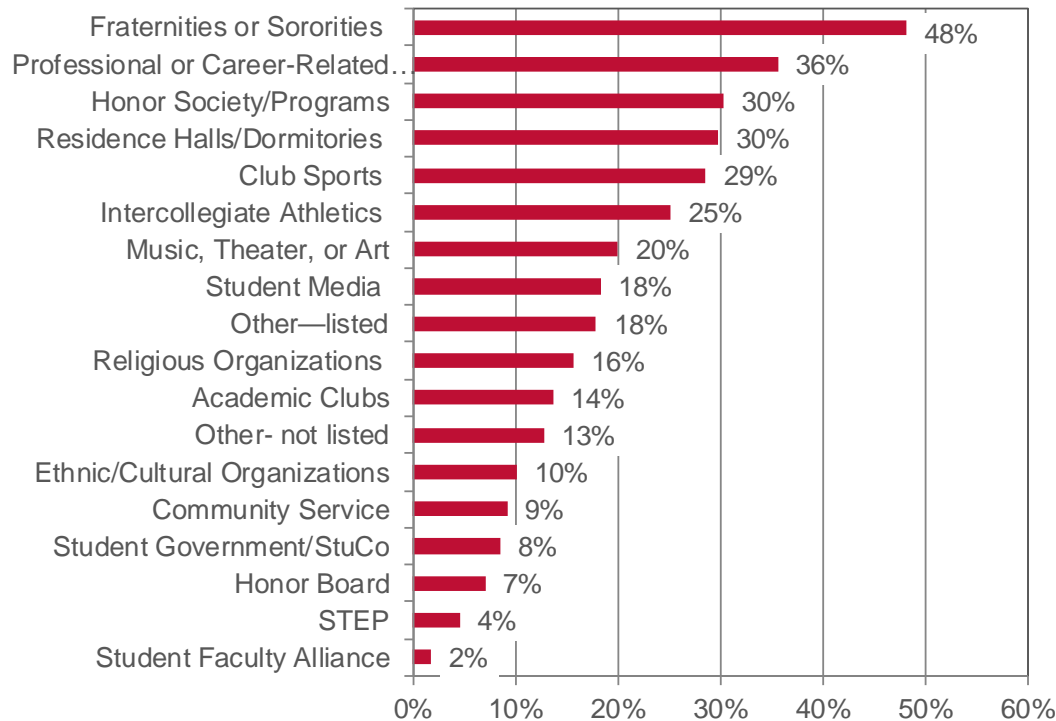
- About one-third of individuals feel the approaches are coming from the Stevens Development program, the Alumni Association, and the University overall.
- Almost 10% are unsure which entity sought to engage them in the past.

Q8. Regardless of whether you perceived the engagement approach as coming from the university as a whole, some part of the university, or the Stevens Alumni Association, did you see the entities as...?



- Nearly three-quarters (73%) of respondents see the entities as a part of Stevens.
- Eighteen percent of individuals believe that these entities are separate and distinct from each other.
- Almost ten percent are unsure.

Q9. Which of the following activities were you involved in as a student?

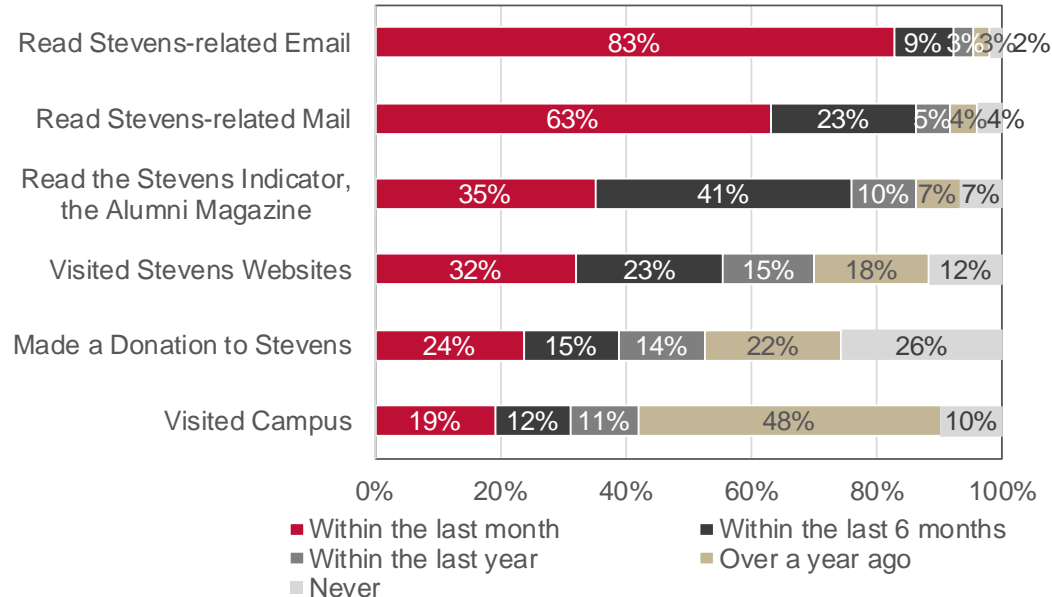


- Nearly half (48%) of respondents—the largest grouping—were involved in a fraternity or sorority as a student.
- The next five largest activities identified were:
 - Professional/career-related
 - Honor Society/Programs
 - Residence Halls
 - Club Sports
- Common responses in the “other—not listed category” included ROTC, Orientation/tour leaders, and Co-op.

Note: Other listed included a list of: Anime, C2GS, Boken, Techfest, Entertainment Committee, Climbing and Mountaineering Club, Cricket Club, Golf Club, Knitting Club, Orientation Team, Residence Hall Association/Inter Dormitory Council, Greek Council, Commuter Council, Stevens Culinary Society, SAVE, Torch Alliance, etc.

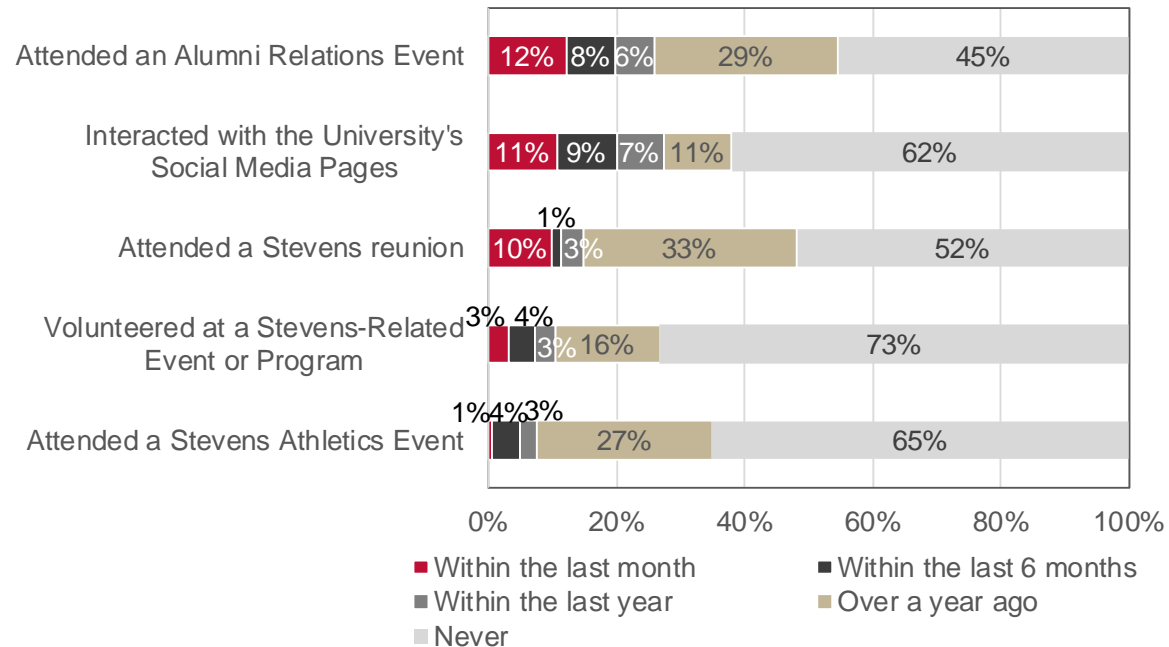
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Q10. Since you graduated from Stevens, when was the last time you...?



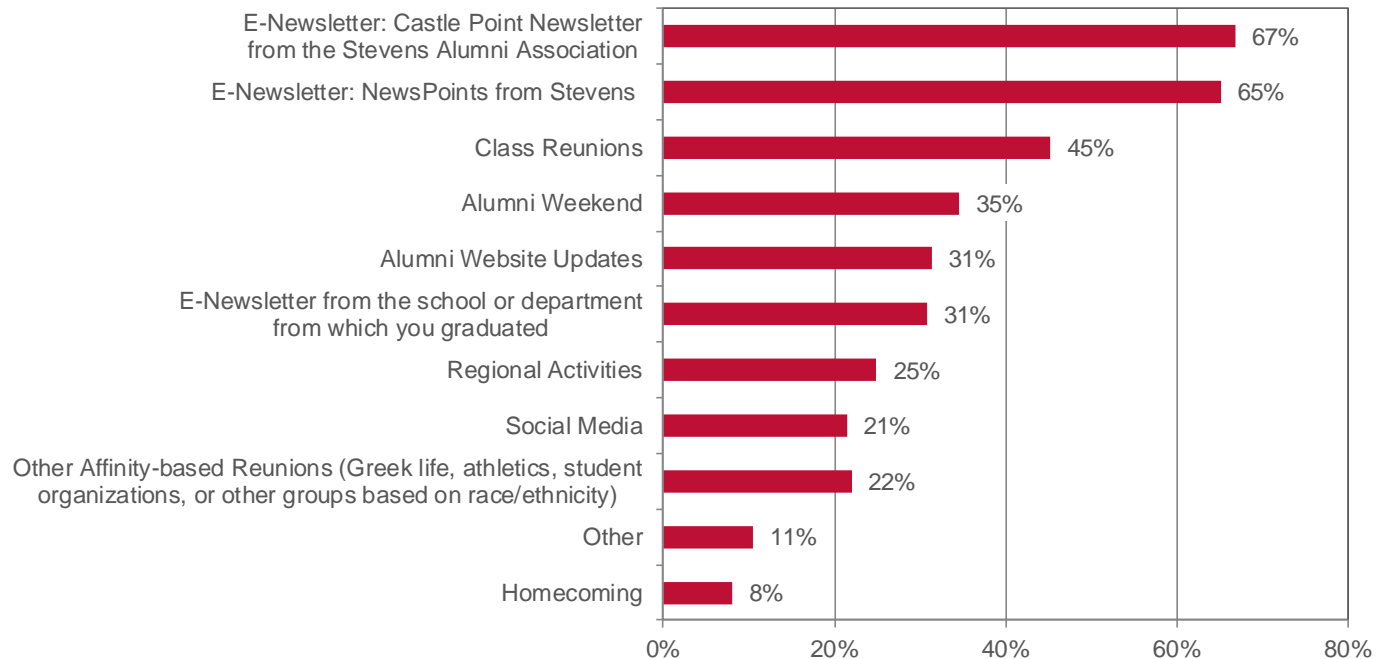
- Eighty-three percent of respondents have read a Stevens-related email in the last month.
- Over half (53%) of individuals have made a donation to Stevens sometime in the past year.
- Eighty-six percent of respondents have read the Stevens Indicator in the past year.

Q10. Since you graduated from Stevens, when was the last time you...?



- Seventy-three percent of individuals have never volunteered at a Stevens-related event.
- Sixty-two percent of respondents have never interacted with any Stevens social media.

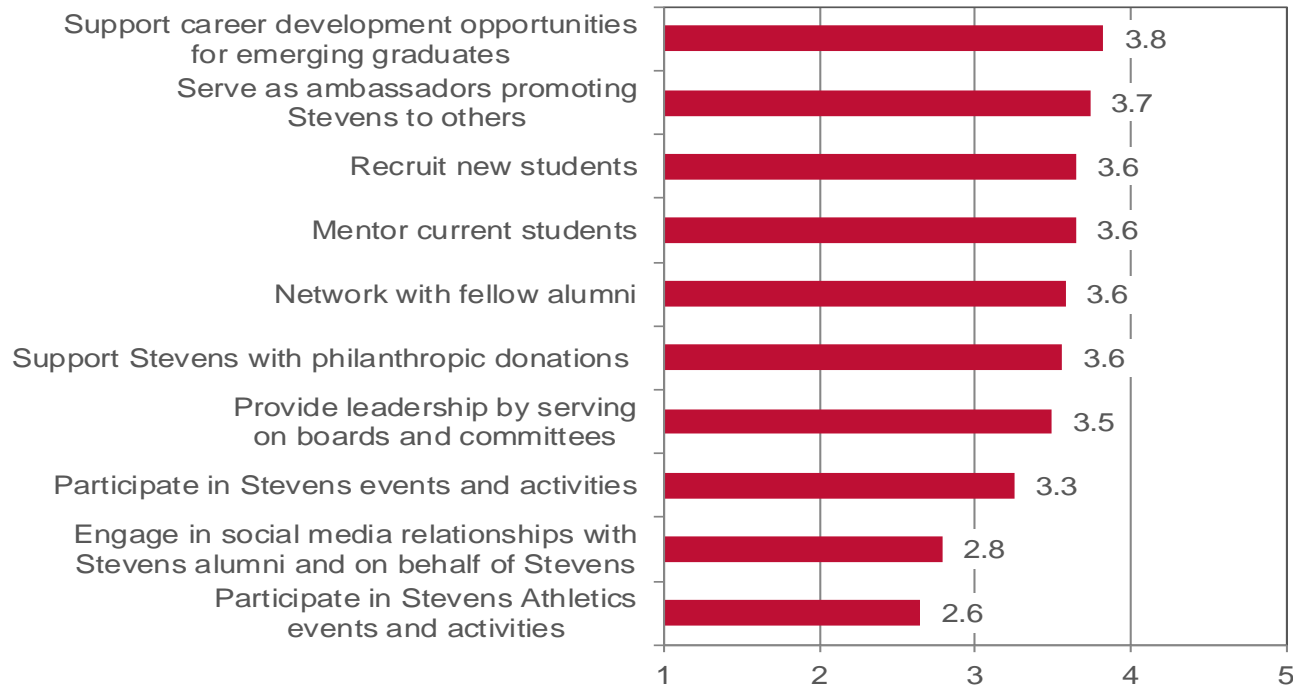
Q11. Which of the following appeal to you as an opportunity to stay connected to Stevens?



- Nearly two-thirds (67% and 65%) of respondents indicated they would like to stay connected via E-Newsletters including both CastlePoint and NewsPoints.
- Twenty-one percent of individuals indicated that they would like to stay connected via Social Media.
- The interest in Alumni weekend is three times higher than Homecoming.

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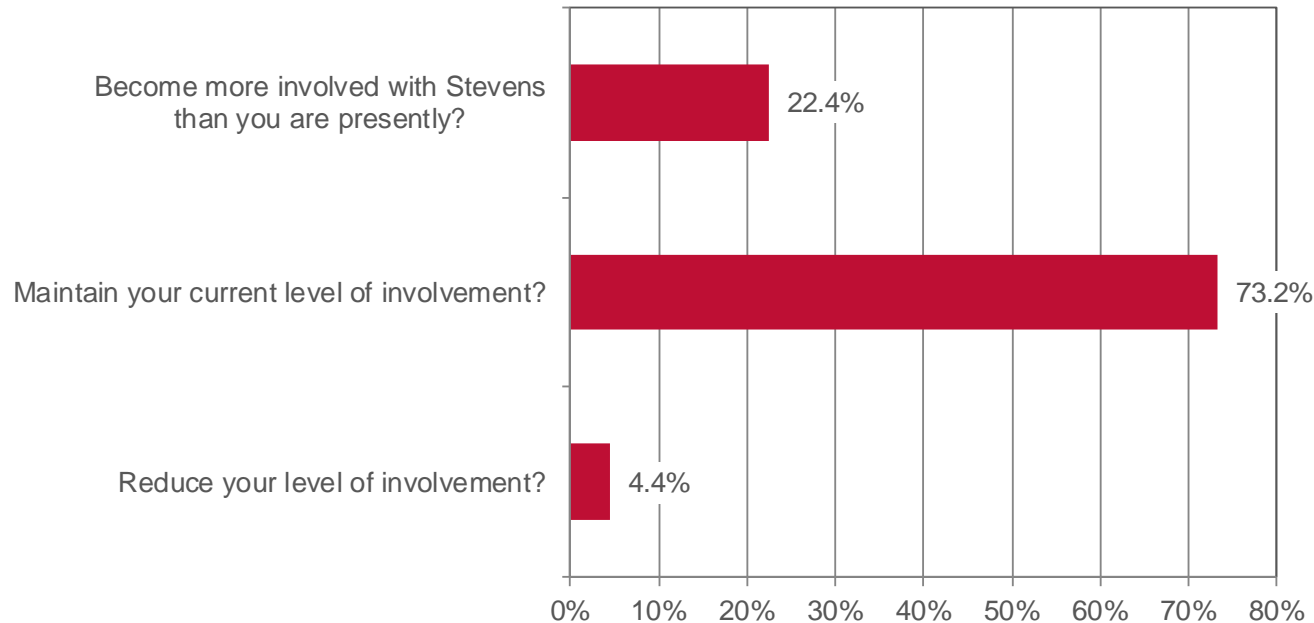
Q12. How important is it for Stevens alumni to do the following?



- Supporting career development was considered the most important for Stevens Alumni.
- Forty percent or more of respondents were neutral towards providing leadership on boards and committees, participating in Stevens events and activities, engaging in social media relationships, and participating in Stevens Athletics events.

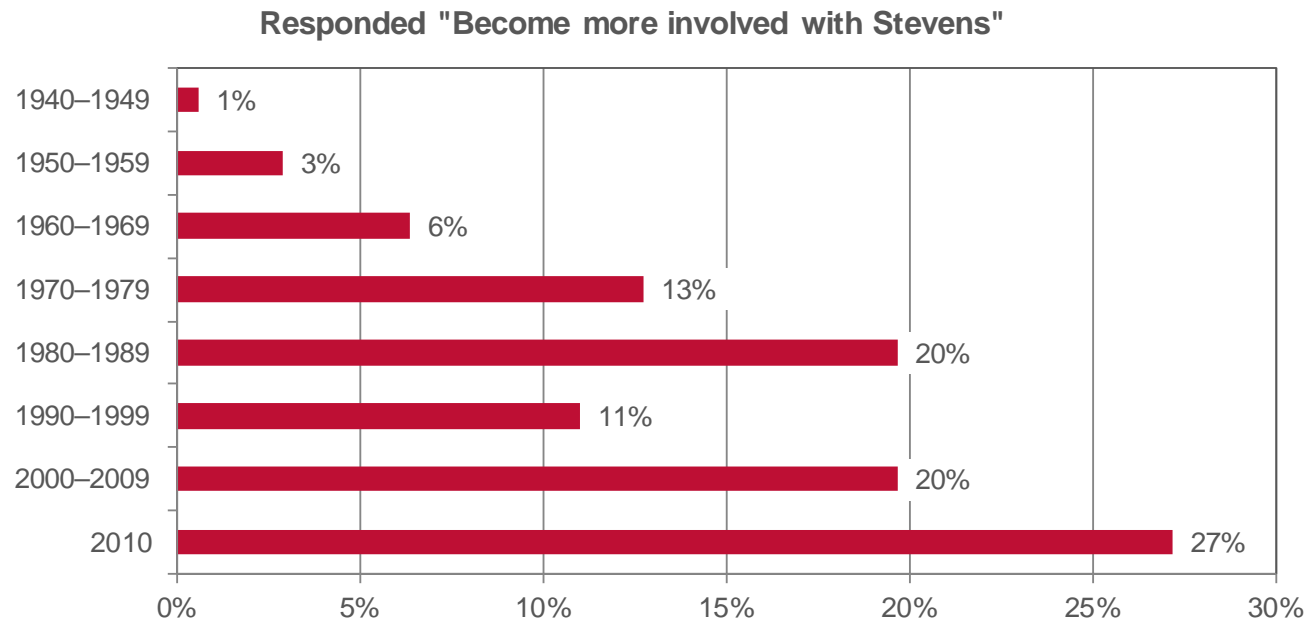
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Q13. Regarding your future level of involvement with Stevens, would you like to...?



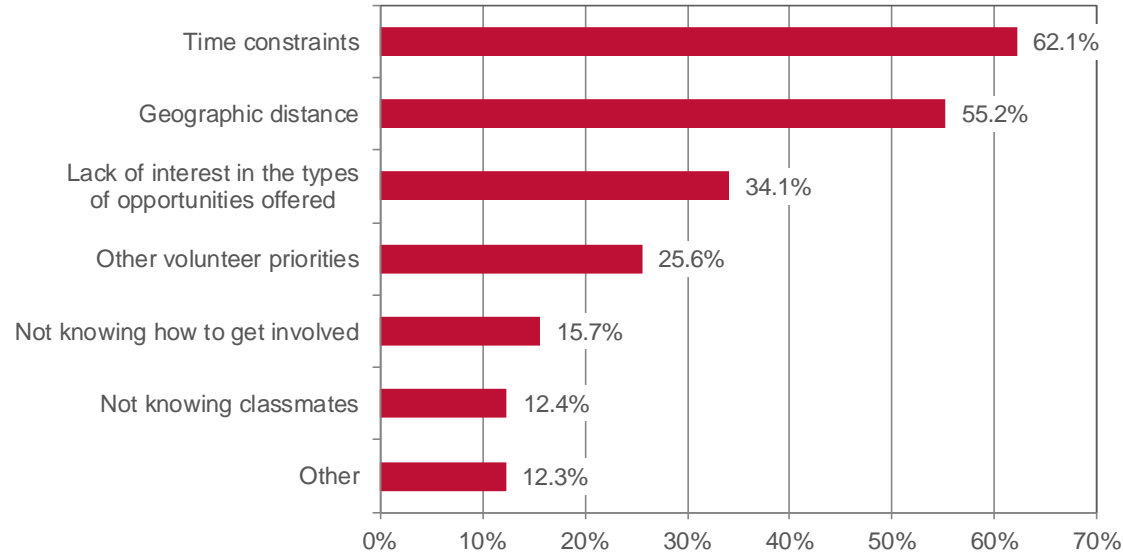
- Almost three-fourths (73%) of individuals want to maintain their current level of involvement with Stevens.
- Five percent of individuals want to reduce their involvement with Stevens.

Q13. Regarding your future level of involvement with Stevens, would you like to...?



- Of those that responded that they would like to become more involved with Stevens than they are currently, almost half (47%) are graduates of 2000 or later.

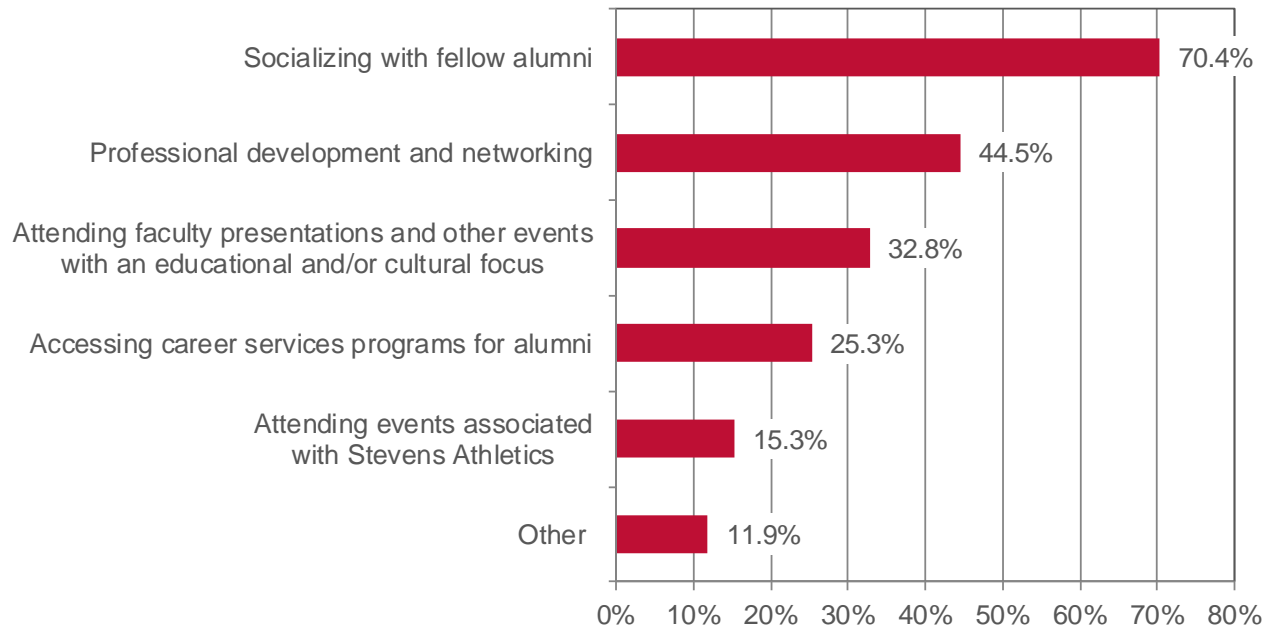
Q14. Which of the following could prevent you from becoming more involved with Stevens?



- Over half of respondents (62% and 55%) indicated that time and geographic distance constraints could prevent them from becoming more involved with Stevens.
- One-third are not interested in the current opportunities for involvement.
- One-quarter have commitments elsewhere.
- Many of those who selected “other” indicated a lack of interest as a reason for not becoming more involved with Stevens.

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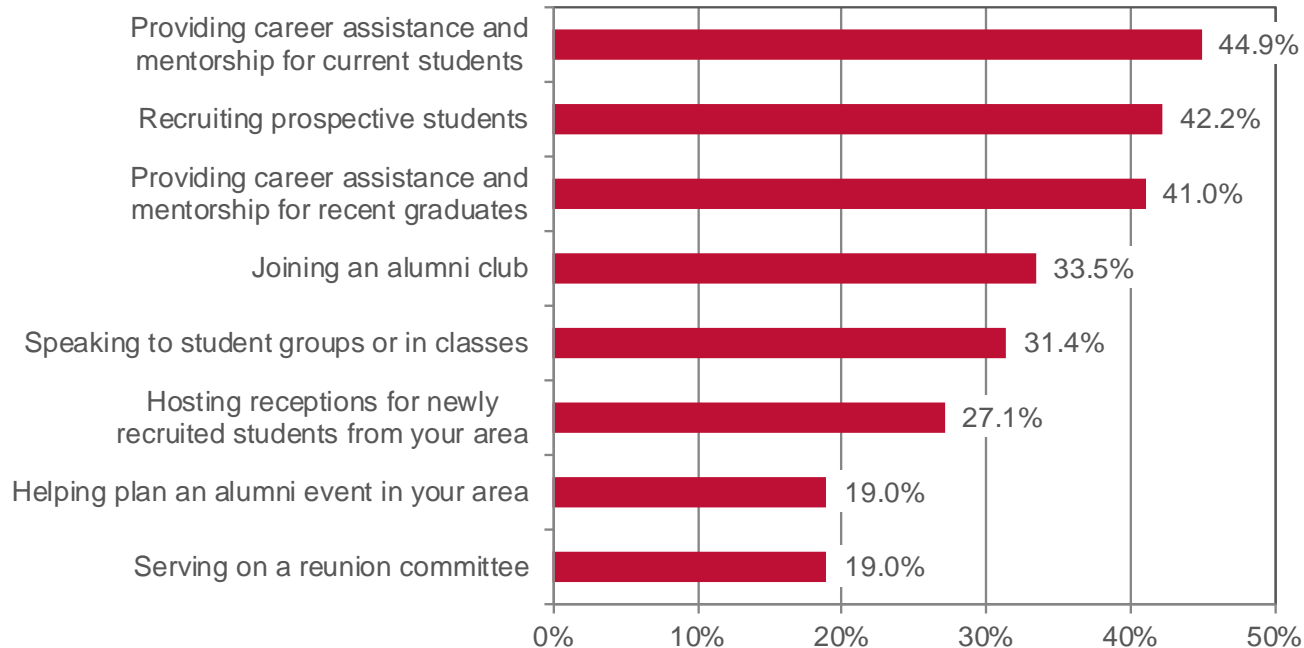
Q15. In the future, in which type of alumni events and activities would you be most likely to participate?



- Seventy percent of individuals indicating that they would be most likely to participate in a social event with fellow alumni.
- A quarter of respondents would be most likely to participate in career service programs for alumni.

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Q16. Which of the following volunteer activities would be of potential interest you to?



- Forty-five percent of respondents indicated that providing career assistance and mentorship for current students would be of volunteer interest.
- A third of respondents indicated that they would consider joining an alumni club.



Open-Ended Response Questions

Responses to the following open-ended questions will be provided in Appendix D of the Stevens Alumni Relations Report.

- Q4. Please comment on why you would or would not recommend Stevens.
- Q9. Which of the following activities were you involved in as a student (other responses)?
- Q11. Which of the following appeal to you as an opportunity to stay connected to Stevens (other responses)?
- Q14. Which of the following could prevent you from becoming more involved with Stevens (other responses)?
- Q15. In the future, in which type of alumni events and activities would you be the most likely to participate (other responses)?
- Q17. Please share any other thoughts or suggestions that you have regarding Stevens or the Stevens Alumni Association.

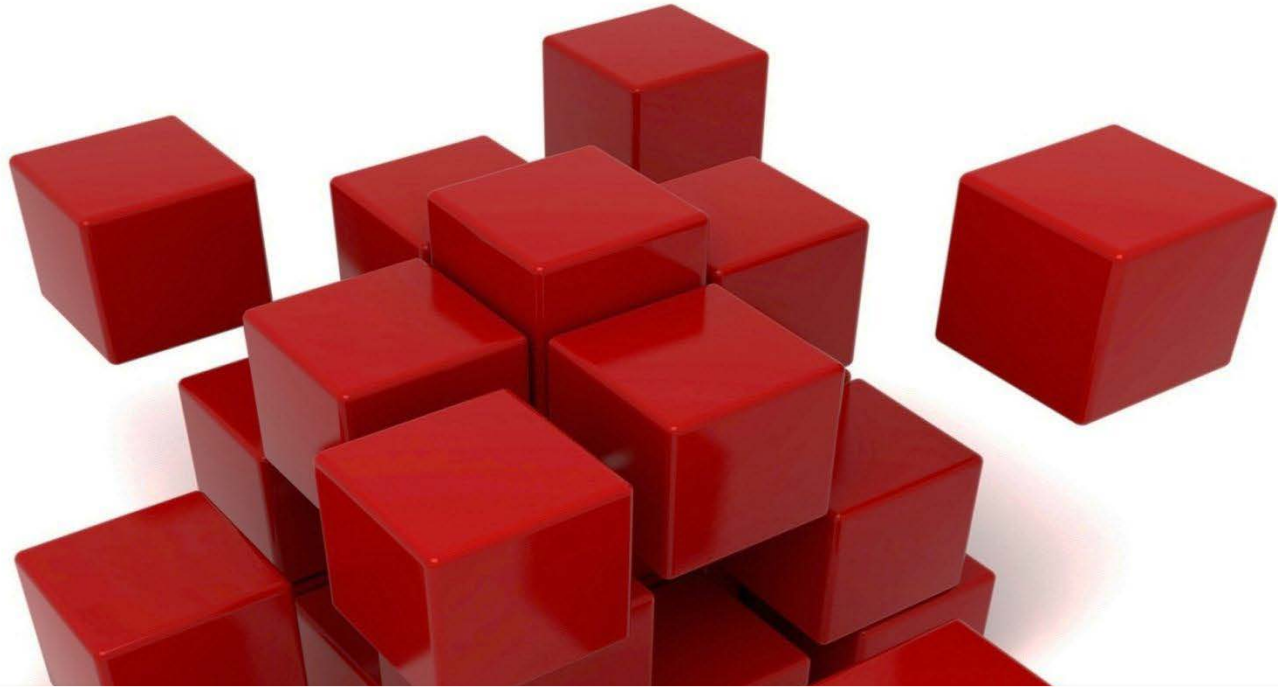


Appendix C: Alumni Relations Benchmarking Survey



Overview

- In the spring of 2015, a benchmarking study of alumni engagement strategies was conducted among a select group of universities.
- Benchmarking questions were distributed, and phone conversations were held to understand current approaches to alumni engagement programming, staffing, organizational structures, and board roles.
- Participating universities included Illinois Institute of Technology, Rensselaer Polytechnic Institute, Lafayette College, and Butler University.



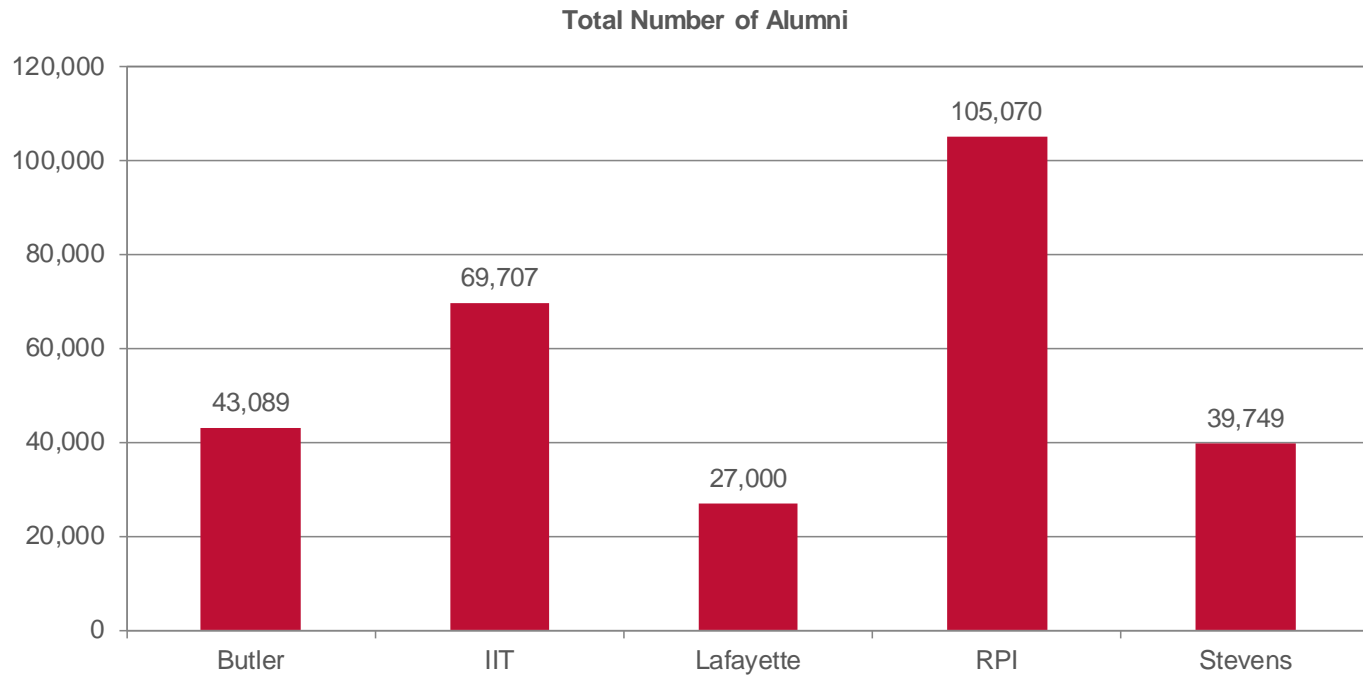
Appendix C:
Demographics



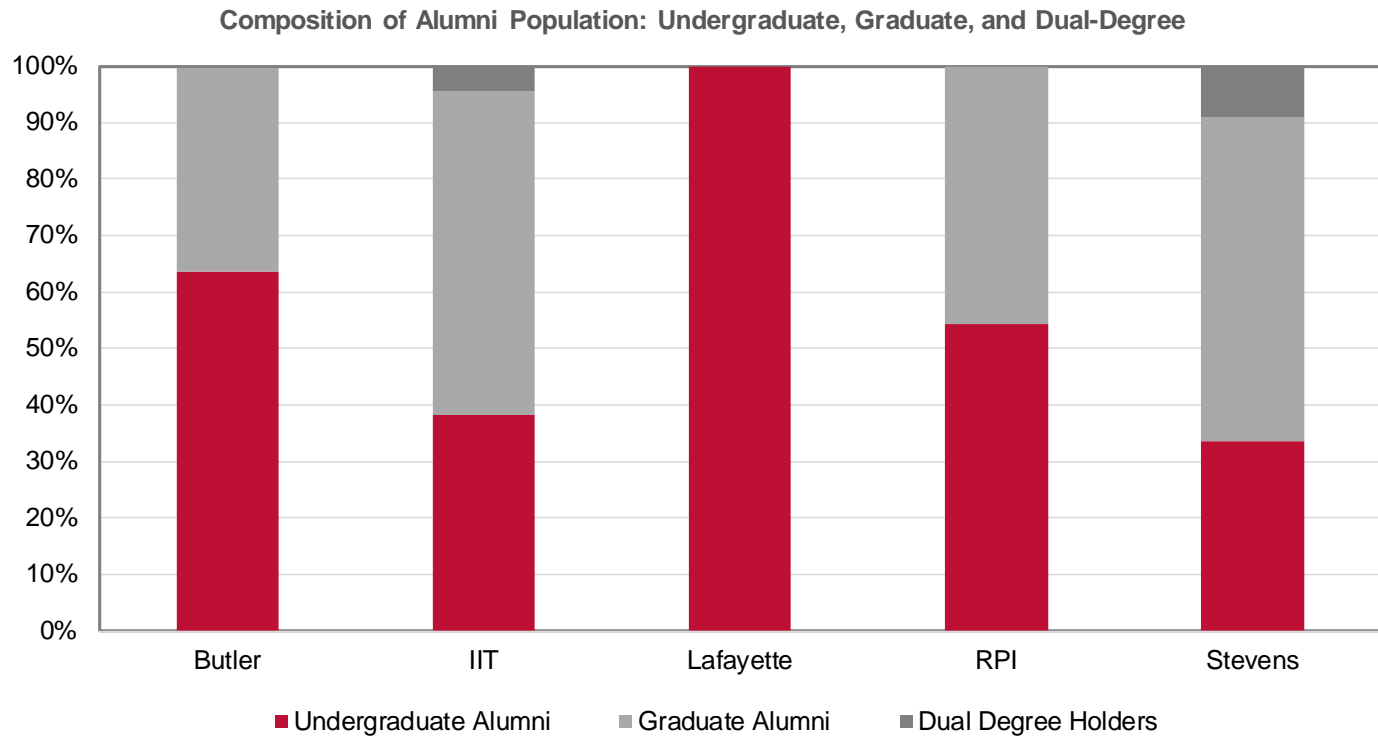
Summary

- Stevens is most comparable to Butler when considering the total number of alumni, but is more similar to IIT when considering the make-up of its alumni—undergrad, graduate, or dual-degree holders.
- Sixty-six percent of Stevens alumni are graduate or dual-degree alumni.

Total Number of Alumni



Composition of Alumni Population





Appendix C:

Programming and Engagement



Summary

Program Offerings

- All participants offer alumni networks based on geographic location.
- Three offer affinity networks based on race/ethnicity.
- Three offer alumni networks based on college or school.
- All offer homecoming and reunions, student and young alumni programming, and volunteer leadership opportunities.



Summary

Program Offerings

- Two have community service programming, and three offer alumni career services.
- All communicate via alumni-specific social media platforms and through an alumni newsletter.
- All but one have an alumni magazine.
- Other programming offerings included international chapters, an alumni awards program, and an alumni house.



Summary

Signature/Hallmark Programs and Services

- These included: large-scale events like Homecoming or reunions, chapters, chapter-based events, alumni awards program/events, alumni communications, and alumni career services.
- The most common signature programs were homecoming/reunions, chapter-based programming, and awards.



Summary

Young Alumni or Recent Graduate Programming

- While all schools indicate they have young alumni programming in general, two participants specified that they have a young alumni leadership group.
- One indicated they have a professional staff that oversees young alumni programming.
- While two schools indicate they try to integrate young alumni into all their offerings, programming specific to young-alumni includes:
 - Opportunities to serve students in an effort to be a bridge from being students to alumni.
 - Networking events and happy hours.
 - A special focus on young alumni on Homecoming weekend.
 - Special communications to the young alumni audience.



Summary

Participation and Segmentation

- Alumni participation in events and programs ranged from 4% to 25%, with Stevens having the lowest participation among the peer set.
- All schools segment their alumni population based on region. Other segmentations include:
 - Reunion Year
 - Academic Program
 - Greek Life
 - Student Involvement/Athletic Team
 - Race/Ethnicity
 - LGBT Identity
 - Age—limited to young alumni



Summary

Metrics

- All schools track event attendance. Other metrics used by the peer set include:
 - Giving Participation
 - Net Promoter Score
 - Volunteerism
 - Contact Information
- IIT creates an engagement score based on several engagement indicators: event attendance, giving participation, volunteerism, substantive interactions (documented meetings, calls, personal emails), and social media membership/participation in private online community.
- Butler is in the process of developing a plan for a better measure of engagement, to be implemented in the next two years.

Program/Service Offerings

School	Alumni Networks Based on Geographic Location	Alumni Networks Based on Race/Ethnic Affiliation	Alumni Networks Based on College/School
Butler	X	X	X
IIT	X	X	
Lafayette	X	X	
RPI	X		X
Stevens	X		X

Program/Service Offerings

School	Homecoming	Class Reunions	Young Alumni Programming	Student-based Programming
Butler	X	X	X	X
IIT	X	X	X	X
Lafayette	X	X	X	X
RPI	X	X	X	X
Stevens	X	X	X	X

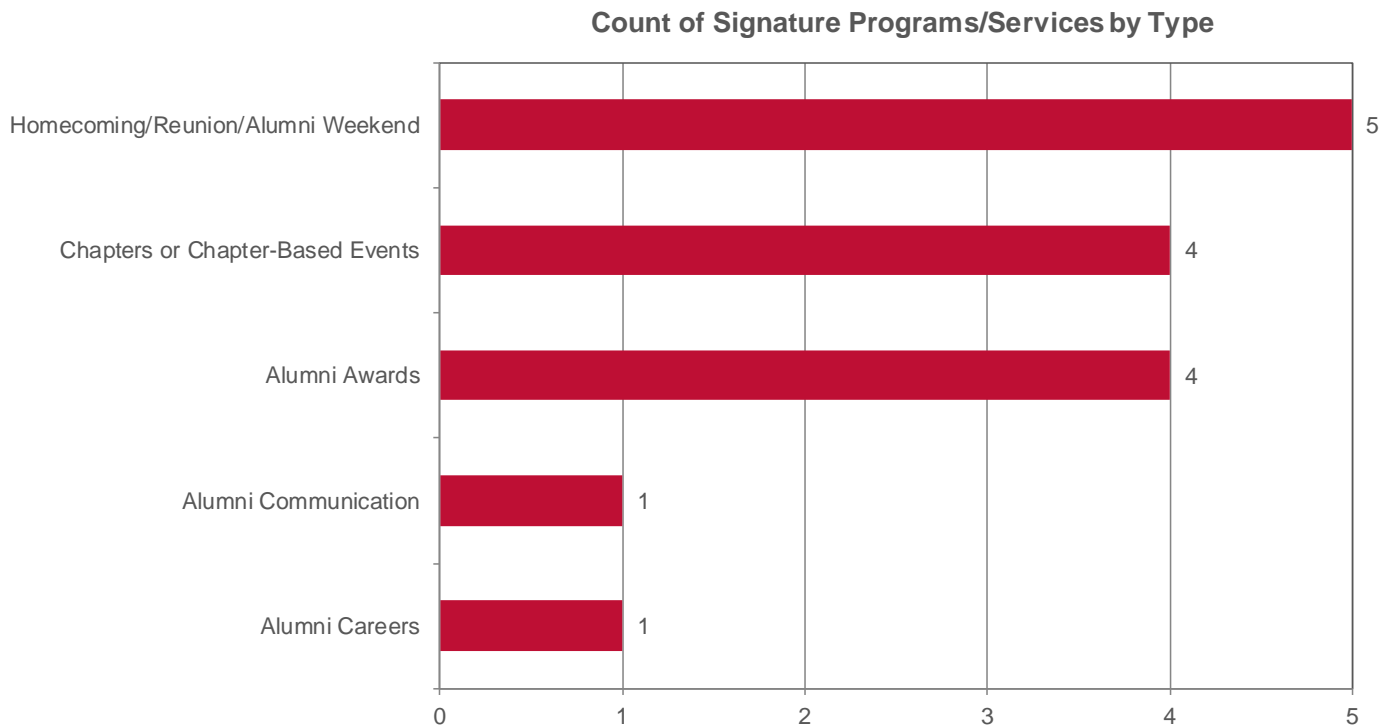
Program/Service Offerings

School	Volunteer Leadership Opportunities	Community Service	Career Services
Butler	X		
IIT	X		X
Lafayette	X	X	X
RPI	X	X	X
Stevens	X		

Program/Service Offerings

School	Alumni Social Media (Facebook, LinkedIn, YouTube, etc.)	Alumni Newsletter	Alumni Magazine
Butler	X	X	X
IIT	X	X	X
Lafayette	X	X	X
RPI	X	X	
Stevens	X	X	X

Signature/Hallmark Programs and Services—Count



Signature/Hallmark Programs and Services—Description by School

School	# 1	# 2	# 3
Butler	Homecoming—600 households, 2,000 people. Alumni gather on campus every fall for football and family fun.	Alumni Recognition Dinner—200 people. An annual dinner recognizing six alumni for different awards.	Alumni Communication—46,000 alumni, family, and friends worldwide. Magazine, social media communications and monthly e-news.
IIT	Regional and international chapters—3,500 alumni, 10,000+ attendees. Network of volunteer-run chapters throughout the US and Asia.	Alumni Awards—12 to 15 honorees, 100 alumni, 250 attendees.	Homecoming/Reunions—650 attendees. Special reunions for 25th and 50th. Expanding to include first year and 10th.
Lafayette	Lafayette-Lehigh Telecast Parties—70 sites, 850+ alumni. Nationwide viewing parties of the annual Lafayette-Lehigh football game in November.	Wine 3/9 Celebrations—40 sites, 600 alumni. Held on March 9 each year, alumni events to toast the signing of Lafayette's charter on that date in 1826.	Reunion—1,110 alumni and guests. Weekend events for alumni in the classes by five year increments.
RPI	Alumni Career Services Program—1100 alumni. Included in the program is an online networking tool called Rensselaer Alumni Connect that allows for job posting, mentoring and online networking. The services uses the profiles of LinkedIn.	Rensselaer Alumni Hall of Fame. Conceived in 1995, the Rensselaer Alumni Hall of Fame was created to honor the past while celebrating all generations of Rensselaer pioneers.	Worldwide Chapter and Affinity Based Programs—~8,000 alumni. 34+ chapters globally, and 20+ affinity based programs, our programs on the road connect alumni to RPI.
Stevens	Alumni Weekend	Homecoming	Awards Gala

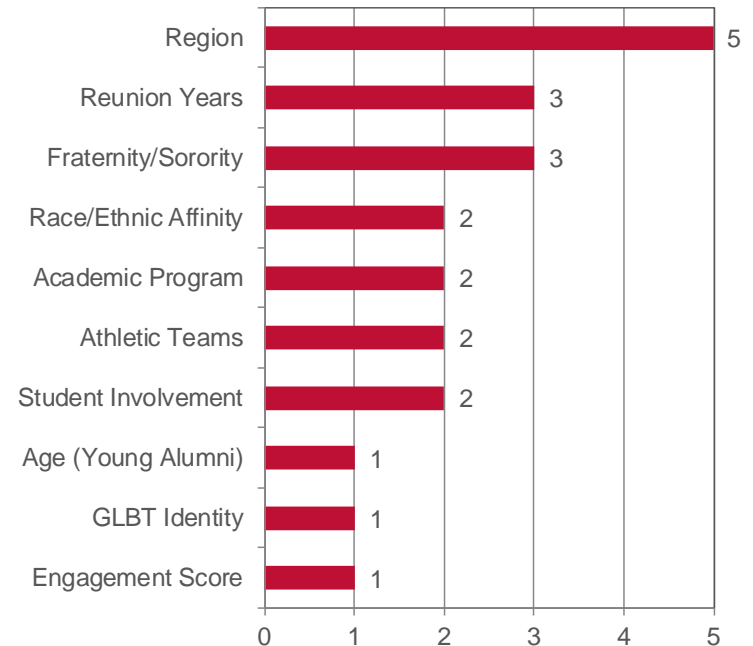
Young Alumni

School	Description
Butler	Has a Young Alumni Board that operates locally around campus. They serve the students by providing opportunities and items, like snack bags during finals week and provide programming for alumni who have graduated in the past 10 years.
IIT	Through a Young Alumni Council, regional partnerships, and affinity/scholarship programs, events and services planned and executed by one professional staff.
Lafayette	Offers “Welcome to the City” happy hours in various regions, monthly message highlighting various events and programs. Discounted prices for events. Special focus on YA at Homecoming weekend each fall.
RPI	Incorporates YA programming in to all of overarching programs—they value young alumni at all events and program. Red & White Student Organization offers the Alum101 Program for juniors and seniors to build the connection of young alumni involvement early. Started in 2009, the program helps educate students on the advantages of being involved as an alum.
Stevens	Happy hours/networking for Graduates of the Last Decade (GOLD).

Segmentation

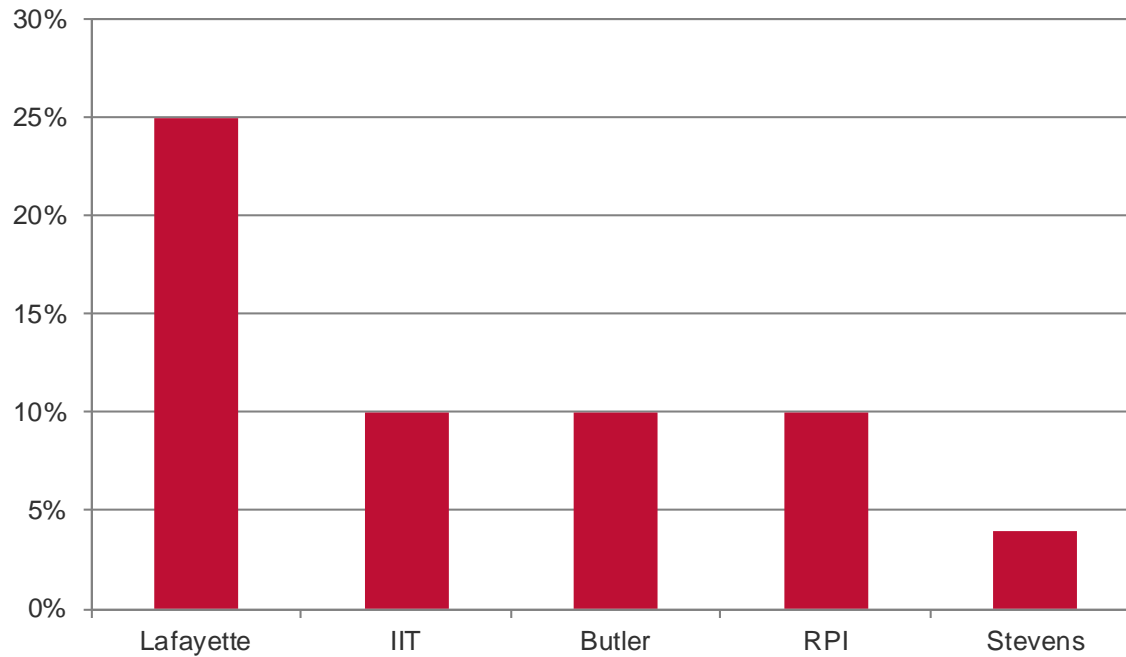
School	Segmentation Description
Butler	Regional chapters, Young Alumni Board, Black Alumni Association, College of the Arts Alumni Community and GLBT Alumni Association. 5, 10, 25 and 50 year reunion gathering every Homecoming weekend.
IIT	Region, affinity relationships—fraternity/sorority, academic program, ethnicity, by engagement score.
Lafayette	Region, but it depends on what program is being offered.
RPI	All programs are strategically developed to include the proper segment for the program. Segmentation based in region, class (5 years), Greek affinity, athletic teams, student leadership and student organizations.
Stevens	Class, Greek affiliation, Region, Athletic affiliation, Student affinity groups/clubs.

Types of Segmentation by Number of Schools



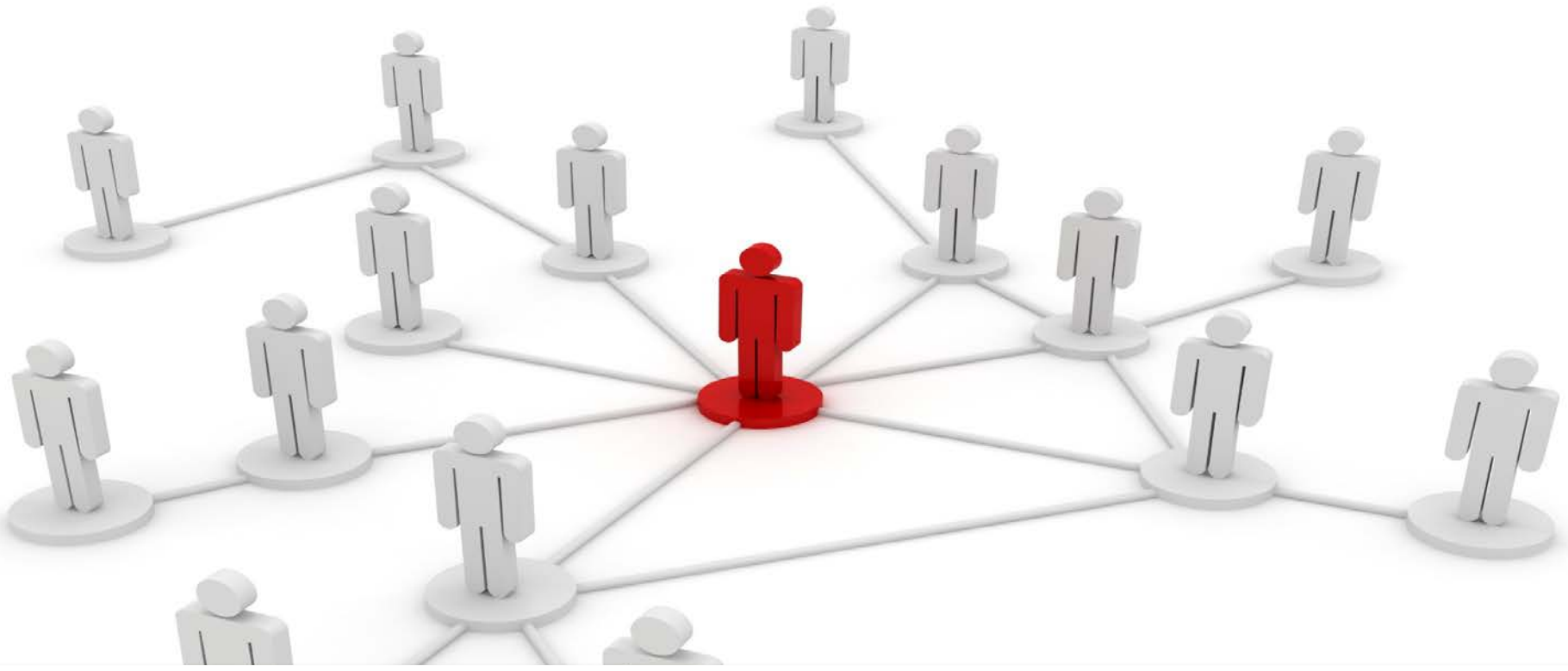
Participation in Programs/Events

Percent of Alumni Community Participating
in Programs/ Events Annually



Use of Metrics

School	Metrics Used
Butler	Attendance for events and programming.
IIT	Engagement scorecard—integrates event attendance, giving participation, volunteerism, substantive interactions (documented meetings, calls, personal emails), and social media membership/participation in private online community.
Lafayette	Net promoter score, event attendance, giving percentage. Just beginning to examine the idea of how to measure engagement and will be developing a plan this summer for implementation over the next two years.
RPI	Attendance at all events.
Stevens	Attendance at events, giving participation, volunteerism, contact info.



Appendix C:
Alumni Boards



Summary

Board Roles, Size, Terms

- All schools have an alumni board. The alumni associations at Stevens and RPI are 501(c)(3) organizations.
- All alumni boards serve in an advisory capacity. At RPI, the board also has a governing function, but its primary role is advisory.
- Board sizes range from 15 to 36. Stevens has the largest board at 36 members.
- Terms range from 2 to 4 years and the number of consecutive terms ranges from 0 to 2.



Summary

Nomination/Selection of Board Members

- All boards except Lafayette's have nomination or selection committees.
- Nominations are gathered via recommendations from board members, staff, faculty, or alumni. In at least one instance, nominations are made based on a profile reflective of the overall alumni population.



Summary

Reporting Lines, Working Relationship with Institution, and Responsibilities

- Board reporting lines vary among participants and include reporting to the alumni director, board of trustees, and no one.
- Working relationships vary among participants: some have representation on or from the university board of trustees, others liaise with the university through the alumni relations office.
- Descriptions of the board's responsibilities ranged from the very technical (attend 3 board meetings) to the very conceptual (represent alumni interests).
- The alumni boards at RPI and Stevens represent their respective alumni associations, which are 501(c)(3) organizations. Given the unique structure at RPI, detail is provided regarding its board structure.



RPI Alumni Association Board Detail

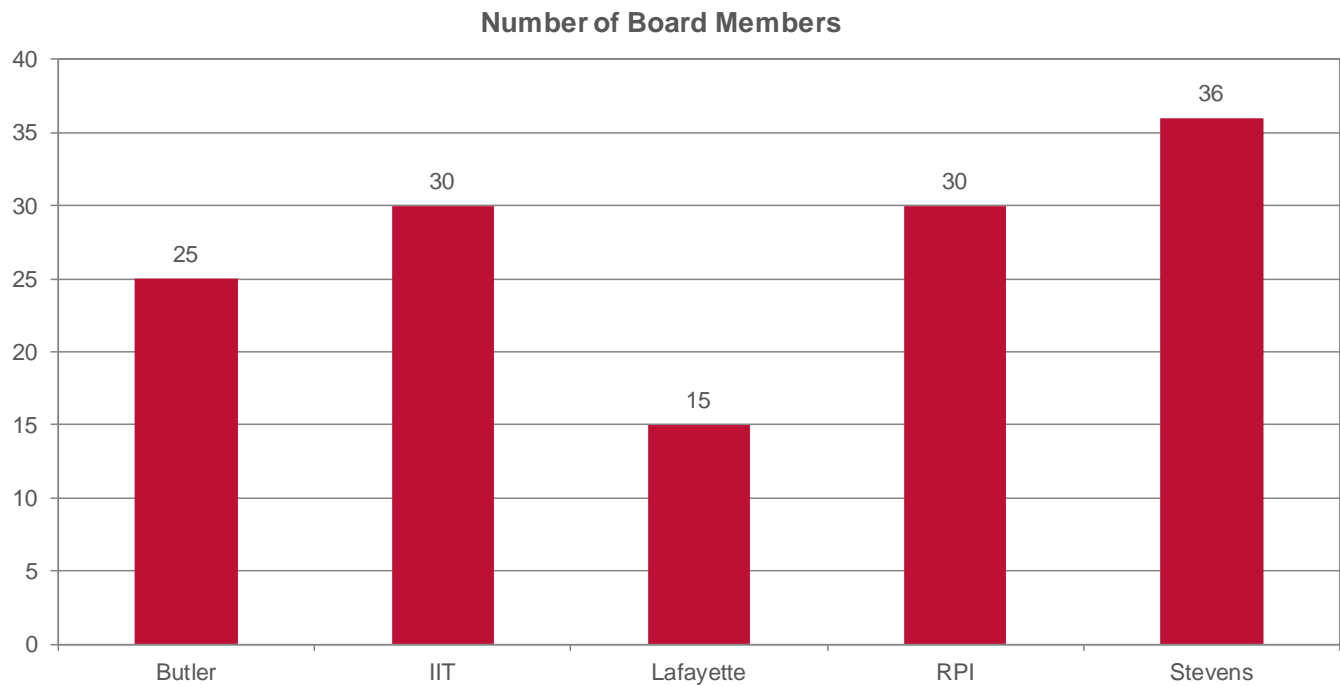
- RPI has a unique relationship with its alumni association. The alumni association is a separate 501(c)(3) organization, but has no staff.
- The RPI alumni relations staff does the work of alumni engagement, but collaborates with the board on what the strategic priorities for alumni engagement should be.
- What makes the collaboration work is the positive, strong relationship between the university and the alumni association board. The alumni relations director works hard to keep communication and planning transparent and functioning well.
- However, the RPI alumni director does not recommend employing a 501(c)(3) structure for the alumni association.



RPI Alumni Association Board Detail

- A few things have helped make this organizational structure work. If these are not in place, the structure will not work:
 - Stability: There has been little turnover in leadership in the alumni association and the alumni relations office. The current alumni director has been in his position for 15 years.
 - Performance planning: 18 months before a new fiscal year, the university prepares its operating plan. At the same time, the alumni association begins its planning. Conversations about what each party wants to accomplish happen concurrently and collaboratively so that by the end of the process, the alumni association plan becomes part of the university plan.
 - Commitment from the university: Several years ago the board wanted to begin fundraising for an endowment to support the alumni association's programming and three student scholarships. The university was uncomfortable with the idea of the alumni board raising funds for its own 501(c)(3), so they created an endowment held by RPI towards which the alumni association could raise funds.

Board Size



Terms

School	Term Years	Consecutive Years
Butler	4 Years	Cannot serve 2 terms consecutively.
IIT	3 Years	Can serve 2 terms consecutively.
Lafayette	2 Years	Can serve 2 terms consecutively. Officers can also serve as members at large—2-year terms, can serve 2 terms consecutively.
RPI	1–3 Years	Did not provide.
Stevens	2 Years	Can serve 2 terms consecutively.

Nomination/Selection

School	Nominating Method	Recommendations Gathered Through...
Butler	Nominating committee comprised of current board members and select volunteers.	
IIT	Nominating committee works to nominate candidates based on a profile reflective of the overall alumni populations—geographic, gender, college, decade.	
Lafayette	Did not respond.	Alumni relations and development staff.
RPI	Selection committee to review and recommend a member.	Alumni, faculty, and staff of the institute.
Stevens	Nominations committee develops slate and a ballot is sent to all alumni (40,000).	

Board Reporting Lines and Working Relationships

School	Reporting	Working Relationship between Alumni Board and Institution
Butler	Executive Director of Alumni and Engagement	The Alumni Board President has a seat on the university president's Board of Trustees. The Office of Alumni and Parent Programs is an office housed in the Advancement division, so the working relationship with the Vice President of Advancement is close. The Vice President of Advancement serves as the program's liaison to the university president.
IIT	Board Chairperson, who is supported by the Senior Director, Alumni Relations	The alumni board has 3 to 5 university board trustees as members. The university president provides regular updates as part of the board's quarterly meetings. The vice president of advancement attends all meetings and participates in new member orientation. The board is self-perpetuating, with advancement providing candidate nominations.
Lafayette	The Board of Trustees	The Executive Director of Alumni Relations acts as secretary to the Alumni Council and is the primary liaison to College leadership. The President of the Alumni Council attends Board of Trustee meetings.
RPI	Executive Director of the Rensselaer Alumni Association	The working relationship between all of the institute's leadership is strong, with great collaboration and a sincere passion for helping the alumni and students, while being great advocates for Rensselaer. This connection is very strong between both groups.
Stevens	Self-governing	The relationship between the board and the university has been fragile at times, but is currently strengthening.

Board Responsibilities

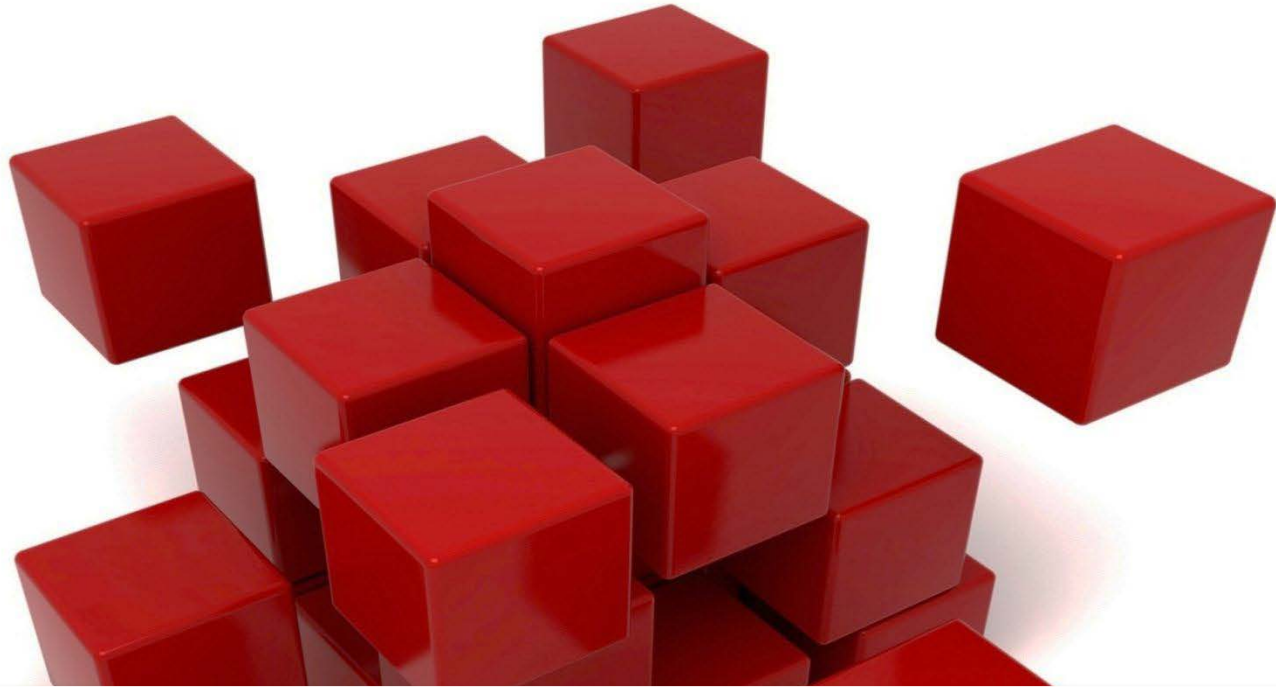
School	Responsibilities
Butler	The Association shall be governed by an Alumni Board of Directors to implement the activities and purposes of the Association. In order to perform its duties, the Board is authorized to do all legal things in the furtherance of the purposes of the Association. The Board may also establish policies or guidelines for the governance of the Association or any local or regional chapters or special interest alumni organizations.
IIT	Members must attend at least two of the three regularly scheduled meetings of the Board. Members must serve on at least one committee of the Board. Members of the Board serve three-year terms and may serve up to two consecutive terms. Make a personal financial contribution in the minimum amount of \$1,000 per fiscal year to the institutional area of the member's choice.

Board Responsibilities

School	Responsibilities
Lafayette	<p>Encourage each alumnus/alumna, as an individual, to assume a full measure of responsibility for the progress of the College. Provide leadership and the means for alumni to unite in their efforts to support and strengthen the College. Work closely with the Board of Trustees and the administration of the College to achieve unity of purpose and activity. Disseminate information that will keep alumni well-informed about the College and the association. Establish class and chapter organizations to efficiently carry out the objectives of the association. Assist in raising funds for the improvement of the College. Encourage qualified students to apply for admission to the College. Make recommendations through its officers to the Board of Trustees concerning matters essential to the welfare of the College.</p>
RPI	<p>The RAA Board of Trustees consists of approximately 30 caring and involved student and alumni members who represent alumni interests to the Institute. Other than some designated positions, the trustees-at-large are elected by fellow alumni. The RAA board works closely with the Office of Alumni Relations in developing and implementing programs that are of interest and value to RPI alumni, including networking, social, educational, and student-centered activities. The Board meets in Troy three times per year and convenes by teleconference or e-mail between meetings. Each elected trustee-at-large is expected to attend all campus board meetings.</p>

Board Responsibilities

School	Responsibilities
Stevens	<p>The Stevens Alumni Association is governed by a Council with responsibility to carry out the mission, activities, and affairs of the Association as defined by its Constitution. The Council consist of (134) members; the Officers, the three immediate Past Presidents, the Decade Representatives, the Class Representatives, the Graduate Representatives, the Club Representatives, the Chair of the Stevens Fund, the Trustees of the Association and the Alumni Trustees on the Board of Trustees of the Institute. There is an Executive Committee of the Council which exercises the power and assumes the duties of the executive management to the extent directed by the Council. The Executive Committee consist of 31 members; the Officers, the two immediate Past Presidents, the Decade Representatives, the Graduate Representatives, the Chair of the Stevens Fund , the Trustees of the Association and the Alumni Trustees on the Board of Trustees of the Institute.</p> <p>The President, two Vice Presidents, Treasurer, Decade Representatives and Graduate Representatives are elected annually by ballot sent by mail to all Association members (39,749).</p> <p>The President presides at all meeting of the Council and Executive Committee of the Council. The Trustees of the Association (5) maintain the Constitution and By-Laws and review the proper operation of the Association.</p> <p>An Association Executive Secretary and staff carry out all the administrative functions under the direction of the President and Executive Committee. All Association Committees are chaired and staffed by members of Association.</p>



Appendix C:

Alumni Relations Partnerships



Summary

Collaboration, Partnership with Development, and Measuring Correlations

- Schools increased collaboration with university partners when communication improved and priorities aligned. Finding ways to work with other departments on initiatives that advance the institution were also found to be effective.
- Two schools identified career services and admissions as key partners.
- When describing the alignment and working relationship between the alumni relations and development departments, the indication from all schools was that the partnership is ingrained through the structures of their organization.

Summary

- Alumni relations is in the same division as development, and AR staff approach their work as a shared endeavor.
- Three out of the five schools assess the correlation between involvement in alumni programs and giving behaviors.
- Indicators of giving behaviors are volunteering, attending an event, and affinity for a particular program. In addition, RPI has found that those who attend two or more events contribute twice as much to the university.

Increase in Collaboration

School	Ways Collaboration Increased with University Partners
Butler	Communication with other university departments has opened up opportunities for collaboration in addition to opportunities for our alumni base.
IIT	Strategic collaborations focused on university priorities—specifically with enrollment and placement, two areas where alumni can be most helpful. Dedicated staff within admissions and career services for alumni engagement has helped.
Lafayette	Very close partnership with Career Services and Admissions.
RPI	Historically the Office of Alumni Relations has great relationships and collaborates well with many departments on campus. There are many ways we collaborate, between our terrific student programs in collaborating with the office of the student experience, to our incorporation of many departments and schools during our Reunion and Homecoming program.
Stevens	Increased communication; partnerships on events.

Correlations between Alumni Involvement and Giving

School	Assesses Correlation between Alumni Involvement and Giving	Correlations
Butler	Yes	Early engagement seems to be key. It is something we struggle with, but are also constantly working on.
IIT	Yes	Volunteerism, event participation, and affinity for the specific program.
Lafayette	No	
RPI	Yes	Consistently we find that those who attend greater than or equal to two alumni events per year contribute double to Rensselaer. Additionally, volunteers and those that are a part of committees on campus will also contribute at a higher numbers. Our involved alumni giving is ~40%.
Stevens	No, but plans to begin tracking.	

Partnership between Alumni Relations and Development

School	Description of Partnership
Butler	We are in the same division as development, so we are always working together.
IIT	We are all a part of advancement and approach our work as shared. Many alumni programs are viewed as cultivation and stewardship opportunities. There is little separation between our roles in building relationships and securing support.
Lafayette	Executive Director of Alumni Relations reports to the Vice President Development and College Relations. Very close working relationship between the departments.
RPI	The Office of Alumni Relations is a part of the Institute Advancement Division. The office collaborates and leverages all opportunities with the development departments. From campus and regionally based programs, to speakers and prospect meetings, our office enables opportunities for the entire division.
Stevens	In the last couple of years, the relationship has been more collaborative and continues to strengthen.