



# **INSPIRE** **ALUMNI ENGAGEMENT** with **TEXTING**

Like most engagement strategies in higher education, building relationships with alumni can be complicated. Not only are institutions complicated, but students' experiences vary widely and their expectations about what it means to be alumni are often a mix of reasonable and arbitrary assumptions.

These days, many people simply ignore communications from their alumni offices, thinking that they will only be asked for money. This may or may not be true. Arbitrary assumptions about alumni outreach efforts may keep alumni from other meaningful opportunities, such as participating in professional development events or mentoring current students.

Nevertheless, alumni giving is a crucial source of funding for most colleges and universities—and the right approach to alumni outreach has never been more critical. Alumni who have graduated over the last 20 years may think fundraising asks from their alma mater distasteful, having heard the media trumpet the expense of higher education over and over. And those who graduated over 20 years may be navigating the next phase, putting their own children through college or even preparing to retire.

Despite these hurdles, now is an ideal time to refine your alumni outreach approach. COVID-19 may, in fact, have a positive effect on alumni giving and participation. With the stock market strong, tax laws still rewarding generous givers, and social and political issues driving education, now is the time to renew your engagement with your alumni base. Signal Vine's Alumni Texting Engagement Framework is designed to help institutions use texting effectively to optimize engagement across the entire alumni ecosystem.

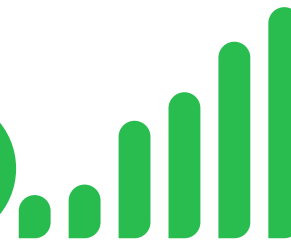
Because the student journey and alumni giving are personal, it makes sense to use the most personal channel, texting, to communicate. Text messages can connect alumni to causes on campus that they are passionate about, let them know how much that the institution depends on their contribution, and help alumni build relationships with current students. In fact, alumni are 74% more likely to give back after they have attended an event or volunteered for the institution, according to the [Donor Loyalty Study](#).

How well institutions engage alumni is as important to the longevity of the institution as it is to current student experience. It takes finesse and integrated partnerships. This ebook explores the latest trends and the challenges and best practices in using texting to increase alumni engagement.

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# ALUMNI GIVING TRENDS



COVID has unlocked unprecedented generosity from alumni. The Blackbaud Institute's 2020 Charitable Giving [Report](#) finds that online giving grew 21% during the pandemic. Factoring out mega donations (like Michael Bloomberg's donations to Johns Hopkins), pandemic giving rose 3.6% [increase](#). [Online fundraising](#) rose 13%, and the average gift increased from \$148 in 2019 to \$177 in 2020. Many alumni are willing to donate—and the easier it is for them, the better.

Consider these [generational differences](#) and communication preferences:

	POPULATION	GIVING	AVG # NON PROFITS SUPPORTED	MEDIAN DONATION ANNUALLY	MOTIVATION	PREFERRED DONATION	COMMUNICATION TYPE	FREQUENCY OF COMMUNICATION	MOST LIKELY DONATION TO
<b>Gen Z</b>	21M	9M	N/A	N/A	Passion for Justice	Online	Texting	2x/Month or more	N/A
<b>Millennials</b>	67M	34M	3.7	\$238	Passion for Cause	Online	Texting/Short Emails	2x/Month or more	Children & Youth Development
<b>Gen X</b>	65M	35M	3.4	\$465	Passion for Cause	Online	Texting/Short Emails	Monthly or more	Children & Youth Development
<b>Boomers</b>	74M	55M	4.1	\$478	Institutional Need	Check	Short Emails/ Letters	Quarterly or more	Places of Worship
<b>Matures</b>	29M	23M	5.5	\$683	Institutional Need	Check	Short Emails/ Letters	Quarterly or more	Places of Worship

Sources: US Census Bureau, [Donor Loyalty Study](#), American Community Survey 2016

The 80/20 rule says that 20% of alumni are giving about 80% of total funds raised. However, a closer look shows that the real breakdown may be closer to 95/5, suggesting that many institutions will need to diversify their approach, particularly as they rely on donors to supplement declining state and federal funding. The ability to broaden the number of donors and consistency of giving is critical.

## GIVING IS DISTRIBUTED ACROSS INSTITUTIONS AND INTERESTS

In general, potential donors are receiving more inquiries from institutions in addition to asks from political, nonprofit, or philanthropic interests. Competition for dollars has increased as more students attend charter or private K-12 schools and pursue degrees and credentials from multiple institutions. Every institution may be asking for a contribution. They may still donate to your institution, but likely at a fraction of their total giving.

## MOTIVATIONS FOR GIVING “Give Til It Feels Good”

Individuals continue to give for varying psychological or emotional reasons, as well. Recent neuroscience has helped us better understand what motivates charitable giving, supporting these theories. These are not mutually exclusive. Someone could be motivated by all three.

## MATURE

Before 1946

A small generation with the largest per capita donor who are at the closing chapter of their lives, this generation may offer gifts through estates and life insurance donations. On average, Matures are supporting organizations with 65% reporting that they give primarily because they were told the organization's success was based on their contributions.

## BOOMERS

1946 - 1964

This generation continues to make the biggest impact with 41% of all donations. With a history of giving with interest in donating named gifts, this generation enjoys in-person engagements despite their institutions having changed so much since they attended, by every major.

## GEN X

1965 - 1980

Often overlooked due to its small size, Gen X is expected to become a greater focus for institutions as the generation moves into prime giving years. Gen X's approach to savings, time, family wealth, and gift wooing is different than other generations they attended, by every major.

**Becker's theory** of altruism suggests individuals feel satisfaction from providing a public good care only about how much benefit is offered and not the process by which it occurs.

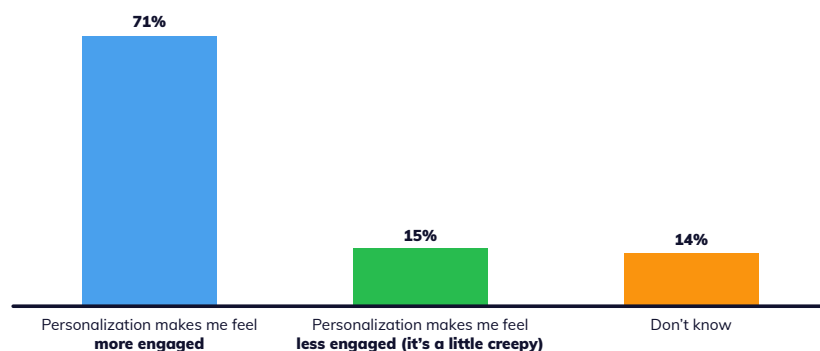
**Andreoni's theory**, of "warm glow," suggests derive pleasure from the act of giving. They don't care so much about those who benefit but how they feel.

**A third theory** suggest people give to impact their social status and being regarded as generous by their peers.

**Giving behaviors** among wealthy people who have earned their wealth differ from their less-well-off counterparts, but not in the way you might think. In fact, those who have earned significant wealth are less likely to give. However, they are more likely to give when they in close contact with individuals or causes of significant need. Donors with less income are, in fact, likely to give more. In aggregate, lower income individuals give more than twice as much as more affluent peers.

Because today's donors are living in a retail environment that tracks their interests and sells to them using that data, donors expect personalization. Institutions that segment donors are often more successful at getting individuals to donate. Alumni expect information relevant to them delivered in authentic outreach. No one wants generic information. Far from "creepy," personalized messages are expected by a majority of donors.

**HOW PERSONALIZATION MAKES DONORS FEEL**



## MILLENNIALS

1981 - 1996

A large generation known for emphasizing values and influencing institutional behavior, Millennials are in their peak childbearing years with less disposable income. Millennials more often "crowd source" contributions toward specific areas of interest. For instance, ten alumni might pool donations to fund a named endowed scholarship rather than each giving to a general scholarship fund.

## GEN Z

After 1996

A new generation to giving with just the first couple of years to review, these young alumni have an interest in donating for specific impact. For instance, they would rather give \$75 to cover a specific student's fee than \$50 to a general fund. This generation's giving behaviors will evolve.

# ENGAGING ACROSS DIVERSE INTERESTS

Each person's journey from student to alumni is unique, depending on many factors including their campus or online experience and engagement in and out of the classroom. Factor in the student's major, gender, athletic and club participation, and it can be difficult to know what will matter most to them over the long run. What will they recall or value from their student years?

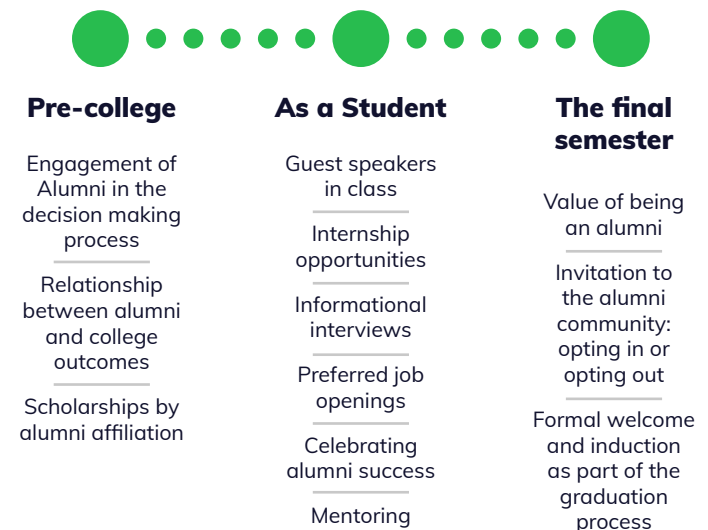
This spectrum of experience across decades results in a variety of wants and needs as alumni: connection, career support, internships, recognition, events, networking, and staying informed about advancements and events on campus. As individuals evolve, those wants and needs change, too. These wants and needs shape whether they will engage with you voluntarily.

The challenge to meet students with diverse interests means that institutions must diligently build strong traditions (beyond homecoming and graduation), celebrate amazing faculty members, and document the seemingly benign to bond students to one another and the institution. Less positive but perhaps more powerful, COVID and other challenging times can also unify students and alumni.

## YOUR VISION FOR ALUMNI: BE INTENTIONAL

What does it mean to be an alum of your institution? How will you set those expectations across their time as a student?

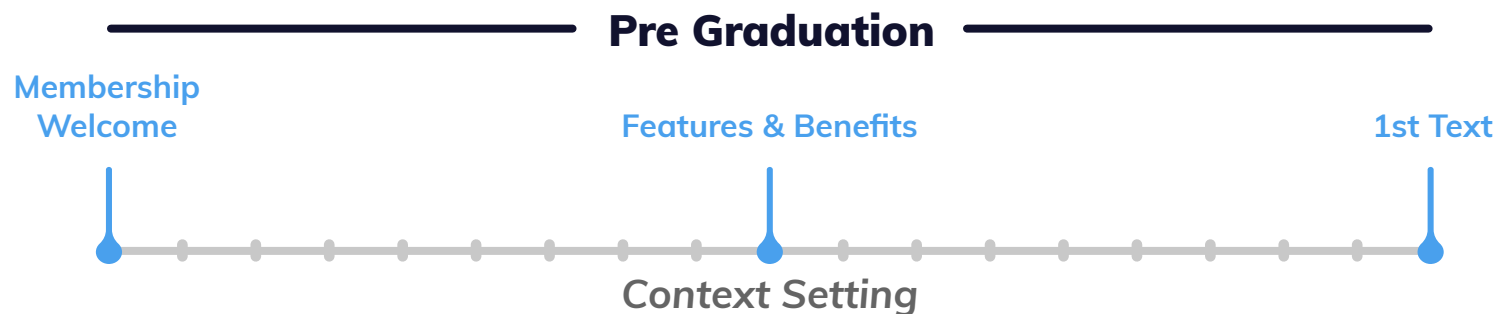
Expectations influence students' experience later as alumni, how their experience translates to their engagement with the institution. If they are seeking interns, it is the difference between "I need the help" and "I really prefer to have students from my alma mater. I want to give back." Expectations shape if and how they volunteer and what they say when they do: "I'm here today to share my professional experience so that it can help you compete in the job market after graduation. When I was a student, alumni helped me see my path. I am paying it forward."



# THE PATH TO ALUMNI ENGAGEMENT AND GIVING

It takes a team approach to build engaged alumni. Engagement strategies need to be long term and iterative, based on individual interests, where alumni are in life, and what they value most from the institution. Alumni offices should not wait until after commencement to communicate with students.

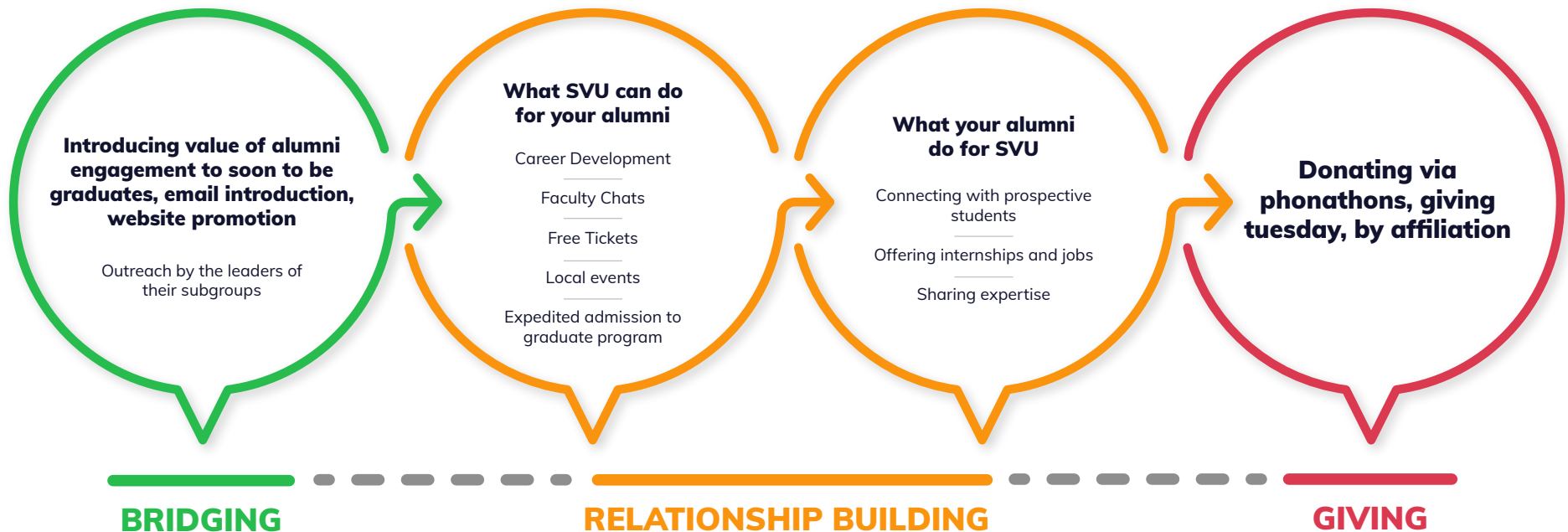
By thinking of every student experience as preparing for the alumni giving ask, alumni expect to be engaged after graduation rather than seeing engagement as optional.



Prior to graduation, communicate the benefits of being active alumni to soon-to-be-graduates. Long before graduation, give students ample opportunity to opt in to an active alumni path. Show them how as alumni they will be supported and how they can give back in non-monetary ways. This provides a solid foundation for all types of alumni engagement.

Provide immediate value to the student in initial messages, partnering with those who coordinate graduation and commencement planning. Text alumni prior to graduation, offering new lines of support and valuable information toward post-graduation goals.





Keep in mind that good alumni relationship building must be more than informational. It's not enough to provide access to resources or tell them that you'd love to invite them back to campus to speak to students. Ask them to participate in a specific event that highlights their personal or professional success. Craft invitations to match their specific interests and include exact dates and times. Then gauge their responses. Remember that even alumni who were "average" students can make wonderful mentors.

Segmentation is core to success in engaging with alumni. In addition to segmenting by generation, affinity groups, majors, and lifetime giving are all important to consider. These elements have changed dramatically in the last 100 years and understanding the intersectionality with generational differences position outreach and connection can shift the dynamic of relating to students. COVID has opened up new connections with these different populations. Zoom meetings, virtual presentations, and remote learning opportunities have eased the burden of the cost (time and money) of visiting campus and expanded the opportunities to engage in meaningful ways.

Establish a culture of exchange and interaction with students and alumni first, then move to donations. Having developed alumni relationship groundwork, you can apply a more refined approach, tailoring communication with insights about what alumni value most.

# CREATING A CIRCLE OF VALUE WITH SEGMENTATION

Generalized outreach is easy. Unfortunately, not only will it fail to engage noncommittal givers, it may actually alienate those who do want to give. On the other hand, alumni relationships founded on give and take, that encourage reciprocity on participation, bode well for giving. Sending personalized communication by text is an ideal tactic for encouraging participation.

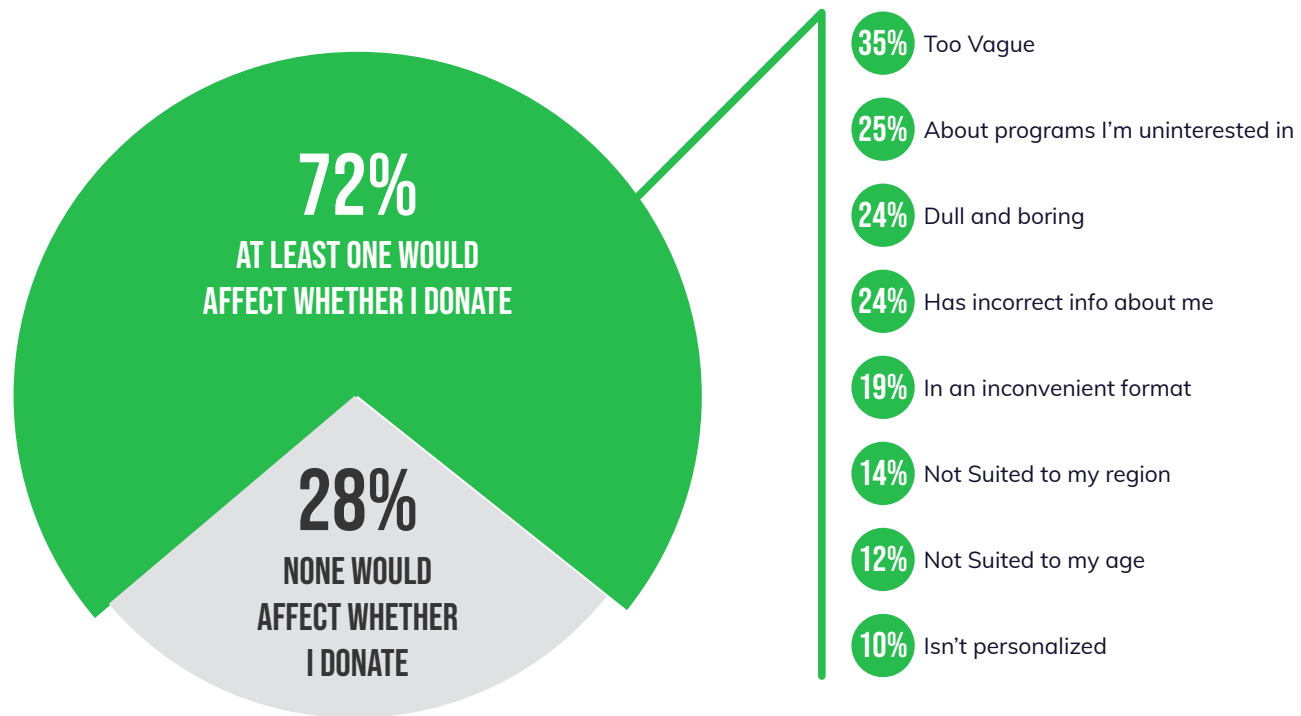
COVID-19 has expanded opportunities for alumni to get involved, with events, meetings, and panels going online, eliminating common barriers to participation such as time, effort, and cost to attend in person. With limited expense, institutions have embraced the opportunity to expand events to reach alumni along a broad spectrum of interests (science, technology, business, history, politics, literature).

## POST-GRADUATION



**ENGAGEMENT YEAR OVER YEAR**

Develop a cadence of communication aligned with alumni interests tailored to their generational preferences. Utilize automation to dig deeper into specific interests or expectations. Personalizing texts means more than using first names; the content must be relevant. Short texts that include visuals, such as pictures or quick videos, generally spark more response than long articles.



By analyzing response data and input obtained through polling, institutions can better understand alumni participation and giving behaviors, and spend more time and effort cultivating engagement with alumni who indicate active interest in giving. For instance, some alumni may consider financial contributions easier than donating time interviewing incoming students or providing internships. Both are important and necessary to the institution and students, so be sure to celebrate the value of every type of giving and recognize that preferences may change based on life circumstances and career changes.

# INDIVIDUALIZATION WITH DATA

**JULIA**  
gave \$20



Hi Julia, We are so appreciative of your 2020 donation towards the scholarship program. The phonathan kicks off on Monday, will you be able to increase your commitment to \$40 this year? Yes or No or Other amount

**Yes**

Excellent! Thank you for supporting our students and having an ongoing impact on students' ability to complete their courses! <<link>>

**No**

We totally understand! Is there anything that we can do to help you? As a reminder you have access to all of these free alumni services <<link>>

**Other Amount**

This is great to hear! What amount are you considering?

**LAST YEAR**

**MARTIN**  
gave \$0



Hi Martin, We hope you are staying safe. The phonathan kicks off on Monday and we are raising scholarship funds for students negatively impacted by COVID. Will you be able to commit \$20 this year?

**No Response**

Hi Martin, The phonathan kicks off Today and we have hit 80% of goal for scholarship funds for students negatively impacted by COVID. Are you interested in contributing \$20 this year? Yes or No or Other amount

**Yes**

Excellent! Thank you for supporting our students and having an ongoing impact on students' ability to complete their courses! <<link>>

**No**

We totally understand! Is there anything that we can do to help you? As a reminder you have access to all of these free alumni services <<link>>

**Other Amount**

This is great to hear! What amount are you considering?

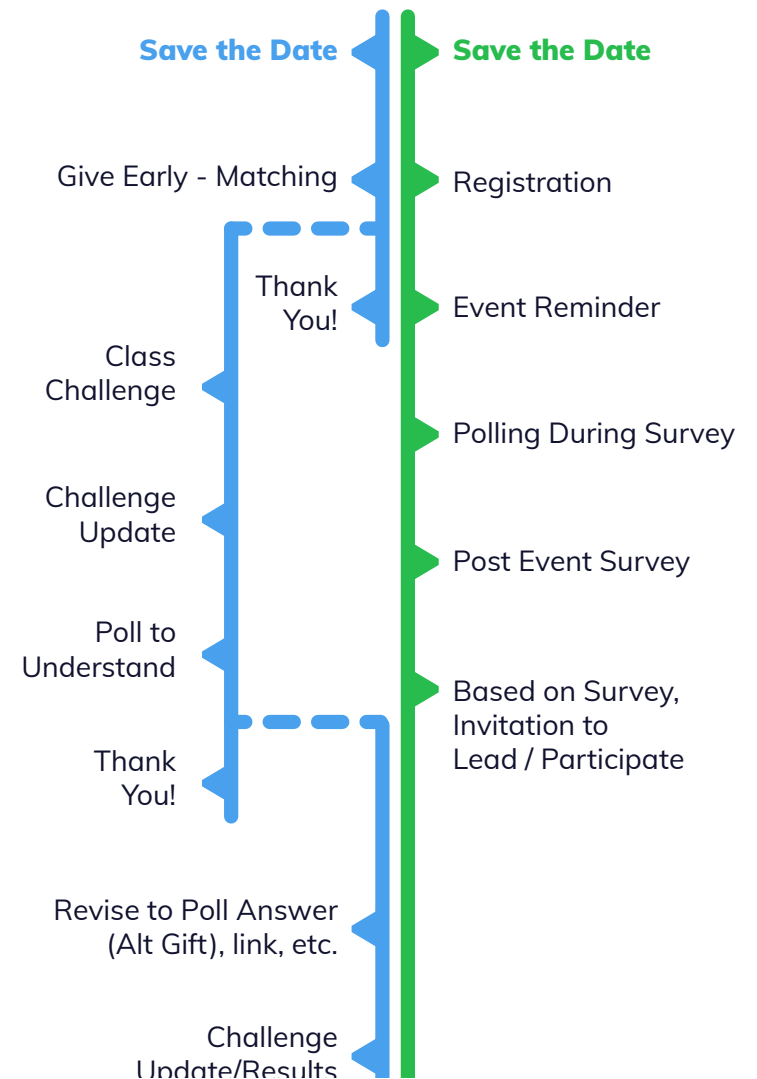
## INCREASE PARTICIPATION THROUGH GAMIFICATION

Gamification injects fun into fundraising. Even fairly inactive alumni may be drawn to peer competitions, and active alumni may increase engagement. You know your alumni best. What type of gamification will excite them? Who do they want to see—and be seen by? What will drive urgency? Simple ways to encourage giving through gamification include:

- Matching gifts that are triggered by a level of giving
- Class challenge competitions
- Unlocking donations by the number of contributors
- Creating urgency across time periods
- Leaderboards where individuals donate to their preferred segment
- Enabling individuals to share donation information on their social channels and giving them credit for bringing in additional donors based on their information sharing
- Access to a proud media opportunity – their name on the score board, at commencement, etc.

The best part of gamification? Celebrating all of the winners, not only on that day but in future publications, social posts, or on your website. This drives excitement and reinforces giving by closing the loop, demonstrating the value of those contributions to current students, faculty, programs, and the community at large.

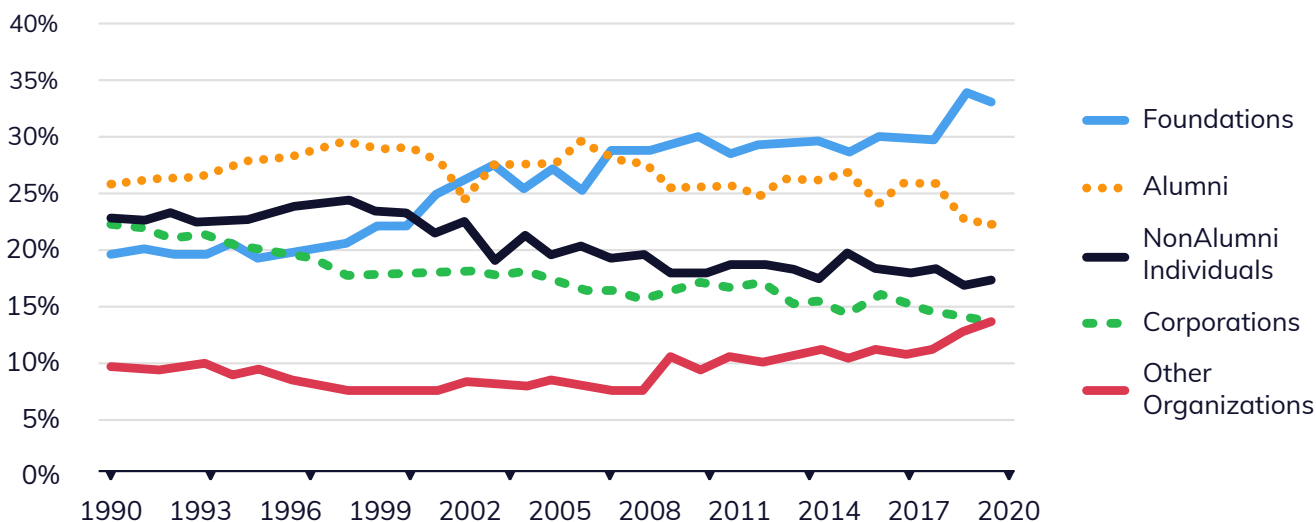
Consistency reinforces value, too. Consistency across the year is as important as consistency across campaigns. It helps alumni take action by offering them options to give when and how it is most convenient for them. Timely announcements, directions, guidance, and follow up help build value with alumni community. Sharing what you have heard from the community invites additional responses, leading to insights that can inspire new levels of engagement.



# ENGAGING OTHER FUNDERS

Alumni or advancement offices are much more than funnels for alumni giving. As the Voluntary Support of Education Survey highlights, most institutions need to engage friends, community members, business, and foundations to meet fundraising goals. The last twenty years of data bears this out. Expanding your texting strategy to engage others, especially those in the foundations and community members eases the communication to them and opens the opportunity for intentionally

**FIGURE 2: VOLUNTARY SUPPORT BY SOURCE AS A PERCENTAGE OF TOTAL VOLUNTARY SUPPORT, 1990-2020**



Texting is a strategy that enables the alumni office to pull together all of campus --- from admissions and career development to academic affairs and athletics – in a coordinated fashion benefits every leader, faculty, student, and alumni. In turn, a siloed approach to engaging with alumni will result in a net loss for every leader, faculty, student, and alumni. Easing the communication to alumni with thoughtful coordination makes it easier for alumni to contribute and participate in meaningful ways.

# ALUMNI TEXTING TIPS

- ✓ Begin the alumni journey prior to graduation
- ✓ Use your data to personalize invitations to participate and contribute
- ✓ Recognize previous participation and contributions
- ✓ Use a common channel to build habits of reciprocation
- ✓ Provide compelling examples and highlight the benefits of participation and contributions
- ✓ Encourage an exchange of information, pictures, and interests
- ✓ Create incentives for every alumni generation
- ✓ Leverage the flexibility of virtual events
- ✓ Use A/B testing to identify messages that resonate best
- ✓ Poll alumni to understand preferences and gauge engagement



## WHAT NOT TO DO

- Overgeneralize
- Be boring
- Only ask for money
- Rely on email and print

# SIGNAL VINE'S RESOURCES FOR SUCCESS

Our Alumni Texting Engagement Framework helps deploy texting across the entire alumni ecosystem to optimize engagement. What works for events may not work for giving—and that is OK. The framework differentiates needs and use cases for new alumni versus seasoned alumni while appreciating the limitations of staff time and resources.



## HIGHER ED ALUMNI TEXTING ENGAGEMENT FRAMEWORK

Signal Vine's robust texting platform enables institutions to proactively support students across college access, enrollment, retention, and alumni development. Institutions have many ways to use the Signal Vine platform to engage with alumni to support their experiences while meeting institutional goals. This framework's goal is to provide users with a structure in which to help institutions design for engagement - for both alumni and staff.

	Stage 1 Point Engagement	Stage 2 Unit Engagement	Stage 3 Targeted Engagement	Stage 4 Guided Engagement	Stage 5 Holistic Engagement
Use Case	Single action (e.g. donate, register)	Functional goals (alumni development, stewardship, and giving)	Institutional goals (alumni development, stewardship, and giving)	Student/Alumni/Family experience	Student/Alumni/Family experience
Sender	Single function	Single department	Unit	Enterprise	System
Workflow	1:1 texting	Texting occurs for major events/activities	Texting a component of workflow	Texting critical to relationship development	Texting modified to help address workflow issues
Users	Front line doesn't use; single owner manages	Restricted use across department	Users across institution	Users coordinated across the institution	Users coordinated across the institution with strategic leadership engagement
Integration	File upload	Automated import	Automated import/export	Integrated into business processes for timely data enabling responsiveness	Integrated with multiple systems or in native environment
Audience Segmentation (data)	True/false	Limited segmentation	Segmentation by unit	Segmentation by desired outcome	Conditional, pre-scheduled, how fine-grained
Personalization (Content); Depends on the Audience	Merge fields	Build characteristics considered within a department	Build across departments	Build considering full student experience	Build based on desired student activity
Data Analysis	Ad hoc	Semester review	Monthly review	Weekly review by department, monthly by leadership	Reviewed and analyzed by institutional effectiveness
Data	Review basic metrics	Using metrics to eliminate negatives	Using metrics to increase positives	Using metrics to optimize utilization	Using metrics to optimize effectiveness
Communication Plan	Ad hoc	Basic plan within department of email and text	Plan across unit of email and text	Institutional plan of email and text through the audience lens	Systemized plan
Scope of Impact	<b>Alumni:</b> Novel guidance for one of many activities <b>Staff:</b> Reduced level of effort to send out Quick Messages	<b>Alumni:</b> Guidance and support through one element of the alumni experience <b>Staff:</b> Improved ability to segment and modify based on alumni feedback	<b>Alumni:</b> Expectation of texting uniform across multiple campus activities <b>Staff:</b> Smooth intra-unit communication deployment and work planning	<b>Alumni:</b> Utilizes texting from graduation through legacy status <b>Staff:</b> Coordinated alumni journey mapping resulting in immediate insights into alumni needs and challenges	<b>Alumni:</b> Utilizes texting from graduation through legacy status across multiple institutions <b>Staff:</b> Coordinated alumni journey mapping resulting in simplifying the alumni-facing opportunities



Signal Vine is the leading higher education AI messaging platform transforming how you reach, support, and engage students throughout their life cycle. With more than 50 million student interactions, Signal Vine's Blended Messaging® personalizes engagement using AI, workflow automation, and one-to-one messaging to keep students on the path to success. Signal Vine has been improving enrollment and retention outcomes with a proactive approach across the entire campus and student life cycle.

The company partners with more than 550 higher education institutions, including college access programs, community colleges, public and private four-years, and alumni programs.

*Reach the right students with the right information at the right time.*

For more information, visit

[signalvine.com](https://signalvine.com)

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