Alumni Community Whitepaper:
Engaging Alumni Outside Academia: Emerging Practices in Foundations, **Fellowships** and Other Nonprofit Organizations

Andrew Shaindlin, Consulting Vice President, Grenzebach Glier and Associates

1. Executive Summary

This paper summarizes the findings of a research project completed by The Rockefeller Foundation and Grenzebach Glier and Associates. The goal was to gather insight and ideas related to the practice of alumni outreach by foundations and other grant makers, scholarly or artistic residencies and similar organizations. Some such organizations are a century old, but the development of systematic alumni outreach is a recent phenomenon and a work in progress for most of them.

In our context, we consider academic alumni communities (such as university alumni associations or school alumni societies) to be "traditional" alumni communities. This is due to their long history, their formal structure and the professionalization of the staff who support them. Our goal in this paper is to inform discussion about how to approach so-called "non-traditional" alumni outreach, in organizations other than schools, colleges and universities. We describe some principles learned from traditional academic alumni organizations, and how they may apply with these other organizations.

Our main conclusions can be summarized as follows:

- Some principles of alumni engagement apply almost universally, regardless of the particular nature of the institution in question. A shared, formative or important professional experience such as obtaining a degree, fulfilling a fellowship, or completing an academic or artistic residency can lead to a mutually beneficial lifelong relationship between alumni and the sponsoring organization, and among alumni themselves.

- Organizations like those described above have unique opportunities to engage alumni, thanks to their singular focus or deep commitment to specific issues, and their targeted pursuit of particular outcomes in society. As such, they can fill a prominent role in the professional lives of their stakeholders.

- The practice of alumni engagement in this landscape is still in its formative stages. Nonetheless, there are some clear "best practice" recommendations that can help fledgling alumni communities, leading to greater visibility and support for the parent organization's mission and achievements. At the same time, we articulate ways in which alumni themselves can benefit from an ongoing connection with the organizations that have sponsored, funded or guided their work (e.g., through fellowships and residencies).

- Finally, we suggest directions for further development of this type of alumni engagement, and encourage the sharing of experiences and ideas between organizations. A structured framework for this sharing would likely enhance and accelerate the understanding of what works, how well it works, and what happens as a result.

2. Background and Purpose

During 2017-18, The Rockefeller Foundation funded a grant to support the development of an alumni strategy for past participants in its Bellagio Center, in Northern Italy. Donated to The Rockefeller Foundation in 1959, the Bellagio Center hosts up to 120 scholars, authors, artists and policy makers each year, in month-long residencies. During their stays, these individuals advance their own work while engaging with "a diverse cohort of fellow thought-leaders."

In addition to its Residents, the Center hosts up to 65 week-long international convenings organized by various global institutions, and many of the gatherings are financially supported by the Foundation. By bringing together decision-makers and experts across a variety of disciplines, these conferences and meetings have driven innovative action in fields such as vaccination and immunization; impact investing; women's education in Africa; the "green revolution," and more.

With a database of thousands of past participants (alumni) in these programs, The Rockefeller Foundation saw an opportunity to help them identify more explicitly as "Bellagio Center alumni." To help research, analyze and structure this path forward, the Foundation engaged global non-profit strategy advisors Grenzebach Glier and Associates (GG+A) to structure its information gathering and to lead the synthesis of findings into a road map for future alumni strategy. As of this writing (May 2018), the resulting strategic road map for Bellagio alumni may also serve as a guiding framework for the engagement of alumni across other Rockefeller Foundation programs in the coming years.

In addition to developing a framework for alumni engagement, GG+A compiled this white paper, to help inform the development, implementation and evaluation of alumni road maps in a variety of non-traditional (i.e., non-school or non-university) alumni settings.

Examples and scenarios discussed in this paper may reflect specific organizational or programmatic offerings. However, we encourage readers to take the narrative as a *general framework* which particular institutions may use to help structure their own specific alumni outreach efforts.

In the Research and Analysis phase of the Bellagio alumni project, Foundation staff and GG+A consultants spoke with representatives from a cross-section of foundations, residency and scholarly programs, to gather information on existing alumni practice in these organizations. Much of the insight shared in this document is the result of those interviews. See Section 6 ("Sources") for a list of organizations interviewed in the process.

NOTE: This paper explores alumni programs of scholarly organizations and residential programs and convenings, as distinct from alumni of educational institutions or of corporate organizations. While our work is informed by the author's knowledge of educational alumni communities, we did not interview representatives of those more traditional alumni organizations for this project, nor did we examine the motivations, structures or outcomes of for-profit corporate firms' alumni efforts, or alumni activities in charities, social service organizations or other types of organizations. Suffice to say that the concept of "alumni" continues to surface in additional organizational contexts all the time.

3. Tenets of Alumni Engagement

In everyday conversation, the word "alumni" is generally understood to refer to individuals who have completed a formal course of instruction in a single educational setting (e.g., a school or university), and who have, as a result, received a diploma from that institution (e.g., a bachelor's degree, a master's degree or a doctoral degree).

This usage is still prevalent. However, in recent decades, the word "alumni" has found its way into broader usage among various sectors of the economy and organizational settings. For example, an Internet search for the phrase "corporate alumni" returns some 61,000 results, reflecting the growth of corporate efforts to keep former employees connected. Even professional sports have alumni of teams and leagues (e.g., the Major League Baseball Players Alumni Association, or the National Football League Alumni Association).

More recently, organizations such as foundations, fellowship providers and residence programs have also realized the potential in keeping past participants connected and aware of institutional activities. It is in this context that we present this paper.

Because the vast majority of alumni communities have the educational aspect mentioned above, it is in these settings that some longstanding, fundamental aspects of alumni community engagement have emerged. Many of these are specific to either the educational setting (e.g., a university campus) or to an individual institution (e.g., school colors, mascots, traditions and songs). However, many have potential or actual analogs outside the formal education setting, and it is these factors we will describe below, along with some additional potential program ideas that would *not* be found in a school or university setting.

Here is a brief synopsis of universal principles or factors that apply broadly across diverse kinds of alumni communities.

i. Identity and Community Building

The basic foundation of alumni community derives from a group of individuals sharing a lived experience that has helped to shape their identity, and/or contributed to their accomplishments over time. In a traditional setting, this would include years living in a residential setting in shared housing, taking courses and socializing together, and achieving official recognition for one's success through the conferring of a degree or certificate.

In the context of The Rockefeller Foundation's Bellagio Center, the achievement is more short-lived (e.g., a one-month residency or a conference of a few days' duration), but also much rarer. There are many millions of university graduates worldwide, but just a handful of former Bellagio residents. So, another aspect of the "glue" that bonds participants is the relatively small number of those who share the same identity or experience.

Another driver of connection among alumni can be the relative difficulty of achieving the goal, or the intensity of the lived experience. Military veterans, for example, are often strongly connected to their fellow service men and women, and the word "veteran" denotes a member of a specific type of alumni community.

A shared experience helps to fuel potential community identity. However, for that identity to persist over time, alumni need motivation to continue interacting with 1) the shared organization (such as university, employer, military branch or foundation) and/or 2) with their fellow alumni. For this reason, merely pointing out the shared identity will not necessarily drive alumni engagement. Rather, a *practical value* or *unique outcome* must be associated by alumni with their alumni status. There are generational aspects to this observation, with older generations (e.g., "Baby Boomers") being more likely than more recent cohorts to exhibit loyalty for its own sake. More recent alumni will expect a balanced value proposition, which leads them to share their time, attention and resources (e.g., donations, or voluntary service) in exchange for something of value to them (e.g., expertise, referrals or tangible benefits otherwise difficult to obtain).

ii. Modes of Engagement

Identity in itself has no tangible character – it requires interaction to make it manifest. All alumni communities, then, must specify ways to interact. We call these forms of interaction "modes of engagement." Traditional interaction is face to face, such as meeting with fellow alumni at an event like a reunion or an annual dinner. With the advent and growth of digital technologies, virtual or online interaction has come to drive many engagement opportunities, in alumni communities of all types.

Other modes of engagement are based on printed communication, although that too has shifted toward the digital realm in recent years.

The relative advantages and shortcomings of these modes are numerous, and in the alumni profession, there is still vigorous debate over their merits, and the tradeoffs between them. For our purposes, it is adequate to point out that in-person engagement generally is considered "deeper" than online interaction, which tends to be fleeting, may be with someone whom one has never met, or who may even be anonymous. However, academic alumni organizations may engage well under 10% of their alumni in face-to-face events each year. So, despite its shortcomings, digital interaction can increase the absolute number of people reached with institutional information and messaging.

iii. Inputs vs Outcomes

As businesses, all formal alumni organizations share the desire to assess and report their achievements. What has an alumni organization done in the past year? How effective were its efforts? This suggests that alumni communities of all kinds should establish metrics for monitoring and evaluating the results of their efforts, reporting if possible on quantitative results. Historically, this has been difficult for traditional alumni organizations, as their normal "results" have more recently shifted to take on the character of inputs, not outcomes.

For example, the advent of social media has generated a number of analytical metrics associated with popularity. How many "Likes," "Favorites," "Shares" or "Comments" did a post receive on a social platform? How many "Followers" does the organization boast? These numbers may be proxies for success, insofar as the more popular the community is with its own members, the larger these numbers become.

However, growth in the number of people who like a page or join an online group does not, in itself, represent "success." Rather, one must ask *what happened as a result of those increased numbers*? It is not often easy to

quantify the answer to that question, but through comparative analyses (such as correlations) one can begin to identify the inputs that lead to desired outcomes. The number of volunteers is not in itself a meaningful metric. The work those volunteers completed, or the likelihood of a volunteer to be a donor (as opposed to that of a non-volunteer) represent outcomes.

Every alumni community must differentiate between the inputs that may lead to success, and the outcomes that represent success itself.

iv. Brand

The brand present in alumni minds is generally that of the parent organization. The goal is to create in stakeholders' minds an organizational identity and impression that leads to specific outcomes (high reputation, word of mouth promotion, repeat engagement and support). Ideally the brand is unique to the organization, and alumni associate it solely with that organization. Brand is important because, to the extent an organization offers alumni services or opportunities that are not unique, the brand strength can serve as a differentiator that leads alumni to choose that organization as the source.

To give a simple example, imagine the alumnus of a business school who is changing careers. She may wish to network with alumni, to uncover job leads or valuable referrals. If she is moving from within the field of corporate banking, she will likely find her MBA alumni community to be of greater value than her undergraduate liberal arts alumni community, which is associated with an institution where she pursued an arts degree. In this way, the business school's brand as a nexus of corporate influencers serves to promote that alumni community above another. Were she to decide, instead, to open an art gallery or to seek to join the board of a museum, her undergraduate alma mater's network might appear to have a stronger, more relevant brand for that purpose.

This leads us to the importance of keeping data about alumni as extensively and as accurately as possible.

v. Data

An organization cannot communicate with alumni directly if it does not have the means to reach them with its messages. Social platforms (such as LinkedIn and Facebook) provide some reach, but this is limited by proprietary algorithms, and of course, not all members of a community belong to these platforms. Therefore, contact details (e.g., for postal or electronic mail) are critical components of an alumni communication strategy, for any kind of organization.

In addition to contact information, additional data can paint a more meaningful and instructive picture of alumni. What are their professional roles, who are their employers, what are their job titles? How senior are they in their firm or their chosen discipline? What are their interests, and how do they interact with the parent organization? What are their communication preferences, and who else in the alumni community do they know? When did they last interact with the organization, and in what way or for what purpose?

Maintaining updated records of this kind is a time consuming, labor-intensive and expensive proposition. But this effort is not an *expense* so much as an *investment* in community engagement. The ability to reach alumni,

combined with knowledge of what they care about, or initiatives with which they might want to help can create relevance that feeds their interest in staying connected and engaged with the organization.

Many institutions have invested in data collection and management for decades, but there are countervailing forces that make data collection, storage and use more difficult than before. For example, the European Union's General Data Protection Regulation (GDPR) will make it more challenging for organizations to collect, keep and use contact data for individuals. Entering into force in May 2018, GDPR overall requires organizations to obtain explicit consent from individuals for any use of their contact data, and will forbid organizations from even storing such data until such time as they obtain that consent. This, and greater expectations of data privacy, may mean that something as commonplace as sending out an email newsletter, or "harvesting" email addresses from correspondence with an individual will no longer be permitted. The net effect will be to limit traditional uses of alumni data for most organizations, and exploration of novel means of communicating with them.

vi. Relevance

Even if one has permission to communicate with a constituent, the content and purpose of that interaction must be relevant and meaningful (or, at least, interesting) to the individual. This relevance mandate governs all programs, communications and activities that an organization offers. Regardless of quality or uniqueness, the offering should be *something that alumni need and want, and that they cannot easily obtain elsewhere*. This potentially limits the type of offerings to alumni, but for special-purpose institutions, or organizations whose niche is especially valuable to stakeholders, it is still possible to offer information that is both important to the alumnus and difficult to procure via other means. This should be the intention of *any* organization preparing to engage alumni.

vii. Technology

Finally, it is impossible to ignore the impact of digital technologies on alumni communities. The same technology that makes it easy for organizations to find and connect with alumni makes it easy for alumni to find and connect with one another, potentially marginalizing the parent organization. Powerful internet search tools mean that individuals can easily find one another and communicate directly, disintermediating the organization.

For this reason, over time, the role of alumni organizers has shifted. Previously, they were the collectors, managers and sole owners of directory-style data about alumni. Now, that role has been democratized. Alumni can organize events using simple online tools, can find each other on social platforms or via other search tools, and even fundraising and publishing functions are in the hands of anyone with a smart phone and web access.

What is left for the organization to do? Helping individual alumni with their own projects does not scale effectively across a large population; there are very few staff professionals but there may be thousands of alumni. Therefore, the role of staff becomes that of "relationship broker," connecting and convening people whose interests and goals mean that they will benefit from knowing each other, and streamlining the process of connecting them across the network. (See our reference to network science, in Section 5 below).

Suffice to say that technology can enable the organization to manage and engage alumni, but at the same time it makes it easier for alumni themselves, in the words of author Clay Shirky, to "organize without organizations."

4. Observations and Examples from Non-Traditional Alumni Programs

As part of our research into non-traditional alumni networks, Rockefeller Foundation and GG+A staff jointly interviewed representatives of nine other organizations, to learn how they structure their alumni outreach, and with what results. In addition to these external interviews, a GG+A expert conducted internal interviews with five members of The Rockefeller Foundation staff, and also spoke with five alumni of either the Bellagio Residency, or of conferences hosted at the Bellagio Center.

The researchers then combined the accumulated insights with demographic and survey data from prior Rockefeller Foundation research on Bellagio alumni. This information characterized alumni according to their Bellagio Center experience, their professional roles, and their professional interests or subject matter expertise.

Among the key goals of this information-gathering process were:

- Assessing how non-traditional alumni networks look and how they function;

- Exploring the additional value that further alumni engagement might generate for the organization and for the alumni; and

- Identifying best practices from external, peer-like organizations that could inform the selection and prioritization of alumni activities.

Below we present a set of general best practices, followed by a list that characterizes how alumni engagement benefits the organization, and how it benefits the alumni. *Where applicable, we have referred to the benchmark organization that applies this practice in its alumni work.*

NOTE: The list of organizations consulted during this phase of our research is located in Section 6 below. This is a summary of the most significant findings:

General Best Practices

- **Prepare participants for alumni identity**

It is generally most effective to introduce the idea of lifelong alumni identity very early in an organization's relationship with its community members. This ensures maximum lead time to build awareness of the lifelong nature of the relationship. A residency or fellowship may last a few weeks or months, but *alumni status is permanent.*

The network idea can be introduced early on as a "perk" or benefit that is added to the experience of the experience itself. One Rockefeller Foundation staff member said that Bellagio Center Residents often feel "a sense of loss" after leaving their month-long sojourn at the Bellagio Center. She suggested that "you email

[alumni] two days after they get home and say, 'Wasn't that amazing, here's how to keep it alive....' You can list opportunities to connect and interact, and they find it easy to engage because the group is already set up."

Internal and alumni stakeholders alike highlighted the importance of showing the value proposition to alumni themselves at whatever time one introduces the idea of alumni identity, and when it is mentioned thereafter. "You have to articulate clearly what it's for and how they can participate," said one internal interviewee.

Recommendations for timing this introduction varied. Some suggest it would be best introduced just at (or soon after) the end of the onsite experience. "You need to have the romance before you can have the relationship," said one former Bellagio Resident.

As an example, in the context of the Bellagio Center, we delineated the phases, or lifecycle of Bellagio Residents. The experience consists of:

Pre-residency

Residents are accepted into the program and are officially welcomed, while receiving information about the other Residents in their cohort.
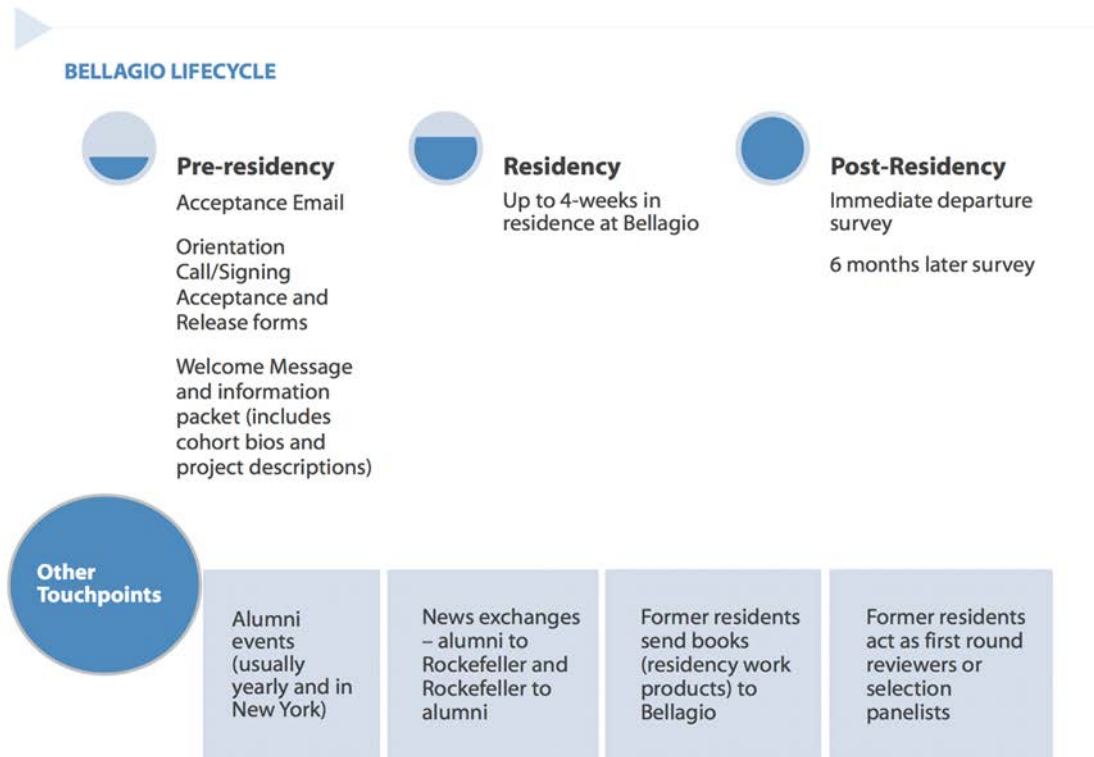
Residency

Participants spend up to a month at the Center, working on their own projects and interacting with other Residents, whose backgrounds, work and experience differ greatly from their own.

Post-Residency

Immediately upon leaving, Residents are surveyed about their experience, and subsequent additional surveys assess the impact of the Bellagio experience on their work at later intervals.

Other Touchpoints

There are a few other times and ways in which Bellagio may interact with alumni. These include periodic events; updates on the work of other Residents and of the Foundation; informing the Foundation of the outcome of work done during the Residency (e.g., publication of a book, the first manuscript of which was produced in residence); and some alumni volunteer to aid the selection process for future Residents.

BELLAGIO LIFECYCLE

Pre-residency

Acceptance Email

Orientation
Call/Signing
Acceptance and
Release forms

Welcome Message
and information
packet (includes
cohort bios and
project descriptions)

Residency

Up to 4-weeks in
residence at Bellagio

Post-Residency

Immediate departure
survey

6 months later survey

Other Touchpoints

| Alumni events (usually yearly and in New York) | News exchanges – alumni to Rockefeller and Rockefeller to alumni | Former residents send books (residency work products) to Bellagio | Former residents act as first round reviewers or selection panelists |

We recommend **explicit reference to membership in a lifelong alumni community**, which can be incorporated in different ways at each stage of this lifecycle. For example, at Bellagio, a welcome message to new Residents from an alumnus (or, potentially, from the leader of a Bellagio alumni community) would implant the idea of "life after Residency," and start to educate Residents about the long-term nature of their connection.

Another idea is that of an Alumnus-in-Residence, who interacts with first time participants and adds the voice of perspective on the Bellagio experience and what it meant to them.

Finally, there is the opportunity to plant awareness of ongoing interaction among alumni post-Bellagio, sustaining peer-to-peer engagement and putting alumni and their activities squarely at the heart of the alumni experience. This idea is well-established in non-profit fundraising circles, where it is referred to as "donor-centric fundraising." An organization cannot impose its will on members who have the ability to "opt out" of participation as alumni; it can, however, honor the needs and interests of its stakeholders by enabling them to support each other. This is the definition of "community."

- Engage alumni to support the organization's mission

Alumni serve the "parent" organization's mission via their advocacy, volunteerism and recruitment of future participants (who become alumni as well), via referral or recommendations. While staff members sometimes engage alumni individually or informally in these roles, a structured and systematic format for this engagement would yield broader awareness and understanding of the organization's purpose, as well as visibility for its achievements, including those embodied in the work of its alumni.

Alumni can provide direct and tangible support by:

— Providing feedback and guidance on emerging initiatives and helping to prioritize possible future programs in the organization;

— Brokering relationships with contacts, thereby making the extended network of alumni accessible to the organization for potential collaboration;

— Sourcing talent for future scholars, fellows, residents, etc., aligned with specific issues or disciplines;

— Promoting the organization's brand and evangelizing for the organization's mission;

— Spreading the word about specific initiatives, acting as a "force multiplier" for staff members, who are often few in number; and

— Planning future convenings, based on their past experience as participants themselves.

It is critical to recognize that many of these efforts require investment of staff time and budget and may also require expertise or competencies not already present among organization staff (e.g., volunteer management).

- ### Compensate for short-duration experiences

In universities, alumni identity is rooted in a multi-year residential setting. In corporate alumni communities, the alumni identity is grounded in long-term employment and interaction with a stable, professional group of colleagues. These landscapes foster strong bonds and community identity that is not possible when, for example, members of a fellowship or residence program are together for just a few weeks.

These long-term interactions are largely absent in the kinds of alumni communities we examined in this project. To compensate for the brevity of the lived community experience, organizers must account for the factors most likely to engender a sense of community and shared identity (which are hallmarks of thriving alumni communities). These are:

1. **Relevance and appeal**

Is the experience and the cohort of some significance in the context of one's own professional pursuits and goals? Does it add to one's likelihood of success in a way not available from some other cohort to which the alumnus belongs?

2. **Effectiveness, utility and outcome**

Does the experience provide practical value that residents or fellows can "bank" for future contribution to their work?

3. **Uniqueness**

Assuming the experience is of some value to participants (see 2. above), is it an experience that is not replicated elsewhere in their lives?

4. Perception of items 1 - 3

Are the factors above made visible to participants? Are they shown examples that characterize the value of these factors so there is *awareness* of the alumni identity, its value, its longevity and its potential importance in their lives?

5. Quality of interaction

Do the conversations, presentations and debates (both organized and spontaneous) that they experience as participants transcend their everyday interactions in rigor, creativity, novelty, relevance or quality?

6. Frequency of interaction

After their time with the organization, is the organization's "brand" visible to participants with some frequency? A single email per year, for example, is not likely to engender an ongoing connection.

7. Regularity of interaction

Finally, is the interaction with the organization or with other alumni consistently scheduled? Even infrequent activity should have some regularity (e.g., the annual dinner every spring; a year-end greeting via email from the President of the foundation; etc.).

- **Prioritize methods of engagement**

There are many ways to engage alumni, and we provide here a list of those most accessible to organizers.

– Information sharing

Updates on alumni achievements; updates on topics of past convenings.

– Events

Face-to-face interaction at formal or informal gatherings can be thematically organized, and/or geographically based. It can have a virtual component to reach more dispersed alumni and outside audiences.

– Special interest programs

Sub-networks of alumni who share goals, interests or challenges, can organize into what one of our interviewees called "meaningful clusters of strategic importance" to alumni.

– Recognition

Organizations can easily acknowledge noteworthy work by alumni. If the notable achievement is connected directly to the alumnus's work as a participant in the organization's program, this creates a stronger bond between the organizational purpose and the accomplishments of its stakeholders.

Another driver of recognition is acknowledgment of alumni working on behalf of the organization itself, or on behalf of its community and network. Volunteer service can be acknowledged in ways similar to those used to account for service to the sector or to one's professional discipline.

Recognition need not be formal (i.e., awards and prizes). It can be informal – such as mentions in publications, "spotlights" online, social media links to alumni work products, and short video profiles highlighting the individual's link with the organization.

– **Follow up support**

Organizations can solidify links to alumni by providing financial or logistical support to alumni work that stems from their work as fellows or residents. Even providing publicity for this work has value that alumni will appreciate.

– **Data access**

A curated historical list of participants allows staff members to identify subject matter experts to consult or to recruit for help with thematic initiatives. Participants can be prepared for this form of engagement by being informed during their tenure with the program, "You may be asked in the future to help with relevant projects."

This idea lends itself to variations. For example, an organization might identify among their alumni leaders in a particular discipline or subject area, and host them for an alumni summit focused on that topic (see *Events*, above). Explicit messaging about this meeting's value to the parent organization will illuminate the link between the organization's mission and the work of alumni.

Tracking and updating alumni data is a notoriously challenging pursuit in all types of organizations. Social media has enabled an additional layer of communication options, but is no substitute for the ability to contact alumni directly and, when desired, individually. For this, email is the most cost-effective and reliable form of communication; organizations must be cognizant of the cost to maintain such data in terms of both budget outlay and staff time.

To make alumni more likely to update their own information, some benchmark organizations we interviewed indicated that they try to structure a benefit to alumni themselves. Namely, if alumni can learn about the work of those in complementary or aligned fields, it can engender enhanced alumni-to-alumni communication, which in turn reinforces a sense of membership in an alumni community.

Organizations often deploy password-protected online directories on their website (so-called "alumni portals"), but GG+A finds that, in general, organizations do not attract much traffic to these sites. The combined challenges of competing with other online resources, requiring profile-based log ins, and duplicating information that is accessible elsewhere (and easily found using internet search), all combine to lower the likelihood an individual alumnus will visit an organizational alumni website.

- **Define who qualifies as "alumni"**

Organizations have broad latitude in defining who will be granted alumni status. The organizations we spoke with have different "enrollment" models, and equally diverse practices in defining alumni. Some, such as the Bill and Melinda Gates Foundation, include former Foundation employees as alumni, while others consider alumni to be those who participated in any of a specified set of programs that the organization administers or funds. A few, such as the Hertz Foundation, include current fellowship recipients as alumni. This is analogous to educational institutions that make some alumni services available to current students (e.g., access to closed discussion groups online).

- **Articulate an Alumni Mission or Statement of Purpose**

The alumni mission statement describes why the organization engages with alumni. These are often formal statement, but some are less prescriptive. For example, the MacArthur Fellows program has what it describes as the "loose goal" of "helping alumni get to know each other," although they do not organize alumni activity to support the Foundation or its grants. The Gates Foundation states its alumni network's goal is to "deepen the connection between the Foundation, its employees and its alumni around a shared vision for a world in which all lives have equal value, so that the Foundation and its alumni have an even greater impact in the sector and their fields together than they would alone."

In some cases, such as the Schwarzman Scholars, the organization has not crafted a specific statement, but does have "a clear idea of how alumni will support the program itself."

- **Identify clear benefits to the organization**

As suggested earlier, the relationship with alumni should be a two-way street, with benefits for the organizers and for alumni as well. In our interviews we identified the following as the most common benefits to the organization, most of which are touched on elsewhere in this paper:

- Direct brand and/or program advocacy (Gates; Fulbright)
- Talent referral for recruiting Fellows or employees (Gates; Hertz)
- Fellowship applicant/candidate evaluation (MacArthur; Fulbright; Schwarzman)
- Subject matter experts to advise on Foundation projects (Gates)
- Increased visibility for the Foundation through Fellows' ongoing success (MacArthur)
- Philanthropy: Direct financial support, or referrals/introductions to potential donors (Hertz)

- **Identify clear benefits to the alumni**

Central to contemporary practice of alumni engagement is the understanding that the value of engaging must be *mutually beneficial* to the organization and to alumni themselves. This "two way street" model reflects the growing stakeholder expectation that providing time, expertise or other professional and social capital will 1) help the organization achieve a desired result, whose impact will be made known; and 2) benefit the contributor in their own efforts to achieve career, professional or personal ambitions. This relates directly to the discussion of *relevance* above (see Section 3. vi.).

What additional value can alumni engagement generate for the alumni network itself?

- **Personal & professional enrichment**

Most or all scholarly, arts or policy-oriented convenings commingle what one of our alumni interviewees referred to as "profoundly interesting people." Communications or gatherings that build on this can deliver personally enriching experiences for alumni.

Professionally, access to experts confers obvious benefits on alumni. Alumni can share professionally relevant information across the network, including privileged or early access to the work-in-progress of other alumni. Bellagio Center alumni commented that "You don't know what you're going to get from an interaction until

you talk to someone…" "[Bellagio participants] open new fields of inquiry – art, science, psychology. They gave me new ways of looking at things. I absorbed different ways of thinking about my daily work."

> **Awareness of the alumni network**

Providing access to a database or directory of participants before arrival at a convening would create awareness of the network's character and membership, and provoke ideas about potential interactions and their benefit. Some of our contacts mentioned the implicit value of creating a general, continued "sense of connection" among alumni. (Gates, Fulbright)

> **Access to special interest sub-networks**

Affinity-based specialized sub-groups of alumni allow for interaction among those with shared goals, challenges or opportunities – what one Rockefeller team member called "meaningful clusters of strategic importance." (Salzburg; Fulbright; Marshall)

> **Professional expertise and/or job referrals**

Alumni can make expertise referrals across the network. As a Bellagio alumnus related, "I connected an architect from Angola with my contacts in China, and it was useful to him." (Gates; Salzburg; Marshall)

> **Selection or referral of future participants**

Alumni can help select future grantees, fellows, residents or scholars. Some alumni would find this opportunity professionally rewarding, and it provides a way for past beneficiaries of support to "pay it forward" to create new alumni cohorts. Alumni also frequently recommend, refer or endorse applicants for participation. (Rockefeller; Hertz)

> **Access to future convenings**

Membership in the alumni community could carry the benefit of access to special events, or even preferential consideration for future grants or program participation. (Gates; Hertz)

> **Access to future funding**

An organization might make financial resources available to alumni. For example, targeted micro-grants, that reward alumni competitively for projects that can scale with modest budgets, and that harness other resources as well. (Salzburg)

> **Survey Responses re: additional benefits to alumni**

In May 2016, The Rockefeller Foundation canvassed alumni of the Bellagio Center, and among other things, asked "What would be of value to you in terms of staying connected to The Rockefeller Foundation Bellagio Center?"

Respondents indicated the greatest value to them post-convening would be connecting with alumni from their own cohort (82.8%), connecting with programmatic initiatives of The Rockefeller Foundation (77.5%) and connecting with other alumni in their own field (66.2%).

Respondents also provided open-ended replies that reflected their desires. That diverse set of responses included support for making available to others the benefit they themselves had received (again, "paying it

forward"); interactive communication instead of just passively receiving a newsletter; and a tendency to self-organize post-experience. Alumni reported, for example, "Our cohort remains in contact among ourselves," "Our group has maintained a Facebook page ever since!" and "My first cohort has had multiple reunions."

Finally, respondents expressed a desire for structured interaction related to their experience. Suggestions included "occasional cohort reunions," "…reconnecting…via a short conference, in which we all present the work that resulted from our stays," and finally, a declaration that "I am already a member of the family. I want the relationship to continue forever."

This articulation of community membership is a prerequisite to lifetime engagement. In traditional alumni relations practice, this sentiment is a condition of increasing alumni engagement over time. However, while necessary, by itself it is not sufficient to ensure such an increase. That requires strategic planning, and staff and program budget investment as well.

- ### Create rewarding volunteer roles for mutual benefit

Organizations of all kinds use volunteerism as a means to keep alumni involved in the life of the organization. This has the dual benefit of 1) supplying access to expertise embedded in the alumni networks, and 2) giving alumni a meaningful way to access and share this expertise for mutual benefit.

There are multiple rationales for involving alumni as volunteers. First, volunteers can act as a "force multiplier" for small organizations, adding effort that would otherwise be unavailable for marketing and advocacy, recruitment, or partnership development. Furthermore, volunteers invest time and expertise, which drives a greater feeling of "ownership" for organizational outcomes. The word "stakeholder" implies that the individual has something at stake. When that is the case, the individual is more likely to act in ways intended to ensure a successful outcome. Finally, for organizations that may wish to engage alumni as donors, GG+A's proprietary research indicates volunteers are much more likely to become and to remain financial donors to the organization.

Here is a list of sample volunteer roles, with brief comments outlining the nature of the commitment and related aspects:

– **Trustee or Director**

At this most senior level, alumni can influence institutional direction and strategy. To the extent they are living examples of the organization's impact, it is in their own interest to ensure that the organization's future trajectory is positive.

– **Alumni Advisory Council or Committee**

This group can set direction for the "why" and "how" of alumni outreach, speaking from a position of experience as alumni themselves. Members can be elected by program participants (Schwarzman), but it is generally advisable for staff to identify, recruit and prepare representatives based on their demographic profile, interest and likely ability to contribute to positive outcomes. Most organizations do not (yet) have such roles identified, as managing an alumni leadership group takes additional staff time and budget. The QEII Academy reported that they were considering creating a "Committee of Engaged Alumni" for this purpose.

– **Ambassadors**

Alumni ambassadors can use social media to spread word of organizational initiatives and achievements among their peers, can help plan events, and can contribute to a newsletter or other periodical communication (Gates); they can aid in recruitment of qualified applicants (Fulbright); and they organize workshops that benefit current and past participants (Hertz). The time commitment can be varied to fit the individual's constraints.

– **Project-based counsel**

Alumni can be advisors to projects of specific interest to them, in alignment with their expertise. (Hertz; Gates)

– **Regional organizations**

Alumni can organize, host and lead geographically-focused chapters or branches to link alumni in a region (Marshall). Depending on time constraints, number of alumni locally, and other factors, alumni can organize less formal gatherings or interactions that do not require a permanent structure like a branch or chapter.

– **Participant recruitment & selection**

Some organizations ask alumni to help recruit and choose participants for fellowships, resident status, grants and more. This can be done in a systematic, prescriptive way, or less formally on an intermittent or ad hoc basis. (Rockefeller; Hertz)

– **Educational outreach**

Some organizations, such as foundations, fund recipients' research or study at specific institutions. They can identify alumni within those institutions to serve as representatives to the institution. (Hertz)

– **Capacity building**

Alumni can help to identify further education, work or research opportunities for current participants (e.g., internships or other experiential learning, teaching or engagement via convenings such as professional gatherings). (Hertz)

Additional Considerations

There are five areas where our research did not reveal "best practice" with regard to alumni outreach. In each case, this is due to the range of organizational missions, stage of alumni program maturity, and diverse scale of operations across the groups to which we spoke. Over time, we expect clearer trends to emerge.

Although these areas may not yet have clear best practices, there are still creative ideas and clear opportunities for organizations of all kinds in each area. Furthermore, these topics should be revisited regularly, for future opportunities to make organizations more effective in each area.

- **Staffing**

In North American universities, GG+A research shows that *average* staff levels range from one fulltime equivalent (FTE) alumni professional for every 15-20,000 living alumni (among a sampling of public universities), down to one FTE for every 4,400 alumni (for some elite private institutions). Among the organizations we canvassed for this project, alumni outreach was generally staffed at a fraction of a FTE

position, and in the very smallest organizations, it is considered a small add-on responsibility for staff working with external audiences of other kinds.

- ### Reporting lines

Our small sample did not reveal a standard reporting structure for alumni outreach. Responsibility for alumni programs was found across: Human Resources (Gates); Communications (Salzburg; Fulbright); Fellowship Support (MacArthur); and shared between functions (Development/Events/Admission at Schwarzman; a combined Admissions and Alumni Relations position (Hertz)).

- ### Budget

It is not possible to paint a picture of budgetary best practice, due to the wide range of evolutionary stages and maturity, the different alumni missions, and the varying scale of the organizations we spoke with. Furthermore, alumni activity is not accounted for in a separate, dedicated budgetary line item. However, it is critical to understand that *without investment of staff time and budget, an official alumni program cannot take root*. Communication (print and digital), events, and supervision of volunteers are time- and budget-intensive and should be seen as an investment by organizational leaders, not merely as an expense.

- ### Metrics

Foundations in particular are rigorous in their evaluation and monitoring of outcomes from programs they fund. As such, they are likely to assign particular value to tracking the results of investment in alumni engagement. However, even traditional university alumni programs are still in the early stages of establishing quantitative metrics, and therefore are the ultimate resource. The principle at work, however, is the same as with any strategic initiative. Namely, managers should track progress toward stated goals, as articulated in a strategic plan. Regardless of specific items measured, the outcomes should represent achievements that advance the cause of the organization, and/or that benefit stakeholders such as alumni.

Metrics should always derive from the outcome intended. For example, if "mentorship" is expected to result from alumni engagement, then the organization will want to track both the scale of mentoring activity, and the mentoring pairs' relative satisfaction after a set period of time or number of interactions.

For early-stage assessment of alumni outcomes, the Bellagio Center tracks Key Performance Indicators (KPIs) such as

- Number of alumni who can articulate Foundation goals after six months;
- Number producing work "that distinctively advances" the organization's strategic goals; and
- Number of grantee convenings that "meaningfully contributed to an initiative."

Metrics like these should be accompanied by definitions so that otherwise subjective assessments (e.g., "high quality," "distinctive," or "meaningfully") are reported with internal consistency over time.

The Bill & Melinda Gates Foundation has categorized its goals for alumni outreach according to four areas: Reach, Engagement, Impact and Sustainability. Each has defined components that, while not all-encompassing, are sufficiently targeted to provide an internally useful depiction of how (and how much) alumni are helping the organization with its overall mission and goals. As an example, within the

"Sustainability" category, Gates records and reports practices that contribute to the longevity of the alumni community as a support for Foundation goals. These practices include employee ambassadorship, alumni volunteer leadership, and content generated by alumni. Note that Gates includes employees in its definition of "alumni."

Other organizations (such as the QEII Academy, with fewer than three dozen alumni) have more modest and subjective metrics (e.g., "Is the network useful to alumni?"). This is suitable for a nascent program; as more alumni engage, the organization can collect more data in more areas and use it to assess progress toward goals.

- **Messaging**

In general, messaging to alumni should support the "mutual benefit" principle: content should express what the organization wants alumni to know, while also reflecting the interests, activities and needs of alumni, as they relate to the organization's work.

With that in mind, we noted the following specific examples of alumni messaging that likely would apply across a diverse range of organizations.

– The alumni network is **a key component of the value** of affiliating with the organization. One organization characterized the alumni network as "the reason the program exists." (Schwarzman)

– **Organizational anniversaries and milestones** provide a framework for contextualizing outreach to alumni. (Gates; Rockefeller)

– Newly-organized networks can use messaging to test or initiate a **"soft launch"** of the community as a formal entity. This can deliver feedback on goals, activities and desired outcomes among alumni. (Gates)

– Online tools can **make specific actions easy** for alumni. For example, a simple online form enables alumni to refer a new applicant for a fellowship or other recruitment opportunity. (Fulbright)

– Messaging should generally be explicit about the existence of both an ongoing relationship with alumni, and the **"continuum of activity"** along which alumni can choose to engage. (Salzburg)

– **Segmentation** is a standard practice in organizational communications. People at different career-stages, in different academic disciplines and different industries, in specific regions, and with different expressed interests form sub-audiences to whom you can target opportunities and updates. This, of course, requires maintaining data that allows you to tag and identify individuals according these criteria. (Marshall; Salzburg)

– **Pre-arrival messaging** can begin the process of educating participants that their relationship will continue after their direct engagement is over. This is akin to universities that connect currently-enrolled students with alumni, as a way of modeling the alumni network and the lifelong connection (Marshall).

Obstacles and Challenges to Establishing Alumni Networks

We have outlined above many of the potential benefits to participation in a formal alumni community for residents, scholars and fellows. Finally, we must note that there are real obstacles that can make forming and sustaining such networks difficult. They include:

- **Diverse interests**

To encourage novel and creative interactions, many programs mix participants whose backgrounds, interests and career stage vary from one another. These varied backgrounds make it difficult to curate network activity for relevance and utility. One can organize activities thematically, but this means exchanging some diversity in favor of narrower content focus.

- **Lack of data**

Investments in data collection, updates and data integrity (and, of course, data security) are worthwhile only if you are certain that you will use the data. Organizations we interviewed uniformly cited incomplete data and lack of data integrity as the primary challenges to systematic alumni engagement. This is largely true for higher education alumni communities, and other well-established alumni organizations as well.

Another problem, noted by the Fulbright Scholars Program, is fragmentation of data sources. Larger, more complex organizations often have individuals who keep separate spreadsheets and "satellite databases" in different parts of the institution. This causes duplication of effort in data management, and uncertainty about which data are most up to date.

- **Alumni time budgets**

As pointed out by a representative of the Schwarzman Scholars, the alumni you may most desire to engage are also most desired by others in their sector. This may mean that they are "too busy, [and that] the ones with time on their hands aren't the ones you want engaged as much."

- **Delayed engagement**

It is important to show the practical value of engagement soon (generally within a year) after their time in a program. Otherwise it becomes measurably more difficult to engage alumni, the more that time passes.

- **Low practical value to alumni**

As noted earlier, the parent organization must articulate (and if possible, show tangible examples) of the value to alumni who engage. A representative of the Hertz Foundation asked, "What is the benefit to the alumni? You need to pick the two or three ways [of engaging] you want to focus on, and that will affect a critical mass among them."

- **Imbalance of breadth versus depth**

Alumni organizations generally wish to engage the largest number of alumni possible. However, they should balance attracting new participants with deepening their connection to already-engaged participants. This is more of an art than a science, but numerical targets as part of an operating plan can balance organizational investment over time.

- ### Low internal awareness

In larger organizations, it is possible that alumni outreach will be unknown to some staff or other internal stakeholders, who otherwise would be happy to support alumni outreach. In one organization we spoke with, a staff member with 10 years' tenure there did not know for sure whether alumni outreach was already taking place, and indicated that other team members were likely also unaware.

- ### Lack of alumni strategy

Every organization we spoke with has an up to date institution-wide strategic plan. These plans may mention alumni; however, at a certain stage of complexity, an organization will need a strategy road map *specific to* alumni programs. This was the catalyst for The Rockefeller Foundation's engagement with GG+A: creating a plan for why, how, when and where to engage alumni, along with expected outcomes.

5. Conclusions and Directions for Future Development of Alumni Engagement

Alumni strategy in foundations, scholarly or artistic residencies, fellowships and other, similar organizations is in its early stages. Many of the practices known for decades to academic alumni communities are applicable, but their use requires adaptation, to account for differences in participants' "lived experience" with the organization and its people.

Other opportunities may be unique to these organizations and have no prior analog from which program officers can learn. This means there is opportunity for creative programming, and planners should experiment even while establishing or nurturing more traditional or mainstream efforts.

Thanks to diverse generational attitudes toward formal organizations, there are differences in how alumni of different eras and at different life stages may wish to interact with organizations with which they have a connection. Technology also influences how and whether alumni engage, as its rapid evolution affects communication and interaction. For these reasons, well-established and more traditional alumni organizations (like those at universities) can serve as a source of emerging ideas, as well as providing tried and true practices.

In the private sector, corporate alumni networks are also growing in number and stability. Despite the for-profit nature of their host companies, they exhibit some characteristics that can be of value to non-profit organizations as well. This includes a focus on hiring and recruitment; a focus on intelligence gathered across the network; referrals to the parent organization of likely supporters or partners; and advocacy for the organization's brand or mission.

One area that has not yet been exploited for the benefit of alumni communities is the field of network science. Analysts have a greater understanding today than in previous eras of the structure, behavior and value of human networks. Formal analysis of how community members connect and influence each other could lead to more effective alumni programs. This may require a formalized definition of what we mean by "network," as another step toward making decisions and strategy more rigorous and more predictable in its outcomes.

In the context of network science, an assertion called Reed's Law describes how a network's value to its members can increase exponentially with the formation of sub-groups within the network. In the context of this paper, the implication is that the most effective alumni organizations will be those that *empower and enable alumni to coalesce with like-minded fellow alumni around their own needs and interests.* This suggests that the organization's needs may not be a compelling call to action for alumni, if those needs diverge significantly from the goals of the alumni themselves. To this end, organizations with a singular focus or specialized purpose are more likely to find their alumni interested in their offerings, as there will be considerable overlap between the organization's goals and those of alumni.

In closing, we see an opportunity for organizations like those consulted in the compilation of this paper to share their knowledge of alumni engagement with each other and to establish a more structured collaborative framework for engaging alumni of these diverse, important and valuable programs.

6. Sources

The Rockefeller Foundation and Grenzebach Glier and Associates are very grateful to their contacts at the organizations cited in this paper (see below). Without exception, they generously shared their ideas, experiences and insights as we compiled our findings.

Organizations and resources consulted during the Bellagio Alumni Strategy development project, as well as other links referred to or referenced in this white paper:

MacArthur Fellows Program

https://www.macfound.org/programs/fellows/

George C. Marshall European Center for Security Studies

http://www.marshallcenter.org/mcpublicweb/en/

Schwarzman Scholars

https://www.schwarzmanscholars.org/

Queen Elizabeth II Academy for Leadership in International Affairs

https://www.chathamhouse.org/academy

Schloss Solitude Residency

http://www.akademie-solitude.de/en/

Hertz Foundation

http://hertzfoundation.org/

Salzburg Global Seminar

https://www.salzburgglobal.org/home.html

Fulbright Scholars Program

https://www.cies.org/

Bill & Melinda Gates Foundation

https://www.gatesfoundation.org/

Information about the Bellagio Center of The Rockefeller Foundation:

https://www.rockefellerfoundation.org/our-work/bellagio-center/about-bellagio/

Information about the value of corporate alumni networks:

https://business.linkedin.com/talent-solutions/blog/2014/09/four-reasons-to-invest-in-a-corporate-alumni-network

Shirky, Clay. (2009). Here comes everybody: the power of organizing without organizations. New York: Penguin Books.

Special Acknowledgments

About the Author

Andrew Shaindlin is Consulting Vice President with global philanthropic consultants Grenzebach Glier and Associates. He has worked with alumni organizations since 1989, with professional roles at Brown University,

the University of Michigan, the California Institute of Technology and Carnegie Mellon University. Andy has several years of experience as a strategy consultant to more than 50 diverse alumni organizations around the world. He has spoken internationally on alumni relations and non-profit strategy, and since 2007 has authored Alumni Futures (http://www.alumnifutures.com), the only blog devoted specifically to alumni engagement practice.

A former Trustee of the Council for Advancement and Support of Education, Andy is a recipient of that organization's Crystal Apple Award for Teaching Excellence. He currently serves as a Trustee of the American Councils for International Education, and is an advisor to Future First Global, a London-based education NGO, and to Switchboard, a provider of alumni community software to non-profits and other community organizations.

Andy holds a Bachelor's degree in International Relations from Brown University and a Master's degree in Education from Claremont Graduate University. He is on Twitter as @alumnifutures. He can be reached via email at: *ashaindlin@grenzglier.com*.