



Alumni Relations Council  
New Rules of Engagement - *Strategic Next Steps*  
June 16, 2017  
11:30 a.m. - 1 p.m.

Meeting Agenda

Pre-meeting tasks: Review New Rules of Engagement, identify rule that resonates with your unit's challenges and priorities.

1. Welcome and introductions
2. ARC FY17 Snapshot
3. New Rules of Engagement
  - a. Relevance of Alumni Relations
  - b. Overview of 5 New Rules
    - i. Make it Easy to Say Yes
    - ii. Meet Them Where They Are
    - iii. Broker Smarter Matches
    - iv. Embrace the "Me" Factor
    - v. Cultivate Campus Allies
  - c. Key takeaways & lessons learned
4. Strategic Next Steps: Roundtable Discussions
  - a. Share 1 alumni engagement challenge or priority are you tackling in FY18.
  - b. As a group, brainstorm and share:
    - i. Why is this new rule relevant to transforming alumni engagement?
    - ii. How can the rule be implemented in your unit? At U-M?
    - iii. What will success look like?

- c. Combating Barriers to Success - TRIZ
  - i. How can we reliably keep alumni from supporting the university?  
Go wild!
  - ii. Is there anything we are doing that resembles items on our list?  
Make a second list of those activities and talk about their impact.  
Be unforgiving.
  - iii. How am I, and how are we going to stop it? What is the first move?
  
- 5. Additional Resources for ARC members (and U-M staff)
  - a. ARC Peer Groups
  - b. Education Advisory Board (EAB)
    - i. New Rules and Strategic Alumni Relations studies
    - ii. [Alumni Leadership Volunteerism Resource Center](#)
    - iii. New Rules web conferences
      1. Converting Almost Givers - June 21, 2-2:30 p.m.
      2. Cutting through the Noise - July 12, 2-2:30 p.m.
      3. Connecting Alumni to a Cause - July 19, 2- 3 p.m.
  - c. [CASE \(Council for Advancement and Support of Education\)](#)
  - d. [Liberating Structures](#)
  
- 6. Unit updates and announcements

### **Notes from Roundtable Exercise**

#### Rule 1: Make it easy to say yes

##### Vision (Why?)

- Not be a roadblock
- We are aligning with them
- Technology changes - different ways to make it easier; different generations

##### Action (What)

- Managing expectations and being transparent about that (e.g. 30 minutes on this day, 1 x per year)
- Being really specific and being flexible for graduate vs. undergraduate students
- Articulating that we are trying to develop campus partnerships
- Our goals align with alumni interest → Entrenched volunteers vs. “one + done”
- What are our concrete goals for next year + how do we have alumni volunteer positions support those?
- Inventory - what are we already doing for our alumni across various degrees? Talking to alumni - hearing what they want to do.

- Surveys - Qualitative and quantitative feedback to keep evolving our models.
- Strikeforce - Quick + dirty qualitative feedback
- Collaboration w/ other schools + staying up to date on industry trends
- Shifting metrics beyond just # of alumni in attendance.

### Rule 2: Meet them where they are

#### Vision (Why?)

- Take away/minimize “busy” excuse
- Travel/convenience

#### Action (What)

- Remote employee
- Utilizing faculty/staff travel
- Data analysis - DART, C-Suite
- 2x3x corporate matching
- Reach out to Business Engagement, COE, Ross, other campus partners with on-campus interviews

#### Success

- Improved data leads to value of connection as alumni
- Metrics - groups, attendance

### Rule 3: Embrace the “Me” Factor

#### Vision (Why?):

- Must be meaningful to recipient
- Networking opportunities should be reciprocal
- Should feel valued for more than a donation
- Creates deeper connection
- Sense of purpose and impact

#### Action (What)

- Identify function of opportunities
- Explicitly state benefits
- Ask/invite
- Use existing relationships
- Use variety of leadership levels

#### Success (Results)

- Increased engagement
  - Volunteers
  - Monetary gifts
  - inquiries

### Rule 4: Broker Smarter Matches

In identifying high-value and highest potential segments for long-term alumni engagement, we focused on:

- Need to leverage data better
- Need to engage students

#### Data

- Model systems/protocols should be identified or created to engage alumni, capture data, and keep it accurate. Uniform approach should be used throughout University to increase accuracy of data.
- More professional data is needed - continue to scrape LinkedIn, and do and share more research and findings on alumni professional information. Use as needed to benefit U departments, programs, and alumni relations.
- Need to capture data on alumni behavior (i.e., which alums serve on boards, what are their hobbies, who are they connected to?). Put in DART. Connect them to similar activities at U.
- Work with alumni clubs and u-events (i.e., law school reunions) to collect data
- Conduct focus groups with alumni to learn what is most fulfilling their needs for connection
- Focus work on increasing professional happiness or connections to friends.

#### Students

- Opportunities for alumni to engage with students creates perceived value for both groups
- Should not be just career related
- More effort should be put into educating students about value of lifelong connection to U, and how they are part of a continuum.

#### Rule 5: Cultivate Campus Allies

##### Why? (Vision):

- Better information (data/data sharing) provides us with a better understanding of our alumni.
  - Relevance - alumni don't fit (and don't want to fit) into one bucket
  - Centralized resource - Ross ROAR (alumni relations staff within Ross)
  - Conduit to bring together assets, resources, etc.

##### How? (Action):

- ARC
- DART/Salesforce

##### What? (Results)

- A positive correlation between student engagement and alumni engagement
  - Volunteer #s
  - Event participation
  - Giving
- Internal stakeholders come to us for information, resources, ideas that we can help with (proactive "asks")