

The Alumni Outreach Office – Final Report

Initial Proposal:

Purpose of Funding: The Morrisville State College Office of Institutional Advancement and College Relations is seeking funding from the NEAT Grant Program to establish an **Alumni Outreach Office**. The mission of the office is to reach out to Morrisville Alumni to meet with them face to face and discuss their history with Morrisville, how a Morrisville education has benefited them and to listen to any advice or clues as to how to further engage them as alumni. This is by far the best way to learn about Morrisville alumni as you receive their personal story as to what made Morrisville tick for them.

Implementation: It is Morrisville's intention to establish a scheduling office to be staffed with Morrisville students to make calls to alumni. Time constraints are the biggest barriers for institutional advancement staff in making these calls. At Morrisville, over 95% of all phone calls go unanswered, while only 30% of all answered calls end up with a positive result. As a small office, there are too many duties to attend to, making it difficult to get even an hour of outbound appointments. The hiring of students to make these calls on behalf of institutional advancement staff presents a great opportunity to contact many alumni while allowing the institutional advancement staff to focus on other priorities. It also provides students with a job opportunity that gives them experience in negotiation, cold calling and prospect management.

Process: The Morrisville State College Office of Institutional Advancement and College Relations intends to create an access database with alumni information and hire students on campus to operate this database. Torin Washington, director of annual giving, will create this database along with any materials associated with the scheduling of appoints, such as a confirmation call and a conversational script.

Planning for the Alumni Outreach Office will begin on July 1st with the following timeline:

June 1 – June 8: Develop database of alumni contact information and other pertinent information to conduct scheduling calls

June 9 – June 15: Hire Morrisville students to begin in the summer, with ongoing hiring as students graduate/quit position

June 16 – July 1: Train students on the use of the database and begin making calls

December 1: Analyze data of actual calls made, success/fail rate, and input information from meetings into college institutional advancement system. Make recommendations on alumni programming based on data acquired from visits with alumni

April 1, 2015: Conduct internal evaluation of program and make modifications to it to improve outcomes. Create a report of the internal evaluation and submit to NEAT Grant Committee

Project Findings:

Morrisville is very pleased with the Alumni Outreach program as it has helped in our outreach efforts and have enhanced our ability to connect with various communities around the country.

To date, the results of this project are as follows:

72 Individuals have agreed to meet with a member of the Institutional Advancement Staff

142 Declined and have no interest in meeting with an Institutional Advancement Staff member

107 Individuals would like to meet but were not available within the timeframe requested

Some notable achievements during the meetings with Institutional Advancement Staff

59 Individuals would consider attending a Morrisville event in their area

30 Individuals would consider coming back to campus for a tour

10 Individuals made a small donation on the spot

10 Individuals would consider becoming more involved on campus, ranging from volunteering to help with events to speaking on campus to students

4 Individuals will consider leaving Morrisville in their will or estate plans

3 Individuals volunteered to assist in our fundraising efforts (write a letter, planned giving advice, help with a major gift ask)

1 alumni event held due to initial visit

1 Individual made a major gift (5 figures) without an ask

All individuals visited are receptive to the idea that someone from the Institutional Advancement office may either call or visit them again

Most results were tracked through using an excel spreadsheet exported from a Microsoft Access Database created for this project.

Methodology: After building the initial database, the Institutional Advancement office made the decision to populate it with individuals meet some of the following criteria:

- Alumni or near alumni with a long, consecutive giving history – regardless of amount
- Alumni or near alumni with a net worth above \$100k with recent giving activity
- Alumni or near alumni with gifts of \$100 over the last 3 years
- Alumni or near alumni with a net worth of \$1 million – no giving history needed
- Alumni or near alumni with an alumni spouse
- Emeritus Faculty
- Board and Former Board members

The thought process behind determining the criteria was that these groups are more likely to be receptive to the Morrisville experience because they are/were donors, served in a leadership or influential role on campus, or were successful in their careers. During the process, the lists were updated regularly, the script tweaked, the types of meetings promoted changed (opting for more “coffee” and “in-home” visits as opposed to lunch). Later on, this alumni outreach calls were coupled with emails to the prospects.

How it worked:

In the Access Database, the student worked with a form, as well as had a script and a mini calendar which was also integrated into the database. The fields that were available we as follows:

Standard Info fields (Name, Address, Email, Phone, etc.)

When to Schedule: Each prospect was assigned a travel date timeframe for the student to mention during the calls. Each timeframe represented a certain region of travel (i.e. Albany, NYC region, Buffalo, Pennsylvania, etc.)

Call Result: This is a drop down menu that lets the office know what happened, such as “Call back – Left Voicemail”, “Yes”, “Not available within timeframe”, and others.

Caller Name: This is how the office tracks which students make the call and makes it easier to reference certain calls to students

Meeting Date, Time, Address: This is all for details of the meeting location

Type of Meeting: Some of the options here are: Coffee, Dinner, Lunch, Visit in Home and Visit at Business. This will help determine the tone of the meeting, duration you expect to be there, and potential scheduling hiccups. For example, if you know that your first meeting is a visit at home with an elderly alumnae, and your next meeting is at a business, you can expect a potential scheduling hiccup if the appointments are less than 3 hours apart. This is because in-home visits can be very long visits. To mitigate this, the Institutional Advancement office put into procedure that all appointments are to be made with a 3 hour spread.

Comment: This is for general note taking about meeting for the student to record. Notes like “Please call the day before to confirm” or “Will be bringing his wife to dinner with him”

What worked well: There are a few items that worked really well in regards to the execution of the program:

1. 3 hour time blocks – starting at 9am. By doing this, it makes it easier for the callers to set a schedule for an appointment as it gives them a sense of certainty about when to schedule appointments
2. Reminder post card – When the appointment is schedule, sending out the reminder postcard is a valuable tool. On this postcard is a simple message stating that we are

excited to see them soon, a confirmation of the time, date and location, and a picture of our entire team on the post card. This gives the prospect a sense of who they are meeting with and is extremely helpful in populated settings such as a busy lunch location.

3. Prospect Sheet - This sheet is basically a summary of the call, giving history, net worth and prospect profile. This is more of a gift officer tool and is very helpful in helping qualify the prospect into a different type of donor.
4. Regional schedule - By making sure that prospects in the same region are scheduled within the same time frame, this cuts down on extensive travel and possible problems with time and resource management.
5. Good callers – Morrisville uses this project as an added opportunity for the best callers during its regular Phonathon. This ensures retention in Phonathon, but more importantly, it ensures that you have a quality caller making these calls.

Tips for achieving success with the program:

1. Avoid the confirmation call: This gives the prospect an out. This is why the appointment card works so well. It's a way to remind them of the visit and puts the pressure on them to reach out to you in order to cancel.
2. Avoid having only 1 visit if you are traveling outside of your region: Unless you have a cancelation, I would try very hard to book another appointment as you do not want to use company resources on a single visit.
3. Make sure you execute proper follow-up: A thank you note should be sent after every visit with some sort of action item for follow up. These people should be tracked somehow, even if they are not a major prospect.
4. Avoid lunches or dinners if you can: The 2 most expensive meals. If cannot get any other type of appointment, then definitely go for what you can get, but some of the best visits out of this program were from in-home visits and coffee.
5. Be Ready to Pay: Unless they are very adamant about paying, its easier to just pay to avoid a potential awkward conversation.
6. Clarity: Have a plan in mind as to why you are visiting them and what you want the outcome to ultimately be. For example: If you are visiting a non-donor alumni, they are going to want to know why you are meeting with them. Be ready with a good and truthful explanation.
7. Timing: Be sure to schedule students for day and night shifts. You tend to get more elderly alumni when you call during the day and those that still work during the night. You also get younger alumni visits through email as well. Don't forget time zones!

Conclusions: This program has been a success for Morrisville because it utilizes students in a capacity that helps a small office perform alumni activities which are normally reserved for larger offices. For larger offices, this can add yet another tool to expanding the outreach into the alumni community, especially for alumni databases that are very large. The elements of this program are easy enough to produce and are at the level where a student can be trained to do the work that is involved effectively. It is important to note that if a college or university is interested in duplicating a similar program, they must have the buy in from the campus and that the program is firmly aligned with the strategic vision of the institutional advancement department. This is important because there are many institutions that will believe that the work involved should be reserved for full-time professionals. This is a fair assessment as a full-time professional will undoubtedly be more successful than a temp service student. However, if a program is looking to achieve “more with less” and are looking to expand their program without the additional hiring of full time staff, then this program is something that is worth looking at.

It is always advised in this profession to get as personal with alumni and friends as possible or feasible. This program accomplishes this with results that vary from minor successes (i.e. agreeing to attend a future event) to major accomplishments (leaving Morrisville in their estate plans). This warrants enhanced resource allocation to the strengthening of this program. This program is designed for small shops, but larger shops can also utilize it in the same manner.

Impact it will have on the future of programming: Morrisville will continue to utilize this program as a complement to the current alumni and development programming. In addition, Morrisville has plans on expanding the program to include several other elements, including moves management, event planning, and corporate and foundation outreach. The institutional advancement department firmly believes that the additional of these new elements will enhance its ability to serve its alumni and friends significantly and will result in greater growth of alumni participation and giving.

Projected Budget:

| Category | Unit Cost | Qty | NEAT Requested Contribution | Morrisville State College Contribution | Total | Justification (Projected) |
|---|------------|------|-----------------------------|--|-------------|---|
| Salaries and Wages | | | | | | |
| Student Wages (per student at \$9.00/hour – 10 hours a week for 24 weeks) | \$2,160.00 | 4 | \$864.00 | \$7,776.00 | \$8,640.00 | Cost to hire four students over the course of twenty-four weeks to call and make appointments at a pay rate of \$9.00 an hour |
| Fringe Benefits | | | | | | |
| | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | Students do not have any benefits for their wage |
| Equipment | | | | | | |
| IBM T430 Laptop – Used | \$500.00 | 2 | \$100.00 | \$900.00 | \$1,000.00 | Cost to purchase two laptops to install the alumni outreach database for students to work on |
| Materials and Supplies | | | | | | |
| Appointment Notecards | \$0.50 | 500 | \$25.00 | \$225.00 | \$250.00 | Cost to purchase follow-up cards for alumni office staff to send to alumni to confirm appointments made by students |
| Travel and Meals | | | | | | |
| (1 lunch and travel per appointment) | \$100.00 | 45 | \$450.00 | \$4,050.00 | \$4,500.00 | Average cost of traveling to a destination and covering the cost of a meal when meeting with an alumnus |
| Other Costs | | | | | | |
| Phone calls | \$0.10 | 3000 | \$30.00 | \$270.00 | \$300.00 | Average cost to make an outbound call considering the number of calls needed to secure forty-five appointments |
| Total: | | | \$1,469.00 | \$13,221.00 | \$14,690.00 | |

Actual Budget:

| Category | Unit Cost | Qty | NEAT Requested Contribution | Morrisville State College Contribution | Total | Justification (Actual) |
|--|------------|-----|-----------------------------|--|-------------------|---|
| Salaries and Wages | | | | | | |
| Student Wages | \$2,178.46 | 1 | \$0.00 | \$2,178.46 | \$2,178.46 | Morrisville ended up hiring 3 students for this role over the course of 2 semesters. Each student worked various hours depending on schedule. Some a lot more than others. |
| Fringe Benefits | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | No change. Students do not have any benefits for their wage |
| Equipment | | | | | | |
| IBM T430 Laptop – Used | \$250.00 | 2 | \$0.00 | \$500.00 | \$500.00 | Morrisville purchased 2 used laptops for this project. |
| Materials and Supplies | | | | | | |
| Appointment Notecards | \$0.50 | 500 | \$0.00 | \$250.00 | \$250.00 | No change. Cost to purchase follow-up cards for alumni office staff to send to alumni to confirm appointments made by students. |
| Travel and Meals | | | | | | |
| Includes mileage, meals and lodging expenses | \$1,421.20 | 1 | \$1,421.20 | \$0.00 | \$1,421.20 | While there were more visits, travel costs were lowered due to the utilization of state vehicles, visits that were close to campus, visits that didn't require the purchase of a meal and visits that didn't require lodging |
| Other Costs | | | | | | |
| Cell Phones with unlimited plans used | \$195.00 | 1 | \$195.00 | \$0.00 | 195.00 | Morrisville opted for cell phones instead of landlines. Cost is lower due to using fewer students to make the calls |
| Total: | | | \$1,616.20 | \$2,928.46 | \$4,544.66 | |