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Kelly T. Lauersen

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Submitted to the Program of Organizational Dynamics, College of Liberal and Professional Studies in the School of Arts and Sciences in Partial Fulfillment of the Requirements for the Degree of Master of Science in Organizational Dynamics at the University of Pennsylvania
Advisor: Jean-Marc Choukroun

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Time, Talent, and Treasure: Exploring Development and Alumni Relations Metrics

Abstract

One of the most common questions for alumni relations professionals is how to accurately measure alumni engagement. This capstone examines alumni engagement metrics from an organizational perspective as a way to identify why such a complex relationship exists between development and alumni relations teams. Limited research exists on this topic, so I reviewed the related literature on goal setting theory, characteristics of engaged alumni, the relationship between giving time and giving money, and alternative ways to measure donations of time. Given my position at Wharton External Affairs at the University of Pennsylvania, I employed the method of Action Research within my own organization. I collected data through my professional experience, including 22 informational interviews with colleagues at Wharton, Penn, and six peer institutions. While I did discover new methods for how to measure different types of alumni engagement, my primary conclusion focuses on five key organizational changes that I believe will help improve the dynamics between alumni relations and development teams.

Keywords

alumni relations, alumni engagement, development teams

Comments

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Advisor: Jean-Marc Choukroun

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EXPLORING DEVELOPMENT AND ALUMNI RELATIONS METRICS

by

Kelly T. Lauersen

Submitted to the Program of Organizational Dynamics,
College of Liberal and Professional Studies
in the School of Arts and Sciences
in Partial Fulfillment of the Requirements for the Degree of
Master of Science in Organizational Dynamics at the
University of Pennsylvania

Philadelphia, Pennsylvania

2021

TIME, TALENT, AND TREASURE:

EXPLORING DEVELOPMENT AND ALUMNI RELATIONS METRICS

Approved by:

Jean-Marc Choukroun, Ph.D., Advisor

Alan M. Barstow, Ph.D., Reader

ABSTRACT

One of the most common questions for alumni relations professionals is how to accurately measure alumni engagement. This capstone examines alumni engagement metrics from an organizational perspective as a way to identify why such a complex relationship exists between development and alumni relations teams. Limited research exists on this topic, so I reviewed the related literature on goal setting theory, characteristics of engaged alumni, the relationship between giving time and giving money, and alternative ways to measure donations of time. Given my position at Wharton External Affairs at the University of Pennsylvania, I employed the method of Action Research within my own organization. I collected data through my professional experience, including 22 informational interviews with colleagues at Wharton, Penn, and six peer institutions. While I did discover new methods for how to measure different types of alumni engagement, my primary conclusion focuses on five key organizational changes that I believe will help improve the dynamics between alumni relations and development teams.

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LIST OF TABLES

TABLE		Page
1	Executive Summary of Findings	35
2	Titles of Interviewees Containing the Word “Alumni”	38
3	Responses to Interview Question on Role of Alumni Relations Team	40
4	Responses to Interview Question on Definition of Alumni Engagement	42
5	Responses to Interview Question on Measurement of Alumni Engagement	44
6	Responses to Interview Question on “Blue Sky” Metrics	47
7	Responses to Interview Question on Alumni Engagement Scores	48
8	Range of Club President Hours Given per Month	54
9	Range of Club Leadership Team Hours Given per Month	55
10	Club Leader Hours Given per Month and Year	56
11	Number of Clubs with Out of Pocket Expenses	57
12	Range of Reunion Volunteer Hours Given per Month	58
13	Club Leader and Reunion Total Volunteers and Hours Given in 2020	59
14	Club Emails Sent through NationBuilder Platform	60
15	Club Event RSVPs through NationBuilder Platform	60
16	Monetization of Club Leader Hours from Annual Registration Survey	63
17	Monetization of Club Leader Hours Including Survey Non-Responders	63
18	Monetization of Alumni Relations Volunteer Hours	64
19	ROI of Wharton Alumni Clubs Program	65

LIST OF FIGURES

FIGURE		Page
1	Representation of Different Structures between Alumni Relations and Development Teams	40

TABLE OF CONTENTS

	Page
Abstract	iii
Acknowledgments	iv
List of Tables	vi
List of Figures	vii
Chapter 1: Introduction	1
Overview	1
Background	1
Personal Introduction	2
Research Methods	3
Assumptions	4
Summary	6
Chapter 2: Literature Review	8
What are the consequences of having responsibilities that are difficult to measure?	9
What is alumni engagement?	12
What is the relationship between giving time and giving money?	16
How can you measure giving time?	21
Chapter 3: Methodology	24
Research through Academic Experience and Literature	26
Qualitative Informational Interviews	27
Data Collection through Professional Experience	31
Limitations	34

Chapter 4: Data Collection	35
Qualitative Informational Interviews	37
Team Titles	38
Relationship between Alumni Relations and Development	39
Role of Alumni Relations	40
Definition of Alumni Engagement	42
Measurement of Alumni Engagement	43
“Blue Sky” Metrics	46
Alumni Engagement Scores	48
Additional Themes	51
Data Collection through Professional Experience	53
Volunteer Hours- Club Leaders	53
Volunteer Hours- Reunion Committee Members	57
Emails Sent by Volunteers	59
Research through Academic Experience and Literature	61
Valuation of Volunteer Work	61
Return on Investment	64
Chapter 5: Data Interpretation	67
Five Key Takeaways	70
Chapter 6: Conclusion	84
Areas for Future Research	85
Final Reflections	86
References	89

Appendix A: Summary Report	93
Appendix B: Informational Interview Questions Template	105
Appendix C: Wharton Global Clubs Annual Registration Survey	106
Appendix D: Wharton Global Clubs Infographic	107
Appendix E: Wharton MBA Reunion Committee Survey Example	108
Appendix F: Managing a Volunteer Leadership Team Presentation Slides	109

CHAPTER 1

INTRODUCTION

Overview

One of the most common questions in the development and alumni relations profession is how to accurately measure alumni engagement. However, from my experience working in alumni relations, I have found that these conversations do not always acknowledge the imbalance within the field and the fact that this measurement challenge does not apply to all teams within advancement organizations. In actuality, development is quite easy to measure, which allows those teams to have very specific monetary targets. Conversely, alumni relations teams, who are responsible for nonmonetary engagement behaviors, have much more ambiguous goals. For alumni relations professionals, what are the consequences of having responsibilities that are difficult to measure, especially in comparison to their development counterparts? How can alumni relations teams set more specific, measurable goals that accurately reflect their work and their relationship with their development colleagues? What is the most effective way to measure nonmonetary alumni engagement?

Background

The Council for Advancement and Support of Education (CASE) is the global non-profit association dedicated to educational advancement. A page on their website says, “There is not an industry-wide standard for alumni engagement metrics” (“Sample Collection: Alumni Engagement Metrics”, 2016, May 1). CASE created the Alumni

Engagement Metrics Task Force in 2016 as “the culmination of a decade long discussion within the profession on the topic of alumni engagement metrics” (Alumni Engagement Metrics Task Force, 2018, p. 4). Fleming (2019) explains that “despite increasing reliance on strong relationships with highly engaged alumni to advance institutional interests, no clear definition of ‘alumni engagement’ has been developed” (p. 104). He provides a conceptual framework for how the alumni engagement process occurs, but he admits that “a method to *measure* engagement lies outside the scope” of his study (Fleming, 2019, p. 126). My capstone aims to help fill this gap in the literature by exploring new methods for measuring alumni engagement that can actually be used in practice. This will provide an important contribution to the alumni relations industry and help me in my current role.

Personal Introduction

I have worked at Wharton External Affairs (WHEA) for almost nine years, entirely on the alumni relations team. WHEA falls under the University of Pennsylvania’s (Penn) Development and Alumni Relations (DAR) department. WHEA has separate teams for fundraising and alumni relations. Similar to other institutions (Goldsmith, 2012, p. 52), WHEA’s development team is significantly larger than the alumni relations team, with approximately 40 fundraisers and only 16 alumni relations staff. In my current role, I lead the global clubs team and am responsible for the strategic direction and oversight of 75+ regional and affinity alumni clubs and the 800+ alumni volunteers who lead and manage the operations of these clubs. A challenge that I keep encountering is that club leadership is hard to measure. It is difficult for me to convey to

my colleagues, who are not on the global clubs team, the full scope of the time and effort that the volunteers give. This in turn makes it difficult to demonstrate our value and impact. I personally know that my team and our volunteers are working hard, but how do I show that?

Not only is club leadership difficult to measure, the entire alumni relations team struggles with these questions of identifying appropriate metrics. The alumni relations team can report total number of events, attendance at those events, and total number of volunteers, but I have always questioned whether these metrics alone sufficiently reflect all of the work that our team does and whether they prove that our alumni are engaged with the school or not. When I look at the size of the alumni relations team in comparison to that of development, it is hard to not feel like the lesser of the two. Accurately capturing the full story of the alumni relations team is essential to our future in the industry. There is a common saying within DAR that we want alumni to give their “time, talent, and treasure”, but the resources for time and talent could very quickly disappear if we cannot establish better metrics.

Research Methods

For my methodology, I employed Action Research in my own organization of WHEA. This was a logical method given my current position, tenure in the organization, and existing relationships. Limited research exists on how to measure alumni engagement, so I examined the related literature on goal setting theory, characteristics of engaged alumni, the relationship between giving time and giving money, and alternative ways to measure donations of time. After completing a thorough review of this literature,

which is outlined in Chapter two, I collected data through my professional experience, including 22 informational interviews with colleagues from WHEA, Penn, and six peer institutions. I then performed a content analysis of the data collected. More details about my methodology can be found in Chapter three, with all of my findings presented in Chapter four. Based on this information, in Chapter five, I have identified five key organizational changes that I believe will help address the imbalance between development and alumni relations. I created a brief presentation of my findings and conclusions (See Appendix A), which I shared with everyone who participated in my interviews and as my contribution to the larger alumni relations industry. Finally, in Chapter six, I suggest areas for future research and discuss my plans to continue my exploration after the completion of this capstone.

Assumptions

My main assumption is that the findings from the volunteer literature can be applied to alumni volunteers, and specifically to Wharton alumni volunteers. Cnaan et al. (1996) propose four dimensions for defining a volunteer: “the voluntary nature of the act, the voluntary nature of the reward, the context or auspices under which the volunteer activity is performed, and who benefits” (p. 369-370). For the most part, Wharton volunteers are “pure” in terms of the voluntary nature of the act and the formal context of being associated with an elite business school. However, the other two dimensions are more uncertain. The alumni are the volunteers and the beneficiaries, and while the volunteers do not receive any direct financial benefits, there is no denying that the nonmonetary rewards are substantial (e.g. Wharton branded gifts, discounted tickets to

school events, access to faculty and school leadership, business opportunities and connections, etc.).

Alumni volunteers might also differ from more traditional volunteer roles because the role of alumni includes “expectations that colleges and universities perceive for the alumni to support the institutional mission and the behaviors an alumnus(a) exhibits which meet those expectations” (McDearmon, 2012, p. 290). This differs from other philanthropic opportunities where an association does not exist until a voluntary action is taken. For example, “in order to be labeled as a blood donor, an individual must first act out the donation behavior that corresponds with that role definition” (McDearmon, 2012, p. 289). Likewise, Weerts and Ronca (2007a) show that “the quality of an alums undergraduate experience...is an important variable predicting his or her volunteer support” (p. 287). Behavior, expectations, and motivations as an alumnus are heavily influenced by one’s experience as a student, which is not typically a factor in other types of volunteering. Additionally, Hustinx et al. (2010) explain that “one of the most agreed upon aspects of volunteer research is that people with higher social and economic status tend to volunteer more” (p. 422). Almost all Wharton alumni would fall into this “dominant status”, which might make them more likely to give back in general. Most studies also only examine volunteering within one country, while Wharton volunteers span the entire globe with club leaders in almost 40 different countries. I recognize that “in various cultures there are no terms such as volunteers” (Hustinx et al., 2010, p. 410) and that there are differences in definitions between countries. For example, “community service is a relatively new concept in India” and “the Dutch word for ‘volunteer’ implies work done on a regular basis” (Handy et al., 2000, p. 54). Given time and other

constraints for this project, I examine Wharton volunteers as a whole, but acknowledge that there may be cultural and regional factors at play.

I also assume that new standards and processes that are suggested and/or implemented at Wharton can be shared with and will benefit other peer institutions. My hope is to make a positive impact not just at WHEA, but across the larger alumni relations industry. It is possible that certain factors that make Wharton alumni and/or WHEA unique would make it challenging to replicate my findings elsewhere (e.g., business school, combination of undergraduate and advanced degree programs, located in Philadelphia, alumni population size that is approximately 75% male and 17% international, team size and structure, organizational budget, technological resources, etc.).

Summary

The University of Pennsylvania's founder, Benjamin Franklin, famously once said, "Remember that time is money". From my perspective, if this were true, then there would not be such a large imbalance between the development and alumni relations teams. My intention is not to discredit or shift the focus away from any fundraising goals. Alumni need to keep giving their treasure. While it is generally accepted that time and talent are also important, as evidenced by the literature and CASE creating a Task Force, where is the data to back this up?

There is a significant amount of literature on characteristics of alumni who are most likely to donate and/or volunteer (Weerts & Cabrera, 2017; Weerts & Ronca, 2007a, 2007b; Wunnava & Lauze, 2001). Research has been done on alumni role identity

(McDearmon, 2012) and how alumni make sense of their experiences and relationship with their alma mater (Fleming, 2019). While all of this is important and helpful context, the information on how to actually measure alumni engagement in practice, beyond just counting the number of volunteers and event attendees, is shockingly sparse. My capstone seeks to fill this void and answer the question: How can alumni relations professionals measure nonmonetary alumni engagement behaviors?

CHAPTER 2

LITERATURE REVIEW

Because the research on alumni engagement metrics is limited, I will explore the related literature around four primary questions: 1) what are the consequences of having responsibilities that are difficult to measure; 2) what is alumni engagement; 3) what is the relationship between giving time and giving money; and 4) how can you measure giving time? The purpose of the first question is to provide a theoretical basis for any changes that I might propose within my organization. The second question provides context, highlights the gaps in the alumni engagement literature, and thus allows me to explain how my capstone seeks to fill those gaps. Question three acknowledges the complex relationship between development and alumni relations. While my research focuses on nonmonetary alumni engagement, it is impossible to explore this topic in isolation from the monetary side of things. Because there does not appear to be any studies examining team dynamics specifically in advancement organizations, my hunch is that exploring the relationship between giving time and giving money will reveal insights into the two teams responsible for those behaviors and what appropriate corresponding metrics might look like. For my final question, I want to focus in on the type of donation that is harder to measure, that of time. Given that in my current role, I work so closely with volunteers, this question is of particular interest to me. Is it possible to accurately monetize alumni donations of time? Would this help mitigate some of the imbalance between development and alumni relations?

What are the consequences of having responsibilities that are difficult to measure?

Locke and Latham (2002) found that “specific, difficult goals consistently led to higher performance than urging people to do their best” (p. 706). They further explain that “when people are asked to do their best, they do not do so...because do-your-best goals have no external referent and thus are defined idiosyncratically” (Locke & Latham, 2002, p. 706). Wharton is currently in a \$1 billion fundraising campaign (“More Than Ever”, n.d.), which is a very specific, collective goal for the development team. On the other hand, the alumni relations team tends to focus more on “do your best” goals with the aim of engaging as many alumni as possible. Wharton currently has 100,000 living alumni, so it is almost impossible to conceptualize when we have engaged enough alumni. Of course, there is also a sense of wanting to raise as much money as possible, but only after the specific fundraising goal is reached.

To build on Locke and Latham’s work, Wallace and Etkin (2017) examined the role of reference points in shaping the effects of goal specificity. The theory of goals as reference points “posits that the desired end state of a goal serves as a reference point during goal pursuit, producing a ‘value function’ that drives motivation as a function of distance to the goal end state” (Wallace & Etkin, 2017, p. 1033). Wallace and Etkin (2017) found that without a specific end goal to use as the reference point, “nonspecific goal pursuers will use the initial state (i.e., where goal pursuit began) as the reference point instead” (p. 1034). They found that for “specific goals, accumulating goal progress increases subsequent motivation, but for nonspecific goals, accumulating goal progress decreases subsequent motivation” (Wallace & Etkin, 2017, p. 1046). As previously mentioned, common alumni relations metrics include number of events, event attendance,

and number of volunteers. Our reference points are these numbers from each previous year, or what Wallace and Etkin (2017) would call the initial state. Given space, budget, and opportunity constraints, these numbers tend to remain somewhat stable year after year and are not always an accurate reflection of alumni having a strong relationship with the school, which makes it even harder to maintain team motivation.

Ethiraj and Levinthal (2009) examined the effects of multiple goals in complex organizations. In their summary of the literature, they included work done by Hölmstrom and Milgrom (1991), which was the “first formal effort to grapple with the problem of incentive design when there are multiple, weakly correlated performance goals to be attained and the measurement of these goals is asymmetric, i.e., some goals are more accurately measurable than others” (Ethiraj & Levinthal, 2009, p. 7). In the case of DAR and WHEA, the two performance goals would be fundraising (measurable) and alumni relations efforts (harder to measure). They found that “when performance goals are positively correlated (i.e., the goals are complements), then incentive design is not a serious issue and asymmetries in the measurement of the performance goals are self-correcting...because increases in effort to achieve one goal will also lead to improvement on the positively correlated goals” (Ethiraj & Levinthal, 2009, p. 7). On the other hand, “when the multiple performance goals are uncorrelated, or even weakly correlated, and there are asymmetries in how accurately the goals can be measured...employees will reduce effort on less measurable goals and transfer their effort to the more measurable goals” (Ethiraj & Levinthal, 2009, p. 7). Efforts to increase giving time and giving money are not always positively correlated since asking for money can sometimes disengage alumni. Unfortunately, I currently do not have a more measurable goal on

which to transfer my efforts, so instead, the emphasis shifts to a metric that I am not directly responsible for (i.e., fundraising).

Additionally, expectancy theory “predicts that motivation is enhanced when behaviors are highly instrumental in achieving desired outcomes” (Colvin & Boswell, 2007, p. 44). Currently, in alumni relations, I believe there is an issue of action alignment, which is an “alignment of employee actions with the objectives of an organization's strategy” (Colvin & Boswell, 2007, p. 40). Colvin and Boswell (2007) use the example of an organization whose strategy is “focused on developing a reputation of being the leading brand in terms of quality for a particular market niche” (p. 45). In this strategy, “it may be very difficult to link any individual employee's behavior to this strategic outcome”, and as a result, “the lack of instrumentality of employee behavior in achieving the desired outcome will reduce employee motivation to engage in this behavior” (Colvin & Boswell, 2007, p. 45). It is challenging for me to directly link my individual actions to WHEA’s priority of securing “philanthropic commitments” (“WHEA Intranet”, 2021), whereas my colleague on the development team can see how the \$100,000 gift she secured contributes to the \$1 billion campaign goal. Furthermore, “research on social loafing has demonstrated that group members who feel their contributions are unidentifiable may exert little effort on behalf of a group” (O’Leary-Kelly, 1994, p. 1287). Without clear metrics and improved action alignment, the alumni relations team risks becoming demotivated and less committed.

From a program evaluation perspective, Michael Quinn Patton (1986) offers an alternative view. He explains that “evaluation research is traditionally defined as measuring the extent to which program goals and objectives are attained” and that “such

an approach requires specification of goals and objectives that are clear, specific, and measurable” (Patton, 1986, p. 94). He believes that “confusing the specification of goals with their measurement and the standard desirability is a major conceptual problem in many program evaluations” and that “the conceptualization of program direction in a statement of goals and objectives should be clearly separated from the specification of how those goals and objectives will be measured” (Patton, 1986, p. 95). Goals make explicit values and purpose, while “measurement, on the other hand, provides data indicating the relative state of goal attainment” (Patton, 1986, p. 95). Some things are easy to measure, while indicators for other areas are “less precise, less clear, and less reliable”, and goals should not be limited by what is measurable (Patton, 1986, p. 95). Likewise, “identifying clear, specific, and measurable outcomes at the very start of an innovative project may be not only difficult but counterproductive” (Patton, 2011, p. 5). Separating goal specificity from goal measurement is an important distinction, but even Patton (1986) goes on to say, “Once they have stated as carefully and as explicitly as they can what they want to accomplish, then it is time to figure out what indicators and data can be collected to monitor relative attainment of goals” (p. 96).

What is alumni engagement?

The early education literature focuses on alumni characteristics that lead to donations of money. McDearmon (2012) explains that “individual factors such as age, income level, satisfaction with one's collegiate experience and involvement in institutional activities after graduation have been found to increase the likelihood of an alumnus(a) making a gift” (p. 285). Additional key demographic variables, such as

“family size, and the ages and schooling of children and grandchildren”, have also been shown to influence alumni giving capacity (Weerts & Ronca, 2007b, p. 21). For a small liberal arts college, Wunnava and Lauze (2001) identified the “following characteristics of alumni as some of the most important to donating: volunteering for the college, major in the social science division, language school attendance, residence in states with alumni chapters, and employment within the financial sector” (p. 540).

Weerts and Ronca appear to be the first to look “beyond just charitable giving and explored multiple ways alumni can be supportive after graduation” (McDearmon, 2012, p. 285). They identified the new category of “supporter” or “super alumni”, which “refers to an alumnus who has served as both a volunteer and donor” (Weerts & Ronca, 2007b, p. 25). Interestingly and in contrast to the previous literature, they found that these “super alumni did not look significantly different compared to their inactive classmates regarding academic and social engagement while in college” and instead they are “distinguished by their attitudes and expectations about university needs, and their personal responsibility to give and volunteer at the university” (Weerts & Ronca, 2007b, p. 32).

In a later study, building on the observation that “higher education leaders in the United States increasingly rely on relationships with alumni to advance multiple institutional goals” (p. 1), Weerts and Cabrera (2017) examined nonmonetary support as the primary focus, rather than just in relationship to donating. Drawing on past literature, they conceptualized four categories of alumni non-monetary support behaviors: “volunteerism (charity preference), political advocacy (social change preference), multimode engagement (high preference for social change/charity), and disengagement

(low preference for social change/charity)” (Weerts & Cabrera, 2017, p. 2). “Super Engaged Alumni” are those “that are actively engaged in a full range of non-monetary support behaviors” (Weerts & Cabrera, 2017, p. 6). While this study reinforces the belief that nonmonetary support behaviors are important in advancing institutional goals, the authors still suggest that future research “might consider how various non-monetary support segments relate to financial support for the institution” (Weerts & Cabrera, 2017, p. 8). Nonmonetary engagement is essential to advancing institutional objectives, but it is almost impossible to consider in isolation from the other primary goal of fundraising.

CASE’s Alumni Engagement Metrics Task Force has defined alumni engagement as “activities that are valued by alumni, build enduring and mutually beneficial relationships, inspire loyalty and financial support, strengthen the institution’s reputation and involve alumni in meaningful activities to advance the institution’s mission” (Alumni Engagement Metrics Task Force, 2018, p. 5). They have also identified four primary categories of alumni engagement: “volunteer, experiential, philanthropic, and communication” (Alumni Engagement Metrics Task Force, 2018, p. 6). Monetary and nonmonetary behaviors are both considered a form of engagement.

While CASE’s definition and categories are a helpful place to start, they still leave a lot of questions unanswered. Most notably, they do not explain the relationship between monetary (i.e., philanthropic) and nonmonetary (i.e., volunteer, experiential, and communication) engagement or how all of the categories are connected to fundraising targets. From CASE’s definition, it seems that the total number of donors would be considered an engagement metric, while the total amount of money given would not. There is an obvious cause and effect between total donors and total dollars, but what

about the other engagement categories? The development team, responsible for philanthropic engagement, can directly show how their work has contributed to the fundraising and capital campaign goals. Conversely, the alumni relations team is left wondering how their total number of volunteers and event attendees have really contributed. A volunteer who makes a donation would also be considered a donor, so which team should take credit for it?

Building on the white paper produced by CASE's Task Force, Fleming (2019) set out "to understand how alumni evaluate these behaviors and experiences to understand how they influence alumni perceptions about, and relationships with, their alma mater" (p.106). He believes that CASE's categories are "centered around activities, but do not account for emotions, motivations, and perceptions, leaving out a substantial element of alumni engagement in how alumni make sense of these experiences" (Fleming, 2019, p. 106). Fleming (2019) found that:

Alumni engagement is the convergence of what an alumnus/a believes is important about their alma mater (personal values), their understanding of the characteristics their alma mater possesses (institutional integrity), the strength of affinity they feel towards the institution (sense of connection), what personal resources they are willing to invest towards the university (commitment), and their assessment of the worth of their investment (sense of fulfillment) (p. 112).

Fleming's (2019) definition is a much more robust understanding of alumni engagement, accounting for more than just overt behaviors, but as he admits in his limitations, this framework does not help solve the measurement question. Fleming (2019) also only interviewed seven alumni to create his framework. Surveying personal values and beliefs

might be feasible for a small alumni population, but it would be much more difficult to do this for Wharton's 100,000 alumni, especially if we have not even established proper metrics for the behaviors yet.

What is the relationship between giving time and giving money?

As evidenced in CASE's definition, alumni engagement includes both monetary and nonmonetary behaviors, but then what is the connection between the two and what might this reveal about the relationship between the teams responsible for these distinct behaviors? Giving time and giving money are often "viewed under a larger conglomerate of helping behaviors" (p. 56), but Drollinger (2010) explains that they are distinct actions in that volunteering is a direct form of helping, while donating is indirect. According to Drollinger (2010), "all donors and volunteers do not give on the same level but and in different degrees of time, money, and commitment", so it should be assumed that motives and expected rewards are also "different according to the level of participation and the type of donation that they engage in" (p. 64). The functionalist approach, "which is concerned with the motivational bases underlying the plans that people make and act on in pursuit of certain goals" (Dwyer et al., 2013, p. 183), suggests that people who decide to give money, time, or both are acting on different individual motivations.

Konrath and Handy (2017) also found that "different people donate for different reasons" and that "it is also likely that different motives are more or less salient in different contexts (e.g., local vs. international) and when donating for different purposes (e.g., alumni vs. medical research)" (p. 368). In their study, "the top reasons that participants donated were for altruistic reasons, because they trust the organizations, and

because others they know care about donating” (Konrath & Handy, 2017, p. 360). They compared participants’ motives for donating to their motives for volunteering using the Volunteer Functions Inventory. There were some correlations across the two scales, such as the values motive for volunteering with the altruistic motive for giving and the social motive in each. However, not all of the motives in the Volunteer Functions Inventory had a donating counterpart, including understanding, which makes sense “since people do not typically give money to learn more about a charitable organization” (Konrath & Handy, 2017, p. 365).

People also have different perceptions of volunteering and donating. MacDonnell and White (2015) demonstrate that “money is generally construed in relatively more concrete terms than time and time is generally construed in relatively more abstract terms than money” (p. 551). This has consequences for the effectiveness of different marketing appeals to potential volunteers and donors. For instance, they showed that “when the marketing appeal is more concrete, consumer contributions of money as opposed to time are significantly enhanced. However, when the marketing appeal is more abstract, consumer contributions of time as opposed to money increase” (MacDonnell & White, 2015, p. 556). If the preferred methods of asking for time versus money donations are different, then the underlying perceptions of the two behaviors must also be different.

Likewise, Reed et al. (2007) explain that “if a person believes that his or her time is ‘worth’ \$50 per hour and is asked to choose between donating \$200 to a charitable organization and spending four hours of time to assist that charity, he or she should be indifferent between these choices, all else being equal” (p. 179). However, they show that this is not the case and that spending time and effort “is psychologically different

from spending the same amount of money” (Reed et al., 2007, p. 179). In a later study, Reed et al. (2016) further illustrate that “all else being equal, the psychological costs associated with giving time should make people less willing to give time than money in service to a social cause” because “giving time is psychologically more demanding than giving money” (p. 436-437). They focus on the concept of “moral identity” and explore the ways in which “giving time more strongly reinforces the moral-self compared with giving money” (Reed et al., 2016, p. 437). Not only do we have different psychological constructs for giving time and money, we also have different perceptions of ourselves when we engage in these different acts.

While giving time and giving money are clearly distinct behaviors, they are also highly connected. Haski-Leventhal et al. (2011) state that “a very high proportion of individuals who volunteer also donate money in the United States; Independent Sector (2001) reported that, among volunteers, only 2% do not donate” (p. 141). A more recent study conducted by the Corporation for National and Community Service found that “volunteers donate to charity at twice the rate as non-volunteers” and “nearly 80 percent of volunteers donated to charity, compared to 40 percent of non-volunteers” (“Volunteering in U.S. Hits Record High; Worth \$167 Billion”, 2018). Similarly, Feldman (2010) explains that “one clear pattern has emerged over the years: volunteers tend to give more in money” (p. 103). The reverse is also true; “individuals who have shown themselves to give in the past signal that they identify with the goals of the charitable organization and are more likely to respond affirmatively to being asked to give again either monetarily or in time” (Feldman, 2010, p. 109). It has been proven that

“people who volunteer time are also more likely to give money and vice versa” (Choi & Kim, 2011, p. 591).

This leads me to my next question of why this relationship between giving time and giving money exists. Why are volunteers more likely to be donors and vice versa? According to Choi and Kim (2011), “previous studies have found that social bonds and close human interactions are the basis of charitable-giving behavior,” which means that “donors tend to base their donation decisions on their involvement in the networks of face-to-face relationships” (p. 594). Brown and Ferris (2007) refer to this as “social capital” or the “the networks of community and the norms of trust and reciprocity that facilitate collective action” (p. 86). The stronger the networks and sense of community, which occur because of volunteering with others, the higher the likelihood of charitable behavior. Alumni clubs in particular are founded on these networks, which might explain why my club leaders have a significantly higher giving rate than the general alumni population. In fiscal year 2020 (FY’20), 18% of club leaders donated, compared to 8% for the total alumni population.

According to Weerts and Ronca (2007b), “there is a strong connection between giving and how alumni view their alma mater, the degree of satisfaction with their alumni experience, and their level of engagement in alumni activities” (p. 23). The volunteer activity creates an “emotional attachment and investment with the university that has been shown to be an important factor predicting alumni giving” (p. 24). Likewise, Haski-Leventhal et al. (2011) explain that “knowing and working for the organization fosters a trusting relationship”, which “makes it easier for volunteers to donate money and in-kind resources to the organization” (p. 141). As previously mentioned, one of the top motives

for donating is trust in the organization. Volunteers have more interaction and a closer relationship with the organization than non-volunteers do, creating stronger feelings of trust.

In addition to social capital, an emotional attachment, and trust, “one of the biggest determinants of charitable giving (both time and money) is being asked to give” (Feldman, 2010, p. 109). Brown and Ferris (2007) explain that “being asked to give and to volunteer has been found to be a significant determinant of whether an individual does indeed give and volunteer, and more extensive networks present more occasions on which one might be asked to volunteer” (p. 90). Interestingly, “individuals who give money are more than twice as likely to be asked to volunteer and individuals who are asked to volunteer are nearly 6 times more likely to do so” (Feldman, 2010, p. 109).

Liu and Aaker (2008) examined the effects of the order of questions in asking for donations of time and money. They explain “that thinking about time activates goals of emotional well-being and beliefs involving personal happiness” and thus an emotional mindset, while “thinking about money suppresses such emotional goals and instead activates goals of economic utility and beliefs about attainment of such goals” (Liu & Aaker, 2008, p. 545). Through their study, they show that “first asking people about their intentions to donate time leads to a significant increase in actual amounts of contribution, compared to either not asking for volunteering donations or first asking people about their intentions to donate money” (Liu & Aaker, 2008, p. 552). First asking people to volunteer causes them to activate an emotional mindset, which then allows them to see a stronger link between personal happiness and giving money. Not only are volunteers more likely to donate, just asking someone to volunteer can lead to him/her donating.

How can you measure giving time?

A common theme in the volunteer and nonprofit management literature is an attempt to measure the monetary value of volunteer hours. Haski-Leventhal et al. (2011) state, “Each year, about one-half of all American adults volunteer in some capacity. Of this estimated 84 million adults, 25 million volunteer 5 or more hours per week and generate services worth more than \$239 billion annually” (p. 138-139). The Independent Sector estimates the national value of each volunteer hour as \$27.20 (“Value of Volunteer Time”, 2020). On the other side of the world, Hyde et al. (2016) found that “of the 5.2 million Australians who volunteered in 2006, 84% contributed 623 million hours to the Australian non-profit sector with a wage equivalent value of Aus\$15 billion” (p. 46). Additionally, in a study done in Toronto, Handy and Srinivasan (2004) demonstrated that “hospitals derive, on average, \$6.84 in value from volunteers for every dollar they spend—a return on investment of 684%” (p. 2). Is it possible to determine similar numbers for alumni volunteers?

Orlowski and Wicker (2015) outline several methods for the valuation of volunteer work. The first is the “opportunity cost approach (OCA), which sets the monetary value of voluntary work equal to the foregone income during the volunteering time” (Orlowski & Wicker, 2015, p. 2673). The main criticism of this approach is that people do not volunteer when they would otherwise be working; they volunteer during their leisure time. A lot of my club leaders work in financial services or consulting, which is very different work from managing an alumni club. The second method is “the replacement cost approach (RCA), which assigns an equivalent market wage to the task

provided” (Orlowski & Wicker, 2015, p. 2673). Many Wharton alumni clubs hire a paid administrator to manage the basic tasks of running the club. An administrator who works with several of our domestic clubs charges around \$29 per hour, which is on the low end of the spectrum. Another club administrator charges \$80 per hour.

Haski-Leventhal et al. (2011) explain the major flaws in these valuations, specifically that “other impacts, not directly related to the hours volunteered, such as being goodwill ambassadors for the organization, enhancing the organization’s reputation, and advancing its mission are often acknowledged, but not accounted for in economic terms” (p. 139). Volunteers also frequently give “financial and in-kind donations” to their organizations (Haski-Leventhal et al., 2011, p. 139). This is certainly true for Wharton club leaders who often end up personally covering the costs of their events. While the calculations are not perfect, I believe that they are a helpful place to start. It is clear that “the revenue that volunteers create (net of the cost of recruiting, training, and supervising) is not paid to them, but stays within the organization and subsidizes output in the same way as explicit monetary gifts” (Bowman, 2009, p. 496). MacDonnell and White (2015) explain, “money is the ‘common currency’ to which goods, services, and experiences must be broken down in order to evaluate them” (p. 552).

Handy and Mook (2010) suggest that “a cost–benefit analysis of volunteering is useful in order to provide a practical understanding of program costs and outcomes” and that “this information can be invaluable in advocating for resources for volunteer programs” (p. 415). In their study, they use the “The Volunteer Investment and Value Audit (VIVA)”, which “examines inputs into volunteer programs and creates a ‘VIVA

Ratio' that shows the return on volunteering-related investment" (Handy & Mook, 2010, p. 415). This method acknowledges that there are also costs to the organization when using volunteers. For Wharton volunteers, this would primarily include costs associated with the full-time staff and training and stewardship of the volunteers. Following a similar model of Orlowski and Wicker (2015), "as a proxy for assigning the value of benefits, the value of the hours donated by the volunteers were used" (Handy & Mook, 2010, p. 415). Handy and Mook (2010) emphasize that when looking at the costs and benefits of volunteer programs, "it is important to consider both monetary and nonmonetary resources" and "even though time and in-kind donations are not generally recorded in financial statements, they should be considered if they are significant, as the organization could not operate without them" (418). Making these volunteer contributions visible is also important in order to advocate for funding for volunteer management (Handy & Mook, 2010, p. 418).

CHAPTER 3

METHODOLOGY

Before I outline my methodology, I want to make my intentions for this project explicitly clear. Michael Quinn Patton (1986) explains that “it is important to clarify at the outset whether the primary purpose of the evaluation is to make an overall judgment about the effectiveness of a program or to collect information that can be used primarily for program development and improvement” (p. 65). This is an important distinction between summative evaluation and formative evaluation (Patton, 1986, p. 65-66), and my intention is to focus on the latter. I also acknowledge that “personnel evaluation is quite different from program evaluation” (Patton, 1986, p. 71). My goal for this project was never to overhaul the entire alumni relations program at WHEA or to evaluate the performance of myself or specific colleagues, but rather to suggest small improvements to an already highly functioning organization that I am deeply invested in.

Given this intention, my current position, tenure in the organization, and existing relationships, I employed Action Research within my own organization of WHEA. During my almost nine years at WHEA, there has been an ongoing conversation about the best way to measure alumni engagement, specifically our work on the alumni relations team. I have also attended numerous industry conferences where the topic has been on the agenda. While the presentations have been informative, I left each conference feeling like the question was never truly answered. My capstone project offered the perfect opportunity for me to explore the question of how to measure alumni engagement on my own, with the ability to research and actively implement changes

within my work simultaneously. My research process informed the actions I took in real-time.

The additional benefit of employing Action Research was that this is a topic that I have been informally exploring for almost nine years and will continue to explore even after I graduate from the Master of Science in Organizational Dynamics (MSOD) program. It would have been impossible to research this topic in isolation from my professional life and without myself, as researcher and practitioner, taking an active role in the process. Given the fact that I lead a portion of the alumni relations team at WHEA, it would not have made sense to wait to try new ideas or make small changes until after my project was complete. This capstone marks a piece of my professional journey in alumni relations, but it was not the beginning and it certainly will not be the end.

To explore the question of how to measure nonmonetary alumni engagement through Action Research, I utilized three concurrent strategies. I selected: 1) research through academic experience and literature, which I have summarized in Chapter two; 2) a series of qualitative informational interviews; and 3) data collection through my professional experience. I then performed a content analysis of all of the data collected. Based on this information, I have identified five key organizational changes that I believe will help address the imbalance between development and alumni relations. Finally, I created a brief presentation of my findings and conclusions (See Appendix A), which I shared with everyone who participated in my interviews and as my contribution to the larger alumni relations industry.

Research through Academic Experience and Literature

As mentioned above, I have been actively engaged in my research questions for a while now. However, my first academic introduction to these topics was during my second year in the MSOD program when I decided to take an elective in Penn's Nonprofit Leadership program. NPLD 781, "Understanding and Managing Volunteers for Impact" taught by Dr. Ram Cnaan, fueled my passion for volunteers. During his class, I read an extensive amount of articles about volunteers – how to define a volunteer, who is most likely to volunteer, differences between volunteers and employees, physical and psychological effects of volunteering, the economic impact of volunteers, etc. The researchers utilized a lot of different variables in their studies, but a common measure for capturing volunteer activity or commitment level was the amount of time spent in the volunteer activity. It is such an obvious metric, but I had never even thought to try to capture it for my alumni volunteers. This was also the first time that I was introduced to the concept of monetizing donations of time. I was thrilled to learn that there were specific calculations to convert time to dollar amounts, and that the Independent Sector estimates the national value of each volunteer hour every year, currently reporting \$27.20 per hour ("Value of Volunteer Time", 2020). I began to wonder if it was possible to monetize alumni donations of time and if this might mitigate some of the imbalance I felt with my development counterparts. I explored the relationship between giving time and giving money for my final paper.

The following semester, I enrolled in DYNM 635, "Organizational Essentials for Leadership". In his Strategy Execution Podcast, Dr. Jean-Marc Choukroun explained that "crucial tasks that contribute to performance are not always measurable, leading to

an overweighting of tasks that can be measured”. This spoke directly to my experience at WHEA. I began to wonder if there was an underweighting of volunteer efforts because donations of time were so much harder to measure. I immediately knew that for my final paper I wanted to explore whether better metrics, or at least more equitable metrics to those of the development team, would elevate the status of alumni relations.

During my final semester in the MSOD program, as I was already actively working on my capstone project, I had the pleasure of taking DYNM 617, “The Economics of Human & Organizational Life”. I had already been introduced to some of Dr. Famida Handy’s work in NPLD 781, and not surprisingly, I was especially interested in her module on the economics of philanthropy. Several of the articles that were required reading for that class are included in my literature review in Chapter two.

With these courses as a helpful starting point, both in terms of diving into the capstone literature review and becoming accustomed to writing about this topic, I continued my academic research during my own time. I quickly discovered that very limited research exists on how to actually measure alumni engagement, so I decided to examine the related literature on goal setting theory, characteristics of engaged alumni, the relationship between giving time and giving money, and alternative ways to measure donations of time. The summary of this literature can be found in Chapter two.

Qualitative Informational Interviews

As I continued my literature review process, I set out to conduct a series of informational interviews with colleagues from WHEA, Penn, and a few peer institutions. The purpose of these interviews was to answer the following questions:

- How does WHEA currently measure alumni engagement, both monetary and nonmonetary? Having worked at WHEA for almost nine years, I believe I knew the answer, but I wanted to confirm with my colleagues on what metrics are actually being captured and shared. I purposefully included monetary engagement as well because I thought my development colleagues might offer a unique perspective and help me confront my personal bias of only ever having worked on the alumni relations team.
- How does Penn currently measure alumni engagement? Given Wharton's close relationship with Penn, I also wanted to understand the University's alumni metrics.
- Why does Penn have an alumni engagement score and how is it used? A common theme that I discovered in my initial research is the trend of creating alumni engagement scorecards or indexes (Lindley, 2015, p. 7). I had seen Penn's score in our alumni database, but I wanted to explore this further and understand the reasoning behind it.
- How do Wharton's peer institutions measure alumni engagement? I defined "peer" as the "10 School Group", which is comprised of the top 10 MBA programs (Wharton, Harvard Business School, MIT Sloan School of Management, Stanford Graduate School of Business, Tuck School of Business at Dartmouth University, Columbia Business School, The University of Chicago Booth School of Business, Kellogg School of Management at Northwestern University, London Business School, and INSEAD). From my experience, alumni relations teams from these schools tend to have more

applicable experiences and similar resources to Wharton than those from other networking groups (e.g., Ivy Plus, Association of Business School Alumni Professionals (ABSAP)).

Based on these research questions, I employed purposeful sampling for my informational interviews. In describing purposeful sampling, Palinkas et al. (2013) explain that it “involves identifying and selecting individuals or groups of individuals that are especially knowledgeable about or experienced with a phenomenon of interest” (p. 534). This is a type of qualitative method or those that “place primary emphasis on saturation (i.e., obtaining a comprehensive understanding by continuing to sample until no new substantive information is acquired)” (Palinkas et al., 2013, p. 534). Based on my professional experience and existing relationships, I reached out to my colleagues who I felt were best suited to answer my research questions. In some instances, snowball sampling was also used. A few of my initial contacts suggested additional colleagues for me to reach out to during the interview, or the initial contact forwarded my email to another member of his/her team to participate in the interview instead. I determined that I had reached saturation for my interviews when I felt like my three primary questions, outlined above, had been answered and I stopped hearing new ideas.

I interviewed 23 colleagues in total: 10 WHEA colleagues, six Penn colleagues (mix of staff from Penn central and other graduate schools), and seven colleagues from peer institutions (two of these colleagues from peer institutions were interviewed together). I reached out directly via email to my colleagues at WHEA and Penn. My supervisor sent an email introduction to the peer institutions collectively, given that she already had relationships with them, and then I followed up with each institution

separately. Within WHEA and Penn, I had a 100% response rate to my outreach. I reached out to nine peer institutions in total, with no response from three of them. To incentivize participation in an interview, especially with colleagues whom I had never met before, I offered to share what I had already learned in my research thus far and exchange best practices during the conversation. The interviews had the added benefit of serving as a networking opportunity. I also promised to follow-up with each person after completing my project to share my findings. I sent each person a thank you email after the interview, and a few conversations warranted additional follow-up items and/or ongoing discussion via email.

I completed the 22 interviews via Zoom between September 10, 2020 and December 15, 2020. On average, the interviews lasted 30-45 minutes. I followed a set of standard questions as a template (see Appendix B), but given that these were professional relationships, I wanted each interview to be more like a conversation or brainstorming session. I also varied the tone of the conversation and questions slightly depending on my relationship with the person and my familiarity with his/her work. For instance, my interview with my direct report who I have been working with for almost five years looked different from my conversation with my colleague from a peer school whom I had never met before.

For the purposes of this paper, my full notes from the interviews will not be shared. At the beginning of each conversation, I made this explicitly clear in an effort to encourage a more honest, meaningful dialogue between two colleagues. The 23 individuals who participated in an interview have been thanked in personal communications and acknowledged at the beginning of this paper, but given the

professional and ongoing nature of my relationships with them, I wanted to maintain some level of anonymity. In Chapter four, responses will primarily be provided as aggregate data. However, very specific or unique metrics, processes, and ideas will be attributed to the individual or corresponding institution.

Data Collection through Professional Experience

In my current role, I lead the global clubs team and am responsible for the strategic direction and oversight of 75+ regional and affinity alumni clubs and the 800+ alumni volunteers who lead and manage the operations of these clubs. I have two direct reports, and the three of us have been working together for almost three years, so our team is very well established. Because club leadership is my area of focus within alumni relations, this was a natural place to start. I set out to answer this question: How can alumni club leadership metrics be improved?

One major “aha moment” I pulled from the literature and from NPLD 781 was the idea of capturing volunteer hours. Handy and Srinivasan (2004) explain that “as a starting point, an easy way to quantitatively measure volunteer contribution is to look at the hours donated by volunteers” (p. 10). Every year, my team sends an Annual Registration Survey to all club presidents. Typically, we send this survey in February, but due to COVID-19 (and conveniently for the purposes of my capstone), I delayed sending it until September 2020. This allowed me to add questions to our Qualtrics survey around volunteer hours and in-kind donations (See Appendix C for the specific questions). Out of the total 78 clubs, 60 clubs completed the Annual Registration Survey this year. The responses created a pilot data set for me to attempt to begin monetizing my

volunteers' contributions, using the "opportunity cost approach (OCA)", "the replacement cost approach (RCA)" (Orlowski & Wicker, 2015, p. 2673), and the Independent Sector's estimate ("Value of Volunteer Time", 2020). This year's responses will also serve as a baseline for tracking this new volunteer hour metric year after year.

The full responses from the Annual Registration Survey will be compiled into the "2020 State of the Clubs Report". I have overseen the execution of the report in 2019 and 2018 as well. Prior to 2018, my team sent a similar survey, but the data was never compiled into this type of benchmarking document. Due to time constraints, the 2020 report was not completed in time to be included in this capstone, but I have included an infographic as a "sneak peek" of the full report (See Appendix D). Additional new metrics that will be included in this year's State of the Clubs report, thanks to my capstone project (e.g., total number of emails sent by volunteer), are highlighted in Chapter four.

To build on the monetization of volunteer hour calculations, I also explored the concept of return on investment (ROI). Through my current position at Penn, I have access to the Annual Giving Network's (AGN) webinar series. According to their website, AGN helps "educational institutions and other nonprofits improve their annual fund result", by providing "training and tools that empower staff and volunteers to continuously learn, sharpen their skills, and develop more effective strategies" ("Our Story", 2020). Given the connection to my capstone topic, I watched the prerecorded AGN webinar on "Measuring ROI in Fundraising". During this webinar, the presenter, John Gough, explains that "ROI is a metric that aims to measure the amount of return on a particular investment, relative to the investment's cost" (2020). He then shares a

specific calculation for determining ROI for annual giving programs: “ROI = $[(\text{Dollars Raised} - \text{Dollars Spent}) / \text{Dollars Spent}] \times 100$ ” (Gough, 2020). I used this same formula to see if I could determine the ROI of WHEA’s clubs program.

In addition to global clubs, the other two verticals within the alumni relations team at WHEA are reunions and classes and lifelong learning. I wanted to investigate how the alumni relations team as a whole could set collective, team-wide metrics. The reunions and classes team reports to the same director as I do, and they also primarily work with volunteers, so I decided to focus on this group next. I used the initial data collected from the club leadership Annual Registration Survey, specifically the volunteer hour questions, to entice the reunion and classes team to try something similar. My hope is to be able to report total number of volunteers and total number of volunteer hours for the entire alumni relations team. This will allow us to have comparable metrics to the development team (i.e., total donors and total dollars).

One of my colleagues on the reunion and classes team offered to send a survey, including volunteer hour questions, to her former reunion committee members, representing the MBA classes of 1990 through 2006. She sent one survey to her current reunion committee members with class years ending in 1’s and 6’s, another survey to those classes who will have a reunion in 2022 (class years ending in 2’s and 7’s), and a third survey to the remaining years. The three forms were created using Google survey (See Appendix E for an example). Some variation of the following question was asked in each form: “As a member of the WG’06 Reunion Committee, if you had to estimate how many volunteer hours a month you have dedicated to your reunion committee efforts,

how many hours a month would that be? Guesstimates are accepted!” In total, she sent her surveys to 539 volunteers and 82 responded.

Limitations

I recognize that I, as researcher and practitioner, am the major limitation of this project. As I mentioned at the beginning of this chapter, Action Research was the logical choice for my research, but it was certainly not without flaws. My tenure, experience, and relationships within my organization offered me a unique opportunity to explore my research question, but they also presented strong personal and professional biases. Someone new to the field or an “outsider” might have asked different questions or viewed the data from a fresh, alternative perspective. I also recognize that some discoveries from this project will work in reality and be easy to implement, while other sections will serve purely for exploration. However, like Patton (1986), I believe “that some systemic information is better than none” and “that a rough idea of the relationship between program activities and outcomes is preferable to relying entirely upon hope and good intentions” (p. 151). I never expected to determine “final answers” (Patton, 1986, p. 151), but what I hope I have provided is a clearer direction for my team, or at least for myself.

CHAPTER 4

DATA COLLECTION

My findings are presented in three sections: 1) qualitative informational interviews, 2) data collection through professional experience, and 3) research through academic experience and literature. Given the extensiveness of my data collection and the multiple sources, I begin this chapter with an executive summary of my findings (See Table 1). The remaining chapter provides more details and observations. My conclusions from these findings are presented in Chapter five.

Table 1. Executive Summary of Findings

Executive Summary of Findings
<p>1) Informational interviews</p> <p><u>Method:</u></p> <p>I interviewed 23 colleagues from WHEA, Penn, and six peer institutions, with questions focusing on the role of the alumni relations team, relationship between alumni relations and development, and definition and measurement of alumni engagement</p> <p><u>Key findings:</u></p> <ul style="list-style-type: none"> • In their titles, teams use “alumni relations” and “alumni engagement” interchangeably, and yet, alumni engagement is seen as any way an alumnus/a is connected to the school, including giving and communications, which are often responsibilities of separate teams. • The alumni relations and development teams, whose relationship is a “work in progress”, are either seen as two pillars of the organization, working side by side, or alumni relations is thought of as part of the base of the pyramid, supporting development’s efforts. This tends to reflect personal philosophies, rather than a defined organizational structure.

- The role of the alumni relations team is described as relationship building, business development, cultivation, customer service, scaling, value creation, positive feelings, and stewardship.
- Definitions of alumni engagement are inconsistent, but themes include relationships, connection/affinity, touchpoints, pipeline, and holistic.
- Alumni engagement includes giving, but there is disagreement on how much it should be included.
- Engagement metrics include the three major buckets of attend, volunteer, and donate, plus communications and digital, student and career support, and surveys.
- If data collection was not an issue, desired metrics would include showing cause and effect, capturing alumni-to-alumni connections and feelings of community, and more digital metrics.
- Alumni engagement scores are prevalent but are infrequently used in practice due to confusion and distrust.

2) Exploration of new metrics at Wharton Alumni Relations

Method:

This year's Wharton Global Clubs Annual Registration Survey asked club presidents to share, on average, how many hours per month they spent on club-related activities in 2020 and then provide the same estimate for their entire leadership team combined (minus themselves). They were also asked if they pay for any club expenses out of pocket. 60 clubs (out of 78 total) completed the survey.

My colleague on the reunion team sent surveys to her former MBA reunion committees and included a question that asked volunteers to estimate how much time they dedicated to their reunion efforts.

Borrowing a metric from Penn Alumni Regional Clubs, I determined the number of emails sent by Wharton clubs through our school-provided NationBuilder platform. 52 clubs (out of 78 total) currently have a website on NationBuilder.

Key findings:

- In 2020, Wharton club leaders spent 39,051 hours on club related activities, and when combined with MBA reunion committee members, club and reunion volunteers spent 54,171 hours on alumni relations activities.
- Over 50% of Wharton club leadership teams personally paid for club related expenses in 2020.
- In 2020, Wharton clubs on NationBuilder sent a total of 1,030 emails, resulting in 10,360 event RSVPs. This was a 52% increase in event RSVPs from 2019.

3) Valuation of Wharton club leader hours and ROI of clubs program

Method:

I then converted the club leader hours to dollar amounts using the OCA, RCA, and the Independent Sector's estimate of \$27.20 (see Chapter two for definitions). For OCA, I used \$150K/year, as this is the average starting salary for Wharton MBA graduates and the only salary data publicly available. For RCA, I used \$29/hour and \$80/hour, which are rates for two of our well known paid Wharton club admins.

The AGN webinar on "Measuring ROI in Fundraising" defines ROI as $[(\text{Dollars Raised} - \text{Dollars Spent}) / \text{Dollars Spent}] \times 100$. I used this formula to calculate the ROI of the Wharton alumni clubs program, with dollars raised as the monetary value of the club leader hours. Dollars spent included salaries for our three clubs team staff and our 2020 expenses (these numbers are not shared).

Key findings:

- In 2020, Wharton club leaders donated between \$1,062,187.20 to \$3,124,080 worth of time.
- In 2020, the ROI of the Wharton alumni clubs program was 362.6%.

Qualitative Informational Interviews

I interviewed 23 colleagues in total: 10 WHEA colleagues, six Penn colleagues, and seven colleagues from peer institutions (two of these colleagues from peer institutions were interviewed together). Of the 10 WHEA interviews, six were with colleagues from the alumni relations team, three were with development team staff, and one was with a member of the data team. Of the six Penn interviews, two were with the director of the alumni relations team of another graduate school, two were with staff who focus on a specific area of Penn alumni relations, and two were with staff who provide supportive roles to frontline DAR staff. For the six interviews with peer institutions, everyone was from their respective alumni relations teams. Of all the interviewees from

an alumni relations team across schools (16 total), only one had any sort of direct fundraising responsibilities. Of the total interviewees, 18 were female and five were male. The subsequent sections describe each question that I asked during the interviews and the corresponding responses.

Team Titles

At the beginning of each interview, I asked each person to confirm his/her title. Of the titles that specifically contain the word “alumni” (11 people), there was an interesting split between those entitled “alumni relations” (6 people) and those with “alumni engagement” (4 people). The full breakdown can be found in Table 2. The one person on an alumni relations team with some fundraising responsibilities had the title “Director, Alumni Engagement”. For the purposes of this paper, I refer to individuals or teams with any of these titles as “alumni relations”, but I provide additional thoughts on the word “engagement” in Chapter five.

Table 2. Titles of Interviewees Containing the Word “Alumni”

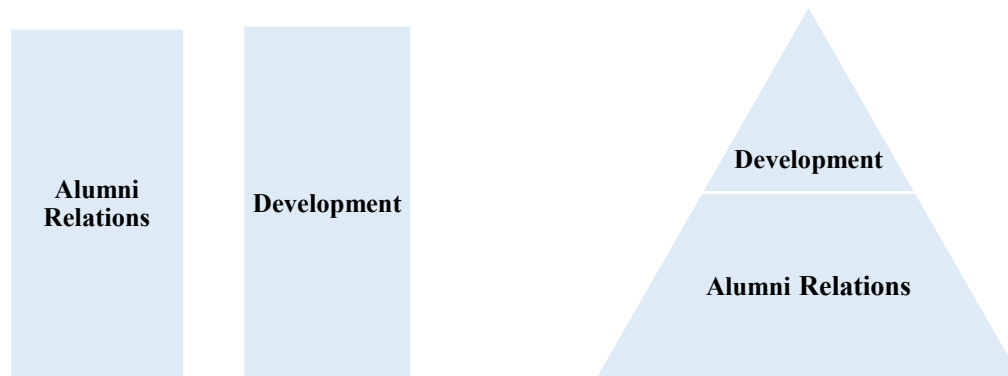
Title	Interviewees
[Executive/Senior/Associate/Assistant] Director, Alumni Relations	6
Director, Alumni Engagement	2
Director, Alumni and Student Engagement	1
Director, Alumni Engagement and Advancement Operations	1
Director, Alumni Information Systems and Communications	1

Relationship between Alumni Relations and Development

In the interviews with Penn colleagues and the six peer institutions, for additional context, I also asked each person to describe their team's relationship with their development colleagues. For my WHEA colleagues, I asked what they thought the relationship between the two teams should be. All of the institutions, including Wharton, currently have separate teams for alumni relations and development, and all of the alumni relations teams are significantly smaller than their corresponding development team. However, most institutions mentioned that at one point in time, the teams were combined in some capacity. The word "pendulum" was used multiple times to describe the change in structure, from combined to separated and then back again. This is also true for WHEA where before I started, "Alumni Affairs and Annual Giving" was one team.

Additionally, there were two key themes for how the relationship between development and alumni relations was described. The alumni relations and development teams are either seen as two pillars of the organization, working side by side, or alumni relations is thought of as part of the base of the pyramid, supporting development's efforts. Figure 1 provides a visual representation of these two structures. This seemed to reflect personal philosophies, rather than a defined organizational structure, as staff within the same institution and even those on the same team shared conflicting answers. Regardless of structure, all of the interviewees mentioned that the relationship between development and alumni relations was a "work in progress". One person even described the relationship as a "soap opera". A few additional quotes supporting this sentiment can be found in Table 3.

Figure 1. Representation of Different Structures between Alumni Relations and Development Teams



Role of Alumni Relations

In conjunction with the question focused on the relationship between the two teams, I also asked each person to more specifically describe the role of alumni relations. Most alumni relations staff defined their own team by explaining how it works in contrast or in relationship to fundraising. Another common theme was that alumni relations is responsible for relationship building, especially establishing the initial relationship. Almost all of the responses included that alumni relations teams are responsible for generating and/or maintaining “positive feelings” and serving the “masses”. Table 3 highlights additional key themes in the responses to this question, using a few direct quotes from interviewees as examples.

Table 3. Responses to Interview Question on Role of Alumni Relations Team

What is the role of the alumni relations team?
Key themes:

- **Relationship Building, Business Development, & Cultivation**

“We’re the ones who initiate the relationship”

“AR is the billboard for the product”

“AR helps create a pipeline”

- **Customer Service**

“AR is not sales; we serve more of a customer service role and help with mad customers”

- **Scaling**

“We are the mass communications. We make movies that appeal to a wide audience; whereas, development focuses on specialized indie films that only show on certain dates in certain theaters”

“We can’t host school sponsored events everywhere, so we need volunteers who are managed by AR”

- **Value Creation, Positive Feelings, & Stewardship**

“AR is about ‘this is the amazingness of being an alum’”

“In order to give, you need to feel like you’re getting something back in return”

“AR offers a menu of different options, so the donor feels good about the school”

“AR is the bread around the peanut butter”

Majority of responses indicated a “work in progress” relationship with the development team:

“We all know development is paid more”

“AR is a thankless job”

“We’re referred to as the “party girls”, but we’re more than just events”

“The assumption is that AR leads to philanthropy, but you can’t show it, so we need a better way to understand the relationship”

Definition of Alumni Engagement

Next, I generally asked each person, “How do you define alumni engagement?” There were a lot of similarities in the responses, but everyone defined the term slightly differently. Some interviewees described alumni engagement by what the role of their team is, while others focused on what an engaged alumnus looks like. A few other people commented on how hard of a question that is to answer and instead responded with what metrics they track to show that their alumni are engaged. There was a general consensus that giving money is a form of engagement, but there were a lot of opinions about how much monetary donations should be included in engagement metrics and what the relationship between the alumni relations and development teams should be. As outlined in Table 4, common key words used were relationship, connection/affinity, touchpoints, pipeline, and holistic. Again, a few quotes are provided to highlight each theme.

Table 4. Responses to Interview Question on Definition of Alumni Engagement

How do you define alumni engagement?
<p>Common key words:</p> <ul style="list-style-type: none"> <li data-bbox="245 1444 1369 1669"> <p>• Relationship</p> <p><i>“Measuring scope and impact of a graduate’s relationship with his/her alma mater”</i></p> <p><i>“Someone you can rely on if you reach out for help and holds the school in a really close regard”</i></p> <li data-bbox="245 1703 1369 1885"> <p>• Connection/Affinity</p> <p><i>“If you want connection, think of the school for that connection, whatever it might be”</i></p> <p><i>“Meaningful opportunities to connect alumni needs/wants with the university”</i></p>

“Keep the school top of mind”

- **Touchpoints**

“Any interaction with a benefit to the school”

- **Pipeline**

“Begins with the students and should be tailored to life cycle of an alumnus (young alumni, middle career, and emeritus)”

- **Holistic**

“Need to think about it holistically – every way someone engages with the university, doesn’t have to be positive”

“Engaging in some way, shape, or form – making a gift, volunteering, or attending an event”

Majority of responses include giving but still some disagreement:

“Doesn’t have to revolve around money”

“Everything that DAR does (not just alumni relations), but not necessarily the big givers”

“Giving should not count as highly in engagement”

“Difference from financial engagement”

Measurement of Alumni Engagement

For those interviewees who did not define alumni engagement by sharing what metrics they track, I next asked “how do you measure alumni engagement?” There was an overwhelming consensus that the three major buckets for measuring alumni engagement are event attendance, volunteering, and giving money. Most schools use some variation of the phrase “Go, Give, Help”. Many of the responses also included a

fourth bucket around communications. This tended to focus on either: 1) the number of emails sent and/or email open and click rates, 2) the number of contactable alumni, or 3) the number of contact information updates in an online directory. Other common themes for metrics were event speakers, first time event attendees, and providing student support. For the most part, the metrics represent data that is available through formal, school sponsored programs. However, a few institutions shared examples of metrics that alumni can self-report, typically through an online directory (e.g., attend/host an informal gathering with alumni) or survey (e.g., volunteer hours). The full list of metrics shared by interviewees can be found in Table 5.

As with the previous question, the majority of responses emphasized the challenge of quantifying engagement and that some things, like feelings, have to remain anecdotal. Table 5 also provides a few direct quotes supporting this. Staff bandwidth and turnover challenges were frequently mentioned as reasons why data collection and tracking are so difficult. There was a general desire to track the metrics year after year with acknowledgment that this presented even more challenges as resources, staff, events offered, programs available, etc. change. Another common theme was segmenting each of the metrics further by specific populations of alumni and/or focusing on when the action occurred (i.e., currently, within the past five years).

Table 5. Responses to Interview Question on Measurement of Alumni Engagement

How do you measure alumni engagement?
<p data-bbox="250 1774 930 1810">Three major buckets (“Go, Give, Lead/Help/Do”)</p> <ul data-bbox="250 1812 743 1883" style="list-style-type: none"> <li data-bbox="250 1812 743 1848">• Attend (registration & attendance) <li data-bbox="250 1850 435 1883">• Volunteer

- Donate

Communications & Digital

- Number of communications
- Email open and click rates
- “Super readers” (alumni with a 100% open rate)
- Contactable rate (available emails)
- Social media followers, likes, and shares
- Updating information on alumni directory
- Number of log-ins to digital platforms

Other event related metrics

- Total number of events
- Speak at an event
- Host an event
- First time event attendees

Other volunteer related metrics

- Total number of clubs/groups
- Club/group membership
- Club/group penetration rate
- Number of emails sent by volunteers
- Number of events hosted by volunteers
- Volunteer hours

Student & Career Support

- Host a company visit
- Job/intern placement
- Participation in mentorship programs
- Referring students for admissions

Surveys

- Response rate
- Satisfaction with event/program
- Willingness to attend future events, volunteer, recommend, etc.

Other

- Touchpoints with staff
- Number of degrees
- Family history
- Alumni awards
- Informal gathering with alumni (self-reported)
- Diversity, equity, and inclusion metrics

All responses acknowledged that engagement is difficult to quantify and can be more “feelings” focused or anecdotal:

“It’s a lot of squishy feelings”

“It is such an unquantifiable thing to say that ‘this is a gem of an alumnus or volunteer’”

“A good metric for AR is that alumni aren’t complaining”

“Blue Sky” Metrics

After responses were provided for what metrics are currently being used, I asked each person to envision what metrics might be possible if data collection and tracking were not taken into account. I told them to ignore how it would actually work in practice, but instead to focus on what metrics would help them in their roles and what story they would want to tell. I called this their “blue sky” metrics. Responses to this question varied the most across all of the questions, but there were some general themes, which are highlighted in Table 6. There was a desire to know how alumni are connecting with each other outside of school sponsored programs and how a formal engagement touchpoint might lead to informal connections and vice versa. Most institutions seem to have the ability to track first time event attendees, but a common theme for “blue sky” metrics was to know *why* they showed up for the first time or *why* they came back after so many years. Another common theme was the desire to be able to show cause and effect, specifically proving how engagement leads to giving.

Table 6. Responses to Interview Question on “Blue Sky” Metrics

If data collection wasn't an issue, what would be your “blue sky” metrics?
<p>Key themes:</p> <p>Alumni-to-Alumni Connections</p> <p><i>“How to measure and track connections to each other when it’s not through a school supported program. An entire class went on vacation together rather than coming back for reunion – this is very different from other alumni who didn’t attend reunion because they didn’t want to”</i></p> <p><i>“Track a volunteer serving as a ‘door opener’ with a fellow alum for a gift conversation or other engagement”</i></p> <p><i>“Friendships that started at the school”</i></p> <p><i>“Who are our key influencers? Mapping networks of alumni and alumni connections and identifying the hubs/spokes”</i></p> <p>First-Timers</p> <p><i>“Why alumni finally come back. Look into these first time touchpoints – what prompted the action if someone has been absent for 20 years”</i></p> <p><i>“First time engagers, who has lapsed, who were we able to bring back in, who made an action on top of that”</i></p> <p>Cause and Effect</p> <p><i>“Identify the number of touch points (e.g. emails with staff, attendance at club events, etc.) before a gift”</i></p> <p><i>“Predictive modeling – capturing ‘journeys’, someone’s progression, and how activities connect”</i></p> <p><i>“The more time a person volunteers, how does that affect their affinity to the school?”</i></p> <p><i>“What type of engagement leads to increased giving?”</i></p> <p>More digital metrics</p> <p><i>“How long alumni are logged into our digital platforms”</i></p> <p><i>“Which alumni are consuming our content and social media”</i></p>

Community

“Capturing sense of belonging, connection, community, pride, that the school is a positive force in my life”

“Sentiments – how do you think of this place where you went to school?”

Alumni Engagement Scores

When asked to share how they measure alumni engagement, several people mentioned engagement scores. For those who did not bring it up on their own, I specifically asked them what their thoughts were on engagement scores and if they had or used one. All of the institutions I spoke with have some sort of internal rating system for alumni. Typically, the score was created for the university as a whole, but a handful of the business schools also have their own score for their specific population of alumni. With the exception of a few staff, all of the alumni relations and development staff that I spoke with do not use their institution’s engagement score in their day-to-day work. Scores seem to be primarily used for capital campaign goals (i.e., “Over the course of the campaign, # unique alumni were engaged”). There was a general sense of confusion about how the scores are calculated and how to use them in decision making and strategy setting. There were also mixed feelings about if and how to include giving in the score calculations. Common themes with quotes as examples are highlighted in Table 7.

Table 7. Responses to Interview Question on Alumni Engagement Scores

What are your thoughts on alumni engagement scores?

Key themes:**One piece of the puzzle**

“It doesn’t need to be perfect, just a guide for internal use”

“I see it as just another tool in the toolbox”

Confusion around what the numbers mean

“A number on its own means nothing because it doesn’t take into account the factors that contribute to your ability to engage, which is different for everyone”

“We technically have an engagement score, but no one trusts it”

Uncertainty on how to use the numbers

“I have suggested that my team look at the engagement score when doing outreach if they need a way to narrow it down, but I don’t have any idea what goes into it”

“It’s only helpful to know who is engaged and who is not engaged, but we should already recognize who is engaged; it shouldn’t be a surprise list”

“I haven’t heard of any really amazing success stories from using engagement scores. Schools seem to have them and then not use them”

Lack of consensus on calculations

“People have a lot of ideas about what should and shouldn’t be tracked. It’s impossible to get people to agree and to please everyone. No one is satisfied with the methodology”

“People get queasy about giving people a value and all of the different stakeholders have different opinions”

“If someone gives a big gift, they’re automatically marked as engaged, but are they?”

Given that Penn already has an engagement score and WHEA is working on developing its own, I specifically reached out to colleagues who could tell me about these scores. Penn developed its score based off of the models used at other peer institutions.

According to the developer, Jason Vail, Director, DAR Reports and Analytics, “the score is relatively basic”; it’s “applicable to all alumni, doesn’t prejudice based on age, and doesn’t change year after year” (personal communication, October 22, 2020). There are four buckets: Giving, Volunteer, Event Attendance, and Miscellaneous. Penn separates between two scores, a 5-year engagement score and a lifetime engagement score, to be able to focus on more recent activity. School specific programs are not included in the scores.

My WHEA colleagues on the data team, specifically James Walton, Senior Data Analyst, are currently working on developing a separate score specifically for Wharton alumni. Wharton’s score will only include Wharton related engagement and will have four primary categories: Experience (i.e., event attendance), Volunteer, Philanthropy, and Communications (i.e., interaction with a staff person). In contrast to the Penn score, the Wharton score accounts for where the individual is in their “alumni career” by weighting engagements to favor recency, and does not include giving thresholds (J. Walton, personal communication, September 30, 2020). According to Walton, “most individuals in *any particular category* have zero engagement, meaning most people have attended zero events, most people are not donors, most people have not volunteered, etc.”, but most individuals do not have an overall score of zero because “there are awards for having current contact information, *not* having various contact exclusions, etc.” (personal communication, January 14, 2021). The WHEA data team is creating an interactive dashboard that will allow staff to just look at one specific category (i.e., volunteer) and/or segment further by region, class year, etc. Conversations are ongoing about how this new tool will be used.

Additional Themes

There were several other interesting themes and ideas that came up during the interviews that I will briefly mention here:

- COVID-19: Every conversation, in some capacity, touched on COVID-19 and the effects of the pandemic on our work. The transition to everything being virtual has significantly impacted what alumni engagement looks like. Multiple interviewees mentioned that their goals for this fiscal year will have a huge asterisk next to them. In addition to an increase in webinars and other virtual events, there is also a new trend towards alumni relations teams providing even more support for students and young alumni. Several institutions have faced layoffs or hiring freezes, so their already small teams are even smaller now.
- Unique staff positions: Penn has a Director of Volunteer Support within its Campaign Office. This position is “tasked with looking at volunteers across the University and building them into the strategy” (A. Chiacchiere, personal communication, October 9, 2020). In this position, Allison Chiacchiere recently launched a “Volunteer Dashboard” and would like to implement a standardized volunteer management training for alumni relations staff. Additionally, Julia Embody, Associate Director, Global Clubs at WHEA and Annie White, Senior Director, Alumni Relations at The University of Chicago Booth School of Business (Booth) both shared the idea of having a general alumni relations position or leads generator. A position(s) on the alumni

relations team would serve as a generalist to work with the alumni who do not naturally fit with one of the other specialized teams (i.e., clubs, reunions, events, giving, etc.) and help point them in the right direction. White compared this to Netflix or Amazon's strategy. This person could reach out to unengaged or slightly engaged alumni and say, "I see you attended this event, you should check out these things as well" (A. White, personal communication, November 24, 2020). This would help create a stronger pipeline for development and more connections between alumni relations and fundraising.

- Giving Days: Several peer institutions have annual giving days, in which they involve their alumni club volunteers. Likewise, the Kellogg School of Management at Northwestern University (Kellogg) has a Global Day of Service, where giving is one of the ways to participate (B. Krause, personal communication, November 23, 2020). These events help create a stronger, mutually beneficial relationship between the alumni relations and development teams.
- Booth's post-meeting form: After meeting with an alumnus, staff at Booth are supposed to submit a post-meeting form in Qualtrics. This form allows "staff to indicate which areas the alumnus might be good for (e.g., admissions, careers, research centers, etc.) and their interests, and then staff can give them an engagement score (0-4)" (A. White, personal communication, November 24, 2020). This information can be used for pipeline meetings and qualification work and to help streamline external and internal requests for

alumni speakers and volunteers. Again, this enables the alumni relations team to more directly contribute to the development pipeline.

- **Emphasis on diversity, equity, and inclusion:** A few interviewees mentioned their work on their organization's committee or task force for diversity, equity, and inclusion. There is currently an emphasis on highlighting diverse alumni voices. I did not directly include this topic in my interview questions, so it is very possible that even more staff are involved in this type of work. It will be interesting to see how new metrics emerge in this area. During our interview, Colleen Blair, Associate Director, Penn Alumni Regional Clubs shared that the Penn Club of Seattle recently sent a survey to their community (all Penn alumni in Washington state) to assess feelings of belonging. They additionally asked a series of demographic questions (e.g., age, gender, race, LGBTQ+, veteran status, disability, political affiliation, etc.). The club's goal is to be inclusive to *all* alumni.

Data Collection through Professional Experience

Volunteer Hours- Club Leaders

On September 10, 2020, my team sent individual emails to all 78 Wharton clubs with a Qualtrics link to complete our Annual Registration Survey. The survey was 48 questions in total and was comprised of the following sections: Leadership Team, Volunteer Contributions, Membership, Events and Programs, Revenue and Expenses, and Bylaws. The section on Volunteer Contributions was new for this year, while almost all

of the other questions had been included in some variation in previous years' surveys. A deadline of October 16, 2020 was given, but we accepted responses through the end of October. In total, 60 clubs completed the survey, representing a 77% completion rate. This is the same number of clubs that completed our Annual Registration Survey in 2019, so I was satisfied with the response rate.

The new Volunteer Contributions section asked club presidents to share, on average, how many hours per month they spent on club-related activities in 2020. They were also asked to provide the same estimate for their entire leadership team combined (minus themselves). As another way to capture some of the less visible ways that club leaders contribute to the Wharton community, we also asked: "Have you or any of your volunteers paid for club expenses out of pocket (e.g., event space, catering, website fees)?" Those who responded yes to that question were asked to elaborate (i.e., what the expense was for and the dollar amount). A screenshot of the Volunteer Contributions section can be found in Appendix C.

Responses for president hours per month ranged from zero (meaning the club has not been active this year) to 60 hours. The mean response was 12.5 hours, and the mode was 5 hours (12 responses). Over half of the responses fell in the 0-9 hours per month range. The full breakdown of response ranges to this question can be found in Table 8.

Table 8. Range of Club President Hours Given per Month

President hours given per month	Number of responses
0-9 hours	33
10-19 hours	9
20-29 hours	10
30+ hours	8

Responses for leadership team hours per month ranged from zero (meaning the club has not been active this year or the president is the only active volunteer) to 300 hours. The mean response was 35.6 hours, and the mode was zero hours (7 responses). Over half of the responses fell in the 0-19 hours range. The full breakdown of response ranges to this question can be found in Table 9. For context, the 60 clubs who completed the survey represented a total of 620 volunteers. Leadership teams ranged in size from 2 volunteers to 36 volunteers. The average leadership team size was 10 volunteers. Size of leadership team was not directly correlated with a larger number of leadership team hours given per month. For instance, the highest end of the range for leadership team hours given per month (300 hours) was for a 13-person leadership team, while the largest leadership team (36 people) gave 10 hours per month combined.

Table 9. Range of Club Leadership Team Hours Given per Month

Leadership Team hours given per month	Number of responses
0-9	26
10-19	8
20-29	7
30-39	5
40-79	5
80-99	2
100+	7

To determine the total number of hours given by club leaders in 2020, I multiplied the monthly totals by 12 and then added the president and leadership team totals together. In total, 620 club leaders spent 34,683 hours on club related activities in 2020. The breakdowns for these totals can be found in Table 10. For comparison, a full-time staff

spends 2,080 hours per year on his/her job (40 hours/week x 52 weeks/year). The club leader hour total is the equivalent of 16.7 full-time employees, which is larger than the entire alumni relations team at WHEA currently (14 staff; not including open positions).

Table 10. Club Leader Hours Given per Month and Year

	Per month	Per year
President hours	753.25	9,039
Leadership team hours	2137	25,644
Total	2890.25	34,683

It should be noted again that 18 clubs did not complete the Annual Registration Survey. The total number of Wharton club leaders is actually 802 alumni, so the totals above do not take into account the time given by 182 volunteers. While the majority of clubs who did not complete the survey are on the smaller side, there were a few large clubs who just never sent in their response. Additionally, most of the smaller clubs who did not submit a survey were not completely dormant the entire year, so their volunteers still gave some amount of time to their club. Assuming a low estimate of just two hours per month for the remaining 182 volunteers would mean an additional 4,368 hours for the club leadership totals. This is the equivalent of two additional full-time staff, bringing the equivalent total up to 18.8 full-time staff. Accounting for the missing clubs, 802 club leaders spent 39,051 hours on club related activities in 2020.

The final question in the new Volunteer Contributions section asked club presidents if they paid for any club related expenses out of pocket in 2020. Over 50% of clubs indicated that they pay for club related expenses themselves. The breakdown for

this question can be found in Table 11. When asked to elaborate, most club presidents did not give specific dollar amounts, so I was unable to calculate a total. Responses ranged from \$30 per board meeting to \$1500 for technology services to \$5000 to defray costs of alumni dinners.

Table 11. Number of Clubs with Out of Pocket Expenses

Club pays for things out of pocket?	Number of responses
Yes	31
No	29

Volunteer Hours- Reunion Committee Members

My colleague on the reunion team sent her survey to 539 alumni and received responses from 82 volunteers, representing a response rate of 15.2%. Reunion committee members were asked how many volunteer hours per month they dedicated to their committee efforts. For the analysis, I removed three responses: one said unknown, one indicated he/she was not actually on the committee, and one responded with 950 hours, which is not a realistic response. For the remaining 79 volunteers, responses ranged from 0 hours to 50 hours. The mean response was 4.2 hours, and the mode was 2 hours (26 responses). Over half of the responses fell in the 0-2 hours per month range. The full breakdown of response ranges to the reunion committee survey can be found in Table 12.

Table 12. Range of Reunion Volunteer Hours Given per Month

Reunion volunteers hours given per month	Number of responses
0-2	52
3-9	20
10-19	2
20+	5

Given that reunion committees are typically only active in the 18 months leading up to their reunion, I cannot simply multiply the total number of hours per month by 12 to determine the total number of hours given by reunion committees in 2020. Likewise, a few of the classes were asked to think back to when they were active during past reunion cycles. In any given year, there are approximately 300 reunion volunteers. Assuming, that the average response of 4.2 hours per month is an accurate representation of this volunteer activity, it would be reasonable to say that 300 reunion committee members spent 15,120 hours on reunion related activities in 2020. Of course, the numbers would be more accurate if, moving forward, we begin surveying all reunion committee members after their reunion takes place to ask them how much time on average they dedicated to the volunteer activity per month.

From there, the club leader and reunion committee totals can be combined to determine the total number of hours that alumni relations volunteers gave in 2020. 1,102 volunteers spent 54,171 on alumni relations activities in 2020. These breakdowns are included in Table 13.

Table 13. Club Leader and Reunion Total Volunteers and Hours Given in 2020

	Number of volunteers	Hours given in 2020
Club leaders	802	39,051
Reunion committee members	300	15,120
Total	1,102	54,171

Emails Sent by Volunteers

During my interview with Colleen Blair, Associate Director, Penn Alumni Regional Clubs, she shared that she has begun tracking the number of emails that clubs send using their University provided website platform. I decided that I wanted to see if this metric could be determined for Wharton clubs. Wharton provides a free website to all clubs on a platform called NationBuilder. 52 clubs currently have a website on NationBuilder. Clubs who do not use NationBuilder either pay for their own website or do not have a website (i.e., use social media instead). After talking with my colleague who is our point person for NationBuilder, I learned that we could, in fact, determine the total number of emails that clubs sent through NationBuilder in 2020 using the administrative tools provided by the platform. We were also able to pull the same number for 2019 to use as a comparison.

In 2019, clubs on NationBuilder sent a total of 1,113 emails, resulting in 6,784 events RSVPs. In comparison, in 2020, clubs on NationBuilder sent a total of 1,030, resulting in 10,360 event RSVPs. Event RSVPs increased 52% between 2019 and 2020. The obvious reason for this increase is that almost all events in 2020 were hosted virtually. Regional clubs were able to expand their reach and open up their events to alumni outside of their local community, and alumni responded enthusiastically.

Likewise, breaking down the numbers by quarter reveals the impact of COVID-19 (see Tables 14 and 15). From January 2020 through March 2020, the number of emails sent by clubs significantly decreased, in comparison to that same quarter in 2019. This is when COVID-19 forced everything to shut down, with the virus making its way across the world from Asia to Europe and then to the US. Clubs took a few months to adapt and transition their programming online, and they came back stronger than ever, as evidenced by a 7.8% increase in emails and a 115.3% increase in event RSVPs during the last quarter in 2020, as compared to the same quarter in 2019. Interestingly, email open and click rates stayed relatively constant across all quarters in 2019 and 2020. In 2019, the click rate was 2.96%, and the open rate was 31%. In 2020, the click rate was 2.82%, and the open rate was 30.77%. In October-December 2020, these numbers increased slightly to 2.93% and 30.97% respectively.

Table 14. Club Emails Sent through NationBuilder Platform

	January-March	April-June	July-September	October-December	Total
2019	239	288	279	307	1,113
2020	170	245	284	331	1,030

Table 15. Club Event RSVPs through NationBuilder Platform

	January-March	April-June	July-September	October-December	Total
2019	1,766	1,432	1,836	1,750	6,784
2020	1,350	2,934	2,308	3,768	10,360

For the 20+ clubs not on NationBuilder, I was unable to obtain these same numbers. Because I do not have access to the back-end of their websites or email tools, I would have had to reach out to each club individually and ask them to share their email statistics. Unfortunately, I interviewed Blair and learned of this metric after my team sent out our Annual Registration Survey. In next year's survey, I plan to include additional questions about email stats for clubs not on NationBuilder.

The full responses from the Annual Registration survey and additional data from NationBuilder will be used to create a 2020 State of the Clubs Report. Due to time constraints, the 2020 report was not completed in time to be included in this capstone, but I have included an infographic as a "sneak peek" of the full report in Appendix D.

Research through Academic Experience and Literature

Valuation of Volunteer Work

Orlowski and Wicker (2015) outline several methods for the valuation of volunteer work, which I used to monetize the Wharton club leader hours that I obtained through the Annual Registration Survey. The first is the "opportunity cost approach (OCA), which sets the monetary value of voluntary work equal to the foregone income during the volunteering time" (Orlowski & Wicker, 2015, p. 2673). Given my position and my professional relationships, it would be extremely inappropriate for me to ask my volunteers to share their salary information, so I will use an average salary number instead. For the graduating MBA class in 2019, the average starting salary was \$150,000 ("Full-Time Jobs Overview, Class of 2019", 2020). While the average age of my club

leaders is 47 and people tend to make more money as they advance in their careers, I decided to still use \$150,000 in my OCA calculations. I did not want to make any assumptions about my volunteers' salaries, but I recognize that this will most likely be an underestimate. A salary of \$150,000 per year comes out to approximately \$72.12 per hour ($150,000 \div 52 \div 40 = 72.115$). Again, according to the Annual Registration Survey, 620 club leaders spent 34,683 hours on club related activities in 2020. At an hourly rate of \$72.12, 34,683 hours equates to \$2,501,337.96.

As mentioned in Chapter two, the main criticism of the OCA approach is that people do not volunteer when they would otherwise be working; they volunteer during their leisure time. A lot of my club leaders work in financial services or consulting, which is very different work from managing an alumni club. The second method is "the replacement cost approach (RCA), which assigns an equivalent market wage to the task provided" (Orlowski & Wicker, 2015, p. 2673). Many Wharton alumni clubs hire a paid administrator to manage the basic tasks of running the club. An administrator who works with several of our domestic clubs charges around \$29 per hour, which is on the low end of the spectrum. Another club administrator charges \$80 per hour. At an hourly rate of \$29, the total club leader hours equate to \$1,005,807, and at an hourly rate of \$80, it would equal \$2,774,640. Likewise, the Independent Sector estimates the national value of each volunteer hour as \$27.20 ("Value of Volunteer Time", 2020). Using this hourly rate, club leaders donated \$943,377.60 worth of time in 2020. All of these valuations are outlined in Table 16. Orlowski and Wicker (2015) discuss several additional models that become increasingly more difficult to measure, including volunteer, supervisor, and

beneficiary judgments of the value of the work. Unfortunately, I do not have enough data to even attempt to suggest equivalent values for these approaches.

Table 16. Monetization of Club Leader Hours from Annual Registration Survey

Method	Monetary value of hours given
Opportunity Cost Approach	\$2,501,337.96
Replacement Cost Approach (Low)	\$1,005,807
Replacement Cost Approach (High)	\$2,774,640
Independent Sector Estimate 2020	\$943,377.60

As previously mentioned, these club leader hour totals do not include the 18 clubs who did not complete the Annual Registration Survey, and thus the time given by 182 volunteers. Again, assuming a low estimate of just two hours per month for the remaining 182 volunteers, this totals an additional 4,368 hours. Accounting for the missing clubs, 802 club leaders spent 39,051 hours on club related activities in 2020. I used the same valuation of volunteer work calculations with these numbers, which are outlined in Table 17.

Table 17. Monetization of Club Leader Hours Including Survey Non-Responders

Method	Monetary value of hours given
Opportunity Cost Approach	\$2,815,967.61
Replacement Cost Approach (Low)	\$1,132,479
Replacement Cost Approach (High)	\$3,124,080
Independent Sector Estimate 2020	\$1,062,187.20

The valuation of volunteer hour calculations would be different for reunion committee volunteers, given the slightly different nature of the work and profile of volunteer. However, the Independent Sector estimate of \$27.20 per hour (“Value of Volunteer Time”, 2020) would be a simple way to convert the reunion volunteer hours into a dollar amount. This number can then be combined with the Independent Sector estimate for club leader hours. These breakdowns are included in Table 18. In 2020, alumni relations volunteers donated \$1,473,451.20 worth of time.

Table 18. Monetization of Alumni Relations Volunteer Hours

	Monetary value of hours given
Club leaders	\$1,062,187.20
Reunion committee members	\$411,264
Total	\$1,473,451.20

Return on Investment

In the AGN webinar on “Measuring ROI in Fundraising”, Gough explains that ROI can be determined using the following calculation: “ROI = [(Dollars Raised – Dollars Spent) / Dollars Spent] x 100” (2020). Gough’s presentation specifically focused on ROI for annual fund programs, but I used the same calculations to determine the ROI for WHEA’s alumni clubs program. Likewise, ROI could be calculated for the alumni relations team as a whole, but for the purposes of this capstone, I will just focus on the global clubs team.

For dollars raised, I can use the monetization of volunteer hour calculations. Specifically, I will use \$1,132,479, which was calculated through the Replacement Cost

Approach (Low), including an estimate for the club volunteers not captured through the Annual Registration Survey results. Dollars spent includes “internal and external costs”, including salary for staff (Gough, 2020). Given that almost all of my team’s work has been virtual in 2020, additional expenses and spending have been very low in comparison to previous years. In previous years, the majority of our budget was spent on team travel and in-person events/training for club leaders. For 2020, the primary dollars spent were my salary and the salary of my two direct reports.

Given the confidential nature of salaries and budgets, I will not share the specific numbers that would go into “dollars spent” and instead just provide the final ROI number. Additionally, given the unique nature of 2020, for comparison, I also calculated ROI based on what we were originally budgeted for FY’21 (this was a significantly reduced budget from the previous year but still included travel) and what our approved budget was at the beginning of FY’20. With significantly reduced team spending in 2020, the ROI for WHEA’s clubs program was 362.6%. With additional expenses taken into account (i.e., team travel and in-person events), using budget numbers for FY’21 and FY’20, the ROI was 265.3% and 132.8% respectively. These numbers are summarized in Table 19.

Table 19. ROI of Wharton Alumni Clubs Program

Calculations for dollars spent	ROI
Actual spending for calendar year 2020	362.6%
Budget for FY’21	265.3%
Budget for FY’20	132.8%

These ROI's would be even higher if the dollars raised took into account "other impacts, not directly related to the hours volunteered, such as being goodwill ambassadors for the organization, enhancing the organization's reputation, and advancing its mission" (Haski-Leventhal et al., 2011, p. 139). As I discovered through this year's Annual Registration Survey, over 50% of Wharton clubs provided "financial and in-kind donations" (Haski-Leventhal et al., 2011, p. 156) to their organizations that are not accounted for in the calculations above. Additionally, Wharton clubs combined host approximately 1,000 events per year. During a "normal" year, WHEA typically hosts around 15 in-person events for alumni. For simple math, if a typical WHEA-sponsored in-person event hypothetically costs \$20,000, then WHEA would have to spend an additional \$20,000,000 to maintain the same number of alumni events if alumni clubs did not exist.

Club leaders also serve as the main points of contact for Wharton in 78 different regions and affinities, supporting the school's admissions efforts, student support, career services, continuing education, fundraising, and brand recognition. Club leaders create a Wharton presence where the school would not normally be. This supports Bowman's (2009) claim that "the revenue that volunteers create (net of the cost of recruiting, training, and supervising) is not paid to them, but stays within the organization and subsidizes output in the same way as explicit monetary gifts" (p. 496). Furthermore, club leaders themselves are more likely to also be donors. In FY'20, 18% of club leaders donated, compared to 8% for the total alumni population. Unfortunately, measuring the economic value of hours worked is not a completely accurate assessment of the full impact of the volunteer activity.

CHAPTER 5

DATA INTERPRETATION

As I worked on this capstone project, I reflected a lot on my own experience as an alumna of Emory University. I look back on my time at Emory with such nostalgia and positive regard. I graduated over 10 years ago, and I still keep in touch with a core group of friends. We are constantly reminiscing about our favorite Emory memories. Several years ago when I traveled to Atlanta to visit Wharton alumni, I made a point to stop by the Emory bookstore and walk around campus. Last year, when my younger cousin mentioned that she might apply early decision to Emory, I was ecstatic and spent a lot of time trying to convince her that it was the right choice. When she was accepted, I felt such pride and gave her a few of my old Emory shirts. I consider Emory one of the most pivotal times in my life. However, I have never donated, and I have not been to a single alumni event. I am not a volunteer and have ignored multiple requests to get involved. I have never logged into any digital platform, other than to track down my transcript to apply to Penn's MSOD program. I follow Emory on social media but have not physically liked a single post. I receive Emory's emails but only skim them at best. Am I an engaged alumna?

I am engaged in all of the ways that schools cannot track. I am part of the problem that I set out to explore through this capstone project. I would most likely feel less connected to my alma mater if Emory stopped being active on social media and removed me from their email lists. The alumni office's efforts are helping me stay connected, but they cannot show any hard data to prove it. Maybe the fact that I have a

valid email address on file is enough? Or maybe I am, in fact, not engaged, even though I feel such a strong affinity to the school?

I began my capstone journey to answer the following questions: For alumni relations professionals, what are the consequences of having responsibilities that are difficult to measure, especially in comparison to their development counterparts? How can alumni relations teams set more specific, measureable goals that accurately reflect their work and their relationship with their development colleagues? What is the most effective way to measure nonmonetary alumni engagement? While I certainly feel better equipped to tackle these organizational challenges than when I started, I need to admit that there are no simple answers. Patton (1986) speaks directly to my experience:

The internal evaluator explains what her staff has done during the year; the problems with getting started (fuzzy program goals, uncertain funding); the data collection problems (lack of staff, little program cooperation, inconsistent state and county data processing systems); the management problems (unclear decision-making hierarchies, political undercurrents, trying to do too much); and the findings despite it all (“tentative to be sure, but more than we knew a year ago and some solid recommendations”)...Then the advisory board explains its frustration with the disappointing results of the explanation (“data just aren’t solid enough”) (p. 10-11).

In this quote, I would just need to substitute “internal evaluator” for an alumni relations staff member (i.e., myself) and “advisory board” for a group of my advancement colleagues. All of these problems are precisely why alumni engagement metrics are so difficult and why many people do not even want to try.

Ultimately, through my capstone project, I did discover new alumni engagement metrics. Specifically, for my club volunteers, I have begun tracking volunteer hours and number of emails sent by the volunteers. These two new metrics, in addition to what I was already tracking, will help me more thoroughly demonstrate how much time and energy club leaders give to the Wharton community. Now that I have a baseline for these numbers, I can work with my team to set specific goals for next year. I have also made significant progress on encouraging my alumni relations colleagues at WHEA to track similar metrics, which will allow us to have more meaningful team-wide metrics. We will be able to report how many total volunteers the alumni relations team supported and how many total hours those volunteers gave, in the same way that the development team reports total donors and total dollars raised each year.

However, my quest to determine *the* most effective way to measure nonmonetary alumni engagement for the entire industry proved more challenging, if not impossible. I now realize that the question I was asking was part of the problem. My primary goal was to identify a more complete way to measure the achievements of the alumni relations team to help elevate our work in relation to our development colleagues. Unfortunately, I had been incorrectly equating the work of the alumni relations team with the definition of nonmonetary alumni engagement, when in fact, a distinction needs to be made. I sought metrics that alumni relations can claim as our own, but what I have learned is that we cannot solely claim engagement. The lines between teams become blurry even when just trying to focus on the nonmonetary portion of engagement. For instance, many schools, have separate communications and events teams, Wharton included, or utilize volunteers specifically for fundraising purposes. There is a big difference between measuring the

outputs of the alumni relations team and measuring how engaged alumni are. For example, the WHEA alumni relations team does not manage Wharton's social media accounts, so while social media followers, likes, and shares might be a good way to measure alumni engagement, it would not be an appropriate metric for the alumni relations team. Likewise, there cannot be an industrywide standard for alumni relations team metrics because every school has different programs and opportunities available for alumni, which are at least partially influenced by very different student experiences. We can share learnings and best practices, but our metrics have to depend on our own institution's structure and priorities and the specific responsibilities of our team.

Therefore, while I did discover new ways for measuring specific types of alumni engagement, the most meaningful conclusions from my data interpretation center around organizational changes that I believe will help address some of the challenges between alumni relations and development teams. These five key takeaways are outlined below. This is obviously very fitting considering this capstone project serves as the completion of my time in the Organizational Dynamics program. My MSOD journey has equipped me with a unique perspective through which to examine my work in alumni relations. I may not have specifically answered my initial research questions, but I have identified some of the reasons why the challenges that led to those questions exist and possible solutions.

Five Key Takeaways

1. Stop using the word “engagement” synonymously with alumni relations teams

Every person I interviewed had a slightly different definition of alumni engagement. In the simplest sense, engagement is used to describe any interaction an alumnus can have with any aspect of his/her alma mater. It is commonly accepted that engagement encompasses both financial donations and nonmonetary behaviors, and giving participation and/or dollar amounts are included in engagements scores. Engagement is also used for titles of alumni relations staff members and teams who do not have any direct fundraising responsibilities. As an example of how interchangeably the words are used, I am on the alumni and student engagement team which is part of the larger alumni relations team. Penn DAR has four categories for departmental goals: fundraising, engagement, programs, and diversity & inclusion. If engagement is all of it, why is it so often separated from fundraising? The distinction is made between Development *and* Alumni Relations in the department's title, but it is also all considered alumni engagement.

Even CASE seems to confuse alumni relations and alumni engagement. CASE's Alumni Engagement Metrics Task Force was created by their "Commission on Alumni Relations" (Alumni Engagement Metrics Task Force, 2018, p. 4). As previously mentioned, their four categories for defining alumni engagement are "volunteer, experiential, communication, and philanthropic", which is "limited to financial support" (Alumni Engagement Metrics Task Force, 2018, p. 6). They then list four engagement measurement inputs, defined as "the basic resources that are needed to develop and manage an alumni engagement program" (Alumni Engagement Metrics Task Force, 2018, p. 8). The four inputs are: "number of living alumni, total institutional alumni relations staff FTE (full time equivalent), total institutional alumni relations staff salary

budget, and total institutional alumni relations program budget” (Alumni Engagement Metrics Task Force, 2018, p. 8). The Task Force recommends “only including alumni relations inputs” and states that the “input data will allow institutions to assess the impact of their financial investment in engagement activities year over year and to build rationale to support increasing and/or redirecting financial resources” (Alumni Engagement Metrics Task Force, 2018, p. 8). At WHEA, there are separate teams for alumni relations, events, communications, and fundraising, so why are only alumni relations staff and budgets included as inputs for the engagement metrics? Financial resources could be redirected away from the alumni relations team for reasons that we have no control over.

In external communications, I do not think it makes sense to start using a different word in place of engagement. It is simple and to the point – of course we want alumni to be more engaged in whatever way they want to be engaged. However, internally, a clearer distinction needs to be made. It is confusing to be on an alumni engagement team and to be presented with an alumni engagement score, which only reflects our team’s work in one variable (i.e., is the alumnus a volunteer – yes or no?), constituting less than one quarter of the score. An engagement score is an appropriate metric for the entire department, but not for the alumni relations team. Alumni relations teams need to stop using the word “engagement” as the main descriptor for our work because we do not have ownership over it. We contribute to alumni engagement, just as the development team does, but there needs to be a piece that is uniquely ours. Something along the lines of alumni experiences, programming, or activities, or alumni volunteer management would make more sense. The corresponding metrics for the team would then be the

number of alumni experiences/activities offered and the participation number and rate in those experiences/activities.

2. Clearly define and depict the organization's structure

As mentioned in Chapter three, during the informational interviews, alumni relations and development teams were described as two pillars of the organization, working side by side, or alumni relations was depicted as part of the base of the pyramid, supporting development's efforts. I believe at Penn, alumni relations and development are seen as two pillars, but at WHEA, the alumni relations team serves as part of the base of the pyramid. This can be very confusing for staff. If I think I am an equal partner to my development colleague, but my development colleague sees me as supporting her, then miscommunication and conflict are inevitable. Leadership needs to clearly define the role of each team. Philosophies around organizational structures and how teams should work together can obviously change as leadership changes, so this should be reassessed and recommunicated on an ongoing basis, especially during staff transitions.

I believe that the two pillars model and the pyramid model can both work as long as they are communicated properly. Given all of the literature supporting giving time and giving money as two distinct behaviors, I also believe that alumni relations and fundraising teams should be separate, assuming the resources are available. The one caveat I will make is that if an organization's ultimate goal is raising money, so that a monetary gift will always be prioritized over a donation of time, then the pyramid model should be implemented. It is unfair to the alumni relations team to be told that they are an equal partner, but then be a third of the size of the development team and have

fundraising always take precedent over their work. The pyramid model helps prevent this issue of action alignment, which is an “alignment of employee actions with the objectives of an organization's strategy” (Colvin & Boswell, 2007, p. 40). Rather than trying to be something separate and equal, as in the pillar model, the pyramid model allows alumni relations to still be separate and important but have a clearer path to the ultimate organizational goal of fundraising.

3. Determine the purpose for each metric and which organizational level it reflects

During my informational interviews, it became very clear that the reason behind the metric, the “why”, is just as important as the metric itself. Some of the metrics that my colleagues shared capture how engaged a particular alumnus is, while others reflect the success of a particular program or initiative, and still others demonstrate the collective efforts of the entire organization. There is often an association between metrics and performance evaluation, and thus an underlying fear that the data might reveal our shortcomings, so clarifying the purpose of the data collection can also ease some of these tensions. There are many reasons for metrics, so it is important to ask, “Why are we collecting this data and what are we going to do with it?”

A helpful way to determine the purpose of different metrics is to identify their corresponding organizational level. If the strategic objectives of the organization are to fundraise and engage alumni, then total dollars raised and total alumni engaged, most likely through an engagement score, would be appropriate measures of the entire organization’s success. At the alumni relations team level at WHEA, in the simplest terms, we collectively provide relationship management, volunteer opportunities, and

programming, so it would be logical to measure total touchpoints with staff, total number of volunteers, total number of volunteer hours (or other metrics that show volunteer activity), total number of programs, and participation in those programs. Another level down on the global clubs team, club specific metrics (e.g., new clubs added, number of club leaders who have also donated) can further demonstrate the activity of our team, our volunteers, and the clubs as individual organizations. These club specific metrics can also be used to motivate and steward current volunteers and recruit even more alumni to get involved.

Kaplan and Norton's (1996) balanced scorecard is a helpful way to visualize the different levels within an organization and their corresponding metrics. The first process in the balanced scorecard is "translating the vision" (Kaplan & Norton, 1996, p. 75).

WHEA's mission statement is:

To engage constituents in meaningful, lifelong relationships with the School that provide value to alumni and the broader Wharton community, thereby creating and sustaining a culture of giving back. While building and leveraging the Wharton brand, EA works collaboratively – across the School and the University – to secure philanthropic commitments to ensure Wharton's prominence as the thought leader in global business education ("WHEA Intranet", 2021).

From there, "the second process – communicating and linking – lets managers communicate their strategy up and down the organization and link it to departmental and individual objectives" (Kaplan & Norton, 1996, p. 76). Additionally, "the organization's high-level strategic objectives and measures must be translated into objectives and measures for operating units and individuals (Kaplan & Norton, 1996, p.

80). Every level should have its own metrics that show progress towards the next level up and towards the overall strategy. For WHEA, this means that on the global clubs team and one level up on the alumni relations team, our metrics should demonstrate how we help create and sustain “a culture of giving back” (“WHEA Intranet”, 2021). However, this also means that the alumni relations team alone cannot be responsible for increasing alumni engagement since that is an organizational objective.

WHEA’s mission statement affirms the importance of “meaningful, lifelong relationships” between the school and alumni (“WHEA Intranet”, 2021), but it is clear that the overall goal is for those relationships to translate into “philanthropic commitments” (“WHEA Intranet”, 2021). I certainly understand the interest in measuring alumni “emotions, motivations, and perceptions” (Fleming, 2019, p. 106), but there needs to be a purpose for collecting those feelings. Perhaps at an organizational level, it would be meaningful to say, for instance, “80% alumni feel connected to the school”, but what does that tell us? I feel connected to Emory solely because of my student experience; Emory’s alumni relations team has very little to do with that feeling. Stories and quotes can be highly effective in communications and other marketing materials. Conducting interviews or focus groups with alumni can provide context to quantitative data and help with decision making, but collecting feelings for *all* alumni would not be a worthwhile exercise without a clear purpose. Metrics should reflect the organization’s strategy and the actual work being done to achieve that strategy. If we want feelings to translate into donating, volunteering, or attending an event, then we should just focus on measuring those behaviors.

Once the metrics are more clearly defined, each with a specific purpose, data collection needs to be prioritized. Metrics should reflect data that is readily available, but there also needs to be a commitment towards proactive data tracking that is emphasized by leadership at every level of the organization. Numerous interviewees mentioned team size and bandwidth issues as reasons why metrics are often insufficient or incomplete. However, as I outlined in Chapter two, the possible consequences of not having clear metrics and action alignment are staff becoming demotivated and less committed. If an organization only prioritizes collecting fundraising metrics, then only those staff who are frontline fundraisers will have clear action alignment. Setting metrics at each level of the organization, that are aligned with the overall organizational objectives, will not make a difference unless data collection is also prioritized. Teams should select a few key metrics, that are reasonably easy to obtain, and stick with them.

4. Elevate your volunteers

As outlined in Chapter two, the literature clearly proves that volunteers are more likely to be donors and vice versa. This is true for WHEA, where in FY'20, 18% of club leaders donated, compared to 8% for the total alumni population. Every single colleague that I spoke with included volunteering as one of the main ways for alumni to be engaged, often comprising an entire third or fourth of alumni engagement scores. Given the relationship between giving time and giving money and the large role volunteering plays in alumni engagement, I believe that more attention and resources should be devoted to alumni volunteers. I want to preface this by saying that I am not necessarily advocating for the addition of more alumni relations staff positions to support volunteers.

I recognize that this is most likely unrealistic. However, I believe that a reassessment of current resources and a shift in culture to one where volunteers are elevated will have a significant impact.

First, I recommend establishing a standard training for all alumni relations staff that includes an introduction to volunteer management. At Penn, there is currently a thorough training program for major gift officers, but no equivalent training for alumni relations teams. Volunteer management can be extremely difficult. Several colleagues that I interviewed emphasized the challenges of working with alumni volunteers. Instituting volunteer management training would help alleviate some of these difficulties and maximize the impact of staff time and effort. For the virtual Wharton Club Leadership Conference that my team hosted in October 2020, I personally developed a presentation on “Managing a Volunteer Leadership Team” based on my 10+ years of experience working with volunteers (see slides in Appendix F). I tailored this presentation for the role of an alumni club president, but it could be adapted and used as a starting point for creating an alumni relations staff training. Additionally, standardizing training for alumni relations staff would help elevate these positions. As a staff member, I assume that major gift officers have intense onboarding training because their responsibilities are difficult and complicated. In contrast, not requiring specific training for alumni relations staff implies that the positions are less complex. If alumni volunteers are so important that they constitute a third of an alumni engagement score, then staff need to be prepared to take on that responsibility.

I feel grateful that Penn has dedicated a position focused on supporting volunteers. In the role of Director of Volunteer Support, Allison Chiacchiere is

responsible for “looking at volunteers across the University and building them into the strategy” (A. Chiacchiere, personal communication, October 9, 2020). She believes that we hold major gift officers to a certain standard, so we need to hold volunteer staff to the same standards. Of course, it will take more than one staff member to change the institution’s culture and how we think about volunteers, but it is an important first step. I look forward to working with Chiacchiere “to elevate the importance of data and tracking, while at the same time elevating the importance of volunteers and how they are integral to the strategy” (A. Chiacchiere, personal communication, October 9, 2020).

Connecting volunteer opportunities to the organization’s strategy is critical. One interviewee explained that her institution is planning to pull back on how much they use volunteers because they are not providing enough value. My recommendation of reassessing volunteer resources might ultimately determine that current volunteer activities are not contributing to the organization’s strategy and need to be discontinued or refocused. A frequent theme during my interviews was the idea of volunteers “going rogue”, and I have certainly dealt with this myself. Of course, there are extreme examples where the problem is truly a bad volunteer, but I believe that most volunteers only “go rogue” when expectations and requirements have not been managed properly. With thorough volunteer management systems, processes, and training, I believe that almost all volunteer issues can be corrected and avoided in the future.

Second, I recommend reexamining the relationship and opportunities between alumni volunteers and donors, especially at the annual giving level. Typically, the emphasis is on encouraging volunteers to donate. This should certainly not stop, but more time should be spent on the reverse as well – recruiting donors to volunteer. The

effects of this will be twofold. First, development staff will have a greater understanding of the volunteer positions and how much time and energy goes into them.

Communicating and working more closely across teams will hopefully lead to a greater recognition of donations of time. Second, by asking donors to volunteer and give more than “just” money, it subtly elevates the status of the volunteer activity (i.e., you need me to do this in addition to the money I have already given, so it must be important). Liu and Aaker (2008) found that “first asking people about their intentions to donate time leads to a significant increase in actual amounts of contribution, compared to either not asking for volunteering donations or first asking people about their intentions to donate money” (p. 552). Including volunteer opportunities in annual fund messaging will not only elevate the volunteer roles, but may ultimately lead to more financial donations.

Third, volunteer appreciation should always be prioritized, but alumni relations and development staff can take this a step further by celebrating the “super alumni”, which “refers to an alumnus who has served as both a volunteer and donor” (Weerts & Ronca, 2007b, p. 25). Traditionally, there is one process for stewarding donors and a separate process for recognizing volunteers. I recommend developing a new process for stewarding alumni who give money *and* volunteer. Establishing a stewardship program for “super alumni” will help incentivize alumni to do both. This will also ultimately help elevate the status of volunteers because we cannot increase the number of “super alumni” without also increasing the number of volunteers.

Finally, monetizing donations of time may be another helpful way to elevate volunteer activities. Volunteering or attending an event are often viewed as stepping stones to making a financial contribution. However, reporting different types of

donations (i.e., money, time) in the same unit of measurement (i.e., dollars) can demonstrate the value and importance of every type of gift. This can be helpful for internal conversations and strategy (i.e., how much a particular alumnus has given in total) and for external marketing (i.e., all gifts are celebrated; help us meet our donation goals in any way you can). However, converting donations of time into dollar amounts may also further reinforce the emphasis on money. If the goal is to make donations of time just as important, then it could be argued that they should be valued for what they are, not in comparison to monetary donations.

5. Explore additional ways to breakdown organizational silos

Silos refer to a “system, process, department, etc. that operates in isolation from others” (Tett, 2016, p. 13). An overwhelming theme from my interviews was that the relationship between alumni relations and development is a work in progress and that the teams often function within their own silos. Even the colleagues that I interviewed from a development team expressed a similar sentiment. I believe that metrics are one way to encourage collaboration between teams. If a team’s work and accomplishments can be more easily understood through hard data, then it will also be easier to recognize the benefits of working more closely with that team. In the past, when I have shared new metrics, I would often hear the response, “Wow. I had no idea your team was doing that much.” Metrics can help spark creativity and lead to increased collaboration.

However, breaking down organizational silos in advancement organizations will require more than just improved metrics. New programs and processes also need to be implemented to incentivize working beyond one’s own team. During my interviews,

reunion was frequently shared as the primary example of development, specifically the annual fund, and alumni relations working together. Reunion encourages alumni to attend the event, volunteer, and donate money, and all three actions are measured to determine the success of the program. Several institutions also host a “giving day”, which involves volunteers and/or offers several options for alumni to give back (i.e., not just giving money). Very few other programs seem to exist that offer multiple types of engagement opportunities at the same time, and thus, there are a limited number of obvious opportunities for multiple teams to work together.

As I described previously, in the pyramid model, everything flows up to the ultimate goal of fundraising. Nonmonetary engagement typically comes first, followed by a monetary donation. Reunion and giving days are so impactful because they do not just encourage one type of behavior in isolation, but rather emphasize “go, give, and help” all at once. Planning and executing reunion and giving days require teams to work across silos. It is also almost impossible to separate this fundraising success from the other types of engagement. This raises the question whether additional programs could be established that encourage multiple types of engagement. When one engagement behavior is focused on in isolation, it is very easy for the team responsible to also work in isolation. Could we actually be more successful in reaching our fundraising goal if we sometimes attempted to reverse the flow of engagement behaviors or connect the dots in a different direction?

In her book, *The Silo Effect*, Gillian Tett discusses the consequences of organizational silos. She explains, “The key to being innovative was to challenge the boundaries. Creativity tended to erupt when people mixed up ideas from different

sources... Innovation happens at the margins, where one discipline rubs up against another. Or as it were, where silos break down” (Tett, 2016, p. 204). It can be challenging to “know how to judge success in a world without clear boundaries” (Tett, 2016, p. 243), but we should not allow an emphasis on metrics to stifle innovation and creativity. Reunion and giving days help break down silos, but these programs are already established best practices in the advancement industry. It is exciting to imagine what else might be possible if the boundaries between teams were “flexible and fluid” more often (Tett, 2016, p. 247). During my interviews, a common “blue sky” metric was showing cause and effect, specifically between nonmonetary engagement and fundraising. There is already a desire to know how our work is connected. Whether through new metrics, processes, or programs, organizations should take advantage of this motivation and encourage more collaboration and creativity across teams.

CHAPTER 6

CONCLUSION

This marks the end of my capstone project and my completion of the MSOD program, but it is certainly not the end of my journey in alumni relations. I look forward to continuing to explore my research questions in my professional life. In order to pursue the next pieces of this ever-evolving organizational puzzle, I plan to focus on the following action items over the next several months:

- Establish a process for collecting and tracking the two new club leadership metrics – volunteer hours and total emails sent by volunteers – year after year. This year’s numbers will serve as a baseline for showing changes in volunteer activity in the future. I also plan to use the launch of the 2020 State of the Clubs Report as a way to convince the entire reunion and classes team at WHEA to start tracking volunteer hours, so our alumni relations team can collectively report this metric.
- Coordinate with the data team on identifying specific use cases for WHEA’s new alumni engagement score and corresponding dashboard. The roll-out of this new score conveniently coincides with the completion of my capstone project, so my findings can serve as context for how to use the score in practice. I can help ensure the score is used thoughtfully (e.g., does not become solely associated with the alumni relations team) and does not experience the same fate as most of the other scores mentioned during my

interviews (i.e., not used at all). Likewise, I will explore whether the volunteer hour metric could eventually be added to the score.

- Continue sharing my summary report (See Appendix A) and schedule follow-up conversations with colleagues. I sent my summary report to all of my interviewees at the same time that I submitted this capstone, so I was unable to reflect on their feedback for the purposes of this project. My ideas on this topic grow exponentially with each conversation and new experience, so I am excited to use my summary report as way to continue building on my next steps and recommendations. Given my position within my organization, I do not have the power to implement most of the organizational changes that I recommended by myself, so these conversations will also serve as a way to generate buy-in from my superiors and identify allies across the organization.

Areas for Future Research

Further research could more specifically explore team dynamics between alumni relations and development within advancement organizations. How might better metrics and/or organizational changes, like those proposed in my five takeaways, affect inter and intra-team dynamics? Additionally, once proper volunteer metrics are established, alumni relations teams could investigate how and if these new data points could be used to increase volunteer motivation and retention. Likewise, the relationship between student engagement and alumni engagement could be explored. As previously mentioned, behavior, expectations, and motivations as an alumnus are heavily influenced

by one's experience as a student. How do certain student engagement metrics translate to corresponding alumni engagement metrics?

Additionally, I acknowledge the unique timing of my research. I began my capstone journey as the COVID-19 pandemic began and just before the death of George Floyd. I took the capstone course during the summer of 2020, and on the first night of our virtual class, Black Lives Matter protests were happening outside of my apartment in Philadelphia and in other cities across the U.S. If I had completed this project just one year earlier, it is possible that my results and conclusions would have been completely different. Further research should explore how the COVID-19 pandemic, the virtual environment, and the heightened focus on diversity, equity, and inclusion have influenced alumni engagement, its corresponding metrics, and the teams responsible.

Final Reflections

The expression of “time, talent, and treasure” always used to bother me. I understood its value in conversations with alumni (i.e., no, we do not *just* want your money), but internally, I always wondered why we did not just say something more comparable to “time and talent are good, but treasure is best”. Within the expression, I believed that time and talent represented engagement and the alumni relations team, while treasure referred to fundraising and the development team. However, thanks to this capstone project, I now realize that “time, talent, and treasure” does not reflect our organizational structure, with separate teams for alumni relations and development, but rather represents one of our organizational goals. “Time, talent, and treasure” is another way of saying “Go, Give, Lead/Help/Do”, the three major buckets of alumni engagement.

Engagement, which includes both monetary and nonmonetary behaviors, is a separate goal from fundraising. Saying that we want alumni to give their “time, talent, and treasure” means that we want alumni to be engaged in whatever way they can.

Not only has my understanding of “time, talent, and treasure” shifted, I also now have an entirely new perspective on the relationship between the alumni relations and development teams. When I started my capstone journey, I was in the two pillars camp and thought alumni relations should be seen as an equal partner to development. This is what my superiors on the alumni relations team told me when I first started at WHEA almost nine years ago, and as I advanced within the organization, I continued to fully uphold this philosophy. I believed that alumni relations and development should be partners, but I never felt like we were on the same level. I wanted to explore new metrics, so I could more easily compare the work of alumni relations to that of development and prove that we were, in fact, equals. My goal to discover better metrics was valid, but I now realize that this competition I felt was misguided.

I can now confidently say that Benjamin Franklin was wrong; time is not money. Giving time and giving money are two completely different behaviors. As demonstrated in Chapter two, we have different motivations and psychological constructs for volunteering and donating, and we also have different perceptions of ourselves when we engage in these different acts. Perhaps a better expression would be “time is *like* money”, both valuable but in different ways. It is impossible to equate volunteers and donors; even the calculations for the monetization of volunteer hours are incomplete. Volunteers should be valued as volunteers, not in comparison to donors. Likewise, the

alumni relations team should be valued in its own right, not in comparison to its development colleagues.

Letting go of my fight to be seen on the same level as development and accepting alumni relations' important position at the base of the pyramid has rejuvenated my motivation and passion for this work and given me a renewed appreciation for my organization. I am more at peace with the current relationship between development and alumni relations because I now have a greater understanding of why things are the way they are. It is not a competition or a matter of "us versus them", but instead, our complex and sometimes challenging relationship is a result of our organization's structure and culture. Better metrics will certainly help the situation and lead to additional benefits (e.g., increased team motivation), but it will require more than hard data to address the imbalance and incite organizational change. I hope my five key takeaways from Chapter five are a helpful place to start.

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APPENDIX A

SUMMARY REPORT

Time, Talent, and Treasure: Exploring Development and Alumni Relations Metrics

How do we measure our work? This is an executive summary of my research on alumni engagement metrics from an organizational perspective. Thank you to the 23 colleagues who participated in my project! I discovered new methods for how to measure different types of alumni engagement, further explored the metric of alumni volunteer hours, and ultimately, proposed five organizational changes to enhance our work and team successes.

Overview of Research Process

1) Interviews with 23 colleagues:

- Participants:
 - Wharton: 6 alumni relations, 3 development, 1 data team
 - Penn: 2 central alumni relations, 2 data team, 1 Law alumni relations, 1 Med alumni relations
 - Alumni relations staff from peer schools: INSEAD, Kellogg, Tuck, Booth, Stanford GSB, Columbia GSB (2)

- Key findings (*see Appendix for more detailed summary*):
 - Alumni relations teams
 - In their titles, teams use “alumni relations” and “alumni engagement” interchangeably, and yet, alumni engagement is seen as any way an alumnus/a is connected to the school, including giving and communications, which are often responsibilities of separate teams.
 - The alumni relations and development teams, whose relationship is a “work in progress”, are either seen as two pillars of the organization, working side by side, or alumni relations is part of the base of the pyramid, supporting development’s efforts. This tends to reflect personal philosophies, rather than a defined organizational structure.



- The role of the alumni relations team is described as relationship building, business development, cultivation, customer service, scaling, value creation, positive feelings, and stewardship.
- Alumni engagement definition and metrics
 - Definitions of alumni engagement are inconsistent, but themes include relationships, connection/affinity, touchpoints, pipeline, and holistic.
 - Alumni engagement includes giving, but there is disagreement on how much it should be included.
 - Engagement metrics include the three major buckets of attend, volunteer, and donate, plus communications and digital, student and career support, and surveys (*see Appendix for full list*).
 - If data collection was not an issue, desired metrics include showing cause and effect, more digital metrics, and capturing alumni-to-alumni connections and feelings of community.
 - Alumni engagement scores are prevalent but are infrequently used in practice due to confusion and distrust.
- Other themes/unique ideas
 - Effects of COVID-19 (e.g., virtual programming, more student support, layoffs and hiring freezes)
 - Emphasis on diversity, equity, and inclusion
 - Unique staff positions:
 - Penn's Director of Volunteer Support (currently Allison Chiacchiere)
 - Idea to have a general alumni relations position or leads generator (specialists vs. generalists)
 - Giving days that involve volunteers or offer alumni multiple ways to participate
 - Booth's post-meeting form: Allows staff to indicate which areas the alumnus/a might be good for (e.g., admissions, careers, research centers, etc.) and their interests, and then staff can give them an engagement score (0-4)

2) Exploration of new metrics at Wharton Alumni Relations

This year's Wharton Global Clubs Annual Registration Survey asked club presidents to share, on average, how many hours per month they spent on club-related activities in 2020 and then provide the same estimate for their entire leadership team combined (minus themselves). They were also asked if they pay for any club expenses out of pocket. 60 clubs (out of 78 total) completed the survey. I used an estimate of 2 hours/month to account for the volunteers from clubs who did not complete the survey.

My colleague, Tania Rorke, on the reunion team sent surveys to her former MBA reunion committees and included a question that asked volunteers to estimate how much time they dedicated to their reunion efforts. The average response was 4.2 hours/month, which I used to estimate the total reunion volunteer hours for 2020.

Borrowing a metric from Penn Alumni Regional Clubs, I determined the number of emails sent by Wharton clubs through our school-provided NationBuilder platform. 52 clubs (out of 78 total) currently have a website on NationBuilder.

- Key findings:
 - In 2020, Wharton club leaders spent **39,051 hours** on club related activities, and when combined with MBA reunion committee members, club and reunion volunteers spent **54,171 hours** on alumni relations activities.
 - **Over 50%** of Wharton club leadership teams personally pay for club related expenses.
 - In 2020, Wharton clubs on NationBuilder sent a total of **1,030 emails**, resulting in **10,360 event RSVPs**. This was a **52% increase** in event RSVPs from 2019.

Club Leader and Reunion Volunteer Hours Given

	Number of volunteers	Hours given in 2020
Club leaders	802	39,051
Reunion committee members	300	15,120
Total	1,102	54,171

3) Monetization of volunteer hours and ROI of Wharton clubs program

I then converted the volunteer hours to dollar amounts using the Opportunity Cost Approach (OCA), Replacement Cost Approach (RCA), and the Independent Sector's estimate of \$27.20 (*see descriptions under Additional Background Information*). For OCA, I used \$150K/year, as this is the average starting salary for Wharton MBA graduates and the only salary data publicly available. For RCA, I used \$29/hour and \$80/hour, which are rates for two of our well known paid club admins.

An AGN webinar on “Measuring ROI in Fundraising” calculates ROI as $[(\text{Dollars Raised} - \text{Dollars Spent}) / \text{Dollars Spent}] \times 100$. I used this formula to calculate the ROI of the Wharton clubs program, with dollars raised as the monetary value of club leader hours. Dollars spent included salaries for our 3 clubs team staff and our 2020 expenses (these numbers are not shared). Given the unique nature of 2020, I also calculated ROI based on our original budgets for FY'21 and FY'20.

- Key findings:
 - In 2020, Wharton club leaders donated approximately **\$1,062,187.20 to \$3,124,080** worth of time.
 - In 2020, Wharton alumni relations volunteers donated **\$1,473,451.20** worth of time.
 - In 2020, the ROI of the Wharton alumni clubs program was **362.6%**.

Monetization of Club Leader Hours

Method	Monetary value of hours given
Opportunity Cost Approach	\$2,815,967.61
Replacement Cost Approach (Low)	\$1,132,479
Replacement Cost Approach (High)	\$3,124,080
Independent Sector Estimate 2020	\$1,062,187.20

Monetization of Alumni Relations Volunteer Hours (Independent Sector Estimate)

	Monetary value of hours given
Club leaders	\$1,062,187.20
Reunion committee members	\$411,264
Total	\$1,473,451.20

ROI of Wharton Alumni Clubs Program

Calculations for dollars spent	ROI
Actual spending for calendar year 2020	362.6%
Budget for FY'21	265.3%
Budget for FY'20	132.8%

Recommendations for Organizational Success

- 1) Do not use the word “engagement” synonymously with alumni relations teams

Alumni engagement refers to everything an advancement office does – volunteer opportunities, events, giving, communications, involvement with student programs, etc. If it refers to everything, it cannot also be synonymous with the alumni relations team. Alumni relations should have its own identity, reflective of what it is actually responsible for (e.g., alumni experiences, programming, activities, volunteer management).

- 2) Clearly define and depict the organization’s structure

Are alumni relations and development teams seen as two equal pillars or does alumni relations support development’s efforts (pyramid model)? The pyramid model makes it easier to see how the work of alumni relations contributes to the ultimate goal of fundraising.

- 3) Determine the purpose for each metric and which organizational level it reflects

Every level should have its own metrics that show progress towards the next level up and towards organizational goals. Alumni engagement scores correspond to the organizational level, not the team level. Like all metrics, capturing feelings, especially for *all* alumni, should also have a clear purpose. If we want feelings to translate into taking an action, then the focus should be on measuring behaviors.

4) Elevate your volunteers

If volunteering is one of the primary ways for an alumnus/a to be engaged, then more resources should be dedicated to supporting volunteers, such as establishing a standard training for all alumni relations staff that includes an introduction to volunteer management and focusing on increasing the number of “super alumni” (those who donate *and* volunteer).

5) Explore additional ways to breakdown organizational silos

Metrics are one way to encourage collaboration between teams. Most alumni programs focus on one type of engagement behavior, so it is easy for the team responsible to also work in isolation. Programs like reunion and giving days are so impactful because they offer multiple ways for alumni to engage at the same time, thus requiring teams to work across silos. The desire to know how our work is connected already exists (*see Interview Key Findings above*); new processes and programs should build on this motivation.

Additional Background Information

1) What are the consequences of having responsibilities that are difficult to measure?

- Specific, difficult goals consistently lead to higher performance than urging people to do their best (Locke and Latham, 2002)
- For specific goals, accumulating goal progress increases subsequent motivation, but for nonspecific goals, accumulating goal progress decreases subsequent motivation (Wallace & Etkin, 2017)
- Action alignment: Alignment of employee actions with the objectives of an organization's strategy; enhances motivation (Colvin & Boswell, 2007)
- Social loafing: Group members who feel their contributions are unidentifiable may exert little effort on behalf of a group (O’Leary-Kelly, 1994)

2) What is alumni engagement?

- Factors that lead to donations: age, income level, family size, satisfaction with one's collegiate experience, involvement in institutional activities after graduation, ages and schooling of children and grandchildren, major in the social science division, language school attendance, residence in states with alumni chapters, employment within the financial sector (McDearmon, 2012; Weerts & Ronca, 2007; Wunnava & Lauze, 2001)
- Super alumni: Alumni who have served as both a volunteer and donor (Weerts & Ronca, 2007)
- CASE’s definition: “Activities that are valued by alumni, build enduring and mutually beneficial relationships, inspire loyalty and financial support, strengthen the institution’s reputation and involve alumni in meaningful activities to advance the institution’s mission”

- Four categories: Volunteer, experiential, philanthropic, and communication
 - Fleming’s (2019) definition: “The convergence of what an alumnus/a believes is important about their alma mater (personal values), their understanding of the characteristics their alma mater possesses (institutional integrity), the strength of affinity they feel towards the institution (sense of connection), what personal resources they are willing to invest towards the university (commitment), and their assessment of the worth of their investment (sense of fulfillment)”
- 3) What is the relationship between giving time and giving money?
- People who volunteer time are also more likely to give money and vice versa (Choi & Kim, 2011)
 - The volunteer activity creates an “emotional attachment and investment with the university that has been shown to be an important factor predicting alumni giving” (Weerts & Ronca, 2007)
 - First asking people about their intentions to volunteer leads to a significant increase in actual monetary donations, compared to either not asking people to volunteer or first asking people about their intentions to donate money (Liu & Aaker, 2008)
- 4) How can you measure giving time?
- In 2020, the Independent Sector estimated the national value of each volunteer hour as \$27.20 (<https://independentsector.org/value-of-volunteer-time-2020/>)
 - Valuation of volunteer work (Orlowski & Wicker, 2015)
 - Opportunity cost approach (OCA): Sets the monetary value of voluntary work equal to the foregone income during the volunteering time
 - Replacement cost approach (RCA): Assigns an equivalent market wage to the task provided
 - Major flaws in these valuations: Do not account for volunteer in-kind donations and other impacts not directly related to the hours volunteered, such as being goodwill ambassadors for the organization, enhancing the organization’s reputation, and advancing its mission
 - “The revenue that volunteers create (net of the cost of recruiting, training, and supervising) is not paid to them, but stays within the organization and subsidizes output in the same way as explicit monetary gifts” (Bowman, 2009)

APPENDIX

INTERVIEW QUESTION SUMMARIES

What is the role of the alumni relations team?
Key themes: <ul style="list-style-type: none"> ● Relationship Building, Business Development, & Cultivation

“We’re the ones who initiate the relationship”

“AR is the billboard for the product”

“AR helps create a pipeline”

- **Customer Service**

“AR is not sales; we serve more of a customer service role and help with mad customers”

- **Scaling**

“We are the mass communications. We make movies that appeal to a wide audience; whereas, development focuses on specialized indie films that only show on certain dates in certain theaters”

“We can’t host school sponsored events everywhere, so we need volunteers who are managed by AR”

- **Value Creation, Positive Feelings, & Stewardship**

“AR is about ‘this is the amazingness of being an alum’”

“In order to give, you need to feel like you’re getting something back in return”

“AR offers a menu of different options, so the donor feels good about the school”

“AR is the bread around the peanut butter”

Majority of responses indicated a “work in progress” relationship with the development team:

“We all know development is paid more”

“AR is a thankless job”

“We’re referred to as the “party girls”, but we’re more than just events”

“The assumption is that AR leads to philanthropy, but you can’t show it, so we need a better way to understand the relationship”

How do you define alumni engagement?

Common key words:

- **Relationship**

“Measuring scope and impact of a graduate’s relationship with his/her alma mater”

“Someone you can rely on if you reach out for help and holds the school in a really close regard”

- **Connection/Affinity**

“If you want connection, think of the school for that connection, whatever it might be”

“Meaningful opportunities to connect alumni needs/wants with the university”

“Keep the school top of mind”

- **Touchpoints**

“Any interaction with a benefit to the school”

- **Pipeline**

“Begins with the students and should be tailored to life cycle of an alumnus (young alumni, middle career, and emeritus)”

- **Holistic**

“Need to think about it holistically – every way someone engages with the university, doesn’t have to be positive”

“Engaging in some way, shape, or form – making a gift, volunteering, or attending an event”

Majority of responses include giving but still some disagreement:

“Doesn’t have to revolve around money”

“Everything that DAR does (not just alumni relations), but not necessarily the big givers”

“Giving should not count as highly in engagement”

“Difference from financial engagement”

How do you measure alumni engagement?

Three major buckets (“Go, Give, Lead/Help/Do”)

- Attend (registration & attendance)
- Volunteer
- Donate

Communications & Digital

- Number of communications
- Email open and click rates
- “Super readers” (alumni with a 100% open rate)
- Contactable rate (available emails)
- Social media followers, likes, and shares
- Updating information on alumni directory
- Number of log-ins to digital platforms

Other event related metrics

- Total number of events
- Speak at an event
- Host an event
- First time event attendees

Other volunteer related metrics

- Total number of clubs/groups
- Club/group membership
- Club/group penetration rate
- Number of emails sent by volunteers
- Number of events hosted by volunteers
- Volunteer hours

Student & Career Support

- Host a company visit
- Job/intern placement
- Participation in mentorship programs
- Referring students for admissions

Surveys

- Response rate
- Satisfaction with event/program
- Willingness to attend future events, volunteer, recommend, etc.

Other

- Touchpoints with staff
- Number of degrees

- Family history
- Alumni awards
- Informal get together with alumni (self-reported)
- Diversity, equity, and inclusion metrics

All responses acknowledged that engagement is difficult to quantify and can be more “feelings” focused or anecdotal:

“It’s a lot of squishy feelings”

“It is such an unquantifiable thing to say that ‘this is a gem of an alumnus or volunteer’”

“A good metric for AR is that alumni aren’t complaining”

If data collection wasn’t an issue, what would be your “blue sky” metrics?

Key themes:

Alumni-to-Alumni Connections

“How to measure and track connections to each other when it’s not through a school supported program. An entire class went on vacation together rather than coming back for reunion – this is very different from other alumni who didn’t attend reunion because they didn’t want to”

“Track a volunteer serving as a ‘door opener’ with a fellow alum for a gift conversation or other engagement”

“Friendships that started at the school”

“Who are our key influencers? Mapping networks of alumni and alumni connections and identifying the hubs/spokes”

First-Timers

“Why alumni finally come back. Look into these first time touchpoints – what prompted the action if someone has been absent for 20 years”

“First time engagers, who has lapsed, who were we able to bring back in, who made an action on top of that”

Cause and Effect

“Identify the number of touch points (e.g. emails with staff, attendance at club events, etc.) before a gift”

“Predictive modeling – capturing ‘journeys’, someone’s progression, and how activities connect”

“The more time a person volunteers, how does that affect their affinity to the school?”

“What type of engagement leads to increased giving?”

More digital metrics

“How long alumni are logged into our digital platforms”

“Which alumni are consuming our content and social media”

Community

“Capturing sense of belonging, connection, community, pride, that the school is a positive force in my life”

“Sentiments – how do you think of this place where you went to school?”

What are your thoughts on alumni engagement scores?

Key themes:

One piece of the puzzle

“It doesn’t need to be perfect, just a guide for internal use”

“I see it as just another tool in the toolbox”

Confusion around what the numbers mean

“A number on its own means nothing because it doesn’t take into account the factors that contribute to your ability to engage, which is different for everyone”

“We technically have an engagement score, but no one trusts it”

Uncertainty on how to use the numbers

“I have suggested that my team look at the engagement score when doing outreach if they need a way to narrow it down, but I don’t have any idea what goes into it”

“It’s only helpful to know who is engaged and who is not engaged, but we should already recognize who is engaged; it shouldn’t be a surprise list”

“I haven’t heard of any really amazing success stories from using engagement scores. Schools seem to have them and then not use them”

Lack of consensus on calculations

“People have a lot of ideas about what should and shouldn’t be tracked. It’s impossible to get people to agree and to please everyone. No one is satisfied with the methodology”

“People get queasy about giving people a value and all of the different stakeholders have different opinions”

“If someone gives a big gift, they’re automatically marked as engaged, but are they?”

APPENDIX B


INFORMATIONAL INTERVIEW QUESTIONS TEMPLATE



1. Tell me about your position (confirm title) and the structure of your team.
2. What is the relationship between alumni relations and development?
3. What is the role of the alumni relations team?
4. How do you define alumni engagement?
5. How do you measure alumni engagement?
6. Does your school have an alumni engagement score? What are your thoughts on it?
7. If data collection wasn't an issue, what would be your ideal metrics, your "blue sky" metrics?

APPENDIX C

WHARTON GLOBAL CLUBS ANNUAL REGISTRATION SURVEY 2020

VOLUNTEER CONTRIBUTIONS SECTION

0%  100%

Volunteer Contributions

On average, how many hours per month do you spend on club-related activities?



On average, how many hours per month would you estimate your entire leadership team (minus you) spends on club activities? Please provide a combined total.

Have you or any of your volunteers paid for club expenses out of pocket (e.g., event space, catering, website fees)? Our goal for this question is to help capture all of the unseen ways that club leaders contribute to the Wharton community.

Yes

No

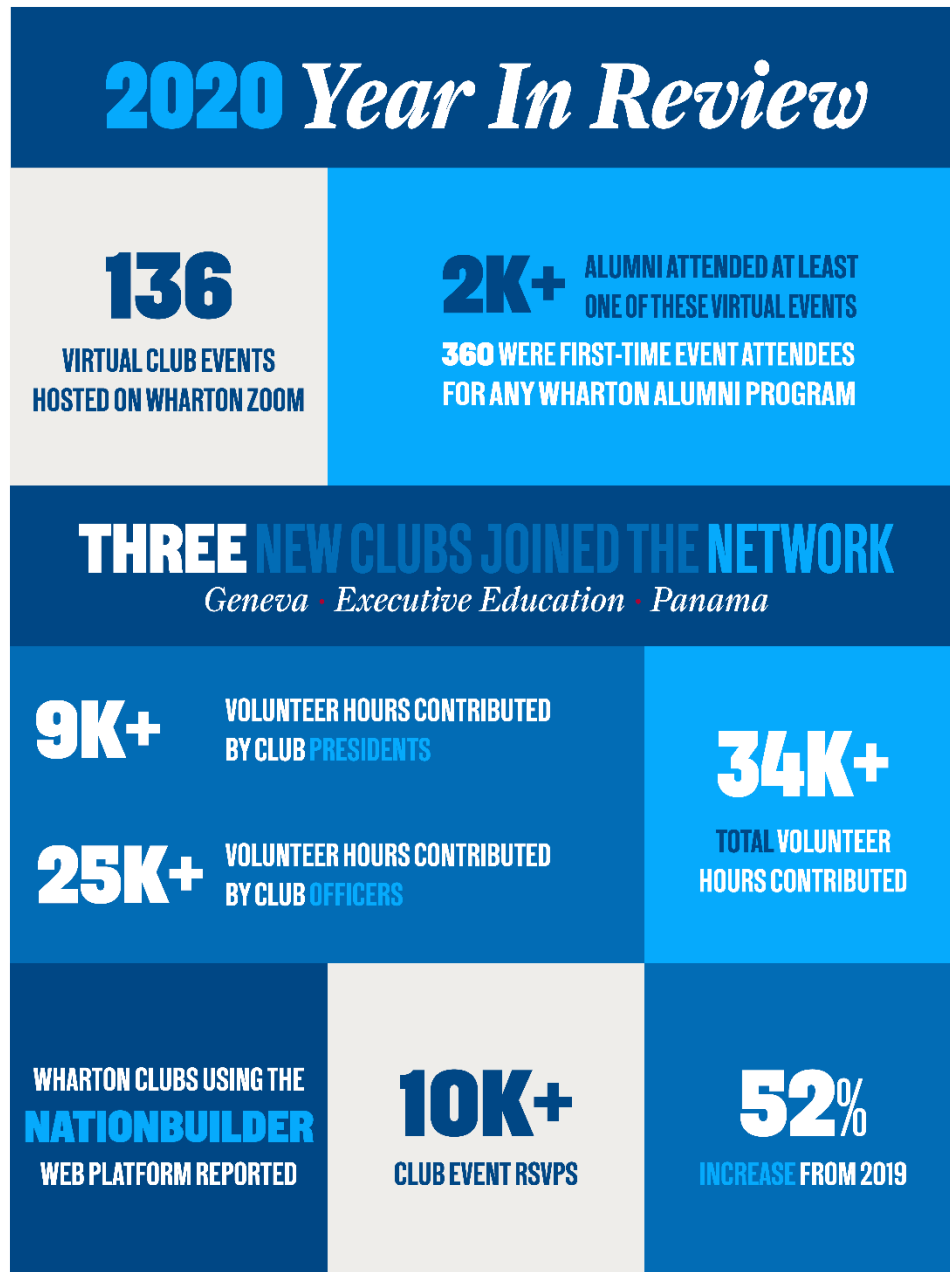
Please name one exceptional volunteer you would like to recognize, either within your own club or the broader Global Clubs Network. Your staff liaison will follow up with special recognition.

APPENDIX D

WHARTON GLOBAL CLUBS INFOGRAPHIC

DESIGNED BY JULIA EMBODY



APPENDIX E

WHARTON MBA REUNION COMMITTEE SURVEY EXAMPLE

WG'06 Reunion Committee Survey

As a member of the WG'06 Reunion Committee, if you had to estimate how many volunteer hours a month you have dedicated to your reunion committee efforts, how many hours a month would that be? Guesstimates are accepted!


Your answer

Thank you for completing the survey.

Submit

APPENDIX F

MANAGING A VOLUNTEER LEADERSHIP TEAM PRESENTATION SLIDES

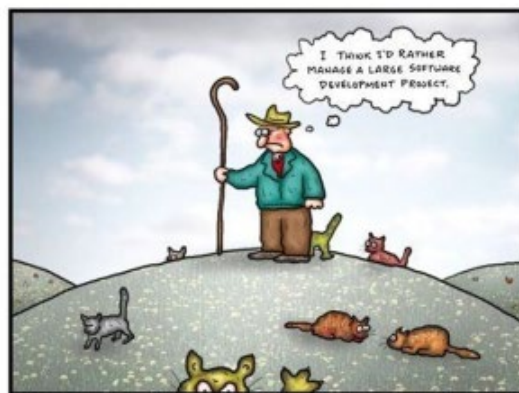


Managing a Volunteer Leadership Team

Wharton Club Leadership Week 2020

Kelly Lauersen, Senior Associate Director, Global Clubs

Volunteer management is hard...



The daydreams of cat herders

But so important!

78 clubs

1,000+ events

800+ volunteers

30,000+ hours donated this year

Wharton

Wharton Club Leadership Week

3



Volunteer Motivations

- Motivations change over time
- Match opportunities to motivations
- Cost-benefit analysis
 - “Enlightened self-interest”

Volunteer Functions Inventory

1. Values
2. Career
3. Social
4. Understanding
5. Enhancement
6. Protective

5

Lifecycle of a Volunteer – The 3 R's



6

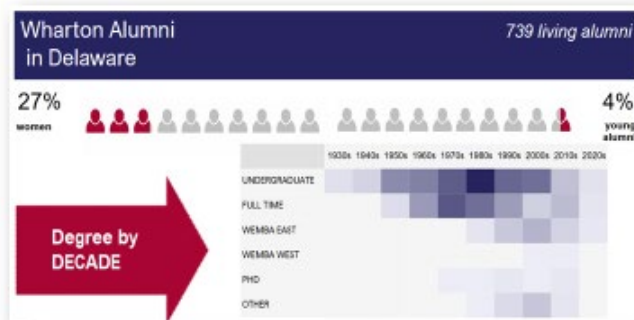
Lifecycle of a Volunteer

The most important step is planning!



Phase 1: Plan

- What do your bylaws say?
- What do you do when someone raises their hand to help?
- Perform a needs assessment
- Leadership team should reflect your alumni population
- Importance of diversity



Leadership Team Structure

- Role of the president
- Leadership team size
- Assign roles and responsibilities
 - Position descriptions
 - Set team and individual goals
 - Helps avoid “free riding” and “social loafing”
 - Be specific about time commitments
- Committees
- Episodic volunteering



9

Position Descriptions

President

- Leads the club in its engagement, programming, and services for alumni in the region or affinity
- Maintains responsibility for the overall operation, organization, and supervision of the club, including fiscal responsibility, the appointment/management of other officers, and succession planning
- Usually acts as the primary contact with the staff liaison and the Wharton School
- Time commitment: XX hours/month

Treasurer

- Maintains and supervises club bank account, pays all club bills, and records sources of income
- Prepares and submits financial statements to the officers and members
- Files all required tax documents
- Time commitment: XX hours/month

VP of Membership

- Creates a strategy for membership including a plan to recruit and retain new members
- Welcomes and recognizes new members during events
- Gathers feedback from existing and new members to improve programming
- Time commitment: XX hours/month

Webmaster

- Serves as the official point of contact for all matters related to the club website
- Updates and maintains (or manages an administrator to update and maintain) all website content
- Manages email communications and online event registration, including initial troubleshooting
- Time commitment: XX hours/month

VP of Young Alumni Programming

- Plans and executes programming and events that appeal to recent graduates (0-10 years out)
- Represents the interests of young alumni on the club board
- Collaborates with VP of Communications or Webmaster to develop a communications strategy to target young alumni
- Helps coordinate events for summer interns
- Manages young alumni committee
- Time commitment: XX hours/month

President Emeritus

- Serves as a mentor for the current President during his/her term
- Provides historical knowledge and context when appropriate
- Helps maintain club succession plan
- Participates in leadership meetings
- Time commitment: XX hours/month

<https://www.whartonofficers.com/leadership>

10

Phase 2: Recruit

- Always be recruiting!
 - Make it visible
 - Best way to recruit new volunteers is to thank your current volunteers
- Volunteer info sessions
- Call for volunteers events
- Surveys
- Elections
- Just ask!



11

Phase 3: Retain

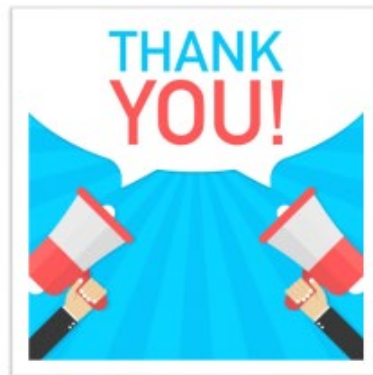
- Volunteer training/onboarding
 - Set expectations
 - Introduce to your staff liaison
 - Resources available
 - Team culture
 - Historical knowledge
- Accountability
- Team dynamics
 - Transformational leadership
 - Communication
 - Board meetings
 - Have fun!
- Firing a volunteer



12

Phase 4: Recognize

- Celebrate
 - Remember important dates
 - Highlight milestones and project completions
 - Share results and outcomes
 - Host events that are volunteer focused
- Create meaning
 - Connect back to mission of club or School
 - Professional development
- Thank
 - Follow-up!
 - Special access to events and speakers
 - Make it visible



https://www.whartonofficers.com/stewardship_guide

13

Succession Planning

- The most important job of a president is finding a successor
- Term limits
- Off-boarding process
 - Bank accounts
 - Passwords
- Elections
- Staggered transitions
- Advisory boards



14

THANK YOU!



15

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Wharton Club Leadership Week



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