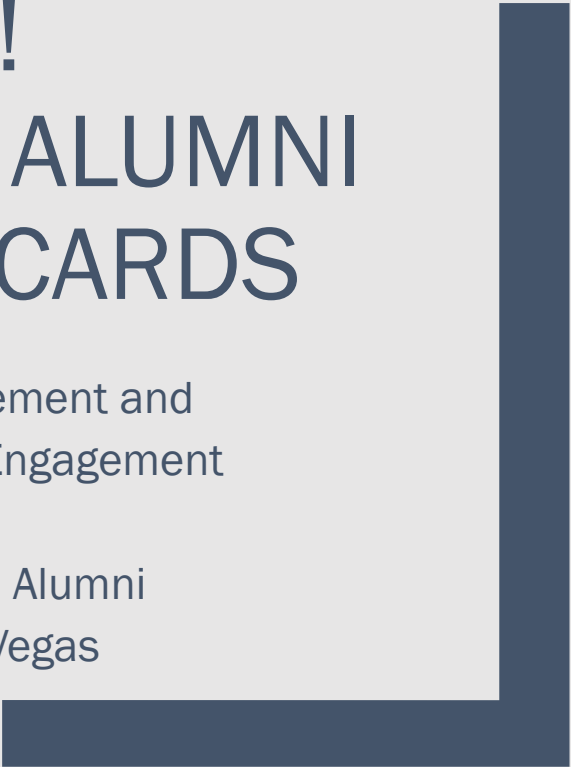# AN **A+** FOR YOU!
CREATING ACTIONABLE ALUMNI ENGAGEMENT SCORECARDS

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Why and what is an engagement score?

- Apply a universal descriptive score to each living individual in your database that reflects their **known** personal engagement with your university

- To assist in identifying those who are extremely engaged, very engaged, somewhat engaged, etc. and to learn why

Benefits of Engagement Scoring

- Compliment and assist **prospect development** with segmentation, prioritization, filtering, and sorting

- Provide additional options for **market segmentation**, i.e. Annual Giving and events strategy

- Increase **tracking** and **accountability** of engagement efforts within your database

- Provide a quick, **numeric snapshot** of engagement prior to looking at a record in your database

- Overall **analysis** and **awareness** of engagement, i.e. ROE

Engagement = Connections + Activities + Giving
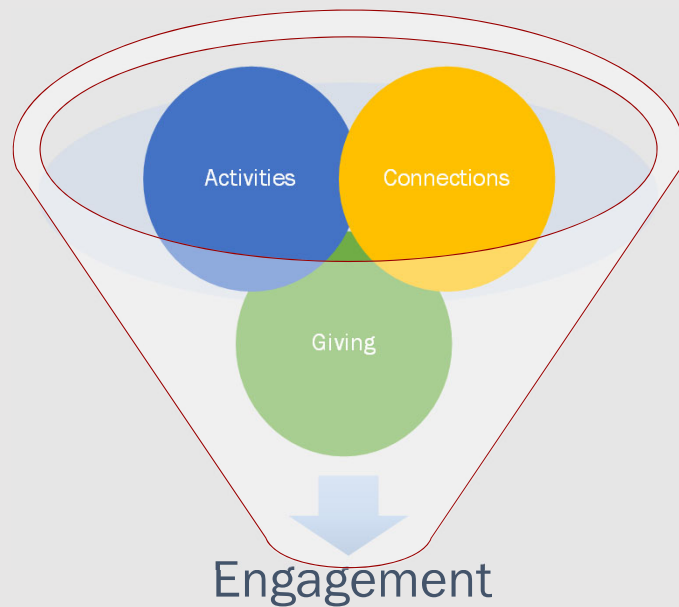
Engagement

A universal descriptive score for every living individual in CRM that reflects their known personal engagement with OSU (points-based, additive score)

- **Connections**
  - *How related to OSU / constituency*
  - *Alumni, Parent, Faculty/Staff, Vet Client, Student Involvements, Solicitation Restrictions, Relationships, Relationship Management*

- **Activities**
  - *Proactive interactions with OSU*
  - *Event attendees, OSUAA Travelers, Committee Members, Future: BBIS/Contacts/Surveys*

- **Giving**
  - *Giving society and giving history*
  - *Recency, lifetime giving, variety of designations, years of giving*

Test Case: Brutus Buckeye 116
(Extremely Engaged)

41		25		50
Connections score	**+**	Activities score	**+**	Giving score

OSU Alumni	Registered for event in FY15/16	Buckeye/President's Club
1 OSU Degree	Registered for an event in 3+ FYs	Purchased high-end Athletics seats
Current OSU Parent	OSUAA Alumni Advocate	in last 3 years
Parents Council Member	Past Alumni Boards/Cmtes Member	Recognized & Hard Credit Donor
Current OSU Employee	Current Non-Alumni Bds/Cmtes Mem	$100K+ LT Giving
3+ Alumni Relationships in TAS	2+ OSU Non-Student Awards	$50K+ Annual Gift (2015/2016)
3+ Non-Alumni Relationships	Recipient	3+ gifts
3+ Organization Relationships	OSUAA Traveler	4+ giving units (SDRs) ever &
Varsity Athlete	OSUAA Life Member	4+ SDRs in last 10 years
Student Honors Society member	Online Community Member	Donor to 3+ designations
Student Leader (Mortar		Last gift in FY15/16
Board/Sphinx)		15+ yrs giving & 2+ out of last 5
Participant in other student activity		5+ consecutive years giving
Current Prospect		Donor to own college
Visit w/in last 12 mos.		Matching gift credit
Stewardship Report Recipient		

Scores (All Living Individuals)	Lowest Score	Average Score (Median)	Highest Calculated Score	Highest Possible Score (Existing Data)	% with score = 0
Connections	-7	4 (2)	41	52	
Activities	0	0 (0)	35	43	89.10%
Giving	0	6 (3)	60	65	38.85%
Engagement	-7	11 (8)	125	160	

34.5%

Population: All Living Individuals	6 Extremely Engaged 56 - 125 points	5 Very Engaged 33 - 55 points	4 Engaged 23 - 32 points	3 Somewhat Engaged 12 - 22 points	2 Modestly Engaged 4 - 11 points	1 Not Engaged -7 - 3 points	Score Distribution	TOTAL
All Living Individuals:	13,944	112,248	129,060	448,777	517,065	538,132		1,759,226
Reachable Individuals	13,896	111,079	124,291	386,875	321,762	273,397		1,231,300
Alumni (primary constituency)	13,054	91,150	82,052	286,076	67,352	0		539,684
Parents	87	2,194	4,628	12,568	62,338	37,679		119,494
Faculty & Staff	86	2,610	3,328	4,485	25,740	1		36,250
Students	0	14	112	948	7,242	43,212		51,528
Other Individuals	717	16,280	38,940	144,700	354,393	457,240		1,012,270
Prospects	7,594	6,280	1,598	1,110	716	88		17,386
Health Care Suspects	782	3,822	2,947	5,301	4,758	45,643		63,253
Avg LT Giving (donors)	$ 187,006	$ 10,642	$ 2,565	$ 945	$ 275	$ 83		$ 4,273
Avg LT Giving (all)	$ 187,006	$ 10,640	$ 2,535	$ 503	$ 192	$ 30		$ 2,541
Median LT Giving (donors)	$ 15,682	$ 1,110	$ 300	$ 149	$ 50	$ 36		$ 100
Median LT Giving (all)	$ 15,682	$ 1,110	$ 295	$ 15	$ 27	$ 0		$ 25
# with no giving (score = 0)	0 / 0%	2 / 0%	896 / 1%	189,711 / 42%	152,142 / 29%	340,647 / 63%		683,398 / 39%
# with no activities	546 / 4%	47,635 / 42%	91,826 / 71%	393,699 / 88%	502,299 / 97%	531,382 / 99%		1,567,387 / 89%

Implementation and Use

- Development, Regional Engagement and Leadership Annual Giving Officers use scores to identify and schedule visits
  - *High/High*
  - *Low/High*
  - *91% of constituents assigned are Very or Extremely Engaged categories*
- Acquisition for Ohio State call center and direct mail
- Event invitations
- Medical Center and Government Affairs to seek volunteers

How to decide what to measure?

- Remember what CASE stands for:
  - *Give*
  - *Volunteer*
  - *Experience*
  - *Digital*

- What data do you have? What data do you want to have?

What it looks like

How to make people care?

Forever Orange: The Campaign for Syracuse University

This comprehensive campaign to raise $1.5 billion in private philanthropy from Syracuse University alumni, parents, corporate partners and friends will further advance academic excellence, provide an unparalleled student experience and create unique learning opportunities that leverage our distinctive strengths and impact our world in extraordinary ways.

The Campaign seeks to attract 125,000 unique donors, and to double the proportion of Syracuse University alumni who are actively engaged with Syracuse University.

Make an Impact

Our Goals

$1.5 billion
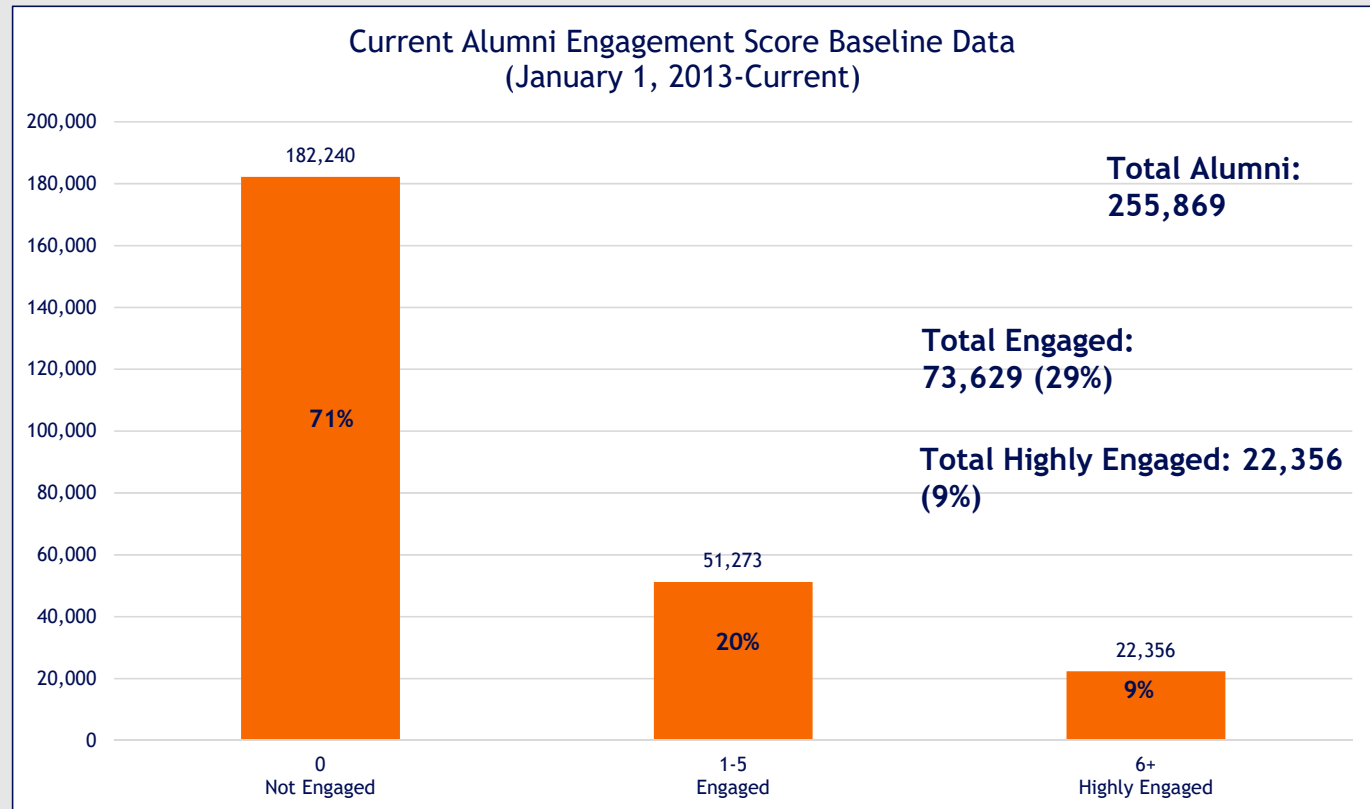in gifts

125,000
individual donors

1 in 5 alumni
actively engaged with
Syracuse University

We have some work to do...

**Current Alumni Engagement Score Baseline Data
(January 1, 2013-Current)**

- 0 Not Engaged: 182,240 (71%)
- 1-5 Engaged: 51,273 (20%)
- 6+ Highly Engaged: 22,356 (9%)

**Total Alumni:
255,869**

**Total Engaged:
73,629 (29%)**

**Total Highly Engaged: 22,356
(9%)**

Alumni Engagement Score

■ Meaningful ■ Somewhat ■ Unengaged

Data updated 10/8/19

Category	Meaningful	Somewhat	Unengaged
Grand Total	10.9%	27.2%	61.9%
Architecture	13.1%	31.2%	55.7%
A&S	12.0%	27.1%	60.9%
ECS	8.3%	21.8%	69.9%
Education	11.5%	25.5%	63.0%
Falk	9.5%	27.8%	62.7%
iSchool	11.6%	29.0%	59.4%
Law	20.0%	31.5%	48.4%
Maxwell	13.8%	30.9%	55.3%
Newhouse	12.8%	33.8%	53.5%
VPA	8.3%	28.4%	63.4%
Whitman	12.7%	28.2%	59.1%
Other	8.9%	14.6%	76.5%

Meaningfully Engaged Alumni by School/College

Schools & Colleges

School/College	Percentage
Architecture	13.1%
A&S	12.0%
ECS	8.3%
Education	11.5%
Falk	9.5%
iSchool	11.6%
Law	20.0%
Maxwell	13.8%
Newhouse	12.8%
VPA	8.3%
Whitman	12.7%
Other	8.9%
Grand Total	10.9%
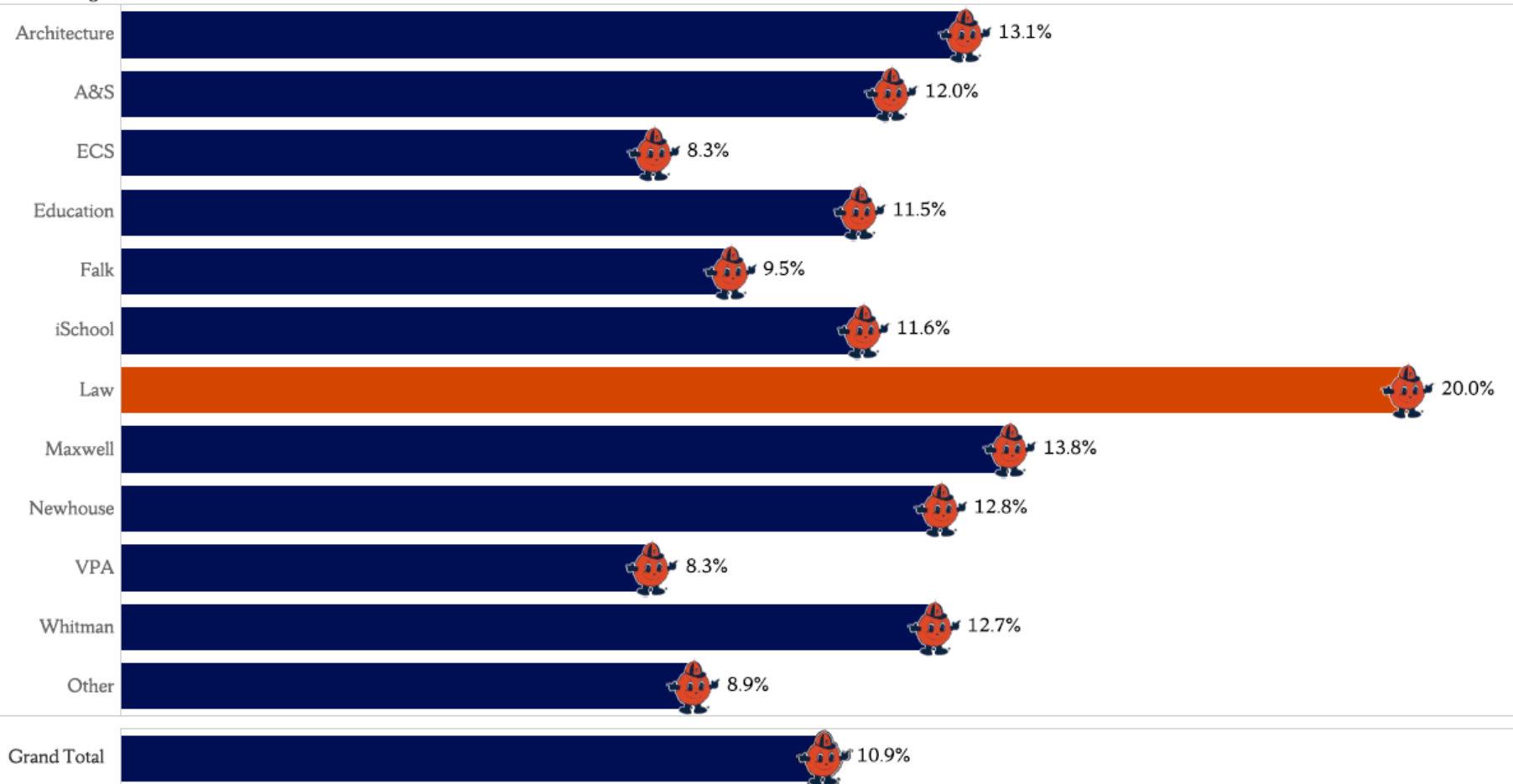
Benchmarks and Tips

Score Category	Somewhat Engaged	Meaningfully Engaged	Highest Score on System
Total	1-5	6+	103
Volunteer	1	2+	50
Give	1-2	3+	38
Experience	1	2+	26
Digital	1	2+	5

Volunteer Score	Number of Alumni	Notes
10+	629	Likely indicates a current member of BoT, School/Unit, or Regional Board or former member of multiple boards.

Give Score	Number of Alumni	Notes
5	6,855	Indicates a new annual donor within the past two years OR Indicates annual donor who gave for 3-5 FY but stopped 5 years ago.
8	1,769	Likely indicates an annual donor who gave for 6FY+ but stopped 2 years ago.
38	39	Highest possible score. $1M donor in Campaign period & a booked planned gift at any time.
33	26	Highest possible score without a booked planned gift.

Experience Score	Number of Alumni	Notes
4	6,435	Attended at least one event within the past two years or current season ticket holder.

Digital Score	Number of Alumni	Notes
2+	22,217	May indicate someone who completed the 2019 alumni survey and engaged on Facebook.

So how do we move the engagement needle?

- Alumni survey showed us what events alumni actually want to attend

- Increase the number of alumni interacting with us on Facebook

- Convince colleagues to share data; we can't track mentoring if we don't know who the mentors are!

Where and how to start?

- Home-grown versus purchase
- Buy-in from colleagues and administration
  - Develop working group
- Remember – big data
- Start somewhere – basic and simple

QUESTIONS?