Building Bridges Using Engagement Metrics

How the Tepper School’s communication plan bridged the gap to cultivate a pipeline of long-term, engaged alumni
Today’s Discussion

Originate
- Discussion, thought and exploration

Focus
- Purpose/vision refined
- Team players

Design
- Communications Plan
- Shaping the Vision

Build
- Plan Execution
- Investments made

Occupy
- Up and running
- Results
- Lessons Learned
Discussion, Thought & Exploration

ORIGINATE
TARGET: MBA Class of 2014

Final dollars $34K+
Class gift participation: 99.5%
Breakdancing
Reunion
Graduation
2014 = Game Changer

Historical Class Gift Campaign Participation Rates

Class of 2014  Class of 2013  Class of 2012  Class of 2011
Class of 2013 as Baseline

Opportunity gap between final year as students and first year as alumni

LYBUNT Donor Participation Rate

FY2014 (1-Year Out)  FY2013 (Class Gift Year)
Maybe they aren’t into us?
Purpose/Vision Refined + Team Players

FOCUS
Bridging the Islands

AR

DEV

VOLUNTEERS

30%

COMMUNICATIONS

reunion
chapters

events

class gift

challenge gift

WLMS
Measures of Success

- 50% donor participation rate
- 50% attend events within 14 months
- 25% of class attends 1-year reunion
Communications Plan + Shaping the Vision
Design

- **Process development**
  - **Budget = $0**
  - **Staff Time Management**
    - Initial investment on front-end
    - Monthly meetings
  - **Calendaring**
  - **Tools**
    - Email marketing, Asana, Google Docs, social media, Advance, CheckInEasy, iPad, Leveraged other video shoots, IM, phone, hand-written snail mail, text
Design

- Process development
  - Volunteer Corps
  - Communication Plan: solicitations, reunion, event messages, rankings, magazine
    - Had to be considerate of what our stakeholders had already planned and supported their metrics
  - Buy-in, feedback from internal stakeholders
  - Presentation to Advancement team
Plan Execution + Investments Made

BUILD
Example #1

- Simple message
- Tap into warm + fuzzies
- Remind them about us

- iPad
- iMovie + Vimeo
- Email marketing tool

- Open Rate: 82%
- Time invested: 4 hours
- Don’t always rely on your marketing team -- always have a camera ready
Example #2

- We give, not take (for once)
- Capitalize off of generic holiday

- iPad
- iMovie + Vimeo
- Email marketing tool
- Cross-campus Partnerships

- Open Rate: 61%
- Time invested: 5 hours
- Out-of-the-box collabs
- A/B/C Subject line testing
- Deans CAN have fun!

LEGEND

Target | Tools | Takeaways
Example #3

- Statistics/Update – keep the class in the loop
- Feeding need for hard facts and figures
- Nothing fancy
- Email marketing tool
- Data crunching
- Volunteers (signers)

- Open Rate: 56%
- Time invested: 2 hours
- Know your audience = this class liked being updated on where we stand
Example #4

- Saying/Giving “Thanks”
- Capitalize off of Thanksgiving
- Butter up for EOCY asks
- Short video; minimal text

- Email marketing
- Cost: Campus video services
- Alumni board time (gasp!)

- Open Rate: 70% (on turkey day!)
- Time invested: 5 hours
- Know your audience
- Early planning
- Way to engage/steward board
Example #5

- Flashback/nostalgia
- Butter up for EOFY asks
- Short video; minimal text

- Email marketing
- Photos while students

- Open Rate: 60%
- Time invested: 5 hours
- Repurpose! Reuse! Recycle!
Other Communications

Liz McFarlin-Marcia
June 30 at 2:31pm

60% participation by the MBA Class of 2014 - ACHIEVED! We're so proud of your outstanding efforts, especially Dean Bob Dammon!

GREAT JOB, 2014!

You're receiving this note because a CMU student, alumnus/alumna or member of the campus community wanted to thank you for your generosity last year. Love a Donor Week brings these Tarsers together to express their gratitude in a personal way. We urge you to keep up the good work and give where your heart is again this fiscal year, which ends June 30.

Thank you for your gift to the Class of 2014 Fund.

To renew please visit tepper.cmu.edu/2014classgift

Hey Tom,
I hope that you are doing well! Thanks for donating to the class gift last year. I'd hope that you can help us meet our new match goals this year!

Stephan

14th Annual ABSAP Conference
Hosted by the Olin Business School, Washington University in St. Louis
July 21-24, 2015 | St. Louis, MO
Up and Running + Results + Now What?

OCCUPY
Measures of Success

- 50% donor participation rate
- 50% attend events within 14 months
- 25% of class attends 1-year reunion
50% Donor Participation Rate
Giving Comparison: Class of 2014 v Class of 2013

- Reduced class gift to 1-year out opportunity gap by 8 percentage points (-18%Δ from Class of 2013 baseline)
- Increased 1-year out donor participation rate by 140%
- Increased 1-year out donor renewal rate by 71%
- There is still a slight "gap"
  - 1-year out donor renewal rate should equal overall LYBUNT donor renewal rate
    - In FY14 overall LYBUNT renewal rate was 69%; Class of 2014 FY15 rate was 65% - SO CLOSE!
50% Attend Events within 14 mos.

MBA Class of 2014
FY15 Percentage of Event Attendees

- Silicon Valley/San Fran: 63%, 62%
- Chicago/Seattle/NYC: 77%, 80%, 76%
- Pittsburgh: 52%, 40%
- Boston: 50%, 40%

Exceeded FY15 goal and benchmark
Exceeded FY15 goal
Failed to exceed FY15 goal

50% Event Attendee Goal
Class of 2013 Benchmark

14th Annual ABSAP Conference
Hosted by the Olin Business School,
Washington University in St. Louis
July 21-24, 2015 | St. Louis, MO
25% Attend Reunion

TEPPER MBA CLASS OF 2014
REUNION ATTENDANCE (PERCENTAGE) COMPARISON

FULL-TIME MBA
25%

ALL MBA
23%

FULL-TIME MBA
21%

ALL MBA
18%

FY15 FY14
Engagement Analysis

Percentage of Engaged Alumni in First Year Out

- “Engaged” = attend and/or give and/or volunteer (equal value)
- Level 1 = fulfilled one (attend or give or volunteer)
- Level 2 = fulfilled two (attend and give; attend and volunteer; or give and volunteer)
- Level 3 = fulfilled all (attend and give and volunteer) – MOST ENGAGED!

<table>
<thead>
<tr>
<th>Class of 2013</th>
<th>Class of 2014</th>
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<tbody>
<tr>
<td>Volunteer Givers</td>
<td>56%</td>
</tr>
<tr>
<td>Event Attendee Givers</td>
<td>54%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Engaged</th>
<th>Level 1</th>
<th>Level 2</th>
<th>Level 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class of 2014</td>
<td>67%</td>
<td>31%</td>
<td>21%</td>
</tr>
<tr>
<td>Class of 2013</td>
<td>55%</td>
<td>31%</td>
<td>28%</td>
</tr>
</tbody>
</table>
If we knew then...

- Conduct initial attitude benchmark with 2013
- Create more donor challenges
- Increase volunteer numbers and use
- People will still give at 11:59 pm
  - People respond to urgency
- Enhance Facebook/Hangout use
  - Critical to fundraising (#TresheaWasRight)
- Texting/Push notifications
Now what?

- Where do we go from here
  - Still hand-holding Class of 2014?
  - Down the road/scope and scale
  - Widen our reach
    - 5-year, 10-year?
    - Other programs?
      - Undergraduates, part-time/online classes
    - International alumni?
  - Reality check
    - Time investment
Building Bridges Using Engagement Metrics

QUESTIONS?
Building Bridges Using Engagement Metrics

THANK YOU!

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