BEING GLOBAL
Making the Case for International Alumni Relations

GRETCHEN DOBSON
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WASHINGTON, D.C.
In Memory of
Jenn
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The equation when considering international alumni relations is this:

student + an educational experience outside the student’s home country = an opportunity to build a lifetime relationship with a school, college or university

The equation is also this:

graduating college senior or graduate student + the future = an opportunity to build a lifetime relationship with a college or university

And the equation may be this as well:

da disengaged alum expat living abroad for the last 15 years + alma mater’s international alumni relations strategy = opportunity

Finally, we have this equation:

a growing number of undergraduate and graduate students studying at international institutions = reality

Being Global: Making the Case for International Alumni Relations was written to provide an assessment of how schools, colleges, universities and some business schools around the world are engaging with their international alumni. Until now, very little has been written on the subject, although it has been the topic of numerous conference sessions, breakfast roundtable discussions and webinars. (I’ve participated in these, and I would bet many of you have as well). For years, the topic has been hardly more than a footnote to most advancement-related conferences.

For many institutions, international alumni relations is not a priority and will never be. Changes during the last decade, however, are causing more institutions to think again about their far-flung graduates: international student enrollments are on the rise, the cost of communicating with people outside one’s own country is decreasing and individual mobility on a global scale is increasing.
This book, then, is for those institutions (independent schools, colleges and universities) that are wondering about how—or even whether—to undertake an international alumni relations program. It’s also for those institutions that have decided to embark on such a program and would like to know more about how others are tackling the challenges and the key issues facing alumni professionals working internationally. And it’s for everyone who is wondering what signifies a successful, exciting program with impact.

Is international alumni relations right for your institution? Let this book help you find the way to an answer.
ACKNOWLEDGMENTS

I wrote this book on a plane—many planes—and that is where I would like to start my appreciation.

I want to thank Tufts University for giving me the opportunity to build an advancement career, to travel throughout the world building relationships with our alumni and our regional chapters and to help instill a desire among international alumni to get involved and give back.

The people at Tufts University have provided the ongoing support to build our international alumni relations program. Acknowledgments begin with former Tufts University President Lawrence S. Bacow and former Senior Vice President and Provost Jamshed Bharucha. Their leadership and dedication to the university’s international agenda provided a road map for much of my work. Vice President for University Advancement Brian K. Lee and Executive Director of Development Eric Johnson led our advancement team’s strategic planning efforts for our current capital campaign. Both colleagues provided ongoing support, direction and opportunities throughout the last eight years as alumni relations prioritized our international plans. Many other colleagues on campus share in our international alumni relations story as well: Jo Wellins, Ming Zhong, Jennifer Simons, Jane Etish-Andrews, Michelle Hinkle and our colleagues from the Fletcher School of Law and Diplomacy.

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Finally, it’s appropriate to thank my family and friends, many of whom are the Tufts alumni dotting the world and leading many of our programs. You know who you are, and I am honored to work closely with you and others every year. Keep up the great work.
INTRODUCTION

You’ve heard it many times: We’re in the relationship business. Whether at independent schools, colleges, or universities, alumni relations professionals help forge and maintain ties between institutions and graduates. Those relationships begin, not at graduation, but when children, teenagers, and even adults first become students at an institution, and we strive to make them continue throughout each alum’s lifetime.

These statements are true whether an institution’s graduates live near or far—even if far now means on the other side of the globe.

Once students become graduates, institutions face many decisions about how to continue their relationships with their alumni. The decisions are made more complex as institutions are faced with the challenges presented by alumni overseas.

For institutions pondering whether to implement an international alumni program, or for those wishing to improve their existing program, this book can offer some guidance and insight.

In chapter 1, we’ll look at how institutions decide whether to undertake an international alumni relations program. In assessing their readiness, institutions need to consider the following questions:

- Will the program support the institution’s goals?
- What are the challenges of beginning and/or sustaining the program?
- What are the potential benefits?
- What resources will be required?

As with most undertakings in alumni relations, the answers vary from case to case. A school boasting a history of more than 100 years will have different considerations than more modern academies. Universities located in major metropolitan areas and business schools that provide international curricula and study-abroad experiences will answer these questions differently as well.

Chapter 2 looks at what constitutes a successful international alumni relations program. How do you define success? How do you measure it? What does a successful program look like?
Today, independent schools, colleges and universities are assessing their international alumni relations practices more than ever. The return on investment is a common evaluative marker, but applying it to alumni relations is difficult. Relationships take time and must be a priority for all, but geographic distances add challenges to these efforts. There are ways to measure the “healthiness” of this relationship, however, by using surveys, benchmarking and other tracking tools. Some institutions also find that linking international alumni relations and development can help make the case that their effort to engage students and alumni pays off.

Chapter 3 gives concrete illustrations of how various independent schools, colleges, universities and business schools around the world are running their programs and coping with many challenges. In this chapter, you’ll see different ways to manage from a distance, learn ideas about student-alumni programming and programming with faculty, and look closely at a few signature programs.

The notion of “best practices” is one of the most important outcomes of the research behind this book. What one school does well in Asia may be exactly what a private school in the U.K. has wanted to try. A traditional event occurring every year for the last 75 years in the United States may make its debut in India in this decade. Read these sections on successes at other institutions and ask yourself whether there is something worth adapting to your campus. What makes one international relations program unique to its alumni can be the same feature that makes another program stand out for the first time.

Chapter 4 looks ahead to what might lie ahead for alumni relations—and what it means for professionals working in this field. It examines some common assumptions about alumni relations and whether they will remain valid through the next decade. How will international alumni relations professionals and our programs adapt to upcoming challenges and opportunities?

In the following chapters, you’ll meet a variety of independent schools, universities and business schools from Australia, New Zealand, Canada, the United States, Europe and Asia. Read these pages as if you have assembled a peer group of international alumni relations professionals for your own focus group. What has been described above is a sample of questions and topics to explore. All together, their collective wisdom and enthusiasm for their work is something worth sharing.
What does “success” look like?
What is benchmarking?
What is meant by “engagement”?
How do institutions evaluate and maintain their programs?

In this chapter, we’ll take a look at how schools, universities and business schools are evaluating their current programs and determining what constitutes success in those efforts. How do we measure—and maintain—success?

In identifying what works best, you will need to evaluate current practices, develop goals and measurement tools and be honest about your resources. Think long-term with other key decision-makers, including your alumni abroad.

Before we move forward to learn about ways to engage with our international alumni, let’s think about ways to define and measure success.

BENCHMARKING SUCCESS

The International CASE Alumni Relations Survey (ICARS), launched in 2005, is building “a statistical picture of what success looks like.” Participation in ICARS is open only to institutions outside North America, but any CASE member institution can read the analysis of each year’s survey to learn “which alumni services and
activities are statistically associated with greater success, and what successful AR programs do more of than less successful programs.”

ICARS participants have agreed that a “successful AR program” would be one whose numbers of attendees, volunteers and donors were in the top one-third of results reported by the 85 participants of the 2010 survey. To be in the top third (that is, to be “successful,” according to ICARS’ definition of success), you would need to have had at least 158 attendees, 23 volunteers and 139 donors per 10,000 constituents.

ICARS is just one example of how alumni relations professionals have started assessing their programs more critically and measuring their efforts against those of other institutions—how they have started to benchmark their programs, in other words. Benchmarking is also possible for alumni relations programs that don’t qualify to participate in ICARS, of course. For example, the CASE Benchmarking Toolkit, available to CASE member institutions, allows “peer communities of practice to design and conduct their own surveys, review results, and instantly download charts directly into reports.”

Your institution can also find consultancies that will conduct benchmarking surveys.

Benchmarking isn’t new to alumni relations. In 1985, CASE published Criteria for Evaluating Advancement Programs, a book about program self-assessment. Over the years, two types of benchmarking in alumni relations have developed. Operational benchmarking “looks at inputs and outputs: how many alumni you have; the size of your budget; and the number of staff, events, and volunteers.” Engagement benchmarking, the newer approach, “looks at how your alumni feel about you and how those feelings influence action.” Engagement benchmarking is more costly than operational benchmarking, but many institutions think it’s worth the extra expenditure for the value of the information they receive.

**ENGAGEMENT**

The ICARS measures of success (numbers of attendees, volunteers and donors) all hinge on engagement. But while we know that engaging alumni anywhere is more than just the numbers of bodies present, we also know that defining and measuring engagement is difficult.
MEASURING THE CASE

TOP REASONS TO BENCHMARK

• **Demonstrate that what you’re doing is effective.** Analysis “gave us national averages we could compare ourselves to” instead of relying on anecdotal evidence, says Helen Murphy, director of alumni affairs at St. Francis Xavier University.

• **Balance out the viewpoints.** “When you have a board of directors with all the same personal experiences, they tend to think that’s what everyone wants,” says Susan Linders-Anderson, director of alumni and parent relations at California State University, Chico. “Benchmarking allows you to demonstrate when that’s not the case.”

• **Deploy limited resources more effectively.** Benchmarking can make you more strategic, says Jason Coolman, director of alumni affairs at the University of Waterloo. “It helps when we make a pitch for an increase in budget that we can show it’s something that will produce results.”

• **Provide data points for decision making.** “We were looking at the frequency of our alumni magazine and trying to determine what was standard,” reports Sue Rees, alumni relations manager at the University of Ulster. Survey results allowed Rees to tell her board that the majority of institutions send out an alumni magazine twice a year.

• **Demonstrate responsiveness to alumni needs and feedback.** After conducting an alumni attitude survey, Linders-Anderson says, California State University, Chico, responded by telling alumni, “This is what you told us, and this is what we’re going to do because of that.”

• **Replace misperceptions with facts.** “I once had a vice president who said, ‘The problem is that all you do is athletic events,’ ” says Joe Flanagan, director of alumni services at St. Bonaventure University. “Because I had the data, I was able to show that actually only 10 percent of our events are related to athletics.”

• **Connect alumni with meaningful opportunities.** “Because our survey wasn’t anonymous, we were able to follow up with those people who indicated interest in continuing education, for example,” says Coolman.

• **Gain a seat at the leadership table.** “We already have the ear of our president, but I’m not sure every alumni office does. By collecting this kind of information, you can get the attention of higher-ups,” says Murphy.

• **Improve your performance.** “When we started participating in [CASE’s] benchmarking survey, it made us look at how we actually record data. We did it badly in some instances. So now we’ve changed the way we record data income and expenditures on events,” says Rees. This type of change helps both in planning and reporting.

Since 2007, Ray Satterthwaite, founder and owner of Engagement Analysis and executive director of advancement at Ashbury College, has developed another way of thinking about alumni involvement and proposes new ways to measure the effectiveness of alumni relations. With more than 20 years of experience in advancement at Canadian institutions, Satterthwaite is encouraging others to prepare for a new form of internal benchmarking.

“Many times there are no visible and ready metrics in alumni relations,” begins Satterthwaite. “The challenge I always found was being consistent with what and how we measure.” For example, outputs, such as attendance numbers, are just one type of measure. Perhaps more important is what drove the alumnus to participate in the program in the first place. Does effective marketing, for example, increase engagement?

Satterthwaite cautions that data can be skewed by alumni attitudes, and it is difficult to have a single objective lens from which to interpret results. How do you compensate for the lack of clarity? Satterthwaite goes straight to the alumni in a survey that tries to separate alumni attitudes toward the institution from their feelings about an event. Satterthwaite’s survey includes 12 groups of “drivers,” or questions, testing an alumnus’s propensity to care about alma mater, grouped under the categories of reputation, relationship and result. (See figure 2.1.) These 12 engagement drivers—academic experience, co-curricular experience, reputation pride, reputation awareness, awareness of impact, communication (propensity to read email), case participation, involvement opportunity, awareness of need (“I know what the direction and priorities are”), involvement action, support level and activities—are all correlated to lifetime giving, according to Satterthwaite. “As engagement goes up, giving goes up. Engaged alumni are also high on the net promoter score, a key for international brand awareness."

**TIP**

Benchmarking involves collecting multiple institutions’ data on an issue of common interest, viewing your own institution’s performance over time and from the perspectives of what your peer and industry leaders are doing, and then using the perspective gained for internal continuous improvement. What it’s not about: rankings, arms races and beauty contests.

Benchmarking questions might include:

- How do we compare to the whole population/our peer group/industry leaders/individual institutions of interest?
- How “different” are we? Are we different for the “right” reasons?
- Are the others doing something we are not or are they doing the same things but doing them better to get their different results?
- Who do we look at for best practices?
- How have we changed over time?

From Judith Kroll, “What Does Successful Alumni Relations Look Like?” CASE report, June 2010
Responses from 200,000 people, collected over the course of two and a half years, continue to validate Satterthwaite’s model. “The responses are all in a pool, and we see which groups are responding in a like way; we are connecting responses together,” he explains.

“It’s not about how many reunions you have, it’s about the feelings alumni have,” he adds. “When it comes to international alumni engagement, I’m finding that with almost all the institutions that I’ve studied, international alumni are more engaged than the average alumni from their country.”

Dr. Peter Brunner, the head of alumni relations at UTH-Zurich, agrees: “Emotions for our university are proportional to the distance they [alumni] are from the campus.”

Conversely, in Boston, for example, Tufts alumni are engaged and aware of what the university is doing, but they tend to suffer a bit on participation because the school is local. Thus there are some gains and some losses, depending on geography, and the job at Tufts is to determine how to gain in both situations with domestic and international alumni. International alumni may not be aware of the fundraising priorities of their alma mater but they are aware of the events. This awareness is measured by the 12 drivers presented in Satterthwaite’s analysis.

“Affinity can happen between institutions, demographically (local vs. international) and by profession,” concludes Satterthwaite. “We can slice and dice [the data] in many ways. We can ask, ‘Are the international law alumni (or alumni of professional schools, or any other segment) more or less engaged?’”
Assessing Effectiveness
How do universities in different regions go about evaluating pieces of their international alumni programs?

Cambridge University
Cambridge University describes its current level of evaluation as an active “work in progress.” For many years, Cambridge had a small alumni staff delivering services, so measurement did not exist at the level of some peer institutions. But Nathalie Walker, head of alumni relations, and Molly Peoples, alumni relations manager of networks and volunteers, are now looking at a closer application of metrics across the program. “Historically we may have promoted group membership but we were not sharing the data [of new members]. Today, we want to encourage communication and a process,” states Walker.8

Walker and the Office of Alumni Relations started expanding their evaluations by asking a limited number of questions of their alumni through surveys. Responses helped Cambridge learn whether alumni were interested in getting involved and with which alumni groups they would want to affiliate. “We want to now ask more systematic questions to get more data on the alumni,” Walker continues.

Cambridge has employed the tactics from Satterthwaite’s Engagement Analysis and surveyed their young alumni (graduates from the last 10 years) across all their colleges. Results of the survey showed young alumni affiliate with the faculty of specific departments. Based on this analysis, Cambridge can deploy more tactics that connect alumni back to their academic departments as the university tries to achieve a higher level of engagement among its alumni. Cambridge can also begin to benchmark their graduate responses across colleges.

Additionally, since a large percentage of Cambridge graduates affiliate with a specific department, one would make the case that the focus should be on the most popular degree subjects. And with some faculty crossing over colleges, it may be the college, the faculty or the university as a whole that would make a connection to alumni. Satterthwaite’s findings at Cambridge show older alumni affiliating with the university as a whole, but in recent years, the deans of the colleges have become more aggressive in meeting individual alumni throughout events and cultivation opportunities.

Cambridge also plans to review the vice-chancellor’s travel. In the past, Cambridge development office’s international fundraiser organized events. Today,
the alumni relations staff can send out recruitment mailing to different constituent groups and track new members and likely new donors. Walker says that the alumni office knows the vice-chancellor’s travel schedule for the next 14 months. “In general, it’s one of the things that we are trying to make more out of from an alumni perspective,” Walker adds.

University of British Columbia
The University of British Columbia (UBC) has begun an institutional global plan, and alumni relations is actively contributing their pieces to it. About 20,000 UBC alumni self-report that they are volunteering for alma mater. The university alumni relations’ goal is to double the number of active alumni by 2015. To achieve this goal, says UBC Director of Alumni Relations Barney Ellis-Perry, alumni relations decided to focus on three areas:

1. Foster the growth and development of UBC’s alumni communities
2. Create access for all alumni to a ready network of peers and the UBC learning environment
3. Equip UBC students to make the most of their UBC networks

FIG. 2.2  |  UBC’S ALUMNI DASHBOARD

<table>
<thead>
<tr>
<th></th>
<th>2005/06</th>
<th>2007/08</th>
<th>2008/09</th>
<th>2009/10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteers (known)</td>
<td>579</td>
<td>1,100</td>
<td>1615</td>
<td>1879</td>
</tr>
<tr>
<td>Volunteers (self report)</td>
<td>13%</td>
<td>N/A</td>
<td>N/A</td>
<td>Next survey 2011</td>
</tr>
<tr>
<td>Peer to Peer Networkers*</td>
<td>N/A</td>
<td>132</td>
<td>162</td>
<td>575</td>
</tr>
<tr>
<td>Annual Donors</td>
<td>N/A</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Alumni Centre Donors</td>
<td>N/A</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Alumni w/ POINTS</td>
<td>13,779</td>
<td>15,602</td>
<td>17,201</td>
<td>20,055</td>
</tr>
<tr>
<td>Visitors to Website</td>
<td>21,398</td>
<td>62,055</td>
<td>93,000</td>
<td>113,943</td>
</tr>
<tr>
<td>% Alumni Email Addresses</td>
<td>14%</td>
<td>32%</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Net Promoter Percentage</td>
<td>N/A</td>
<td>16%</td>
<td>N/A</td>
<td>Next survey 2011</td>
</tr>
<tr>
<td>Feel well served</td>
<td>46%</td>
<td>50%</td>
<td>N/A</td>
<td>Next survey 2011</td>
</tr>
<tr>
<td>Appreciation of Lifelong Relationship</td>
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<td>N/A</td>
<td>61%</td>
<td>Next survey 2011</td>
</tr>
<tr>
<td>Units with Alumni Engagement Goals</td>
<td>N/A</td>
<td>N/A</td>
<td>25 key partners identified</td>
<td>9 faculties/departments covering an alumni body of 139,569</td>
</tr>
</tbody>
</table>

*Number denotes reunion committee members, award nominators, branch reps and active presidential connectors

Updated May 3, 2010
UBC uses an Alumni Dashboard (see figure 2.2) to track their effectiveness in achieving greater alumni engagement and in creating increased opportunities for student-alumni involvement as well as for more campus partnerships. Cumulatively, the dashboard represents the overall success of UBC’s alumni relations with respect to its annual goals. The dashboard measures engagement in a number of ways, from number of volunteers (known and self-reported) to website visits, to alumni with “points”—for example, a graduate who buys a bookstore item, attends an event, mentors a student or engages in other defined proactive efforts. The staff also measure alumni engagement through “peer-to-peer networkers.” As Tanya Walker, UBC’s alumni affairs senior alumni relations manager, explains, “We hope our thought leaders can influence other peers to get involved. We want them to say to fellow alumni, ‘Your time and talent will be well spent, and getting involved provides you access and opportunities to influence.’”

There are a variety of ways to measure engagement and UBC has chosen to track personal involvement and attendance as a positive measure. Satterthwaite would caution against assuming that someone who attends an event had a positive experience.

University of Toronto
When asked about the readiness of their international relations program to adapt and change over time, Jeremy Woodall looks to the next five to 10 years and points to two priorities. “We have an adaptable program since our focus is on fostering alumni communities. Our [first] goal is to attract alumni and keep them engaged. We try to keep up with local alumni expectations.”

The second priority is related to development. “One of our long-term goals is to change the ways our alumni think about regular sustained annual giving in Asia. We are working to cultivate a new appreciation in younger alumni groups that our international communities have a tremendous potential to impact change. They really can advance the institution’s international programming through gifts as small as 500 Hong Kong dollars.” U of T will be tracking engagement and participation by younger alumni closely in the next five years.

MAINTAINING ENGAGEMENT
No matter how it’s measured, engagement is the key to a strong and successful alumni relations program, overseas or at home.

Findings from the 2009 ICARS on correlations between alumni relations and “success” measures indicated the following:

- To increase the number of attendees, institutions should put on more events (rather than making existing events bigger) and connect with potential attendees through email or e-newsletters.
• To increase the number of volunteers, institutions should connect with them through email or e-newsletters and should have a website and a frequently published magazine.
• To increase the number of donors, “be prepared for the long haul, years of asking and years of having an e-newsletter and a dedicated website” and a frequently published magazine.\textsuperscript{11}

ICARS, or course, defines success in terms of the numbers of attendees, volunteers and donors; Satterthwaite’s model measures engagement in other ways. Institutions need to consider budgets, staffing levels, communications plans and other strategic considerations to sustain optimal levels of engagement in order to achieve their own definition of success.

Communications

Market Research
In order to build and maintain a successful program, “institutions need to know why and how their alumni want to engage with them,” points out Elizabeth Scarborough, CEO of SimpsonScarborough, a market research and strategy firm based in the United States.\textsuperscript{12} “Research should be used to explore the factors that motivate international alumni to seek a relationship with their alma mater.”

Scarborough offers a few reasons why alumni might want to make a connection:
• Do they hope to simply connect socially with friends and former professors?
• Do they hope to gain new knowledge that will support their career?
• Do they hope to resurrect the feeling of pride they felt as a student?
• Do they feel an altruistic tug to “give back”?\textsuperscript{12}

“The ‘how’ of engaging alumni is particularly important when working with international alumni,” Scarborough continues. “In-person engagement opportunities are typically limited and the vast array of online or ‘distance’ activities need to be carefully identified to reveal the tools, tactics, and vehicles that will do the best job of building a connection despite the geographic chasm that may exist between the graduate and the physical campus. In a word, \textit{research} is essential in building a successful program.”

Surveys may not be able to solve all problems, “But good research can help institutions understand how to better connect with alumni. Information gleaned from surveys can help alumni professionals tweak programming and create events and opportunities that are more popular, more meaningful, and more successful at connecting alumni back to the institution.”\textsuperscript{13}
Social Media

Using social media to communicate with international alumni is standard practice among most institutions. Facebook accounts for the bulk of activity and more than 70 percent of Facebook users are based outside the United States. Alumni relations and communications staffs are customizing Facebook pages and are creating Facebook groups to increase participation and ownership of regional alumni. Moreover, more and more individuals own smart phones and have ready access to social media from their hand-held devices. Communicating with alumni has never been easier, but what will be the new standards for social media and international alumni relations? Your institution’s strategic communications plan should be nimble enough to allow for rapid changes in technology. According to Lisa Notter, director of advancement communications at Lewis University, and Michael Eck, new media and advancement communications project manager at Lewis University, the near future is about greater integration and personalization of social media. Facebook, Twitter, and LinkedIn accounts may be combined to bring ease of access and greater participation among users. Just as Amazon.com tracks previous purchases to market future buying opportunities, web-based and mobile phone applications will be developed to attract and retain the affinity of international alumni. Does this pose some risks? Not initially; using technology is an effective, creative and collaborative way of reaching out to others, tracking data and surveying the interests of alumni. But it is not low cost (see discussion below under “Services and Staffing”).

Andy Shaindlin, founder of Alumni Futures, shares another viewpoint about social media. “I distinguish between ‘communications’ and ‘engagement.’ I think that social tools have a communications function (sending news and information), but their real long-term value is in engaging alumni. This often means giving them a platform for conversation or interaction and getting out of their way. Not talking, just listening. This is a fundamentally new and challenging paradigm for traditional communications pros.”

TIP

In June 2010, CASE, in partnership with mStoner and Slover Linett Strategies, launched a survey on social media in advancement. More than 18,000 U.S. and international CASE members at independent schools, colleges and universities were asked to participate, and nearly 1,000 did so.

Among the findings: The biggest challenges that are keeping institutions from doing more with social media are staffing, expertise, and funding.

The University of Auckland has asked international alumni to run alumni pages for the university’s alumni association on local social networking sites. In Korea the university has an alumni page on Cy World, which is used by 95 percent of Koreans and is more popular there than Facebook. “The challenges are to ensure that our volunteers update the site with information on news and events and [that] it has links to our official university alumni website and our Facebook alumni page,” says Auckland’s Alumni Relations Manager Amanda Lyne.17

Determining which local social networking site is preferred by your alumni is the first step. If a site is easy to use, regularly accessible, and generally reputable, the challenges of having one more communications source to update may be worth the time and effort.

But most institutions, in Shaindlin’s opinion, will be better served by picking and choosing three or four tools that alumni are already using and making clear to their audience that this is where the school’s content currently lives online.

Scarborough agrees: “An institution should stay focused on strategy and goals, first; tools and tactics should stem from these. An example is the recent Spartan Sagas initiative at Michigan State. The university’s brand centers on ‘hardworking excellence.’ To engage alumni, they sought to create a vehicle for hardworking Spartans who are making a difference in their communities and around the globe to share their stories with each other and the world. Hundreds of alumni ultimately shared their ‘saga’ on a web page that was designed to gather and disseminate their stories. Had the university created a web page that was not so centrally focused on their brand, it’s unlikely they would be generating so much attention.”

Ongoing Assessment
Keeping pace with developing technology is a challenge that will require institutions to continue to assess the best modes of communication. Beyond assessment must lie a willingness to learn and use new forms of communication.

At the Benenden School, one of the U.K.’s most prestigious independent schools, a major goal is the development of technology. The staff received a primer from the advertising world in the fall of 2009. Development Director Debra Price sought information about trends and future practices to help inform her thinking over the next five years. She was trying to find a fresh way for Benenden to connect with its students and young alumni, since young adults communicate more via social media. Additionally, Benenden wants to find ways to make older alumni comfortable with technology.18

TIP
What is familiar to users in Korea is not the same as what is familiar to users in England. There are other sites, such as Mixi in Japan and Orkut in Brazil. Today, people in different countries have developed their own social networking sites.
To that end, Price and her department spent a day with one of Britain’s biggest advertisers, asking how it uses e-communications to promote brands in Britain. This form of corporate cross-training helped Price learn what is possible in the coming years, valuable information to share with Benenden’s information technology department. Price recounts the day: “We had an afternoon together and we were part of a presentation about best and worst practices of e-communications and using technologies of the future. We discussed which cutting-edge industries are using e-communications and, now, we are working on reviewing our own communications plan.” Price says that this learning experience, followed by her own internal communications review, has led her to believe that some efforts will never move to e-communications. “Some of the pieces will remain hard copy. These are precious.”

In the next three years Benenden expects to formalize other alumni networks in New Zealand and Australia and will increase its work in India and Russia. Electronic invitations and other means of communication are the most economically viable and efficient way to support the school’s expansion plans.

At the American School in Japan, the development and alumni relations staff is developing a strategic communications plan for the school. Staff predicts an overhaul of many services and programs and expects to redefine target audiences. “For the last two years, we focused on using social media, and we were one of the first schools to use this,” says Andrea Booth, ASIJ alumni relations officer. “However, in a year from now, I bet we look a lot different.” In addition to changes to traditional communications channels, such as moving class agent contact information and class letters from ASIJ’s print magazine, the Ambassador, to sections on its online community, the staff continues to scale back resources. ASIJ will not send staff to events and will reduce the number of receptions in the United States from four to one per year. Aiming for more strategic programs in recent years, ASIJ has focused on e-communications and engaging local alumni and is using both the parent and the local alumni community to bring speakers to campus for a student/alumni speaker series. This is an economical way to add value to programs.

Budgeting and Resource Allocation

Budgeting
International alumni relations programs attract alumni, parents, prospective students and potential donors, but why is the international alumni relations program usually perceived to be underfunded—especially when considering the financial realities of planning events overseas and coping with fluctuating exchange rates, an environment that can quickly change, and a variety of cultural norms? There is a clear argument for spending 95 percent of the central alumni relations budget on services and programs
that cater to 95 percent of the alumni populations residing in the home country, but when the efforts of the international alumni relations program provide direct benefit to so many other campus departments, why shouldn't budgets be shared?

This is something to discuss across the campus during the planning cycle for an upcoming fiscal year. If the parents program office is not going to program internationally but there is an expectation that all parents of current students are invited to international events, is there a way to share the ultimate costs incurred by alumni relations? Do the annual fund or major gift areas contribute a set amount of money each year to the alumni relations operating fund so events can continue to be sponsored and staff can continue to travel to meet with alumni?

Finally, will advancement operations send a clear sign of commitment to their international alumni relations program by designating a shared international budget for the offices who most likely engage with international alumni? Externally we may be sending strong signals that “we are all one,” but internally can we commit to making sure we have the resources it takes to sustain our expectations for future growth and development?

Services and Staffing
Sustaining effective programs and communications is not a “low cost” endeavor. According to Andy Shaindlin,20 the personalization of international alumni relations work has high overhead in terms of staff time. Individual attention to alumni and donors does not scale. Also, Shaindlin points out, integrating social tools into communications in general is an institution-wide priority that cannot be successfully executed by an alumni or development office acting on its own.

With resource allocation in mind, the United World College Southeast Asia has been reviewing the menu of services offered to alumni. The alumni relations staff members have researched other alumni programs online, talked to alumni and mapped out what services they want to provide. Today, although they wish to continually add to their program of services, their primary focus is to maintain and enhance the current services (regional reunions, web-based communities, publications and a mentorship program). UWCSEA would need another staff member to help with the increased flow of communications into and out of the office before introducing new initiatives.21

A recent white paper, “Use of Technology for Development and Alumni Relations Among CASE Members,”22 presented results from a comprehensive survey of 89 independent schools and 268 higher education institutions. The paper, which “explores the role of ‘advancement-enabling’ technology in helping institutions meet the challenges of engaging constituents and attracting private support,” looks at how effective online communities and social media were in raising participation and support from alumni, parents and friends, among other support groups. An important point to consider is that institutions can’t sacrifice staffing if they want
to make the most of new technologies and communications techniques—although many institutions appear to be “under-resourcing”:

Several findings in the research underscore the theme that a lack of staff resources prevents advancement professionals from both functioning more effectively in general, and also from leveraging technology to a greater degree. One-half of advancement professionals consider a lack of staff and financial resources to be a significant challenge, as do 38% of respondents at independent schools. Advancement professionals’ primary barrier to using technology more effectively is a lack of staff to support their technology needs. The majority of advancement systems are primarily supported by the institution's central information technology department, which suggests that technology needs for advancement may not be appropriately resourced by the institution.

The bottom-line message: Technology doesn’t run itself. People are still the primary factors in the engagement process.

Collaboration

Collaboration goes beyond budgets and coordinating technology across campuses. There are many other avenues to campus buy-in—and support—for an international alumni relations program. In 2006, our Tufts World Day was designed specifically to expose a large number of domestic and international chapters to our pre-campaign celebration while also providing colleagues in admissions, study abroad offices and the parents program (all co-sponsors of World Day), to name a few, an opportunity to travel on behalf of the university, fulfill their own program needs and support a comprehensive and strategic program.

In regard to collaboration, the four pillars of engagement (see figure 1.1) may be interpreted in several ways. For my international alumni relations planning, I am now using the pillars as a barometer by which to measure Tier 1, Tier 2 and Tier 3 regional chapters for Tufts University. Tier 1 regions produce a proportionally high number of international applications for the first year class, and the undergraduate admissions office deems these regions a priority; Tier 1 regions also have a Tufts-affiliated study-abroad center or may host centers for Tufts academic programs or partnerships with at least one of our schools; finally, Tier 1 regions have a robust and active chapter community of alumni from all schools, parents and friends. Fellow advancement officers will usually find more than one opportunity to visit Tier 1 regions.

The four pillars of engagement may also be used internally across campus when thinking about staffing, resources and budgetary planning for international alumni relations. Above, the discussion on budgets proposes a collaborative budgeting process that could pool resources to support overall institutional international
outreach. What if we added resources from the enrollment management and academic sides of the house? Who would ultimately decide how much and for what purposes? An exercise like this alone would inspire immediate dialogue and introspection about the international aims of the institution.

The CASE/SunGard white paper also concludes a need for more institution-wide collaboration between alumni relations and development, advancement and central information technology departments, as well as advancement and other departments such as enrollment management. The CASE/SunGard white paper also concludes a need for more institution-wide collaboration between alumni relations and development, advancement and central information technology departments, as well as advancement and other departments such as enrollment management.

Ideally, wouldn’t a centralized tracking system for all international outreach and engagement (from admissions, alumni, parents, sabbatical schedules, study abroad, to name a few) be an efficient and transparent way of measuring progress?

CONCLUSION
Whether your work is based in Asia, North America or Europe, efforts to identify, attract and engage alumni through creative systems of communication and programming are increasing each year. Technology today creates easy-to-use, cost-effective and mobile forms of staying in touch with alumni. But should it replace the face-to-face meetings? Does “breaking bread” still remain important in some cultures? Every situation requires a different approach.

As advancement professionals, we will continue to learn from each other and our experiences both at home and abroad. By doing so, we add value to the profession, to our work and to the experiences of our alumni. As one head of alumni relations in Asia feels; “We learn a lot of global trends from American schools, but we also want to ‘leap frog’ a new generation (of alumni) in areas of technology. How we revamp the web site and give alumni a new email address (is strategic). We need to continue to invest in the future.”

ENDNOTES
2. Ibid.
3. Ibid., 6, 10.
6. Unless otherwise indicated, quotations from Satterthwaite in the following paragraphs taken from telephone interview with author, Nov. 26, 2010.
8. Quotations from Nathalie Walker from email to author, Feb. 9, 2011.
10. Jeremy Woodall, telephone interview with author, July 13, 2009. At the time of this interview, Woodall was at U of T's advancement office in Hong Kong. He is now director of the University of Oxford's China office.
12. Elizabeth Scarborough, email interview with author, Dec. 12, 2010. Other Scarborough quotations in this chapter are also from this interview.
15. Ibid.
23. Ibid., 5.
24. Ibid., 8.