



# EDUVENTURES

## Case Study: Leveraging Technology for Advancement Annual Member Meeting, June 12, 2012

### Introduction

As Jay Anderson, Vice President of Development and Alumni Relations at ABC University, hung up the phone, he was concerned. President Jackson had been at the University for less than two years and was facing mounting pressure from the board to significantly increase alumni involvement and, of course, giving. In particular, the board seemed caught up in the social media frenzy and was questioning the campus' online strategy, something that was not at the top of Jay's priority list.

It did not help matters that President Jackson had spent the first part of his career as a senior executive in a software technology company. In fact, Jackson's key accomplishment was introducing email and other collaborative tools to the Fortune 500 long before there was an internet. Jackson viewed himself as a thought leader and pioneer in social connectedness with technology. Jackson had been wildly successful in business and brought this same passion to ABC U. He had promised the trustees that he could reconnect to the 70,000+ Alums and in turn raise the stature of ABC U. Jackson was convinced that technology was the key to cost-effectively connecting with alumni. In fact he had challenged the entire campus to do more with technology. His favorite saying was: "People are not the answer, technology is!"

Jay Anderson, successful in his own right, was the one hold-over from the prior administration. He had been in the development business for well over 20 years and had always delivered on his goals. Jay had been brought to ABC U nine years ago to lead the last capital campaign and under his leadership the University had raised \$250 million in five years, a fundraising record. During the campaign, alumni participation also increased from 5% to 15% and Jay had done a masterful job of developing "friends of the University." By all accounts Jay had scored many home runs. Jay knew that fundamentally the development business was a *relationship* business and he was skeptical about the place of social media and other online tools in development work. He had built a staff of gifted development officers and given them the room to run and succeed. Jay was committed to his model.

### ABC University Today

It had been 3 years since the end of the last campaign, and as is true with higher education today, it was time to start preparing for the next campaign. It was also true that ABC U and Jay had been coasting a bit since the last campaign; his team was performing well but was 20% smaller than during the height of the last campaign. The size reduction was achieved through natural attrition. Alumni participation had remained at a respectable 10% and annual contributions were consistently averaging \$40 million. Budgets were balanced, enrollment was strong and ABC was starting to move up the rankings. To Jay's thinking he ran a solid shop that was delivering.

To engage with alumni, Jay's team used best practices. They had a well-managed alumni database, an engaging web site, solid self-service tools for alumni profile updates, an online alumni directory and an

on-line giving program that was increasing steadily each year. They leveraged email and paper-based outreach nicely without spamming alums and, of course, they were on Facebook and LinkedIn. In essence, they were doing all the right things.

While Jay was satisfied, he knew his president wanted more out of technology. It felt like everywhere he turned there was an article about social media and alumni (Please see Appendix). A tried and true professional, Jay believed that getting development officers out on the road was worth far more than spending as much as \$100,000 on some new technological fad. Yet, he had to wonder, what he was missing? He deeply respected President Jackson yet he wondered if technology was really the answer.

### The Challenge

It was a picture perfect mid-west spring morning as Jay walked across campus to the president's office. Graduation and reunions were behind them and they had been a huge success. As Jay entered the office he was wondering why the unscheduled event. President Jackson welcomed Jay and got right down to business. "Jay we need to go social! I am convinced that the world has changed and if we do not change our ways we will lose our younger alums. I know you have been dabbling around the edges but I want more. I want us to be a leader in the use of technology to connect with our alums!"

Jay was floored. He had always been successful and never micromanaged. His first reaction was why? His second thought was how?

As Jay left the office he assured President Jackson that Jay would have a plan for him within 30 days. They set the next meeting date and Jay headed back to his office. Along the way his mind was racing.

- What does "going social" really mean?
- How can I develop an offering that resonates with our alums?
- What do I need to offer versus where in the social world do I need to play?
- What will the impact of "going social" be to our existing business processes and people?
- What are the "bumps" that I need to watch out for?
- What is the true cost of "going social"?

## Appendix

Google alumni social media

Search About 25,900,000 results (0.14 seconds)

### 10 Ways Universities Are Engaging Alumni Using Social Media

**INFINITE CONNECTION**  
NEWS & VIEWS

Home > News & Views > Alumni News & Features > Alumni News Archive > Social Media

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**SOCIAL MEDIA**

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The MIT Alumni Association has ramped up its social media presence with the

**ALUMNI DEVELOPMENT**

**ENGAGING ALUMNI USING SOCIAL MEDIA**

Kate Klingensmith

In a Mashable article that was recently published, called "10 Ways Universities Are Engaging Alumni Using Social Media", a number of highlighted Schools v strategies alumni co to show u LinkedIn.

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### Five Tips for Encouraging Young Alumni Engagement Through the Web & Social Media

### **U. of Wisconsin Donor Offers \$1 for Each New Twitter Follower**

Colleges have done some strange things to get Twitter followers. To name a few: offering a free iPod, creating Twitter accounts for mascots, and promising a full scholarship to the applicant with t...

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### **E-Mail Marketing Campaign Gets By With a Little Help From Some 'Friends'**

06/29/2011, By Ellen Foley

Madison College convinced voters to approve the funds to update classrooms and equipment by using a creative social-media effort.

Emory University started the [Blue Pig campaign](#) to encourage its undergraduate students to give to the school by using a [Facebook profile](#), a Twitter account ([@thebluepig](#)) and other media. The hope is that when the students graduate, the practice of giving back to the school will continue, said Cassie Young, program coordinator for alumni programs. The campaign seems to have been very successful too, resulting in a 157% growth in number of gifts from undergrads, according to [Michael Stoner](#), who owns the [mStoner communications firm](#), which specializes in web development for higher education institutions.

Another way schools are engaging alumni is by allowing them to produce their own content, which includes things like the wikis at Stanford and photo sharing with the alumni network at other schools.

The [University of Texas at Austin](#) built its own [photo sharing site](#) that allows alumni to share photos of themselves showing the school's well-known "hook 'em, horns" hand gesture, along with a brief bio.