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# The Seven Essentials of Highly Engaged Alumni

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THE SEVEN ESSENTIALS OF HIGHLY ENGAGED ALUMNI

by

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ABSTRACT  
THE SEVEN ESSENTIALS OF HIGHLY ENGAGED ALUMNI

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The Seven Essentials of Highly Engaged Alumni define the desirable characteristics of a highly engaged alumnus/a of Marquette University – in how they view themselves and how they connect to their alma mater. Alumni Engagement staff at Marquette analyzed current alumni offerings to identify voids in current programming. This study utilized four focus groups segmented by life stage to test ideas for new programming to help fill voids in the essential areas of Learning (particularly online opportunities), Spirituality and Character, and Service. Thirty-eight alumni participated in the focus group sessions and also shared insights on their perceptions of their own involvement with Marquette as well as their feelings about their alma mater as a philanthropic organization. Findings from this study will help Marquette’s Alumni Engagement team determine which offerings are most likely to be successful for implementation to ideally increase engagement levels of the local alumni (and eventually regional alumni) demographic. Future research will take the focus group model established for this study to regional segments of alumni.

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## THE SEVEN ESSENTIALS OF HIGHLY ENGAGED ALUMNI

### Introduction

It is generally understood in the university fundraising setting that alumni engagement leads to philanthropic support. Several studies offer further insight into this concept. Rodoula Tsotsou (2004) studied how three factors—involvement being one—impacted donors making large versus small contributions to athletics programs. Tsotsou suggests that donors consider causes more carefully for their support when they are highly involved with said cause. Tsotsou explains:

“It has ... been reported that alumni involvement is positively related to the frequency of the contributions made to an educational institution ... Moreover, it seems that the amount of money donated is related to involvement. If a donor is highly involved with a university athletics programme, he/she will make large donations to that programme.” (2004, p. 118-119)

It was confirmed that the three factors studied helped distinguish donors of small donations from those of larger donations (Tsotsou, 2004). Tsotsou found, “Donors who are motivated (high involvement) and have the capacity (high income) will make larger donations than those who are not very motivated (low involvement) and have less capacity (low income)” (2004, p. 122).

Lili Wang and Elizabeth Graddy’s article looks at how social trust and social networks impact charitable giving. They suggest, “Exposure to requests to donate, an individual’s organizational involvement, and community size are factors shown to be associated with the decision to contribute” (Wang and Graddy, 2008, p. 26). In particular, they discussed volunteerism as a form of involvement—or engagement—with an

organization. They state that “informal helping behavior and participation in organizations that serve as channels for giving and volunteering ... are strongly related to giving behavior” (Wang and Graddy, 2008, p. 26). Therefore, as alumni give of their time and talent in a volunteer capacity, they become more likely to support the university with their treasure as well.

Andrea Jerrell’s article discusses the value of alumni relations activities traditionally seen as “friendraising” meaning more than just converting alumni from the status of friend to donor (2009). She suggests alumni relations offer activities that build deeper relationships with alumni stating, “Today’s donors have more options for their philanthropic interests than ever before, and they want deep connections with institutions that matter to them and share their values” (Jarrell, 2009, p. 37). The article goes on to quote Hildy Gottlieb, an author of a book on “friendraising,” who comments, “When institutions think of their donors only in terms of money, they’re leaving on the table all the real benefits that come with having true friends—their wisdom, ideas, experience, loyalty, advocacy, and, oh, by the way, greater financial support” (2009, p. 38).

Thomas Minar is the vice president of development and alumni relations at American University in Washington, D.C. He wrote an article discussing the importance of integrating alumni relations and development. In it he writes, “The best alumni relations officers understand the direct relationship of their work to resource gathering, and they integrate awareness of philanthropy and development programs and even solicitation into their work” (Minar, 2010, p. 1). Minar continues by suggesting:

“Institutions strive ... for the ongoing engagement of alumni in the life of the institution and, ultimately, for their sharing of time, talent, and treasure. In *The*

*Complete Guide to Fundraising Management*, Stanley Weinstein writes,

‘Friendraising activities are essential to any fundraising effort. As people become more involved, they become more committed. Their donations increase as their sense of belonging grows.’” (2010, p. 2)

Minar believes that “philanthropy is an outcome of effective long-term relationship building” (2010, p. 2). He acknowledges that in some advancement offices, fundraisers sometimes forget about the range of engagement opportunities that allow relationships with donors to be built. Other colleagues may “limit the potential” of true relationships with alumni by merely inviting them to events then asking for money (Minar, 2010, p. 3). He goes on to explain that by offering a wide variety of engagement strategies that benefit the institution while connecting with alumni in an array of ways from mentorship to speaking opportunities to serving as athletics supporters, volunteers and advisors, “deep, familial relationships between alumni and the institution [form making] alumni feel included, important, and valued for reasons far beyond their checkbooks” (Minar, 2010, p. 3). Further, he suggests “many people will give more because they are engaged in those meaningful ways” (Minar, 2010, p. 3). Through this approach, giving becomes an engagement opportunity among a vast list of offerings. Without giving, even the most active alumni are not fully engaged (Minar, 2010).

Over the past several years the department of University Advancement at Marquette University has sought to “de-silo” and in turn integrate and strengthen partnerships between the department’s functional units. In particular, an important relationship is that between the Alumni Engagement and Development teams. A strong emphasis has been placed on value-infused programming to increase alumni engagement

with an ultimate goal of increasing opportunities for development colleagues to gain financial support from these alumni driven by relationships strengthened through engagement offerings.

Alumni these days have more constraints on their time, numerous choices of philanthropic organizations to support and are facing difficult economic times that may be straining their capacity to donate to various causes. As a result, it is vital that Marquette University discover ways to successfully engage alumni through program and service offerings that appeal to a broad spectrum of demographics. This professional project is being conducted to offer insight into enhancements that can be made to such programs and services that Marquette University currently offers its alumni. This study seeks to utilize focus groups to better understand how alumni offerings can engage more alumni and further inform University Advancement about alumni attitudes toward Marquette as a philanthropic organization.

As a member of the Alumni Engagement team and soon to be alumna of Marquette University, I have a vested interest in the impact of this project and its potential influence on the future offerings and ultimate success of this team at Marquette.

### **Literature Review**

*The Chronicle of Higher Education* is regarded as the number one source of news and information for college and university administrators and academics. Articles from this daily academic news source were reviewed in preparation for this professional project and several themes were discovered. Several articles acknowledged the decline in alumni financial participation. Kathryn Masterson states, “colleges are fighting to reverse a trend of declining alumni participation, new data suggest that rising tuition costs, along

with a belief that colleges don't really need the money, may be a major barrier in getting ... alumni to give" (2010, July 18, p. 1). In a separate article, Masterson quotes an annual giving consultant suggesting, "some colleges feel they can't do much to reverse the downward trend of alumni participation. Yes, the economy is bad, he says, but 'we have some responsibility if we haven't gotten creative'" (2010, February 21, pp. 1-2). At Marquette University, the University Advancement model has been built with the intention for Alumni Engagement programming to be a feeder for the Development team's fundraising efforts. With the current downward trends in giving, Marquette's Alumni Engagement team must be stronger than ever to help fight the barriers to financial participation.

In another article, author Erin Strout suggests, "studies have shown that engaged alumni are more generous alumni" (2006, p. 2). She goes on to share an example from Columbia University where the number of alumni donors doubled in three years, which they believe is due, at least in part, to the establishment of a university-wide alumni association offering volunteer and mentorship opportunities as a means to help alumni feel connected to their alma mater (2006). This same article states that a challenge many alumni associations face is that of encouraging disconnected graduates to become more involved with their alma maters. Marquette shares this same challenge, and this project is an indication of the commitment the university has to address it. Marquette has seen these trends firsthand and from my perspective as an employee, I can attest to the need to be innovative with program offerings. Strout (2006) shares, "many alumni associations have started functioning more like businesses, constantly rethinking their 'service offerings' in order to attract and retain 'customers'" (p. 2). She explains that this is due to the

competition in the market – alumni already have numerous volunteer, cultural and networking opportunities outside of what their alma mater offers. Therefore, colleges and universities need to further set themselves apart by showing alumni what they can get in return for their participation. In a subtle way, this may take the form of ensuring alumni programming offers some level of value beyond purely social interactions they could achieve elsewhere in their lives. Strout also states, “alumni associations have been forced over the last 15 years to become entrepreneurial, offering travel and educational opportunities, charitable programs, professional industry events, career networking, and online job boards” in order to remain competitive (2006, p. 2). As this paper will go on to demonstrate, several of these very offerings were the focus for testing among Marquette alumni for this project.

Masterson (2010, July 18) also notes that findings from a “Mood of Alumni” survey of 700 alumni conducted by Engagement Strategies Group identified a top reason young alumni “were disinclined to give were perceptions ... that their college hadn’t done enough to connect with them outside of asking for money” (p. 1). According to the article, the survey goes on to conclude that alumni felt their college fell short when it came to “keeping up a relationship with them that goes beyond asking for a gift” with nearly half of the respondents suggesting they don’t feel their alma maters do enough to connect with them outside donation solicitations (Masterson, 2010, July 18, p. 2). This suggests the value and importance of alumni engagement by enhancing alumni connections with their alma mater through means that go beyond requests for financial support.

Another area expressed as an important theme for alumni engagement is around the idea of life stages and understanding that alumni in different stages feel and think differently about their alma mater. Strout notes another key change in the way alumni associations think about program offerings, “The most significant change has been the segmentation of the alumni body – most associations don’t think of it just in terms of class years anymore, but in terms of other affinities and life stages” (2006, p. 2). Over the past few years, Marquette has also begun taking this approach to program offerings. Masterson suggests, “It’s important for colleges to figure out the generational divides among donors –and how to best reach the different groups” (2010, July 18, p. 1). This project is utilizing these suggestions through focus group segmentation by life stage in an effort to further understand these differences.

Overall, these articles demonstrate the importance of utilizing research tools to understand one’s alumni base. Strout’s article goes as far as stating, “colleges that don’t figure out what alumni want from them can reinforce the idea that institutions are only looking for money when they reach out to graduates” (2006, p. 2). Marquette University has made a commitment to putting in the time and resources to ensure we understand our alumni so we can offer the appropriate programs and services to meet their needs and expectations. As such, previous market research conducted for Marquette has proven a solid basis as an information source for understanding and moving forward with this project.

Previous Marquette University research reviewed in preparation for this project included Gallup Consulting Research Reports (from 2004, 2006 and 2009), a southeastern Wisconsin alumni survey (conducted in 2009), Marquette University

Alumni Association Alumni Involvement Committee graphs (2009), Alumni Chapter and College/Interest-based Club Annual Reports and Leadership Feedback as well as additional club information (2008-2009), and Right Brain Strategy research (2009). The following offers highlights of what was discovered through this research analysis.

The greater Milwaukee area—southeastern Wisconsin—offers the largest number of Marquette alumni and provides a major opportunity to increase overall engagement levels (Skelton, Husband, Geraghty, and Volm, 2010). According to Gallup research and the club data analysis, this alumni segment is also our least fully engaged. Factors such as taking for granted their proximity to campus or the ability to connect and spend time with fellow Marquette graduates in their own social circles may contribute to this lack of engagement, but further research must be done to better understand this alumni segment. This substantiates beginning with the Milwaukee area as a focus of this project's research.

According to Gallup (2004, 2006 & 2009), the most fully engaged age segment is the oldest, with the greatest capacity to give of their time, talent and treasure. This constitutes segmentation by life stage for this project to further understand the differences in activity levels and interests among alumni in various stages.

The regional clubs around the country exist in most of the major metropolitan areas with the largest numbers (concentration) of Marquette alumni (Alumni Engagement, 2009 – Data analysis). Dedicated volunteers are in these club regions and carry great passion and pride for Marquette (Alumni Engagement, 2009 – Annual reports). However, the overall satisfaction level with alumni programs and services tends to be relatively low (Gallup Consulting, 2004, 2006 & 2009) and event participation is

generally low as a percent of total (Alumni Engagement, 2009 – Data analysis). Chapter support from Alumni Engagement staff liaisons is considered very good among volunteers leaders (Alumni Engagement, 2009 – Annual reports).

Approximately 35% of alumni reside in areas not supported by regional alumni clubs, which suggests a need for different services and programming—such as online opportunities—to further connect and engage this demographic (Skelton, et. al., 2010). Our current offerings for this alumni segment are minimal. A strength identified by Skelton, et. al. (2010) is that adoption of social media is high. Ideally, this will aid in the engagement of the 35% not served by local clubs. It will be important, however, to identify ways in which alumni wish to connect via social media and other online resources.

A potential threat identified through this previous research included the pace of life and changing technology making face-to-face events increasingly challenged (Skelton, et. al., 2010). Therefore, it will be vital to the success of Marquette’s alumni engagement efforts to round out offerings to meet these changing times. In addition, stakeholders are expecting relevance and value in the ways they connect with their alma mater (Skelton, et. al., 2010). A goal of these focus groups will be to better understand what, in particular, Marquette’s alumni consider relevant and valuable.

In order to better understand and utilize this research conducted on alumni engagement over a five-year period (2004-2009), a small cohort of internal and external representatives organized and analyzed disparate pieces of data. The desired outcome of the process was the development of an applicable plan to determine relevance and value for current and future alumni program offerings. What evolved from this analysis are the

Seven Essentials of Highly Engaged Alumni. The Seven Essentials, as outlined below, define the desirable characteristics of a highly engaged Marquette alumnus/a – in how they view themselves and how they connect to their alma mater (not necessarily to all essentials concurrently, as this will vary by life stage). These are attributes that alumni themselves strive to demonstrate. The essentials are also a tool to assist with categorizing, refining, adding and decreasing specific offerings. They allow the Alumni Engagement staff to better understand and identify gaps and opportunities.

The Seven Essentials of Highly Engaged Alumni include:

Community and Networking: Stay connected to Marquette, a community larger than oneself with shared values.

Pride and Spirit: Having a personal stake in the success of Marquette University, whether it's on the court or in the classroom; feeling “you are Marquette.”

Spirituality and Character: Your Marquette experience is central to a life philosophy centered in Catholic Jesuit principles, and committed to doing the right thing.

Service: A keen sense of responsibility to serve others, to “pay it forward.”

Learning: Committed to lifelong learning, personal and professional development as a whole person.

Connecting with Students: Linking oneself to the future generation of Marquette alumni who will make a difference in the world.

Giving and Creating Legacy: Making a difference by investing your time, talent and treasure toward making the Marquette experience available to others.

Following the establishment of these essentials, a comprehensive spreadsheet of current offerings and brainstormed ideas for new offerings around the Seven Essentials

was established. Analysis and deeper understanding was then needed to develop a plan for moving forward with enhanced program offerings. This project will inform the Alumni Engagement office in how we can better incorporate the Seven Essentials into our work and ultimately use that knowledge to increase alumni participation in engagement activities.

Research questions for the study are as follows:

- What are the voids in current programming?
- Where is there excess? What does this mean? Do we trim in these areas to focus on our voids?
- How can programming be enhanced to minimize these voids and offer a well-rounded menu of opportunities for alumni to connect back with their alma mater?
- What programs and services not currently offered would alumni like to see added? What would they be most likely to participate in?
- How do alumni currently view the university as a philanthropic organization? What might inspire them to give?

### **Methodology**

This project was conducted in partnership with the Alumni Engagement team within Marquette University's department of University Advancement with the intention to improve understandings of how currently disengaged and minimally engaged alumni wish to connect back to their alma mater, and as a result, increase their level of engagement with Marquette. Qualitative research via focus groups was chosen in order to gain a deeper understanding of alumni engagement needs. An article in *The Chronicle of Higher Education* suggests that many colleges have utilized focus groups as a means to

inform projects (Nicklin, 1996). Nicklin states, “Colleges want to be what their constituents want them to be, and focus groups are a fairly inexpensive way of accomplishing that” (1996, p. 1). Focus group findings cannot be as generalizable as other quantitative research methods; however, they do “allow an organization to explore people’s opinions in ways that questionnaires and surveys do not” or in other words they allow us to go deep (Nicklin, 1996, p. 2). By adding knowledge gained through these focus groups to previous research conducted (as noted in the above section), this research will add to the overall understanding of Marquette’s alumni base. The following describes the process and methodology of this professional project.

After previous market research offered the Seven Essentials of Highly Engaged Alumni as a tool for understanding alumni engagement and program offerings, a series of brainstorming sessions took place with alumni volunteer groups and staff. These brainstorming sessions used the Seven Essentials as a basis for suggesting new program and service opportunities for alumni to connect back with Marquette. Once these brainstorming sessions were complete, all ideas were added to a master spreadsheet that included all existing alumni offerings. This Seven Essentials spreadsheet was then separated by existing offerings and ideas for new offerings with any duplicates removed. Taking this well-refined Seven Essentials spreadsheet Alumni Engagement staff identified and noted primary and secondary essentials for each entry.

This project began by then tallying all primary and secondary essentials in the well-refined and labeled Seven Essentials spreadsheet (see Appendix A). To clearly understand current programs, they were categorized by subgroup within each essential (i.e. “attend non-Marquette sporting events – tailgates, horse races, baseball games, etc.”)

or “summer-send-offs”). The purpose of the spreadsheet was to have all current offerings and ideas compiled together to begin to understand the voids and areas of excess in programming currently offered to Marquette alumni. To help determine the voids in current programming, the comprehensive spreadsheet was utilized to understand the number of existing offerings by essential. When reviewing these numbers, patterns were recorded and summarized.

Once patterns were identified, current programming voids were noted as an objective for focus groups to discuss and specific questions were established around these voids categorized by essential. The number of focus groups was selected because they were organized by life stage. Five life stages have been identified by the Alumni Engagement staff (Young Alumni, Early Career/Young Family, Mid-career, Peak Career, Legacy Years); the staff chose to focus on the latter four of these life stages (removing Young Alumni because other forms of research are being conducted separately around this life stage). The number of subjects per group was selected based on the number of participants typically recommended at minimum for qualitative research.

The recruitment process involved selection from the university’s donor database—The Raiser’s Edge—based on specific criteria. As a goal of this research was to increase alumni engagement levels, recruitment focused on those alumni who currently have low engagement levels. Marquette alumni with minimal engagement with the university (e.g. attend only one event per year, have a valid e-mail address on file in The Raiser’s Edge but no other interaction, or equivalent minimal engagement) were identified by pulling a list from The Raiser’s Edge based on engagement score criteria. University Advancement has established an Engagement Scoring Model to measure

alumni engagement levels. The engagement score allows staff to assess how active and committed an alumnus/a may be with the university. The score entails a 16-point model where each attribute is measurable and can be improved/increased each year. Attributes of the model include both involvement/connectivity with Marquette (including components like being a season ticket holder, volunteering for the university, interacting through Marquette's online community, having an e-mail address on file with the university, attending Marquette events, etc.) as well as giving to the university (making financial contributions/donations). Each alumnus/a has a specific engagement score based on level of engagement in these areas. Through The Raiser's Edge database, staff can pull a list based on engagement score. The average engagement score for the entire alumni population (of approximate 107,000 alumni) is between a 2 and 3. With a score of 16 indicating maximum engagement with Marquette, there is more work to be done to increase alumni engagement across our alumni base. As such, this study focused on those alumni with scores of 1 through 4, aiming for a mix of individuals who are not currently engaged and those with minimal engagement. This mix was chosen in an effort to reduce the negativity that could arise from having only individuals who are not at all engaged with the university. It was important to receive feedback from alumni who had some willingness to get involved as they would represent the target audience for future engagement through new programs and services.

Additional criteria for recruitment included undergraduate degree status, email address on record, proximity to campus, status as a non-donor for the past three years and non-Marquette employees. Previous market research at Marquette has shown that undergraduate alumni have stronger affinities with the university, and therefore, tend to

have higher engagement as alumni than those with only graduate school or professional degrees. With undergraduate alumni making up the largest segment of the total alumni base, this research has the potential to make the greatest impact on this segment.

Undergraduate alumni with graduate degrees as well were left in the recruitment pool; however, those with professional school degrees (i.e. Law School and Dental School) were removed as, at this time, the Alumni Engagement team does not plan or strongly influence the program offerings specifically for this professional school alumni demographic. An email address on record was a required criterion as recruitment was done via email so we needed the ability to contact recruits through that means.

The greater Milwaukee community territory was generally selected for this study and further defined by a 30 minute driving radius from either the home or business address of the recruits to the Marquette campus. This driving radius was considered reasonable by researchers since focus group participants needed to travel to Marquette to participate in this research and the further they had to drive the less likely they were to participate. Donors from the last three years were removed from the recruitment pool because a donor survey—separate from this research—was also being sent by University Advancement at the time of this study, and we wanted to avoid overlap in communication. In addition, this study intended to inquire about alumni perceptions of Marquette as a philanthropic organization and it was most helpful to hear from non-donors so we could learn about what could be done differently to inspire this demographic to give financially to the university. Lastly, alumni who are also Marquette employees were also removed from the list as they often have a unique perspective on and relationship with Marquette that would have added complexities beyond the scope of

this research study. Within the recruitment criteria, Marquette alumni of all ages, ethnicities, genders, etc. were offered an equal opportunity to participate in this study via the focus groups.

Once a list of names was compiled, the list was segmented by life stage (Early Career/Young Family, Mid-career, Peak Career, Legacy Years). These segmented lists were then used as the recruitment lists for each of the four focus groups (organized by life stage) held. Knowing there would be commonalities within the same life stage that impacts their financial resources, time availability to dedicate to Marquette, placement in their career, etc.; this segmentation of focus groups enabled a stronger dynamic within each group and allowed the research to go deeper.

The following chart offers numeric breakdowns for each life stage (indicated by graduation year range at the top left) and each engagement score (noted across the top from 1 to 4) within the recruitment criteria. The total list resulted in 3,972 alumni, a number larger than was manageable for this research project. Therefore, the desired number of recruits for each life stage (once the list was divided by life stage, a stratified sampling method) was determined and the proper proportions within each engagement score level were maintained. Based on these numbers, alumni were randomly selected—using a systematic sampling approach—within the overall pool identified to establish our sample. Nicklin (1996) indicates, “To identify prospective participants, many colleges select every fifth or tenth person on a list of whatever audience they want to sample. This is the preferred method, experts say, because it generates a random sample” (p. 2). In total, 750 alumni were included in the recruitment pool with 250 in each life stage segment with a goal to achieve a yield of approximately 4%.

Figure 1. Numeric Breakdowns of Alumni by Life Stage within Recruitment Criteria

<b>Life Stages: Peak Career (51-65 yrs) &amp; Legacy Years (66-73 yrs)</b>					
<b>1960-1982</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	
1045	109	447	385	104	
proportion	10.4%	42.8%	36.8%	10.0%	
recruit proportion	26	107	92	25	250
Focus Group dates: Monday, April 18, 2011, from 5:00–6:30 p.m. & Tuesday, April 26, 2011, from 5:00–6:30 p.m.					
<b>Life Stage: Mid-Career (36-50 yrs)</b>					
<b>1983-1997</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	
1469	203	475	570	221	
proportion	13.8%	32.3%	38.8%	15.0%	
recruit proportion	35	81	97	38	250
Focus Group date: Monday, April 11, 2011, from 5:00–6:30 p.m.					
<b>Life Stages: Early Career &amp; Young Families (27-35 yrs)</b>					
<b>1998-2006</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	
1458	281	517	483	177	
proportion	19.3%	35.5%	33.1%	12.1%	
recruit proportion	48	89	83	30	250
Focus Group date: Friday, April 15, 2011, from Noon–1:30 p.m.					

The recruits received written correspondence in the form of an email from the university requesting their participation in a focus group to help Marquette chart a course for alumni engagement. The emails were sent, in name only, on behalf of Valerie Wilson Reed, President of the Marquette University Alumni Association National Board, because her name and position offer additional credibility to the project. By utilizing her name for the recruitment emails, it showed her support of this project and may have helped to generate a stronger response from participants. In the emails, focus group participants were offered compensation for their participation with a gift card of their choice to either Amazon.com or a local gas station in the amount of \$100. Compensation as an incentive

is a common practice for academic focus groups (Nicklin, 1996). As such, this was a strategy to increase response rates as the alumni being recruited were not currently involved with the university, and we felt it was likely they needed this additional incentive to elect participation.

Recruits then self-selected participation in the focus groups and responded to me their willingness to participate. According to Nicklin (1996), a typical college focus group involves 10-15 participants. At the advice of our marketing consultant, we aimed to cap our groups at 12. The Early Career/Young Family and Mid-career focus groups both reached capacity of 12 participants after the initial recruitment email was sent. The two focus group sessions for the combined Peak Career and Legacy Years segment received positive response but did not reach the desired size of at least six to eight subjects per focus group. Therefore, an additional email was sent resulting in the desired focus group size being achieved.

Focus groups took place on the Marquette University campus. As noted above, four focus groups in total were held each with eight to ten alumni participants per group. There were a few instances where those expected to attend did not show, but sizes for the focus groups were still above the minimum number required. There was no overlap between participants in the focus groups and subjects only needed to commit to one-time participation in a single focus group discussion that lasted approximately one and a half hours. The focus groups were facilitated by an experienced marketing consultant hired by Alumni Engagement. This consultant was utilized to offer an unbiased perspective in leading discussions with alumni. Nicklin (1996) argues, “if an experienced facilitator does not run the focus group—or if the participants aren’t sure that the college will not

know which of them made what comment—then the quality of the responses can be diminished” (p. 1). Knowing this, our consultant was able to encourage candor and openness from participants without the risk of censorship in fear they would hurt the university’s feelings or damage their relationship somehow with Marquette. It also helped me to act purely as an observer so I could really hear what our alumni were saying without having to worry about managing and moving along the conversation as well. Further, the consultant’s previous experience conducting focus groups is more vast than my own so she offered this study a deeper level of credibility.

The focus groups were video recorded and streamed live to another room via the web so I could observe without influencing respondents with my presence. Through Nicklin’s research on focus groups in the academic setting, she found that even though participants were told they were being watched, several shared that they forgot about this element quickly and did not hold back on their comments (1996). Participants in this study were informed of their rights to confidentiality and the purpose of the study via a written consent form emailed at least two days in advance of the focus group session and again reviewed at the start of the focus group discussion. A waiver of consent was granted and participants consented through their participation in the focus group discussion. All participants elected to participate after the consent form was discussed and questions were answered with no participants dropping out during the sessions. Upon completion of the focus group sessions, video files were transcribed without a direct link to the alumni participant in order to maintain confidentiality.

For the focus groups, a facilitation guide was used (see Appendix B) to take participants through a series of questions related to potential offerings within the Seven

Essentials. Questions were based on voids and foci identified through spreadsheet analysis previously discussed. In general, the outline for the facilitation guide included a discussion to understand participants' perceptions of their own involvement and what might preclude them from being involved; sharing of potential programs and services to understand level of interest in the categories of online learning opportunities, spirituality and character, and service; and finally a conversation around financial support to Marquette to learn about perceptions of the university as a charitable organization. This is discussed in further depth in the Results section of this paper. Upon completion of the focus groups and transcription of the video recordings, I reviewed and analyzed the transcriptions and notes to identify themes and patterns in participant responses, also discussed in the following sections.

## **Results**

### **Seven Essentials Spreadsheet Analysis**

In preparation for the alumni focus groups, it was first necessary to determine the voids in current programming. The comprehensive Seven Essentials spreadsheet was utilized to understand the number of existing offerings by essential looking mainly at the primary notations. When reviewing these numbers, clear patterns emerged as outlined below.

#### **Community and networking.**

Community and Networking is the highest essential in terms of offerings within both the "primary" and "secondary" categories. Based on the proliferation of programs of this nature over the past five years through regionally-based CIRCLES (value-infused networking program), forums, Marquette WORKS (workplace affinity program), higher-

end gatherings, and more, this essential came to the forefront for the Alumni Engagement team. When reviewing the Gallup data from 2006, it was clear that value-infused, relevant networking opportunities were the wave of the future and something worth Marquette's resources. This is an area where no void exists.

It can be said, however, that there might be slight overage within this essential when looking at it from a different angle. This essential also comprises happy hours, attending non-Marquette sporting events (bowling, kickball, salsa dancing, etc.), dinner clubs and more. The Alumni Engagement team has made strides in empowering volunteers to own larger pieces of the planning process. The Community and Networking essential poses an opportunity for additional leadership by Marquette alumni; in turn, Alumni Engagement has prioritized those events that can be managed more by the clubs/alumni leaders (non-CIRCLES type events) as a key initiative for regional work.

Hands down, this is the broadest essential category. This is an area that, at this time, does not warrant additional research as the needs of alumni are being fulfilled within this sphere. To remain on the cutting edge, Alumni Engagement plans to incorporate some ideas that would enhance current offerings into our work. The reality is that focus groups are already taking place to ensure the university is on track through the CIRCLES Host Committee meetings that take place prior to launching CIRCLES events in all cities.

### **Pride and spirit.**

Behind Community and Networking, Pride and Spirit is the essential with the highest quantity of offerings around the country. Alumni Engagement has capitalized on the excellent marketing product that is Marquette's men's basketball program (history,

excitement, affinity, prestige) through pre- and post-game receptions, game-watching gatherings, National Marquette Day, Buzz's picnic, the incorporation of the head men's basketball coach into programming, and more. In fact, when given the opportunity to plan and help promote a National Marquette Day site, alumni previously not involved with their alma mater volunteered in non-club areas (e.g. New Orleans, Las Vegas, etc.).

Beyond basketball, this essential also includes affinity- and college-based programming, such as Family Weekend, Awards, milestone celebrations, ROTC gatherings, etc. Another essential, Giving and Creating Legacy, is a strong secondary for several offerings of this nature; this type of program is a platform to infuse a message pertaining to the importance of giving, as well as follow-up from Development staff. The opportunity around Pride and Spirit is to work to continue and/or enhance the connection between this essential and the Giving and Creating Legacy essential.

### **Spirituality and character.**

Based on the numbers (only three primary and one secondary for existing offerings), Spirituality and Character represents an area of void across the essentials. Although Marquette offered 26 Mass and Brunches in fiscal year 2010 in different regions, this only fulfills one piece of the spiritual journey for alumni. Seasonal reflections—another type of offering with this essential as primary—are locally-based and limited in accessibility (i.e. Women's Council, the Association of Marquette University Women). Although Alumni Engagement capitalized on the milestones to incorporate spiritual offerings (i.e. White Mass & Tea for health care professionals in conjunction with the College of Nursing's 75<sup>th</sup> Anniversary), we are limited in our scope of offerings. Marquette's online spiritual community is new and will assist in fulfilling

part of this essential through its offerings; however, there is still more to be accomplished as learned through this process.

As additional research is conducted around the essentials, it was highly recommend that Spirituality and Character be considered as a key component. Solid ideas were generated by current alumni leaders and Alumni Engagement staff in the spring and fall of 2010 (i.e. Jesuit collaboration across universities, spiritual forums, infusion of spirituality opportunities within CIRCLES and other programs, virtual retreats, and more). Testing these ideas through focus groups would be valuable to inform future enhancements to programming. Since Marquette's spirituality online presence is still in its infancy, incorporating dialogue around this initiative into additional research and/or focus groups would be beneficial as well.

### **Service.**

Within this essential, there is only one primary – service projects around the country. There were 16 service projects offered to alumni in fiscal year 2010; however, several of the events were concentrated in three regions – Chicago (6), Carolinas (3), Minnesota (3) – with single service projects occurring in Phoenix (1), Rock River Valley (1), Washington, D.C. (1), and Milwaukee (1). Alumni Engagement has improved and expanded this particular offering in fiscal year 2011 through the inclusion of Kansas City, San Diego, Boston and New York.

What is most striking in this data is the fact that the concept of service was such an instrumental component of the Marquette student experience; therefore, a touch point is likely missing around this essential. All of the secondary Service programs were offered in conjunction with the Connection with Students essential – all of which were

also locally-based. The e-mentorship program (connecting alumni and current students via LinkedIn) will help to fill the void with this secondary service essential opportunity.

It was recommended that this essential also be explored further to expand offering ideas. Alumni Engagement has learned through previous research that Marquette alumni are already giving back in their local communities – to their church, their children’s schools, etc.; therefore, it is worth exploring ways that we can either tap into this or recognize it in a different way. For instance, do we offer a photo competition similar to National Marquette Day? Do we highlight alumni connections to service projects (either through recognition opportunities or ways to capitalize on what our alumni are already doing)? Do we collaborate in a deeper way with our partners (other Jesuit universities, Catholic Charities, Cristo Rey, etc.)?

### **Learning.**

Based on the initial research, immediate steps were taken by the Alumni Engagement team in fiscal year 2011 to further fill a void within this essential. Book clubs have expanded, faculty travel is immersed in engagement work, forums are part of our CIRCLES planning, learning opportunities are encouraged through Marquette WORKS, and we have better capitalized on the lectures and competitions that we can promote to our alumni through the colleges. All of the work around this essential needs to continue to be thoughtfully enhanced in the coming fiscal year and beyond; however, this essential is on a more productive path as evidenced by improvement over the past two fiscal years.

The area where a void still exists is through online opportunities. Whether it is an online lecture about a current and relevant topic (e.g. mortgages, eldercare, new health

care plan, social media, forum for Q&A with a professor) or online chat rooms (e.g. book club discussion) or a glimpse of a live classroom, this is an area that needs further testing regionally. This is an area of opportunity to reach the 35% of Marquette's alumni base residing in non-club areas.

As all of the essentials are somewhat interconnected, Learning will be impacted positively through work around Spirituality and Character (online presence, forums) and Community and Networking (enhancement of CIRCLES offerings, online networking opportunities, stronger collaboration with Career Services).

### **Connecting with students.**

Based on current offerings, it is clear that there are many more opportunities locally to connect with Marquette students than exist regionally. It is noteworthy, however, to acknowledge that Alumni Engagement has capitalized on an enhanced relationship with Admissions (summer send-offs, yield receptions) and increased awareness of collaborative opportunities with faculty and College Advancement (Ins and Outs of Wall Street, CIRCLES student travel, student networking program) to better connect Marquette alumni with the students both locally and regionally.

Similar to work around the Learning essential, the Alumni Engagement staff incorporated findings through this process to enhance our work around the Connecting with Students essential. Staff time dedicated to components of the Admissions process has increased, particularly around yield and summer send-offs – this is also being done in conjunction with Development colleagues. The Student Ambassador program has strengthened to better incorporate the student members into alumni offerings, an e-mentorship program will soon be launched, and there is better organization around a list

of student speakers to utilize at programs (scholarship recipients, etc.). Legacy has also become more of a priority in fiscal year 2011 with more visits to families and a program offered each quarter.

Because so much already exists locally around this essential, including a piece related to Connecting with Students (e.g. e-mentorship) once focus groups are taken national was recommended.

### **Giving and creating legacy.**

Marquette learned from the Right Brain research that alumni have the belief that their time and talent is a more helpful resource to the university than their treasure (2009). Interestingly, Alumni Engagement has taken this approach in certain ways through our programs – the focus of what we offer is typically based on a different essential; however, Giving and Creating Legacy messaging has been infused into these offerings. In fact, this essential has one of the highest numbers of secondary marks – as Community and Networking or Pride and Spirit may have been primary, Giving and Creating Legacy still played a role (e.g. CIRCLES, high-end gatherings, Reunion Weekend, Awards, milestone celebrations, etc.).

There is an area for additional learning around this essential that focus groups could help shed light on. For example, seeking to understand what through our offerings would inspire giving to Marquette would be helpful to understand what more can be done. An additional area where a void exists is transitioning students into alumnihood with an understanding of the importance of giving back to their alma mater. Immediate action is taking place in fiscal year 2011 and continuing in fiscal year 2012 to ensure this improves. Another potential focus group question around this topic is inquiring about

what more could have been done during the student years to further educate future alumni about Giving and Creating Legacy. Along these lines, it would be helpful to learn what more could have been done during these formative years to inspire their engagement as alumni as well.

### **Focus Group Findings**

After voids were identified above through the Seven Essentials spreadsheet analysis, topics were formulated for the focus group facilitation guide. There were 38 total participants among the four focus groups conducted with gender balance achieved and multiple ethnicities represented within the initial criteria established for focus group recruitment. Initial themes were identified and further illustrated once videos were transcribed. The following offers the findings based on common themes discovered through focus group research.

#### **Involvement.**

A logical starting point for the focus groups was to begin by assessing participant perceptions of their own involvement with Marquette. While our data suggests minimal engagement, it was a valuable first step to learn whether perceived engagement was consistent with Marquette's measurement tool (Engagement Scoring Model). A bit to my surprise, the vast majority of participants were very honest with their assessment of their own involvement indicating they were minimally involved to not involved at all – consistent with their engagement score assessment, negating any perceptions that these alumni might consider themselves more involved than their engagement score indicates.

The intimidation factor manifested as a key reason among all focus groups for lack of involvement. In the dialogue, some mentioned how much campus had changed,

increasing anxiety about coming back to an event and not knowing anyone. One participant commented, “Campus just looks SO different, I’m kind of a little bit lost ... you know, it’s not my stomping grounds from days gone by” (Rawski, 2011, April 11). For similar reasons, another shared, “I just feel like I’d be out of place, I guess” (Rawski, 2011, April 11). Others further expressed the concern of not knowing anyone with one stating, “I would say if I knew people that I knew were going ... unless it’s a topic that I’m really interested in—that wouldn’t be a problem—but if it’s just a social event it would be more awkward.” (Rawski, 2011, April 15).

What this ultimately affirmed for Alumni Engagement staff was the power of affinity groups. Over the past few years, we have worked to incorporate more offerings, in some cases they may be special reunion groups that bring alumni back based on a specific program or activity they were involved with on campus as a student. Radio, Resident Assistants, newspaper, sailing, crew, fraternities and sororities were all examples of groups that focus group participants mentioned would draw them back to reconnect at Marquette. One participant mentioned the honors program as a cohort that was a cohesive group she spent a lot of time with as a student and said, “When there’s a reunion, those are the people I’m with basically” (Rawski, 2011, April 26). We have seen success with these programs through alumni turnouts, but this concept was certainly reinforced by these focus groups.

Other hindrances to involvement from focus group participants included time constraints due to family, personal and career commitments. The Mid-career life stage segment noted family more than any other focus group as a reason for not being involved. One participant from this group said, “I probably would do more but family life gets in

the way. We have a 13 and 14 year old. And I probably would do more if there was more service related or more involving children” (Rawski, 2011, April 11). Others further explained that this stage in their lives involves active schedules for their children, and as parents, they remain busy with the interests of their kids be it coaching sports teams or volunteering with their children’s schools. Even the Peak Career and Legacy Years life stages participants mentioned that when they were at the stage of having adolescent and high school age children, their focus really shifted away from Marquette. This presents an opportunity for re-engaging these life stages once children have transitioned to college and beyond. In order to help address the needs of the Mid-career segment, several suggested offering more family friendly engagement opportunities from events that appeal to kids or service projects where their children could volunteer with them. Work keeps the Early Career segment busy as they are starting their careers and focusing on other things. Throughout the life stages, community activities such as parish, school, scouting and coaching, among others, keep them occupied.

Both of the combined Peak Career and Legacy Years focus groups uncovered the issue of the commuter culture. For this demographic, several noted that they lived at home rather than on campus in the dorms. This resulted in less affinity to campus and stronger friendships in communities where they live(d) versus the Marquette community. For many this community has remained their friendship base. One participant explained, “The reason why I’m not involved in too many things is because I’m from town, and I didn’t live in a dorm, and my friends are from town and so I stay in touch with them and don’t need to go through the university for that” (Rawski, 2011, April 18). Another shared that she lived on campus while her husband commuted noting that when you live

and sleep at Marquette, you have many more opportunities to be involved. She had a very different experience than her husband and is now much more active and involved with Marquette than her husband is (Rawski, 2011, April 26). Several also noted that they were transfer students and didn't have the same amount of time to build connections as others or were more "utilitarian" with their time, focusing on their studies rather than socializing (Rawski, 2011, April 26). University Advancement has been working to focus some Development and Engagement efforts around a "micro-region" concept that goes deep in specific communities. These comments from alumni speaking to the strength of their current communities and not feeling the need to come to campus to feel connected to Marquette further enforces the value in bringing Marquette to them, where they live and work and already have established connections.

A third theme that arose through the dialogue is specific to the Milwaukee community. Several noted that they already feel immersed and connected to Marquette through social circles in the Milwaukee community. As such, they feel they don't need to come to campus or attend events to make those connections. One stated, "About a third of our social friends are Marquette graduates so I'm with them all the time so I don't necessarily come down to the campus here to participate" (Rawski, 2011, April 18). Another shared, "If you grew up in Milwaukee and you stay in Milwaukee, you have so many Marquette connections ... You always feel that you're somehow connected to Marquette even if you're not actively involved" (Rawski, 2011, April 26). In this realm of Marquette contacts, others also noted that they remain connected to the university through family members (younger generations) now attending Marquette (Rawski, 2011, April 11).

A key point to note related to the involvement discussions is that there was very little negativity toward the university, which came as a bit of a surprise to staff. Less than a handful of participants cited specific examples of negative experiences or brought up the Warrior mascot name change as leaving them with “hard feelings” toward Marquette. Overall, feelings are very positive for the university and particularly the education they received. It was encouraging to hear that they generally had a willingness to become more active. It will just be a matter of finding the right engagement opportunities that can offer value and fit within their already busy schedules.

Following the involvement discussion, potential programs and services were shared to understand the level of interest from alumni in the Seven Essentials categories where voids and opportunities were previously identified. The goal of this programming discussion was to determine whether these offerings might motivate alumni to increase their level of engagement and what level of interest they hold with each potential offering to help gauge whether some are more viable options than others.

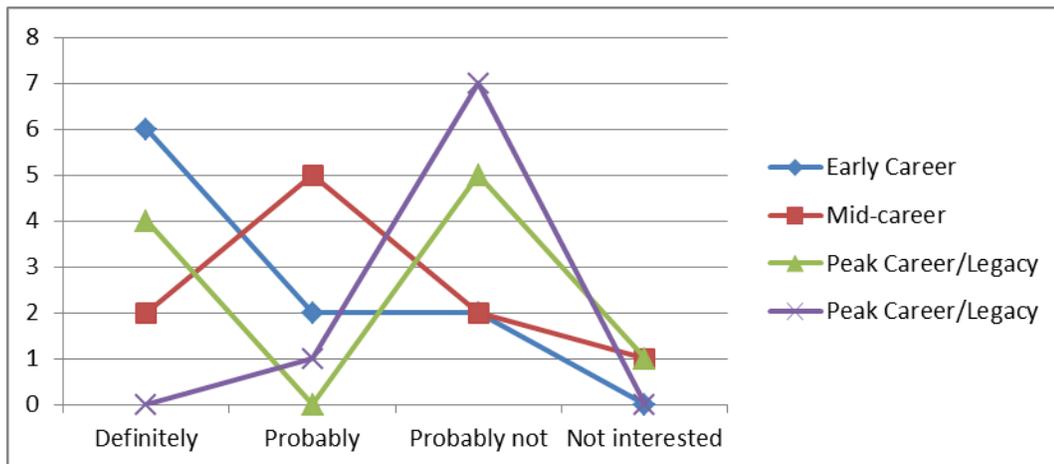
### **Online learning.**

The first programming discussion centered on testing ideas generated around online learning. In total, seven online learning opportunities were offered. Potential offerings discussed ranged from online lectures about a current and relevant topic to an online chat with an “expert” to an online tour or glimpse of a live classroom to career development opportunities. This portion of the focus group discussions began by asking participants about the time they would be willing to spend online for personal interests and benefits, assuming the learning opportunities Marquette would offer would be something of interest to them. The Mid-career life stage group indicated they would be

willing to spend approximately one hour or more for online learning – this was the most amount of time of all the focus group life stages. Following them, the Early Career/Young Family segment said they would generally be willing to spend approximately 30 minutes online. Lastly, the Peak Career and Legacy Years life stages followed indicating they would spend somewhere between 15 to 30 minutes online for a learning opportunity with participants split with some suggesting they'd spend 15 minutes or less and others indicating 30 minutes would be their expected amount of time.

In general, as online learning opportunities were discussed, the idea of value and relevance came up frequently. It was clear from almost all life stages that offerings need to be on their time and be current. One participant specifically stated, “Timeliness is important for me too so if the content of that lecture is of a very relevant nature ... then I would sign up” (Rawski, 2011, April 18). Illustrating the point that offerings need to be accessible when alumni are ready to watch rather than a scheduled webinar, an Early Career alumnus stated, “For the lectures, it would be only if it was at my convenience ... like TED where you can watch it anytime. It's rare that I watch a webinar that's at a set time” (Rawski, 2011, April 15). Similar comments were heard from multiple participants in various life stages. The graph below depicts the varied interest in the topic of online lectures. From this illustration, one can see that online lectures are most appealing to the Early and Mid-career alumni segments based on focus group responses. That said, this is a concept that does appeal to select individuals in other segments as well. A Peak Career alumna noted, “I like that idea because recently Marquette launched The Difference Network ... I work full time so I couldn't come [for a few speakers/lectures on campus] but I could watch them online” (Rawski, 2011, April 26).

Figure 2. Graph Depicting Focus Group Ratings for Online Lectures



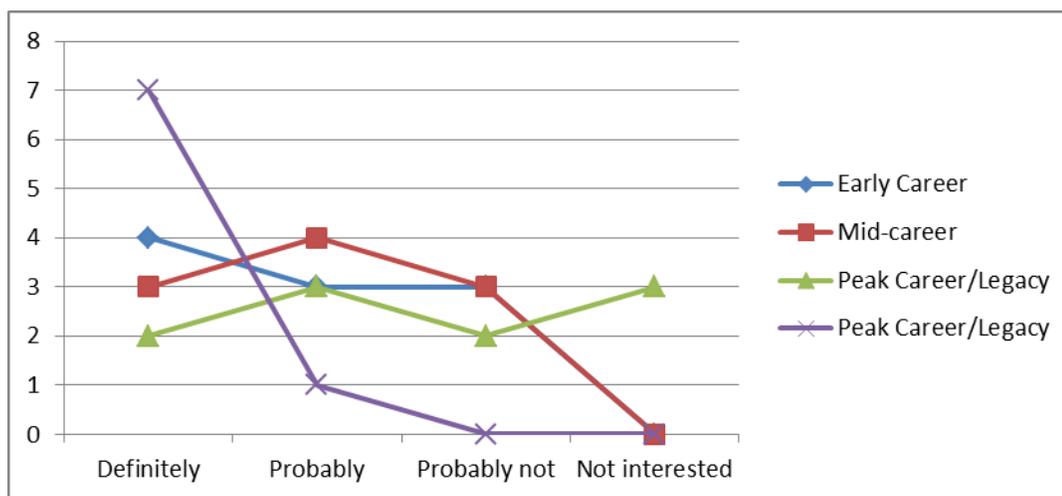
Of all the online learning ideas offered for alumni feedback, an area that received strong favorable response from all groups most consistently was career development services. Most felt this was value added for alumni and would enhance their connection to Marquette significantly. As the graph below shows, there was definite strong interest from all with each life stage offering responses of definitely and probably interested more than probably not and not interested. In fact, career development was the only online learning opportunity the second Peak Career and Legacy Years focus group segment really expressed an interest in. From that group, one alumna noted:

“As someone who changed careers, I think that would be great to offer, like resume building ... Not everyone is looking for the 22 year old graduate. There are a lot of places that would like to have a seasoned employee, and I think that would be great to use Marquette for that. I never would have thought to use Marquette for that, but it would be a nice option.” (Rawski, 2011, April 26)

Another further emphasized, “I’ve had to hire people and instead of going through the riff-raff that I find online or in the Journal Sentinel, I’d love to narrow it down to

someone who went to school here” (Rawski, 2011, April 26). Others further agreed that online networking components would be useful professionally, particularly given the strong alumni base in southeastern Wisconsin. One participant also suggested exploring credentialed career development opportunities to award CEU’s for continuing education.

Figure 3. Graph Depicting Focus Group Ratings for Career Development Opportunities

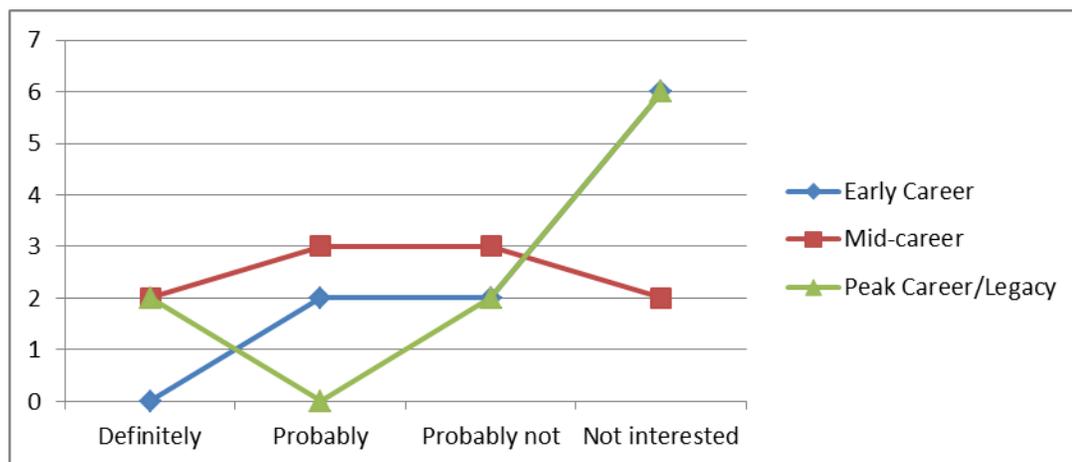


An additional area for exploration is around mobile applications. The Early and Mid-career segments were the only groups to discuss this, but it could be an area of interest amongst the younger generations of Marquette alumni. One participant specifically clarified, “If it had push notifications like a day before an event or a week before” it would be something he would pay attention to (Rawski, 2011, April 15). Others agreed.

Another interesting but mixed response was for a glimpse of the student experience through online viewing (potentially to include tours of dorms, short clips of classroom segments, joining students in the dining hall, etc.). While some were definitely

not interested as the graph below shows, others expressed moderate interest. Those most likely to be interested were those with high school age children or relatives preparing for college as this would provide an opportunity for alumni to share and watch with these prospective students in their families. One specifically said, “I wanted to find something like that to let my nephew look at before he decides what school he wants to go to” (Rawski, 2011, April 18). Overall, it was clear that this was most likely something to view as a recruitment tool for prospective students. Alumni may be interested but most likely only if they could share it with someone thinking about college, or Marquette in particular, as they serve as advocates for the university.

Figure 4. Graph Depicting Focus Group Ratings for Glimpse of Student Experience



Overall, the concept of online learning opportunities did resonate with some of the participants. There was not a consistently strong response locally as some indicated it feels a bit strange connecting online when campus is so close. Some in the Peak Career and Legacy Years groups are more interested in face-time versus online resources (e.g. live lectures and forums versus online learning opportunities). That said, online engagement opportunities may be better received regionally (outside Milwaukee and

Chicago markets). This warrants further research with alumni outside local markets to assess interest around the country.

### **Spirituality and character.**

The next programming discussion covered the area of Spirituality and Character. Again, several ideas that had been generated to expand spiritual offerings were tested to help understand the effectiveness and appeal of online and in person spirituality offerings. There were some general and open-ended questions to begin the discussion followed by three specific types of offerings being presented for interest rating. These three offerings included daily online postings, spiritual forums on various topics, and alumni or family retreats.

The spirituality discussion began with an open-ended question asking participants to share ways in which Marquette could help to enhance their spirituality. For the most part, across the board participants indicated that they already have a spiritual community in their lives through their local parish, where they live and with people they know. To help illustrate this point, a participant expressed,

“I kind of feel like I’m already getting what I need from my parish and if there’s something I’m not getting from them, then [I’d try] a parish council meeting ... That’s my base of my friends and the people my kids go to school with, the area of town that I live ... That kind of thing needs to come from where I choose to worship ... If I came here, say, for a bible study group, it would be with a whole bunch of strangers. I’d rather do that with people that I already know.” (Rawski, 2011, April 11)

Others echoed these sentiments throughout the dialogue, and in particular, the Early Career and Mid-career life stages shared the least amount of interest in connecting with Marquette on a spiritual level.

While the Mid-career life stage didn't express much interest in spiritual engagement offerings with Marquette, they did seem to be interested in seeking teachings, readings and materials they could use as resources for their own spirituality and parish activities. One participant said "We are looking always for studies to do with our church group that would further growth, and I think Marquette could offer options like that, like recommended books, studies" (Rawski, 2011, April 11). Ultimately, Marquette could help alumni by offering resources to supplement the spiritual fulfillment that they are already receiving through their own parishes and communities. The point was also made that through these resources, Marquette could bring new perspectives on traditional readings: "I would probably read an inspirational quote every day that made the teachings new or fresh and if it came from Marquette that would be pretty cool" (Rawski, 2011, April 11). This would help set what Marquette provides apart from other materials available online.

Of the life stages, Peak Career and Legacy Years expressed the most interest in spiritual offerings in general. In response to whether she would look to Marquette for spiritual offerings, one alumna stated, "I definitely would ... It's really the reason I came here to finish my degree" (Rawski, 2011, April 18). Others shared that they wish they knew more about what Marquette currently offers remarking on the value in the Jesuit education they received, "I would love to know [what is offered] because that was the best part of my experience here was the Jesuit education and the Jesuit teachers that I

had” (Rawski, 2011, April 26). In all, this segment appeared most open to engaging with Marquette on a spiritual basis. One specifically explained that she views this type of topic much differently now that she’s older:

“I think it’d be nice to have a lecture series that, not just as alum, that you and your spouse could say we’re going to go to this four-part lecture series ...

Unfortunately, I think, and I can only speak for my parish, I don’t see it offering those types of things. So as I get to this point in my life, I think those are topics I’m more interested than I was when I was 25 or 30 years old or when my kids were younger. But I think that’d be really nice if it was sold and packaged that way. That this is a four-part series. You’d get to know people, it’s bringing people together, you’d be with other alum.” (Rawski, 2011, April 26)

Again, Marquette would be offering something different and personal that could potentially appeal to some of the legacy generations.

Similar to online engagement opportunities, spiritual offerings may be better received regionally (outside Milwaukee and Chicago markets). This, too, warrants further research with alumni outside local markets to assess interest around the country.

### **Service.**

Service was another area of focus for discussion, again with several ideas tested around potential expansion of service offerings. These ideas included tapping into current community volunteerism through recognition vehicles and highlighting alumni connections to service projects, collaborating in a deeper way with Marquette University partners (e.g. Boys and Girls Clubs, Cristo Rey Schools that serve under-privileged students, Catholic Charities/Catholic Relief Services, and fellow Jesuit universities), and

finally understanding the interest in e-mentorship service opportunities (service to Marquette via online mentorship of current students).

Regarding the first option, all participants were asked whether they would like to be recognized for the service work they already do in their communities or recognize the work of others (which could be through a photo contest, online volunteer recognition website, etc.). Very consistently participants mentioned that they do not volunteer for the recognition so that component did not appeal to them. However, all focus groups mentioned an interest in posting volunteer needs for the organizations they are currently involved with. One person said, “I don’t feel I need to be recognized for volunteering but I would love the opportunity to be able to post if ... we need some more support ... so other alums could get involved if they wanted to” (Rawski, 2011, April 11). All focus group participants across the four life stages seemed to find great value in leveraging the Marquette alumni network for supporting each other’s causes in this way. One participant did mention recognition of others as a nice way to showcase what alumni are doing, particularly if the focus was on the cause. He felt this could lead to more engagement of alumni as they could reach out to each other as resources with knowledge of different organizations in the community (Rawski, 2011, April 26).

When asked whether they would be inspired to add to their current volunteer commitments by joining a Marquette service project that incorporated collaboration with a current community service partner most felt they might be interested if they believed in the cause of the partner organization. That said, they expressed interest in learning more about some of these partnerships (e.g. with Boys & Girls Club, Cristo Rey, etc.) and felt

more could be done to communicate and highlight what Marquette is doing to partner with them.

The e-mentorship program through LinkedIn to benefit current Marquette students seemed most appealing to the Early Career segment likely due to the nature of it being online considering their comfort level, in general, with social media networking. The other life stage segments expressed interest in mentoring students but felt, given their proximity to campus, this would be better suited in person rather than on the web. As with previous topics, these online connections may be more attractive to regional alumni who do not have the same opportunities to come to campus to connect with students.

Ultimately, alumni seem to want to continue doing what they are doing as far as volunteer work in their communities. Many said their time is limited and they've chosen organizations that are important to them and their families. They reacted very positively to the idea of learning what others are doing and sharing their own volunteer needs for organizations they support through service work.

#### **Giving and creating legacy (financial support for Marquette).**

The final section of the facilitation guide included a very open-ended prompt around financial support for Marquette. Participants were asked to share their thoughts on how they think about Marquette as an organization to support with their charitable giving versus other non-profits they might support. The outcome of this dialogue was very interesting and possibly the most insightful piece that came out of the focus groups. Again, a bit surprisingly, alumni participants were very candid in their responses, many disclosing the fact that they are not currently donors.

A key theme among all focus groups was that Marquette may be a worthy organization and alumni appreciate their education, but in comparison to all of the other organizations in need of philanthropic support, they do not see “Marquette as an underdog in the world of need” (Rawski, 2011, April 26). Some felt a disconnect while they still owe school loans or are paying off their children’s school loans and cannot see giving a donation to Marquette as they continue paying off the education. An Early Career participant stated, “I have other areas that I have my charitable giving go toward because Marquette’s already got an awful lot of my money and will for many years” (Rawski, 2011, April 15). Others felt it in poor taste to call asking for a donation immediately after one graduates or as the parents of a current student in her freshman year. “I’m like, ‘We got two kids in college; we have our own scholarship fund right now.’ We’ll help when we can, but sending extra dollars here is not something we can afford right now” said the mother of a current student (Rawski, 2011, April 18). Others shared feelings like “It’s definitely off-putting after a month after you graduate getting a phone call asking for money when you already owe so much” (Rawski, 2011, April 15). This suggests that Marquette reconsider the timing of such solicitation phone calls to alumni depending on life stage and the information on record for them.

While some current parents above indicated a disinterest in giving while their children are at Marquette, others expressed a deeper appreciation for the importance of scholarship aid. One said:

“I have a much greater appreciation for Marquette now that I have two boys coming and they’re getting some pretty nice scholarship money. Well, that didn’t just fall out of the sky. Someone wrote a check to Marquette so that they have this

pool of money. So my fondness has grown tremendously now that I know how my kids will benefit.” (Rawski, 2011, April 26)

Alumni who are also Marquette parents, especially with children who received scholarships, seem to appreciate Marquette more and feel a stronger commitment to giving back as a thank you for the support their children received or are receiving. Marquette is already adjusting the way it looks at legacy families and increasing the attention on this group. This is certainly an alumni segment to consider differently in solicitations.

Another theme involved a desire to share their preferences for how they are asked for contributions (or the means of solicitation). It was acknowledged that people have different preferences. Some strongly dislike phone calls at home as evidenced by one alumnus’ comments, “I’ve gone to Marquette and a number of different schools, and they all call me at home at night. And it’s gotten to the point where anybody who tries that now, I’m actually unhappy with them ... It doesn’t work for me” (Rawski, 2011, April 26). This alumnus then continued by saying that he’s willing to give as long as it’s through another method. It’s clear there are missed opportunities here as a result. Others tend to enjoy the phone call solicitations as a chance to connect with students. “I’ve been called at home. If you run across a conversation with someone you can identify with, it almost puts you back to when you were in their shoes, so I’m more inclined at that point to give something” said one alumna (Rawski, 2011, April 11). She then continued by saying that this phone call method is preferred because it’s more personal than receiving something in the mail. Then, yet another participant seemed as if she’d prefer mail

solicitation or pausing solicitations altogether for a period of time. She shared her story as follows:

“I wouldn’t mind donating more. I lost my job because of the recession so it’s one of those things where you dread getting that phone call because then you’re telling a current student ‘No, I can’t give you money because I don’t have a job right now.’ It would be nice to put the turn off switch on those kinds of calls.”

(Rawski, 2011, April 11)

Still others seek convenience when making their donations so opportunities to donate online or through payroll deduction are attractive options, “All of our donations are payroll deductions ... I think about those organizations that are available [through workplace campaign]” (Rawski, 2011, April 11). Ideally, Marquette could benefit from finding ways to determine alumni preferences and tailor solicitations accordingly.

Perhaps the most insightful piece from the focus groups was the learning that Marquette needs to present itself as more of a cause and very specifically clarify the impact any size donation can have. Based on focus group discussions across the board, there seems to be a perception that Marquette is doing “just fine” without their money, particularly if they don’t feel their contribution would be large by certain standards. Therefore, it will be vital for Marquette to better illustrate how small gifts make a difference. Alumni commonly hear the impact of large gifts but do not see what their gift of \$25 to \$100 can do. An alumna shared Habitat for Humanity as an example of an organization that says, “If you donate \$10 ... \$10 buys this, \$15 buys that” and then joked by implying that \$10 might not achieve anything at Marquette (Rawski, 2011, April 11). Along these lines, an alumnus shared:

“I feel like I’m a really small fish in a big lake. I just feel there are alumni who they can rely on more who are able to give more. I just feel there are other areas where I can donate and the amount of money at this point in my life that I can give just seems like a drop in the bucket here where other places it would be more meaningful.” (Rawski, 2011, April 15)

Repeatedly, alumni mentioned concern that a small donation will not have an impact and they prefer to give to philanthropic organizations where they can truly feel they are making a difference. Another key concern was that a gift to Marquette just goes into a “black hole” or “big pot” with one indicating, “Marquette Magazine sometimes highlights million, billion dollar donors and so I don’t feel that my small donation is significant, kind of ‘why bother?’ I know that’s not right but again, a drop in the bucket” (Rawski, 2011, April 11).

Some challenges identified through this feedback are as follows. Marquette needs to consider a “your gift has a big impact” strategy (and demonstrate the benefit) for smaller donors or non-donors while positioning fund designations in a manner to overcome the “black hole” perception. Donors need to see impact and outcomes is not limited to the large donors. These individuals care just as deeply about the impact of their modest charitable commitments as do larger donors as some mentioned—illustrated above—that they worry that their donation will not offer the same resources or mean enough as if they supported a different organization at that same amount. And finally, alumni must see Marquette as a cause with some mentioning that a small donation does not matter or that Marquette’s been growing without their contributions. Even those who want to give back don’t because they do not think their contribution would be significant

enough: “I don’t feel pressure to give. I would love to give back in some sort of way because I feel that the university gave me a lot in terms of my education” (Rawski, 2011, April 15).

**Other findings related to university communication.**

Not a formal part of the facilitation guide, but commonly brought up in natural discussion with each of the focus groups, was the topic of communication from the university. This communication encompasses print materials to email messaging to social media. Several themes consistently arose.

Most frequently, Marquette Magazine came up in every focus group session in a positive manner. One participant shared, “I always read Marquette Magazine and get very nostalgic about certain things” (Rawski, 2011, April 11). The participants are reading the magazine, and the university can view this as a powerful form of communication with alumni. It is worth noting that one of the focus groups commented on how they wish Marquette Magazine would also feature the donor that makes the “smaller” gift versus always featuring those that give such transformational contributions.

Especially among the Early Career segment, there is a willingness to connect through Social Media. Many are fans of Marquette’s Facebook page, one indicating, “I think whoever maintains that does a really nice job because the photos are great; the little stories are always inspirational so I always read what’s on Facebook” (Rawski, 2011, April 15). Several also follow Marquette on Twitter, and following up on the above comment, another participant stated, “Same thing with Twitter. Both of them are very well done. I do the social media [for my company] and I look to them for ideas because they do a great job ... not overwhelming, just the right amount” (Rawski, 2011, April

15). Given this positive feedback and response that the messaging is being read, if Marquette continues to produce content strategically, social media can serve as an excellent communication vehicle, particularly for our younger alumni generations.

An overall theme around communication was segmentation based on life stage and interests, as a few examples. This is something that will likely require additional research but is well worth considering for the future to ensure communication is being read rather than ignored. One participant suggested the university ask alumni to filter their interests and email preferences “Because sometimes when I get them, I can read them but most of the time I don’t. Just feeling that ‘Oh yeah, there’s something in there that interests me” would increase the likelihood of her paying attention to it (Rawski, 2011, April 15). Others shared that they receive so much information that they debate whether to unsubscribe. One stated, “It’s a little overwhelming for me. I’m almost at the point of cutting it off, but I don’t want to because I like to get the calendar of events ... there are certain emails that I would prefer not getting” (Rawski, 2011, April 18). To begin with, an option for immediate consideration is how Marquette utilizes the subject line for emails. Some of this is being done already, but alumni supported the concept indicating, “I read what’s in the header and if it doesn’t automatically grab my attention I figure I’ll just come back to it later which means three years later” (Rawski, 2011, April 15). Another shared, “If they’re identifiable and very descriptive in their heading, I’ll know and I’ll save it. If it’s too generic, I’ll just delete it without opening it. A good subject line is important” (Rawski, 2011, April 18). To further improve email open rates, the subject line must be clear as it often determines whether or not someone opens an email. On a broader scale, Marquette should consider tailoring communication even

further based on alumni interests. With this information on file, it could benefit the university in a number of additional ways from planning programs for various regions and alumni demographics and determining mailing list for print marketing materials.

### **Conclusion**

A vast amount of information was gathered for the Alumni Engagement team's consideration through this study. In many ways, the feedback from alumni will be very useful and have positive implications moving forward. Life stage segmentation was successful with participants expressing similar challenges (with children, time, etc.) and interests. All life stages have things that are pulling their attention away from Marquette; however, good feedback was received on potential programs. Bottom line, alumni offerings must provide relevance and value if Marquette is to draw alumni attention amidst their other commitments. It was affirmed that different life stages have different interests and different essentials will appeal to different life stages. For example, online learning may be more appealing to the Early Career segment whereas spirituality appears to be more appealing to the Legacy Years segment. A key learning is that the university needs to find ways to better communicate and inform offerings as well as financial needs. Marquette Magazine is a vital tool, but we can't rely on one time communication through this medium.

In the coming months, findings will be presented to appropriate audiences at Marquette to include the full Alumni Engagement team, Marquette University Alumni Association National Board members and other volunteer leaders. In addition, this research will also be shared with fellow colleagues across University Advancement and campus (from those responsible for e-communication, reunion offerings, solicitations,

etc. as well as the Office of Marketing and Communication cohorts). Changes to current offerings (opportunities to enhance, adapt, reduce or add programs and services) will be proposed. The Alumni Engagement team will then work to begin implementation of proposed changes with the hopeful result of increased alumni participation in program offerings and increased financial support of the university. We will have the ability to continue measuring these changes using our Engagement Scoring Model.

As with all research, there are limitations to this study. Focus groups traditionally feature small sample sizes so research goes deep but is not typically generalizable to a broad audience. That said, insights gathered provide helpful direction for future testing and because these findings are being combined with and added to previous research, they offer a fuller picture of Marquette's alumni base. Only a small segment of minimally engaged alumni (only one segment per life stage) was gathered for feedback, and in the coming paragraphs additional focus groups will be recommended. As with all qualitative research, each focus group conducted is a bit different as the facilitator must adapt accordingly to participant comments and reactions. So while our facilitator followed the same facilitation guide for each focus group, it is not a precise science and they vary slightly with different follow-up questions asked in some sessions and not in others, for example.

There are many opportunities for continued research following this study. The Alumni Engagement team intends to replicate this focus group model in different regions around the country knowing that alumni demographics can differ depending on region as well as distance from Marquette. The marketing consultant who served as our facilitator will be offering trainings in late summer and early fall 2011 to help prepare other

teammates to lead these discussions during their travels for alumni programs around the country. This regional outreach will be important as local alumni may, in some cases, take for granted the fact that Marquette is easily accessible (in their backyard with high likelihood to run into fellow alumni on a regular basis in the community) while alumni that need to travel miles to come back to campus (with fewer fellow Marquette alumni in their communities) may yearn more for certain types of programs to connect them back to their alma mater. We expect that findings will differ greatly in certain respects as we get farther away from the Milwaukee market. In the focus groups for this study, one participant shared that she became interested in getting involved with Marquette as an alumna when she was living out of state in Virginia (Rawski, 2011, April 18). This interest could make engagement opportunities like online learning and spiritual offerings, e-mentorship through LinkedIn and other connections via the web much more important and appealing.

An additional opportunity for further research could involve Marquette Graduate and Professional School alumni. Specifically targeting Law and Dental school alumni or Graduate degree only alumni may bring very different feedback than our undergraduate alumni have offered. While the Professional Schools tend to take the lead on programming for their alumni, the Alumni Engagement team within University Advancement intends to do more engagement with Graduate School alumni. This presents its own challenges as the affinity to a university where one received a graduate degree can be very different (often less) than one's undergraduate university or college.

A few comments from focus group participants sum it up well. "There's so many ... more opportunities to become engaged. I'm sitting here and I'm thinking, wow,

there's a legacy of Marquette grads, and I always look forward to running into another person who came here." Even as an employee of Marquette, I find myself continually surprised by how expansive the Marquette alumni network is. Whether I'm wearing a Marquette t-shirt walking through my neighborhood or staffing an event across the country, the opportunities to run into another person with a Marquette connection are endless. More often than not, positive feelings and immediate bonds arise in the conversation that follows this initial Marquette realization and greeting. As I said in the introduction to this paper, it is generally understood in the university fundraising setting that alumni engagement leads to philanthropic support. One alumna supported this concept stating:

"Giving is directly correlated to how much you feel a part of the community ... If it's not part of your life, it's really hard to write a check to the place ... if you're not having any experiences at Marquette, it's hard to think about writing a check ... You can't just call me and ask me for money." (Rawski, 2011, April 26)

This research study has the ability to keep Marquette on a trajectory of truly understanding what alumni are looking for so we can ensure we are meeting their needs, or Seven Essentials of Highly Engaged Alumni. If we can find success through alumni engagement, we can help to ensure the success of current students—our future alumni—and the university as a source of Catholic Jesuit education for many generations to come.

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