

WAKE FOREST UNIVERSITY PRO HUMANITATE AND ALUMNI ENGAGEMENT

What's Next for University Advancement Alumni Engagement

THE BUSINESS CASE FOR ALUMNI ENGAGEMENT

What the private sector has to say about engagement, and what it means
for Wake Forest University in the long run

In an annual business survey,
Gallup showed that at least
30% of employees are not
engaged at work.

WHY DOES IT MATTER?

- The average working population ratio of engaged to actively disengaged employees is nearly 2:1
 - Actively disengaged employees erode an organization's bottom line, while breaking the spirits of colleagues in the process
 - Cost to the bottom line: more than \$300 billion in lost productivity alone
 - In contrast, world class companies have an actively engaged ratio of 9:1
 - Companies who are top in employee engagement have nearly 4 times the earnings per share growth rate
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BUT, ALUMNI AREN'T OUR EMPLOYEES

How about customers?

- Gallup found that customers who are fully engaged represent an average *23% premium* in terms of share of wallet, profitability, revenue, and relationship growth over the average customer.
- Actively disengaged customers represent a *13% discount* on the same measures.

Engagement measures in business—whether with employees or customers—show a high correlation between engagement and financial performance

WHY ARE ALUMNI DISENGAGED?

- Sign of the times—it's a national trend
- Over the past forty years the percentage of alumni giving to all colleges and universities peaked in 1990 at approximately 18%. In 2012 the alumni giving participation rate was 9.2%, down from 9.5% in 2011 and 9.8% in 2010.
- Changing demographics, communications, technology
- More demands on our time
- At Wake:
 - Lack of culture of philanthropy historically
 - Inconsistent performance in sports
 - Changes at Wake Forest—it is not the same university it was before

DESPITE THE CHALLENGES, WAKE HAS DONE A LOT WITH A LITTLE

- According to surveys with peer institutions, Wake's AE department consistently meets or exceeds best practices in most areas
- WF lands in the middle of the pack in terms of percentage of mailable alumni who participate or volunteer each year (4%)
- WF lands in the middle of the pack in terms of number of homecoming reunions (12)
- WF lands in the middle of the pack in terms of number of club events (250)

In a survey of 33 Private College
and Alumni Directors, Wake
ranked **32nd** in Alumni
Relations expenditures.

Respondents included American, Rice, Dartmouth, Lehigh, Duke, Emory, Johns Hopkins, Pepperdine, Rice, Seton Hall, Texas Christian, Tufts, Tulane, Notre Dame and Washington University.*

* Some of these institutions have revenue-based alumni programs; statistics were self-reported by alumni directors

WHY HAVEN'T WE BEEN INVESTING MORE?

- Campaign feasibility demonstrated an immediate need to ramp up other areas to initiate and conduct a successful campaign
 - Like other universities, Wake Forest has been searching for a new approach to alumni engagement
 - Leadership knew that “More of the same” is not the answer
 - We need a new model and a defining value proposition to engage alumni in a meaningful way
 - Wake Forest should follow our recent tradition of creating ground breaking new strategies to become a leader among peer universities.
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SO, WHAT IF WE HAD A SECRET WEAPON? ONE THAT...

- Connected to our alumni in a more meaningful way?
 - Built on existing Wake Forest tradition?
 - Didn't rely on sports performance?
 - Could mean many things to different people?
 - Could be applied to any walk of life?
 - Could create meaning in our lives?
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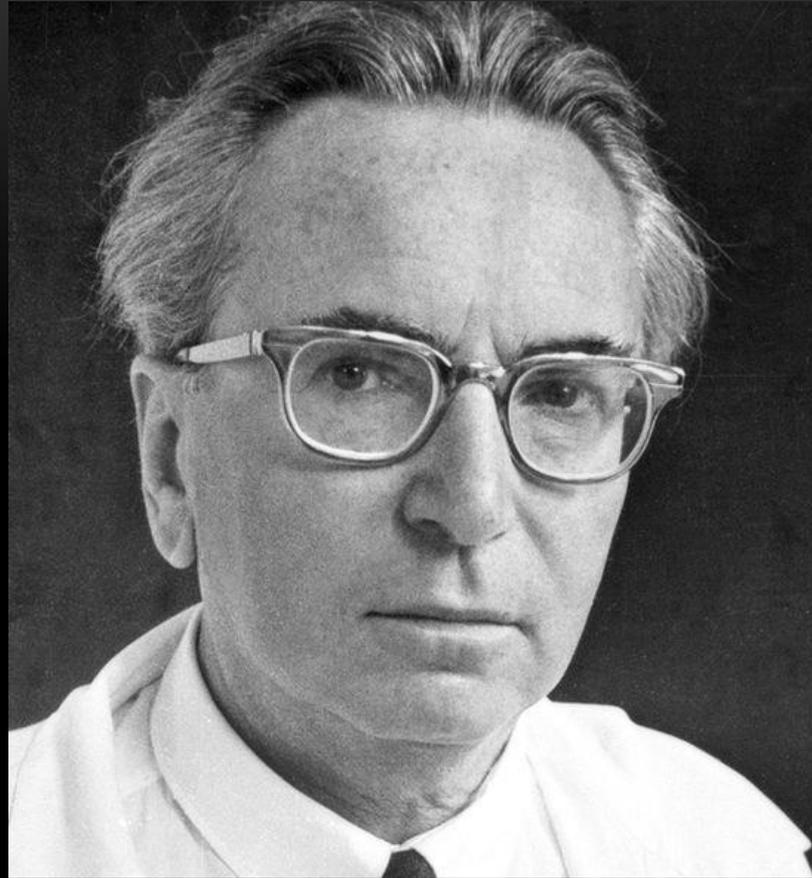
In our Pro Humanitate research,
when asked if they connect their lives
of service to their time on campus,
90% of alumni replied “yes” or
“somewhat.”

CAN PRO HUMANITATE BE A UNIFYING FACTOR FOR OUR ALUMNI AND THE WAKE FOREST FAMILY?

It already is...

- Whether implicitly or explicitly, Pro Humanitate is foundational to our Wake Forest experience.
- We connect the motto to our current lives of service, whether through a solid or dotted line
- Over time, it has become a part of the Wake Forest DNA

While we have been good stewards of our motto on campus, we can do a better job with alumni and the broader population



“Life is never made unbearable by circumstances, but only by lack of meaning and purpose.”
— Viktor E. Frankl

THE NEW FACE OF ALUMNI ENGAGEMENT

- New position –Senior Advisor for Engagement Strategies
 - Same great team lead by Kelly McConnico
 - New position reporting to Kelly—Pro Humanitate Project Coordinator
 - Advisory assistance from alumna Lisa Quisenberry '81/MBA '84, an expert in community engagement
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THREE STEPS TO GUIDE US GOING FORWARD

STEP ONE: CREATING A VALUE PROPOSITION

- The most successful alumni engagement programs (non-academic) studied had clear and definable value propositions
 - We need to speak in the language that appeals to alumni
 - It's not "why we need you"
 - It's "why you tell us you want us"
 - And we should ask, not assume we know
 - The Alumni Council will begin the process by providing us input during an interactive session
 - The AE team, in conjunction with CER, will create a clear and succinct value proposition that will be our guiding principal for programs and initiatives
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STEP TWO: CREATING AN INVENTORY OF TRANSFORMATIONAL CATEGORIES

- Education/Enlightenment—learning something new (Back to the Classroom, Spring weekend, sharing faculty, and life-long learning—ZSRx)
 - Opportunity—career advancement, networking, professional development (OPCD)
 - Community—connecting with other people in a meaningful way (Clubs, Alumni Council, Homecoming, Affinity Groups)
 - Travel—opportunity to learn, grow and serve (Adding faculty and service learning to select trips)
 - Service—helping others in a transformative and measureable way (Pro Humanitate Days, other service events, PHI)
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STEP THREE: CREATING A PLAN FOR METRICS

- Figure out what to measure and how to measure it
 - Transactional surveys—event and program related
 - 0-6 detractors
 - 2-8 passives
 - 9-10 promoters
 - Attitudinal surveys
 - Repeat an enhanced version of Spring '13 survey
 - Use the existing measures—Informed, Involved, Invested and Committed, with additional behavior examples to describe these categories
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GALLUP'S Q12 FOR EMPLOYEE ENGAGEMENT

- I know what is expected of me at work
 - I have the materials and equipment to do the work right
 - At work, I have the opportunity to do what I do best, every day.
 - In the last seven days, I have received recognition or praise for doing good work.
 - My supervisor, or someone at work, seems to care about me as a person
 - There is someone at work who encourages my development
 - At work, my opinions seem to count
 - The mission or purpose of my organization makes me feel my job is important
 - My associates or fellow employees are committed to doing quality work.
 - I have a best friend at work
 - In the last 6 months, someone at work has talked to me about my progress
 - This last year, I had opportunities at work to learn and grow.
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COMPONENTS

- Communication
 - Community Engagement
 - Conversation
 - Connectivity
 - Classroom and Campus
 - Catalyst
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COMMUNICATION

- Continue what's working
- Integrated and consistent social media #prohumanitate
- Pro Humanitate branding and merchandise
 - Test marketing this weekend
 - Merchandise chosen to demonstrate the PH vision
- Long term vision of an annual Pro Humanitate Journal



CONVERSATION

- Back to the Classroom: the Spirit of Pro Humanitate
 - Re-imagined Back to the Classroom with an engaging format
 - Featuring an overview of the PH research, followed by faculty members presenting mini-classes on their work/passion
 - Ending with a meaningful panel discussion on Pro Humanitate in the 21st Century
 - Professional taping to be used in social media and to drive attendance to road show events

CONNECTIVITY

- Take Back to the Classroom on the road
 - Five major cities this Spring
 - Visiting NC markets this fall with the original PH presentation
 - Focus at Club Events over and above PH Days
 - Other efforts will include:
 - Honor PH Alumni in individual markets
 - Local volunteer leadership engaging in PH efforts
 - Tool boxes, examples for clubs
 - Provide connection for on-going service projects
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COMMUNITY ENGAGEMENT NEAR TERM

- Strengthen and Rebrand Pro Humanitate Days
 - Working with AE team and Lisa Quisenberry
 - Make PH Days the “ultimate volunteer experience”
- International alumni service trips
 - Test 3-4 international trips with both faculty and service components
- Homecoming service projects
 - Introduce in 2015
- Other initiatives under consideration
 - Integrate alumni in alternative Spring Break projects
 - Encourage more student/alumni service projects
 - PH alumni/student mentoring

COMMUNITY ENGAGEMENT LONG TERM

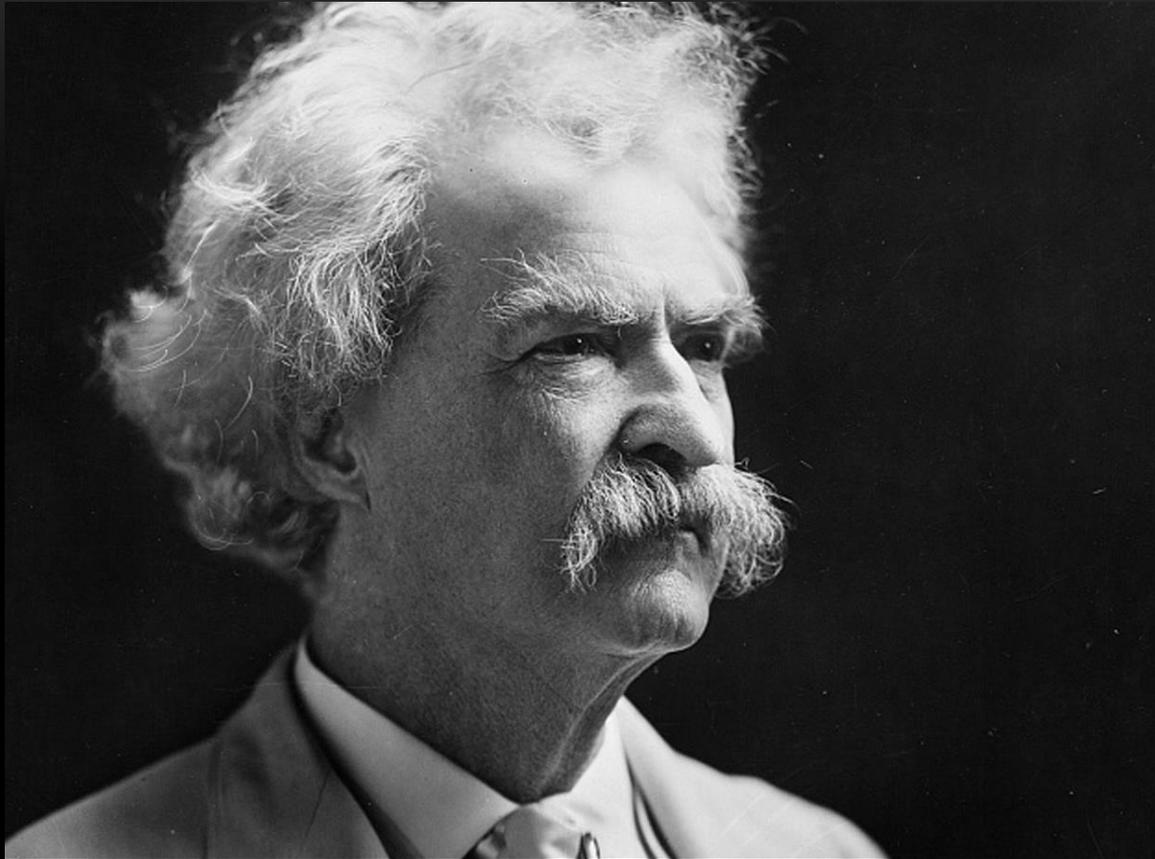
- Create Focus Areas based on skills- and needs-based volunteerism
 - Democratic process, beginning with student focus areas
 - Consider national signature projects in each area
 - Provide on-going opportunities for club service
 - Integrate social media and media relations
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CLASSROOM AND CAMPUS

- Active collaboration with the Pro Humanitate Institute
 - Two-way collaboration for a consistent message and body of work
 - Connect classroom and campus activities with alumni engagement whenever possible
 - Research, follow and report on the Pro Humanitate project academically
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CATALYST

- Start a fund for Pro Humanitate projects
 - Students, Alumni, “family” could promote projects and apply for grants
 - Invite friends to support through a “crowd funding” model for matching funds
 - Special emphasis on projects that cross all sectors and include service learning for students and alumni
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“The two most important days of your life are the day you are born and the day you figure out why.”

— Mark Twain

VALUE PROPOSITION FOR ALUMNI ENGAGEMENT

WAKE FOREST MISSION STATEMENT

- Our mission is to educate the whole person, graduating students who seek purpose-filled lives while building a community dedicated to serving humanity in the spirit of our motto, *Pro Humanitate*

VALUE PROPOSITION

- A believable collection of the most persuasive reasons people should notice you and take action

E&Y ALUMNI ENGAGEMENT VALUE PROPOSITION

- Prestige/Brand
 - Career Advancement
 - Connecting with old friends
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TEACH FOR AMERICA ALUMNI ENGAGEMENT VALUE PROPOSITION

- Career Advancement
 - Connecting with old friends
 - Commitment to an important cause
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**AS AN ALUM, WHAT VALUE DOES WAKE FOREST
BRING TO YOU?**

FIVE TRANSFORMATIONAL CATEGORIES

- Education/Enlightenment—learning something new (Back to the Classroom, Spring weekend, sharing faculty, and life-long learning—ZSRx)
 - Opportunity—career advancement, networking, professional development (OPCD)
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