

ALUMNI GO EUROPE

A Lifelong Learning Grundtvig Project 2008-2010



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ABOUT THE PROJECT

The management of the relationship between former students (Alumni) and universities is a fairly new profession in European universities: even the most advanced institutions have barely more than 15 years experience in this area.

Regional networks of professionals have sprung up across Europe and exchanging best practice at European level was seen as a logical next step to advance the profession further.

From 2008 to 2010, staff and Alumni from four partners (the University of Linz in Austria, the University of Navarra in Spain, the University of Siegen in Germany and CASE Europe, based in the UK) met in seven European cities to discuss how they could enhance Alumni relations.

The participating institutions are very different in their nature: three are universities while CASE is an international membership association representing the profession.

Colleagues from the Universities of Birmingham, Liverpool, Reading, University College London (UCL), University of California, Los Angeles (UCLA), Birkbeck and the School of Oriental and African Studies (SOAS) also participated in some meetings.

The project was not only an opportunity to harness best practice at European level but also a fantastic first chance to “learn to learn” between countries and partners.

‘We learned from our partners, about dividing more of our services related to the diversity of our target group regarding age, interest and need. Related to our own human and financial resources we have to focus on efficient services.’

**Susanne Padberg, Head of Alumni Relations,
University of Siegen**

The topics covered in the various meetings included:

- ◆ how to define success in Alumni management and measure what we do;
- ◆ what types of services should and could be provided to Alumni;
- ◆ how to manage and harness the goodwill of volunteers;
- ◆ how to strengthen the links between fundraising and Alumni relations;
- ◆ what to consider when choosing a database;
- ◆ how to make the most of online platforms and social media
- ◆ how to strengthen Alumni events.



2. PARTICIPATING ORGANISATIONS / PROJECT PARTNERS

2.1 Kepler Society

Name of (Alumni) organisation:	KEPLER SOCIETY
Name of university the organisation is related to:	Johannes Kepler University Linz
Country:	Austria
Contact person:	Judith Raab
Position:	Managing Director, Kepler Society Head of JKU Alumni- and Career Service
Telephone:	+43 (0)732 2468 5134
E-mail:	judith.raab@jku.at
Legal status of university: (private/public)	Public
Size of university: (number of current students)	17,000
Specification of university: (subjects, departments, research focus)	3 Faculties (Law, Economics, Engineering) with 120 different departments
University's founding year:	1965
Total amount of Alumni: (theoretical, approximately)	30,000
How the Alumni organisation is related to the university: (autonomous organisation, association, part of university/which department...)	Combination of being part of university (Alumni- and Career Service) AND autonomous society
Total amount of members: (Alumni, Students, others)	4,100 member Total 10,000 in contact
Paid or free membership:	Paid membership
Opt in or opt out membership:	Opt in
Number of staff: (full time equivalent)	3.5
Main services:	Newsletter, lectures, socialising, sport and cultural events, career centre service, international chapter and reunions, about 100 events per year

Staff and learners from the Kepler Society who took part in one or more meetings:

- ◆ Judith Raab, General Manager, Kepler Society
- ◆ Roxana Monadjemi, Alumna
- ◆ Thomas Malzner, Alumn
- ◆ o.Univ.Prof.Dr. Friedrich Roithmayr, Vice-Rector, Johannes Kepler University
- ◆ Sabine Luckeneder, Staff Kepler Society
- ◆ Carola Berer, Head of JKU Career Center Service, Johannes Kepler University

2.2 Universidad de Navarra

Name of (Alumni) organisation:	ALUMNI Universidad de Navarra
Name of university the organisation is related to:	Universidad de Navarra
Country:	Spain
Contact person:	José Luis de Cea-Naharro Romero
Position:	Deputy Director of Alumni Relations
Telephone:	+34 (0) 94842 5608
E-mail:	jlcea@unav.es
Legal status of university: (private/public)	Private
Size of university: (number of current students)	12,000
Specification of university: (subjects, departments, research focus)	Law, Economics and Business, Communication, Humanities, History, Philosophy, Philology, Pedagogy, Architecture, Engineering, Medicine, Pharmacy, Chemistry, Biology, Nursing, Theology, Business School
University's founding year:	1952
Total amount of Alumni: (theoretical, approximately)	130,000
How the Alumni organisation is related to the university: (autonomous organisation, association, part of university/which department...)	Part of the University
Total amount of members: (Alumni, Students, others)	27,000
Paid or free membership:	Paid membership
Opt in or opt out membership:	Paid
Number of staff: (full time equivalent)	3.5
Main services:	Alumni Chapters, Magazine, Online Newsletter, Lectures, Social/networking events, Reunions, Online community, Scholarship programme, Career services

Staff and learners from the University of Navarra who took part in one or more meetings:

- ◆ José Luis de Cea-Naharro, Deputy Director of Alumni Relations
- ◆ José Antonio Fernandez, Director of Alumni Relations
- ◆ Iris Torre, Event Manager
- ◆ Teresa Molina, Event Manager

2.3 Alumniverbund der Universität Siegen

Name of (Alumni) organisation:	Alumniverbund der Universität Siegen
Name of university the organisation is related to:	Universität Siegen / University of Siegen
Country:	Germany
Contact person:	Susanne Padberg
Position:	Head of Organisation (Alumniverbund)
Telephone:	+49 (0)271 740 4912
E-mail:	padberg@Alumni.uni-siegen.de
Legal status of university: (private/public)	Public
Size of university: (number of current students)	13,000
Specification of university: (subjects, departments, research focus)	Departments: Social Sciences, Philosophy, Religion, History, Geography, Education and Psychology, Linguistics, Literature and Media Science, Art and Music Education, Business Economics, Business IT and Commercial Law, Mathematics, Physics, Chemistry, Biology, Architecture and Urbanism, Civil Engineering, Mechanical Engineering, Electrical Engineering and Computer Science
University's founding year:	1972
Total amount of Alumni: (theoretical, approximately)	40,000
How the Alumni organisation is related to the university: (autonomous organisation, association, part of university/ which department...)	Part of the university involving faculty based Alumni groups as chapters
Total amount of members: (Alumni, Students, others)	13,000
Paid or free membership:	Free membership (university association) and paid membership (faculty-based groups)
Opt in or opt our membership:	Opt in membership
Number of staff: (full time equivalent)	1.5
Main services:	Alumni newsletter and university journal, homecoming, reunions and graduation events, Alumni-Forum: meetings and discussion events, International Career Book, Life Long Learning: Autumn school and workshops, mentoring programme and careers guidance events.

Staff and learners from the University of Siegen who took part in one or more meetings:

- ◆ Susanne Padberg, Head of Alumni Relations, Universität Siegen
- ◆ Anne Mairose, Alumni Officer, Universität Siegen
- ◆ José Fernando Ramírez Bucheli, Networks, Universität Siegen
- ◆ Josefine Kahle, Online Communications Manager, Universität Siegen
- ◆ Marcellus Menke, Head of Career Services, Universität Siegen
- ◆ Jan Paul Schrake, Alumn
- ◆ Markus Berkenkopf, Alumn
- ◆ Alexandra Roeder, Alumna
- ◆ Michaela Thiel, Alumna and Alumni Relations Manger, University of Würzburg, Germany

2.4 CASE Europe

Name of (Alumni) organisation:	CASE [Council for Advancement and Support of Education] Europe
Name of university, the organisation is related to:	Association of educational institutions; headquartered in Washington, D.C.; offices in London and Singapore
Country:	UK-based but operates throughout Europe
Contact person:	Laure-Anne Garnier
Position:	European Projects Manager
Telephone:	+44 (20) 7448 9943
E-mail:	garnier@case.org
Legal status of university: (private/public)	Registered charity
Size:	12,000
Mission:	Education's leading resource for knowledge, standards, advocacy and training in Alumni relations, communications, fundraising, marketing and related activities.
Founding year:	1974 (CASE); 1994 (CASE Europe)
How the Alumni organisation is related to the university: (autonomous organisation, association, part of university/ which department...)	Member institutions include colleges, universities, primary and secondary independent and international schools and non-profit organisations. Individuals within these institutions can subscribe for additional services by registering for "professional membership"
Total amount of members: (Alumni, Students, others)	Over 3,400 institutional members in more than 65 countries (more than 61,000 people)
Paid or free membership:	Annual fee
Opt in or opt out membership:	Opt in
Number of staff: (full time equivalent)	Around 80 in Washington D.C. 14 in London and six in Singapore
Main services:	Training (conferences), advocacy for the sector, books, <i>CURRENTS</i> magazine, research and information centre

Staff and learners from CASE who took part in one or more meetings:

- ◆ Laure-Anne Garnier, European Projects Manager, CASE Europe
- ◆ Sinéad Devlin, Alumni Manager, University College London
- ◆ Emily Rycroft, Head of Alumni Relations, University of Birmingham
- ◆ Trish Gannon, Deputy Director of Development and Alumni Relations, University of Reading
- ◆ Karen Brady, Head of Alumni Relations, University of Liverpool
- ◆ Francis Roberts, Alumni Officer, School of Oriental and African Studies
- ◆ Evana Topolovec, Development Manager (Alumni), Birkbeck, University of London

CASE Europe would also like to thank the following CASE members:

James Davis, Jennie Moule and Sue Watts (UCL); Marci Weisblatt (UCLA); Zeba Salman and Chris Trevor (SOAS); Mark Lewis and Katharine Dearing (Goodenough College London); Megan Bruns (King's College London) and Matt Mangan (University of Birmingham)

3. TOPICS DISCUSSED IN THE PROJECT

3.1 Benchmarking Alumni Management

The International CASE Alumni Relations Survey (ICARS) has been run on an annual basis since 2007. More information is available from www.case.org. The survey measures key performance indicators from Alumni organisations across Europe and Australia. Participating organisations took part in the survey and we compared results amongst ourselves as well as with the whole group. In this survey, successful Alumni organisations are defined as the ones having more volunteers, more events and more donors.

Correlations from the CASE benchmarking survey:

- ◆ Volunteers: number of email addresses, issues of magazine and e-newsletter produced per year, the percentage of reunion invitees and availability of career networking activities will impact on the number volunteers.
- ◆ Events: Number of staff, events and budget will impact on event attendees.
- ◆ Donors: Number of years that a magazine and a website has been offered; frequency of newsletters; travel programmes will all impact on donors.

What to measure:

The definition of success will vary by institution according to their strategic plans. Measures that may be useful to consider are:

- ◆ Membership numbers.
- ◆ Events: attendees, number of new events offered, overseas vs. domestic activity, overall numbers.
- ◆ Communication: amount of inward-bound communication received (letters, emails and phone calls) and measures of responsiveness (how long does it take us to reply?).
- ◆ Data quality: current / lapsed addresses, email addresses, phone numbers, business / salary information etc.
- ◆ Volunteers: number of volunteers and the amount of time they have given.
- ◆ Student awareness: student participation in campus events.
- ◆ Recruitment: number of prospective student enquiries that come via an Alumni recommendation.

New ideas which participants considered implementing:

- ◆ Running career-focused events e.g. negotiating a salary increase.
- ◆ Social events for young Alumni.
- ◆ Monthly podcasts as a way of showcasing academic talent.
- ◆ Affinity chapters based on hobbies and interests.
- ◆ International career book to show prospective students the impact of a degree.
- ◆ Dinner with 12 strangers. Based on a simple idea, the programme involves local Alumni who host dinners in their homes for students, faculty and fellow Alumni in an effort to make their institution a smaller, friendlier place. By the end of the evening, 12 strangers have become 12 friends. The goal is to bridge the gap between students and Alumni.





'I will avoid presuming I know what Alumni want without analysing existing data or gathering new data first.'

Evana Topolovec, Development Manager (Alumni), Birkbeck, University of London



3.2 Alumni Services

'I have always been wary about the time and resource needed to establish a career mentoring programme for Alumni but since talking to the other participants about how they manage such schemes, we have now begun a pilot an 'Alumni-to-Alumni mentoring scheme.'

Emily Rycroft, Head of Alumni Relations, University of Birmingham

Key services offered by the partner organisations included:

- ◆ Communications (printed publications such as magazines and newsletter or e-communications) as a way of passing on key messages and gathering data to allow other activity to happen.
- ◆ Annual Alumni reunion / homecoming.
- ◆ Alumni Chapters, regional outreach work.
- ◆ Mentoring programmes as a way of engaging Alumni and offering support to students.
- ◆ Careers service / career fair as a way of engaging Alumni and offering support to students.

'We want to implement an Alumni survey, to evaluate our services and to focus on need and interest. We will focus on services related to the university and the relationship between students and Alumni; we will avoid developing commercial benefits.'

Susanne Padberg, Head of Alumni Relations, University of Siegen

3.3 Volunteer Management

Project partners agreed on a number of essential elements required for a successful volunteer programme:

Database:

- ◆ Keep an up-to-date and current database of Alumni contact details, relationships with the institution, business details and any other information that would help to identify Alumni most suitable for volunteering should be maintained.
- ◆ Maintained list of hand-selected Alumni who could be involved in high-profile events, for example, as speakers, fundraising volunteers, or to help with lobbying or profile-raising for the institution.
- ◆ Record all relevant information about volunteers, such as when and how they volunteered, their feedback on the event. Based on this information you can decide what an adequate thank you would be (e.g. a letter from the Head of your institution or from the Alumni manager).

Volunteer pool:

- ◆ Like all prospects in a donor-pool, a volunteer-pool needs to be continually expanded to avoid overusing the same volunteers.
- ◆ Create a broad range of different volunteer opportunities so Alumni can get involved at different levels.
- ◆ Work with colleagues in Development to identify high-profile Alumni who might like to be involved as they might be future donors.
- ◆ Initially engage those Alumni who are personally known to the Alumni office to ensure the success of the volunteering opportunity.

Engagement and brief:

- ◆ Offer written guidelines and job descriptions for volunteer activities to ensure expectations are fulfilled on both sides – be clear what you are asking someone to do and why their support is so important to the University.
- ◆ Volunteers should be contacted by phone, or in person, to invite them to the university and to clearly brief them on their role, expectations and the purpose of the event they are attending.
- ◆ Put a timescale on volunteer roles.
- ◆ Consider who would be the most appropriate person to approach an Alumn for help and which method of contact would be best (phone call, letter, face-to-face or email).



'After networking with our partners and learning from the "Alumni go Europe" Grundtvig project, we know that we have to implement and improve some programmes and activities, such as training for volunteers. We need to improve the engagement of our volunteers in Alumni Chapters, Schools and Faculties, and the best way that we have learnt is by encouraging their knowledge about the University and improving their management skills.'

José Luis de Cea, Deputy Head of Alumni Relations, University of Navarra

We were fortunate enough to benefit from the experience Marci Weisblatt, Director of Advancement at UCLA (University of California, Los Angeles):

- ◇ **UCLA use volunteers for a wide variety of roles including:**
 - ◆ Career support and mentoring.
 - ◆ Events.
 - ◆ Student recruitment and admissions work.
 - ◆ Internal advisory boards.
 - ◆ Ambassadors.
 - ◆ Chapter management.
 - ◆ Fundraising.
- ◇ **The Alumni Office acts as a gateway, connecting Alumni volunteers with each Department of the University.**
- ◇ **UCLA Volunteer management team consider themselves to have two clients:**
 - ◆ Alumni Volunteers: The team maintain communication with volunteers ensuring they are properly trained and offered appropriate opportunities to volunteer.
 - ◆ Internal Departments which they work with to ensure that they are identifying the right type of volunteers and skill sets and that the Department is fully supporting and thanking their volunteers.
- ◇ **It is important to remember that volunteers are not paid members of staff and should be treated appropriately.**
- ◇ **If you are unable to immediately use the talents of a particular Alumn, it is crucial that you continue to communicate with them and thank them for their offer of help.**
- ◇ **UCLA created an 'Alumni academy' as a way of engaging volunteers more deeply in the strategy and life of the institution. The more engaged Alumni are, the more committed and motivated they are to the University's cause.**

'Whilst we have always been aware of the need to engage and involve volunteers, our long-term strategy was not well-developed. The opportunity to hear from UCLA about their volunteer management strategy was invaluable.'

Emily Rycroft, Head of Alumni Relations, University of Birmingham

3.4 Links between Fundraising and Alumni Relations

'Fundraising: We do have a culture of giving, but not a culture of asking. So: Just ask! And set up a button on our website for VOLUNTEER and DONATION.'

Judith Raab, Head of Alumni Relations, Johannes Kepler University



Alumni Relations as a springboard to Fundraising, how to build a fundraising operation from the scratch, experience of the University of Birmingham

Main aspects:

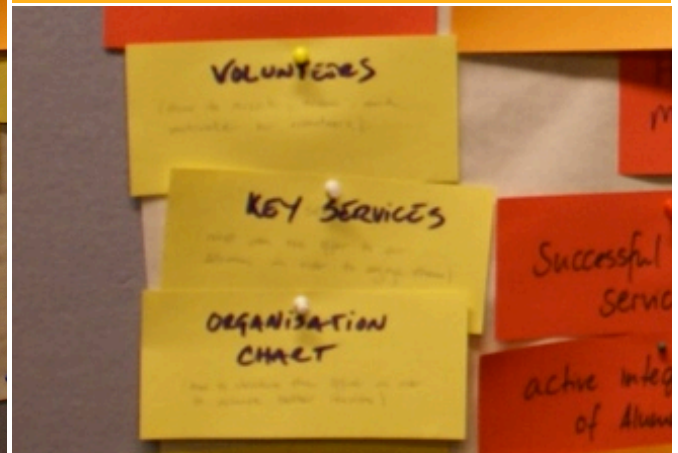
- ◆ Development must be linked to the strategic goals of the University. Any fundraising project must add value to the institution's overall strategic direction and priorities.
 - ◆ Donors are motivated by the project and the strength of your case for support; few give for tax reasons.
 - ◆ Success relies on gaining the buy-in of your senior management team; major donors will usually want to meet them. Make it fun and easy for your senior management team to be involved in face-to-face development work.
 - ◆ It is important that your Senior Management (and fundraising team) lead by example by making a personal gift.
 - ◆ Every institution defines a 'major gift' slightly differently – decide what level suits your institution.
 - ◆ It is important to create a 'culture of asking' within your institution.
- ◇ Consider creating "Giving Clubs" as a way of motivating and recognising donors who climb the giving ladder.
 - ◇ Consider how you can use fundraising volunteers within your development activity to help you approach new prospects.
 - ◇ Define your stewardship programme. How will you thank donors and keep them engaged in your institution? How would they like you to recognise their gift?

3.5 Databases for Alumni Management



'When students register at university: obtain their approval to stay in contact with them afterwards so you can avoid future issues around data protection.'

**Judith Raab, Head of Alumni Relations,
Johannes Kepler University**



A good database is central to anything you do: be it managing your relationships with your Alumni, tracking their engagement, the gifts you receive or your communications. To find the right database system for your Alumni-association, you need to form a working group to discuss how the system will be built. The working group should think about whether you can use an existing database from a supplier or if it is better to build your own from scratch.

If you feel that your database system is not working properly, think about the people who are using it.

'It's not about the system, it's about the people!'

Chris Trevor, Database and Stewardship Officer, SOAS

If you are thinking about implementing a database system you have to find a system that suits your users *and* your institution, *not* the perfect system on paper. Also be aware that if the decision is difficult, you need to try and work the issues out via the working group rather than going deeper into the technology of the system itself.

Existing database solutions offer the advantage that they are constantly developed. Self-made databases might be more static and difficult to develop.

Very few universities work with a closed system that offers everything for the campus in one: i.e. managing Alumni, students and staff. Usually they work with different systems for the different target groups.

'We want to start evaluating the information of our Alumni database, build a cluster of volunteer engagement and then to follow the development.'

Susanne Padberg, Head of Alumni Relations, University of Siegen

3.6 Social Media and Online Platforms for Alumni Relations

'Since the meeting, we have started paying much more attention to our online presence and have been more organised and strategic in our communication. We have since improved our website and have a Twitter account to help keep our Alumni informed about our activities.'

Evana Topolovec, Development Manager (Alumni), Birkbeck, University of London



An institution that owns an online platform gives their Alumni the possibility to communicate and exchange ideas.

Our group strongly believed that we have to go where our target group is. So if most of our Alumni are in one or more online social networking sites, such as Facebook, LinkedIn or Xing (in German speaking countries), form your own institution group or send newsletters through this medium.

Show your Alumni that you are there!

It can be very difficult to convince Alumni to log in using an institution's own online platform when they are in other communities on a daily basis. Using popular networking sites to redirect them to your own platform could be one way to capture them.

'Instead of attempting to do everything when it comes to online communications, I learnt from other partners to be targeted and realistic about what you can do and to discuss with your Alumni what they actually want rather than following every new trend for the sake of it!'

Trish Gannon, Deputy Director, Development and Alumni Relations, University of Reading

'We changed our communication strategy regarding the frequency, the media and the use of channels: we communicate more often, altered our newsletter format and implemented groups in social communities (Facebook) and career networks (XING, LinkedIn).'

Susanne Padberg, Head of Alumni Relations, University of Siegen

3.7 Events and Alumni Relations



'I was put off the idea of hosting an Alumni weekend, it seems to be high risk and drain resources.'

Francis Roberts, Alumni Relations Officer, School of Oriental and African Studies (SOAS)

Events are a key part of what Alumni organisations do to engage their constituents. We shared our most successful and least successful experiences and here is what we learnt:

- ◆ Organise fewer, more successful events each year. Concentrate on running those events which have good uptake and attendance levels.
- ◆ Organise low cost events where possible by sharing costs with other departments or charge a fee if possible.



'We had already decided to cease doing our Alumni weekend but I think listening to the fact that colleagues had some similar issues, I felt greatly reassured that we had made the right decision, and that concentrating on a 'little and often' events philosophy for the future is most likely the best approach for Liverpool.'

Karen Brady, Head of Alumni Relations, University of Liverpool

'We used to run free events but now we charge where possible as this adds value to an event and it also ensures a better attendance rate. As budgets are now restricted, we also hope to advertise events mainly by email. This will require work in building up our email lists.'

Sinéad Devlin, Alumni Relations Manager, UCL Development and Corporate Communications Office, University College London

- ◆ Get support from personal / professional contacts and from Alumni volunteers.
- ◆ Don't forget to show appreciation to your volunteers, for instance by organising a special dinner for them.
- ◆ Social and cultural events are the most successful ones (wine-tasting, quizzes, an evening with...).
- ◆ Try to offer more lifelong learning activities.
- ◆ The Alumni weekend is not successful in most universities because of the hard work, the target (same people every year) and the high budget.

'We've been organising large biennial homecoming days regularly since 2001. The discussion in the project has been a great opportunity for me to re-think how to be strategic about these days. I am now looking more carefully at what the various target groups will respond to – most Alumni's priority seem to be being reunited with former classmates. This will enable me to make best use of limited resources – be it budgets or professors' time.'

Susanne Padberg, Head of Alumni Relations, University of Siegen

- ◆ Establish clear aims when organising events, don't organise for the sake of organising.



4. LEARNING TO LEARN AT EUROPEAN LEVEL

Are you considering running your own European Learning Project Network?

This was the first European Project for most of the partners involved. Here are a few Do's and Don'ts we learnt throughout the course of the project:

DO'S	DON'TS
Do make the most of the opportunity to work in a small network and over a long period of time.	Don't expect to cover every topic on the agenda in each meeting – there will always be natural overlap and flow between subjects and meetings.
Do remember that Alumni management is in the early stages in most of the European countries.	Don't wait until the last minute to disseminate project results, drafting copy in the common language is time-consuming.
Do ensure each partner is easily reachable - choose universities which are close to an airport	Don't rush, remember some colleagues may be less fluent in the working language and need more time when expressing themselves.
Do agree on a working language and stick to it.	Don't be set in your ways, flexibility is the key to working in a small, multicultural, plurilingual group, where topics and ideas adapt constantly.
Do define the rules of how you will work together at the beginning of the project, and the consequences of breaking those rules.	Don't expect each meeting to follow the same format – we found that shorter meetings (two days), with informal activities, over a long period of time worked best.
Do mix different countries in the working groups and respect all the different cultures.	Don't expect to cover too much ground in each single meeting but focus on going deeper into separate topics.
Do set out your aims and objectives of how the group will work and what you would like to gain from the project at the very beginning.	Don't be put off by the diversity of a group – this drives richer results.

'I now have the beginnings of a broader European network that means I can proactively gather knowledge and ideas from a much broader audience; my intention is to use all available opportunities to continue to grow this network.'

Emily Rycroft, Head of Alumni Relations, University of Birmingham

'This project has broadened our horizons. We know that today's students are our future Alumni and, as European borders disappear, learning to manage Alumni in a European way was a great opportunity. We have gained the confidence to optimize our strategy and services. Most importantly, when faced with new challenges in our daily jobs, our first reaction is now to check with other universities across Europe.'

Susanne Padberg, Head of Alumni Relations, University of Siegen