



Welcome, Visitor

Member Status:



Logout



CURRENTS

ABOUT CASE

MEMBERSHIP

DISTRICTS

CASE ASIA-PACIFIC

CASE EUROPE

NEWSROOM

BOOKSTORE

CAREER CENTER

CONFERENCES

MATCHING GIFTS

AWARDS &amp; SCHOLARSHIPS

CURRENTS MAGAZINE

RESOURCE CENTER

YELLOW PAGES

ASAP STUDENT ADVANCEMENT

AFFILIATED FOUNDATIONS

SPONSORS &amp; PARTNERS

CONTACT US

## In This Section:

[View Current Issue](#)
[Past Issues](#)
[Search CURRENTS articles](#)
[Subscribe](#)
[Advertise](#)
[Propose an Article](#)
[Talk to Us](#)
[People on the Move](#)
[Home](#) > [October 2008](#) > Know Your Market

[October 2008](#)

## Know Your Market

*Solid market research can improve alumni outreach efforts*

*Surveys may not be the solution to every engagement conundrum, but good research can help institutions understand how to better connect with alumni. Alumni relations officers and research pros share what they've learned and provide tips on how to get the most useful data.*

By [Erin Peterson](#)

Winthrop University's alumni relations office seemed to be doing everything right: planning events, sending out notices to a thousand alumni, offering free food and beverages. You know the drill.

But attendance was abysmal for local mixers, says Debbie Garrick, executive director of alumni relations at the South Carolina university. "We'd get 25 or 30 people," she says. "We'd been doing the events for so long that even when we'd get 20 people, we'd think we were doing well."

Garrick was ready to shake things up, and in

2006, she commissioned a survey and discovered that many of the assumptions she and her colleagues made about what alumni wanted—including those punch-and-cookies events—weren't quite accurate.

Surveys may not be the solution to every engagement conundrum, 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 ultimately more successful at connecting alumni back to the institution.

### **Begin with the end**

The key to getting great results through market research has less to do with finding the right answers than it does with asking the right questions. Rob Shoss, managing director at the Texas-based consulting firm Performance Enhancement Group, says that designing the survey itself is critical.

"You have to implement the [Stephen] Covey model: You've got to begin with the end in mind. When you understand what [kind of analysis] you're going to apply to your findings, then you can determine the questions that will feed that analytical model."

In other words, think about what kind of answers you'll need to plot a course of action. Then consider what questions will help you get to those answers.

Many institutions don't have an in-house research guru to design a survey, but consultants, faculty members, and even knowledgeable volunteers may be able to lend a hand. Wendy Greenfield, executive director of

the alumnae association for Bryn Mawr College in Pennsylvania, was able to tap an alumna, a professor at the Darden Business School at the University of Virginia, to design a professional-quality survey for free. Other institutions, including Winthrop, have piggybacked onto larger national surveys, such as PEG's Alumni Attitude Study ([www.alumniattitudestudy.org](http://www.alumniattitudestudy.org)), to get information about their alumni at a lower cost.

Tara Scholder, vice president for research operations at Maguire Associates, a research-based consulting firm in Massachusetts, says that a good alumni survey will take 10 to 12 minutes to complete. Most surveys should be predominantly multiple-choice, though it's also important to include a few open-ended questions to allow alumni to clarify or amplify their answers.

While there are always exceptions—Greenfield says Bryn Mawr alumnae are so passionate that a third of them sat down to answer an 18-page questionnaire mailed to them—following Scholder's rules of thumb will likely help you get good results.

Online surveys are increasingly popular and much less expensive than paper surveys, but Scholder warns against relying too heavily on online-only surveys. "You may underrepresent older alums," she says. "In general, the best way is to send everybody a paper survey with a link to an online option in the invitation."

No matter how you proceed, says Stanford Alumni Association's Director of Market Research Jerold Pearson, it's critical that the research is done right. "Don't do amateur research," he says. "Even if you've got someone who knows how to analyze data, if the survey or research design is flawed, the

data are going to be flawed. And misleading information can be more dangerous than no information at all.”

## **Change through knowledge**

Once you’ve got data, you may find that they confirm your previous suspicions about the strengths and weaknesses of your alumni programming, or that they offer some surprises.

Garrick found out that alumni really did want to come to events, but they wanted more than just refreshments to entice them. They wanted something they could do with their families, or something that felt unique.

So when a Norman Rockwell exhibit came to Discovery Place, a nearby museum, the alumni office decided to team with the admissions office, rent out a space in the museum, and invite people to come. “We had 75 or 80 people there,” she says. “Alumni thought it was a neat thing.”

It’s normal to want to take action on every flaw your alumni have pointed out—or to feel paralyzed by the amount of work that lands in your lap. Often, alumni relations directors with good intentions shelve the survey until they have more time to deal with the information it provides, only to find it gathering dust a year or two later.

Regardless of what the survey tells you, the first step of the process is to share the results with your alumni. “If a school reaches out to alums and asks them to share their wants and needs, it’s important to share those results back to them,” says Scholder.

Sharing the results of the survey will not only allow the alumni association to show

appreciation for the alumni who gave their opinions, but it will also help the institution bolster its case for difficult decisions on programming cuts or changes.

Jeff Todd, executive director of Oregon State University Alumni Association, says that advice worked well for him. In 2007, the alumni association conducted a survey, which garnered more than 3,500 online responses and 305 successful phone interviews, for an 18 percent response rate.

He says that sharing the results in a feature story in the alumni magazine was beneficial, even though not all the news was good. In addition to highlighting the many positive results from the survey, the article discussed a few areas of concern, including alumni's desire for more career networking tools. "We knew that this was an area that needed attention, and when we had the survey results, we needed to outline how we were going to act on it," he says.

Partially as a result of the survey, OSU is in the process of restructuring its business roundtable group, adding online career services tools, and increasing networking opportunities.

Greenfield and her staff discovered that they didn't need to add to the catalog of alumnae offerings—they needed to upgrade them, including the alumnae magazine. The initial comprehensive survey, conducted in 1999, suggested that alumnae were generally satisfied with the magazine, but to find out more, the office conducted a more in-depth magazine survey. They surveyed alumnae as well as stakeholders, including the president and board of trustees.

As a result of the alumnae response, the magazine expanded its section on college news, outsourced the design to get a more professional look, and increased the budget for photography and design.

Greenfield says that alumnae have taken note of the changes. "The magazine is being noticed more broadly and it's more widely read," she says. "We have more alumnae who have been in touch with us to tell us how much they like the specific articles as well as the look and feel of the magazine."

Joe Long, director of alumni relations at Plymouth State University in New Hampshire, says that his institution sent some 5,000 online surveys to alumni in 2006, for an 18 percent response rate. Much to their surprise, the survey suggested that four out of five alumni felt deeply connected to the intramural program. "We never would have even thought about that before," says Long.

Now they're taking action: The university is encouraging alumni teams to return during homecoming weekend. "Alums who might have played together 10 years ago on an intramural basketball team are getting back together to play in a tournament during homecoming family celebrations," he says.

Long says that while that was an immediate, visible change, the information that he and his staff gleaned from the survey has had a significant impact in other ways. "It's a foundation for everything we've done for the past two years," he says. "We've used it as a base for launching our new strategic plan for our engagement program, to build our programs, and to do follow-up analysis on all of our outreach efforts."

Some surveys allow targeted communication based on specific responses from alumni. Jeff Terry, executive director of Kenan-Flagler Business School at the University of North Carolina, developed a comprehensive, 23-question alumni survey with faculty and alumni input and the online tool Survey Monkey. The survey received an 11 percent response rate.

Several questions made reference to online class notes, directories, and job postings. If a respondent said that he or she wasn't familiar with the offerings, the response was linked to the e-mail address and that information was saved. The university then sent messages to those alumni specifically that introduced the services and included a link to them. "[This type of online survey] really gives you an opportunity to be more finite and targeted with your messages," says Terry. "It gave us the chance to address something they may in fact be interested in, but not have an awareness."

## **Hard choices**

Just because a survey indicates that alumni want—or don't want—a specific program or tool doesn't mean that making the change will be easy.

With a wobbly economy keeping budgets tight, adding a new element often means that something else must go. Long at Plymouth says he and his staff have addressed the problem in three ways: They've cut out unnecessary expenses, asked alumni to help chip in to keep popular programs running, and developed creative revenue streams to boost the budget.

As a result of survey findings, Long and his staff launched an ambitious career management and mentoring program. To help

cover expenses, they had to take a hard look at the budget and cut costs. They started with the things that they'd always done but hadn't always known why. They dropped two big direct-mail pieces—one for homecoming and one for alumni board of directors elections—that cost thousands of dollars but seemed to have little return on investment. Now the alumni office puts notices about both in the alumni magazine.

"That's a total of about 50,000 direct-mail pieces," he says of the cuts they made. "We've saved a lot of money that we've poured back into programming and services."

In addition to making those cutbacks, Long has begun attaching a price tag to events. Even if it's just a token amount, he says, it reminds alumni about the real value in attending them. Many events—including a Red Sox game that costs up to \$85 a person—have sold out. The office has also raised some revenue through credit card programs, insurance programs, and sales of diploma frames and chairs.

"We explain to alumni what we do with the money we raise—90 percent goes to our programming and 10 percent to scholarships—and that has helped us bring in additional resources," he says.

On the flip side, cutting programs a majority of alumni don't want probably won't be as simple as moving the money elsewhere. Bryn Mawr's Greenfield says that survey results suggested it might be time to drop the college's bed-and-breakfast program, which was rarely used but much-loved. In this program, which was organized by the alumnae office, traveling Bryn Mawr alumnae would stay with Bryn Mawr hosts. Greenfield says the logistics were often a nightmare.

"Change is difficult," she says. "A lot of people are attached to things the way they used to be, so we tried to be sensitive in the way we phased out programs, and we tried to be very communicative in our approach to doing it."

Greenfield says that key volunteers were well-informed about which programs were popular and which were less so (like the bed-and-breakfast program). When volunteers were informed that a program was going to be eliminated, the change didn't seem to come out of the blue, and volunteers were able to pass along the information to others. A story in the alumnae magazine kept the rest of the alumnae informed.

When Winthrop's Garrick saw that alumni were generally just as happy to receive e-mail correspondence as direct mail—a surprise, considering how much the office had resisted sending messages electronically—the alumni association was able to shave costs by eliminating some printed materials.

More important, she says, were the partnerships that the alumni office has developed with the admissions and development offices. To start offering the kind of unique events that surveys suggested alumni craved, Garrick looked for additional support.

"We started doing out-of-state events with admissions so we could split costs," she says. "It's not new—or even all that unusual—but it was new for us. And it was much more cost-effective."

No matter what the surveys tell you, don't expect to overhaul your entire program, says Todd. "You can't tackle it all. You have to think about what will work best and what you have

the resources to address. For us, that meant identifying three to five things that we could take away from the survey. And we hit those as hard as we could to see what we could do.”

## Looking forward

A good survey can take months to create, distribute, and analyze, and the information that comes back may seem overwhelming. But it’s only a starting point. The survey can be a baseline by which to make changes, but you should continue to follow up with smaller, more targeted surveys to track your progress.

Long says that after every alumni event, alumni staff members hand out satisfaction surveys asking about the venue, price, food, and whether or not attendees would come back. “We used to hear a lot of things anecdotally, but now that we’re doing [the mini-surveys] consistently, we can start seeing trends,” he says. “We can tweak events, cancel them, or add a new twist based on what they tell us.”

PEG’s Shoss says that a comprehensive survey should be followed every two or three years with smaller surveys that track key elements to see if changes are having their intended effect. Every third or fourth survey should go back to the larger, more comprehensive look at all the alumni outreach efforts.

“If you only do a survey once every 10 years, you’ll find that most of the people in the institution have changed; nobody can find the previous survey,” he says. “You’re basically starting over.” By putting your efforts under the microscope every few years, you’ll be more likely to see the areas that need changes before a complete overhaul is necessary.

Garrick says she'd recommend surveys to everyone. She says that Winthrop invested about \$5,000 in the study and that she'd do it again in a heartbeat. "It costs a little bit on the front end," she says, "but it's worth it in the long run. In two years that study has paid for itself."

After all, just guessing at what alumni want can be costly. But knowing for certain is, some might say, priceless.

## IN SHORT

**Less Is More.** Low response rates are the bane of the survey world. In a two-pager on this topic, Jerold Pearson, director of market research at the Stanford Alumni Association, writes that people engage in cost-benefit analysis upon receiving a survey. The cost is tangible (their time), but the benefit is not (unknown programming changes?). So make it snappy. If the purpose of the survey is to gather current contact information, then resist the urge to add other questions of interest, he advises. And if you already have contact information, don't ask for it on the survey. For more of Pearson's thoughts, go to [www.stanford.edu/~jpearson/survey\\_response.pdf](http://www.stanford.edu/~jpearson/survey_response.pdf).

**Cash Is King.** Given the cost-benefit analysis that occurs when one receives a survey, a small token of appreciation can ensure that the benefit outweighs the cost. In 2002, researchers at the global tax firm Ernst & Young sent one batch of surveys with \$5 in the envelope and another with the promise of a \$10 gift certificate upon completion. The delayed incentive yielded a 22 percent response rate, while the immediate cash incentive produced a nearly 60 percent response rate. To read the full analysis of this

experiment, go to the American Statistical Association's Web site ([www.amstat.org](http://www.amstat.org)) and search using the article title: "Incentives in a Business Survey."

**Focus Group Gripes.** OK, so you need to keep your survey short, but sometimes you want more detailed information. Maybe you are thinking about holding focus groups. This might still be a good choice for alumni associations looking to tweak programming, but many in the corporate world are starting to forget the focus group, according to articles in *BusinessWeek* and *Context* magazines, to name a few. The main complaint is that focus group members frequently aren't honest about their feelings. In fact, *New York* magazine ran an article in 2004 about how to make a living as a focus group participant. The advice: Tell them what they want to hear.

**Building Blocks.** As was the case at Plymouth State University (discussed above), a comprehensive alumni survey can be a good foundation for the alumni association's strategic plan. Need some building materials to go with that foundation? Check out the best-selling book from Robert A. Sevier, *Strategic Planning in Higher Education: Theory and Practice* (\$51.95 for CASE members; \$68.95 for nonmembers). Sevier offers a comprehensive look at the trends in the higher education marketplace and then discusses how campus planners can anticipate, evaluate, and take advantage of changes and opportunities. To order, go to [www.case.org/books](http://www.case.org/books).

## About the Author

*Erin Peterson is a freelance writer based in Minneapolis, Minn.*

*This article is from the October 2008 issue of  
CURRENTS.*

EMAIL  
THIS PAGEADD TO MY  
NOTEBOOKPRINTER  
FRIENDLY

[Home](#) | [My CASE](#) | [Join CASE](#) | [About CASE](#) | [Membership](#) | [Districts](#) |  
[CASE Asia-Pacific](#) | [CASE Europe](#) | [Newsroom](#) | [Bookstore](#) | [Career Center](#)  
| [Conferences](#) | [Matching Gifts](#) | [Awards & Scholarships](#) | [CURRENTS](#)  
[Magazine](#) | [Resource Center](#) | [Yellow Pages](#) | [ASAP Student Advancement](#)  
| [Affiliated Foundations](#) | [Sponsors & Partners](#) | [Contact Us](#) |  
[Advancement Management](#) | [Advancement Services](#) | [Alumni Relations](#) |  
[Communication & Marketing](#) | [Development](#)

[Contact Us](#) [Terms & Conditions](#) [Privacy Policy](#)

Copyright © 2008 by Council for Advancement and Support of Education.  
All rights reserved.