




CASE Institute for Senior Alumni Relations Professionals
AAS Report on Segmentation
April, 2008

 INSTITUTE FOR
**Senior
Alumni Relations
Professionals**

Why Generation is “Old School”

April, 2008


Presented by:


 

The slides in this handout are part of a more complete and comprehensive oral presentation. For an in-depth understanding of the information provided herein, you should view these slides in combination with that presentation.

Why Segmentation Matters

- Communications to Alumni
 - Magazine
 - Web
 - Email
 - Direct Mail
- Targeted Programs for different interests
- Annual Fund Message (Nurture and Ask pieces)
- Membership Message (Nurture and Ask pieces)
- Internal coordination for Alumni Relations

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Alumni Attitude Study[©]

- **Cooperative development of the instrument**
 - ✓ *Greater need for feedback versus pricing and staff involvement issues to do one-up research*
 - ✓ *85% remains the same from original instrument*
 - ✓ *Custom-designed instruments have some comparable questions*
- **Random sampling reflective of institution demographic makeup (some sent to 100%)**
- **Over 100 colleges and universities have participated – results from over 130,000 alumni**
(average response rate of 15% to 20%)
- **A branded survey was emailed to each individual with a link to a secure site for survey completion**



Alumni Attitude Study[©] Founding Institutions

Baylor	Lehigh University
University of Georgia	University of Michigan
Iowa State University	University of Nebraska
Indiana University	Northwestern
Kansas State University	Oklahoma State
	SUNY Buffalo



Alumni Attitude Study[©] Segmentation

Internally Generated

- Gender
- Ethnicity
- Giving Status
- Degree Type
- Membership Status
- Age
- Graduation Year
- Activities as Student

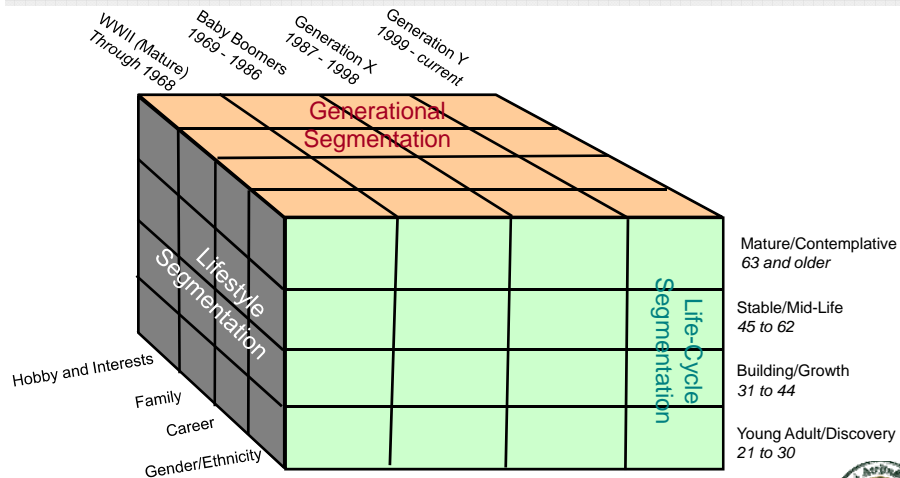
Optionally Provided by Institution

- College
- Giving level
- Campus
- Actual Degree
- Giving Program Involved
- Alumni Activities
- Volunteering Status
- Major

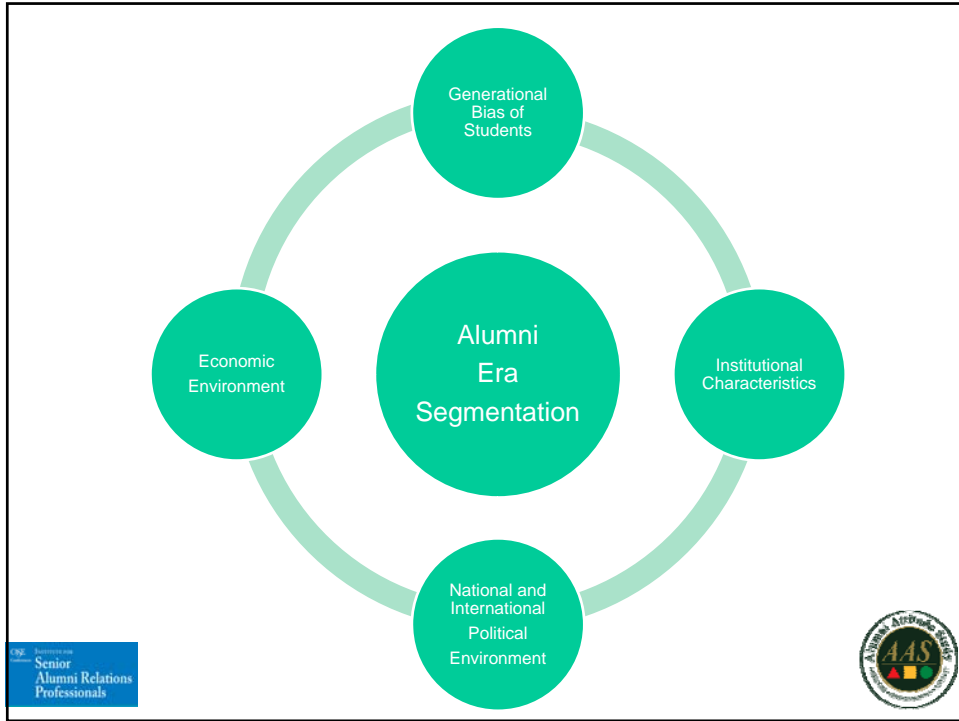


Initial Alumni Segmentation Model[©]

It is important to consider generational, stage of life, and lifestyle market segmentation.



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Segmentation Based on Graduation Year

Decade	1960	1970	1980	1990	2000	
	Pre 1960	1960's	1970's	1980's	1990's	2000's
Generation	Mature		Baby Boomer		Gen X	Gen Y
Current Era Structure	Post WWII	Woodstock /Vietnam	Post – Watergate	Yuppie/End of Cold War	Dot-Com	Post 911
Revised Era (Under Consideration)	Post WWII	Woodstock/ Vietnam	Yuppie/End of Cold War	Dot-Com	Post 911	


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Post WWII <i>Grad up to 1963</i>	Woodstock/Vietnam <i>Grad 1964 - 1973</i>	Post Watergate <i>Grad 1974 - 1980</i>
<ul style="list-style-type: none"> • Few affinity groups during college days • College as path to job • Marry young and start family early • Work hard and save • Survived the war and depression • Conservative and dressy while in school • Patriotic • Respect for authority 	<ul style="list-style-type: none"> • Question Authority • Cause oriented • Grew up under threat of nuclear war • Personal Gratification • 1968 – RFK and MLK Assassinated • 1969 – First Lunar Landing • Kent state Shootings • Liberal Arts is the action spot on campus • Hesse and Cummings are national heroes 	<ul style="list-style-type: none"> • Need to be different from older brothers and sisters • Lack of trust in leaders • Watched the cold war ending • Energy crisis • Layoffs • Three Mile Island • Jonestown • Iran hostage crisis




Slide 9



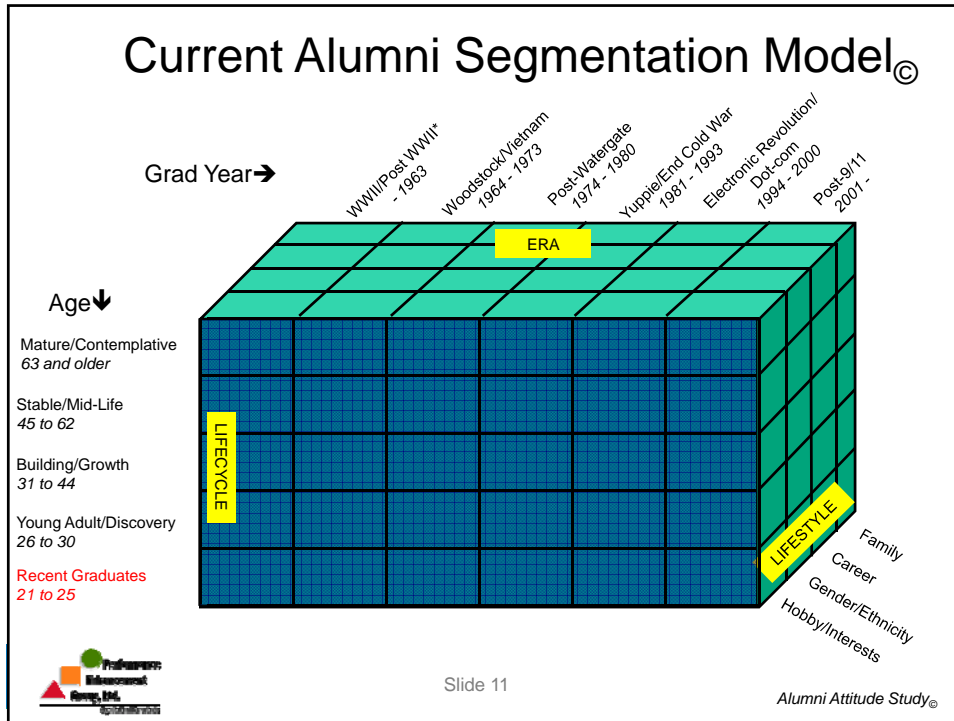
Yuppie/End of Cold War <i>Grad 1981 - 1993</i>	Electronic Revolution/ Dot-Com <i>Grad 1994 - 2000</i>	Post 911/Post Dot-Com <i>Grad 2001 -</i>
<ul style="list-style-type: none"> • Business is in and the MBA rules on campus • Fall of Berlin Wall (1989) • Operation Desert Storm (1992) – War is easy • John Lennon shot (1980) • Love trendy stuff – Designer XXX • Cold war is ending opening up opportunities for new markets as it ends • Optimistic • Revitalized national pride 	<ul style="list-style-type: none"> • IT and Computer Science are hot spot on campus • Its not about the degree • New Economy • Spend the peace dividend • Rewriting economic models of – supply, demand, and scarce resources don't really impact growth • Anything is possible through the internet • Geeks Rule 	<ul style="list-style-type: none"> • The economic party is over and many of the hero's of it are going to jail • The world is no longer considered a safe place • Degree's matter for scarce job market flooded by laid-off Dot-comers • Friends at war and getting shot/wounded • Country is brought together then extremely polarized • Country cannot even pull off an election without lawsuits and the courts • Clinton and Bush dynasties



Slide 10



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The Alumni Attitude Study[©] Questionnaire

- Structure of Survey
 - *Student experience*
 - *Overall experience*
 - *Alumni experience*
 - *Demographics*
- Categories of Analysis
 - *Loyalty*
 - *Communication*
 - *Programs*
 - *Giving*
 - *Branding on Campus*



Student Experience Questions

- **Student participation**
- **Importance/performance – student experience**
 - Academics / classes
 - Attending athletic events
 - Exposure to new things . . .
- **Qualitative responses**
 - Name and discuss one person who had a special impact on you as a student
 - Name and discuss one program which had a special impact on you as a student



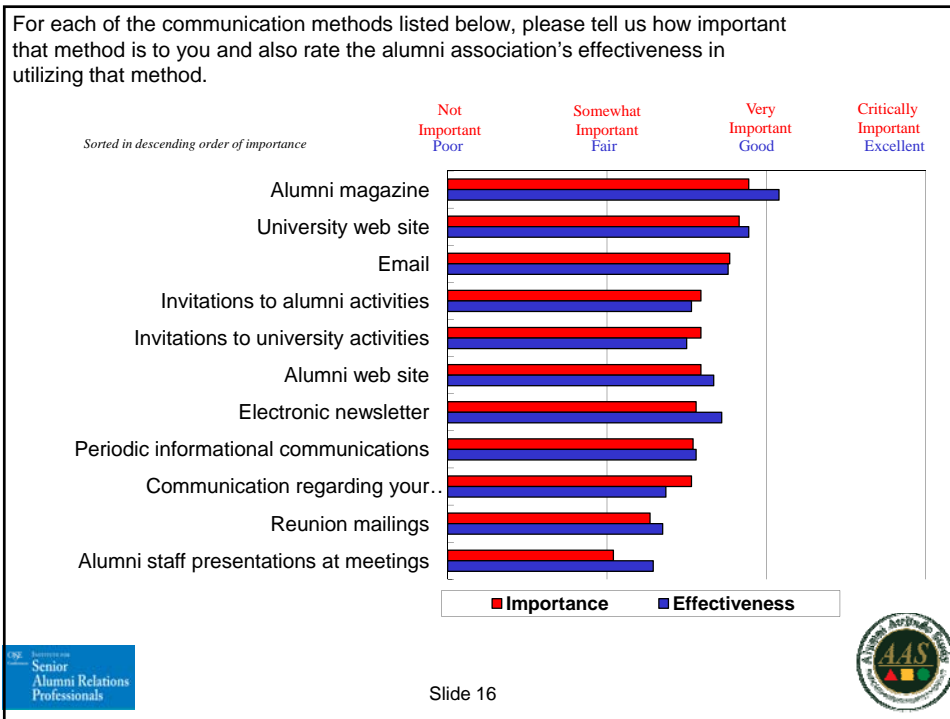
Alumnus/a Experience Questions

- **Willingness to financially support the school**
- **Importance/Performance - Communications**
 - Web site (both alumni and university)
 - Communications regarding services and benefits
 - Alumni magazine . . .
- **How often do you do things:**
 - Attend events
 - Read Alumni magazine
 - Visit school web site
- **What impacts your opinion of the university**
 - Value and respect for degree
 - Accomplishments of each – students, alumni, and/or faculty
 - Success of athletic teams
- **Barriers to participation**
- **Qualitative questions:**
 - What is most important to you about being an alumnus/a
 - What is the most meaningful thing the association can do for you in the next 5-10 years

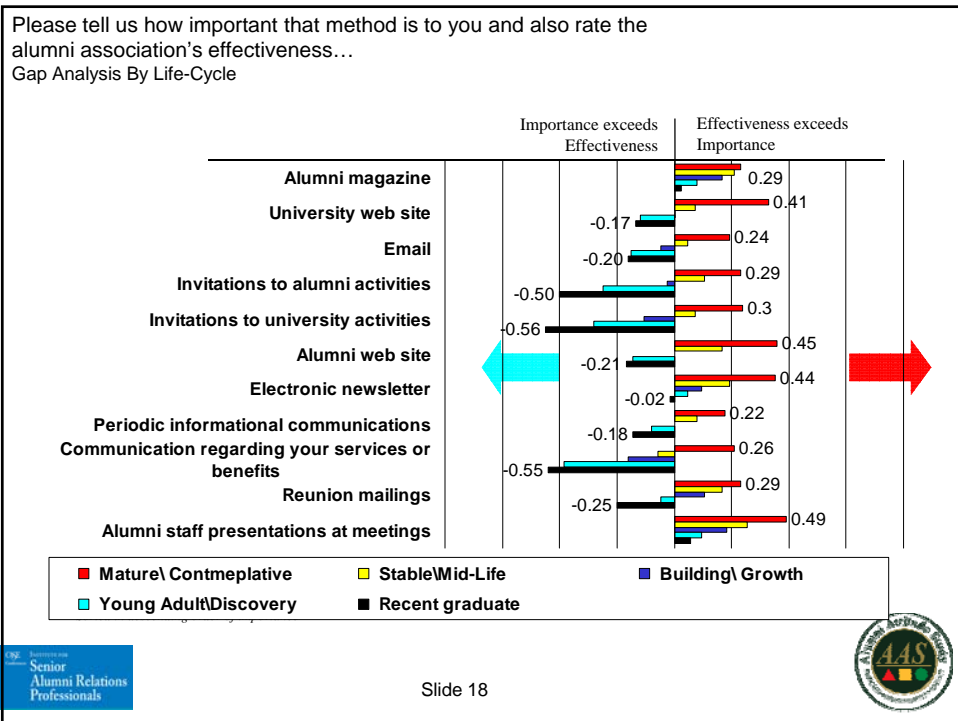
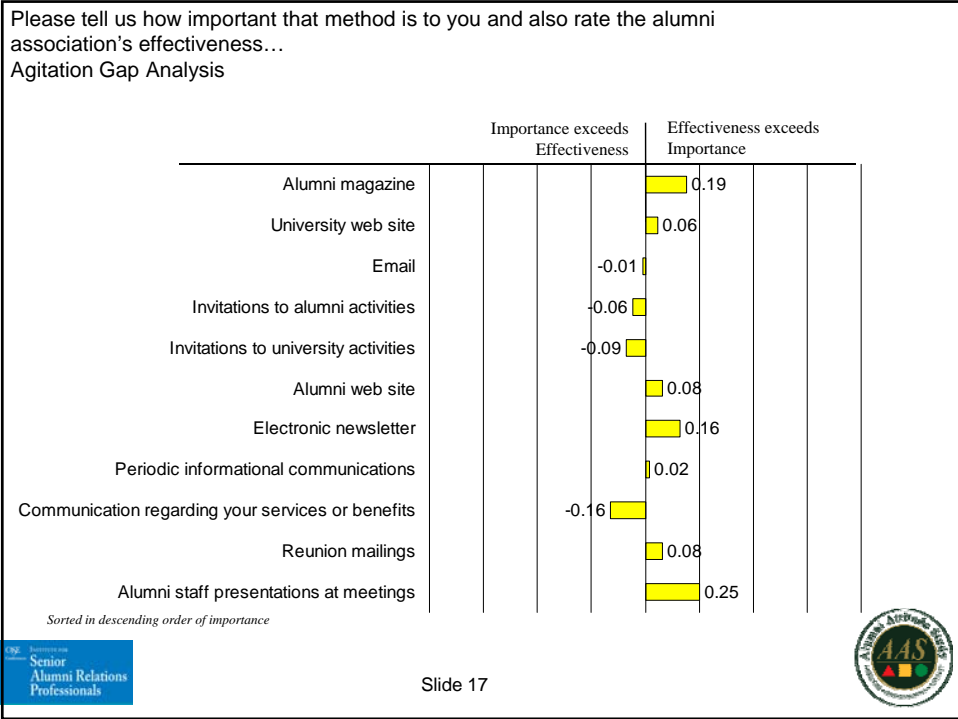


Loyalty and Overall Experience Questions

- **Loyalty**
- **How well did degree prepare you for:**
 - Current work status
 - Responding to new career opportunities
 - Contributing to community . . .
- **Importance/level of school support – alumni activities**
 - Mentoring
 - Identifying job opportunities for graduates
 - Recruiting students . . .

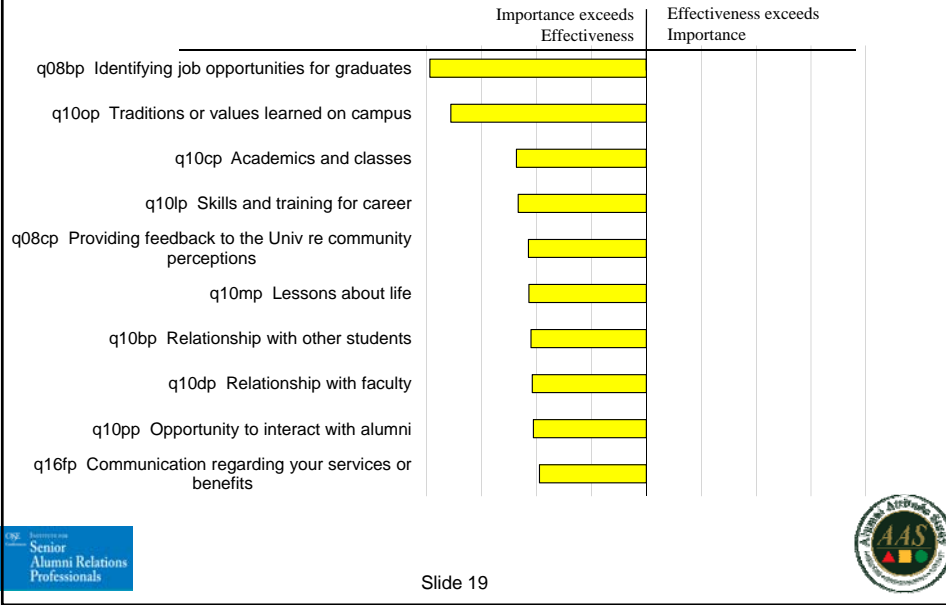


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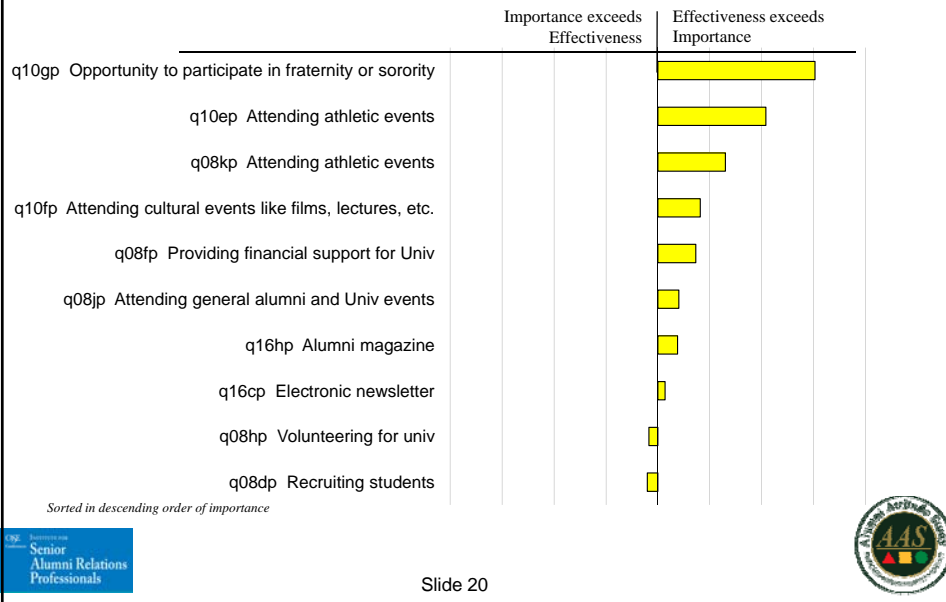


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Post 9/11: Highest Overall Agitation

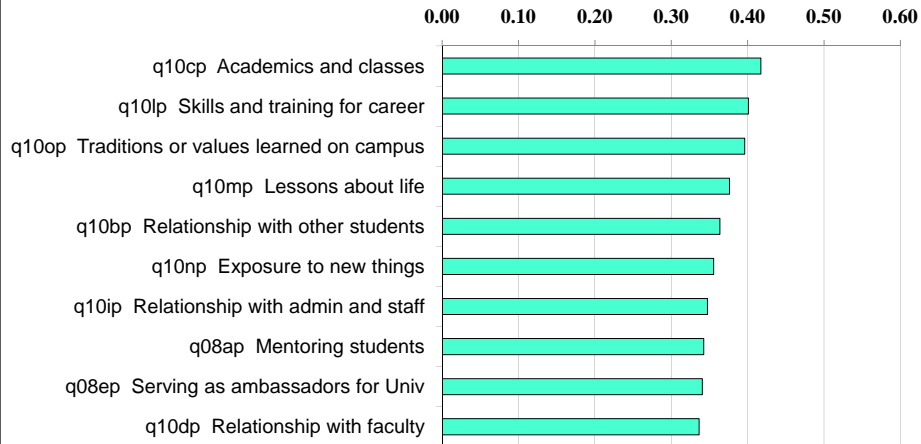


Post 9/11: Highest Overall Satisfaction



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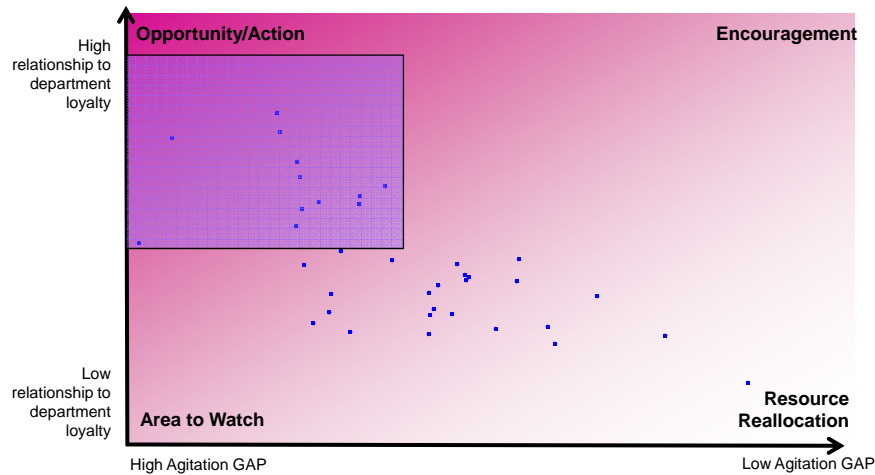
Correlation to Loyalty in Post 9/11



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Action/High Impact Opportunity Matrix Post 9/11 – Post Dot-Com



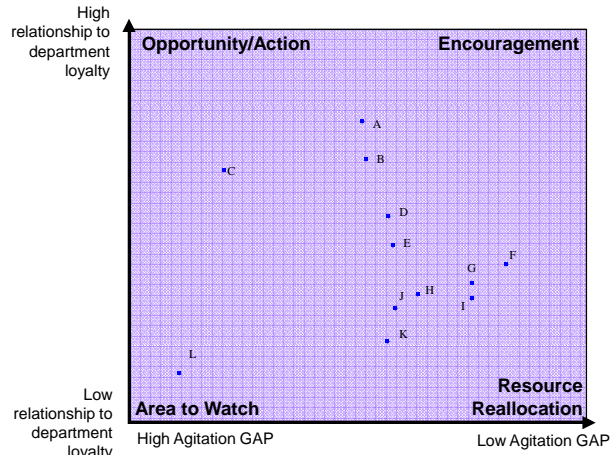
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Action/High Impact Opportunity Matrix Post 9/11 – Post Dot-Com

- A q10cp Academics and classes
- B q10lp Skills and training for career
- C q10op Traditions or values learned on campus
- D q10mp Lessons about life
- E q10bp Relationship with other students
- F q10np Exposure to new things
- G q10ip Relationship with admin and staff
- H q08ap Mentoring students
- I q08ep Serving as ambassadors for University
- J q10dp Relationship with faculty
- K q08cp Providing feedback to the University regarding community perceptions
- L q08bp Identifying job opportunities for graduates

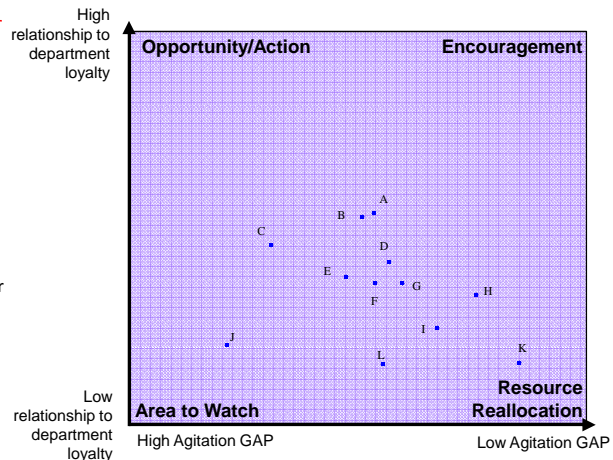


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Action/High Impact Opportunity Matrix Dot-Com

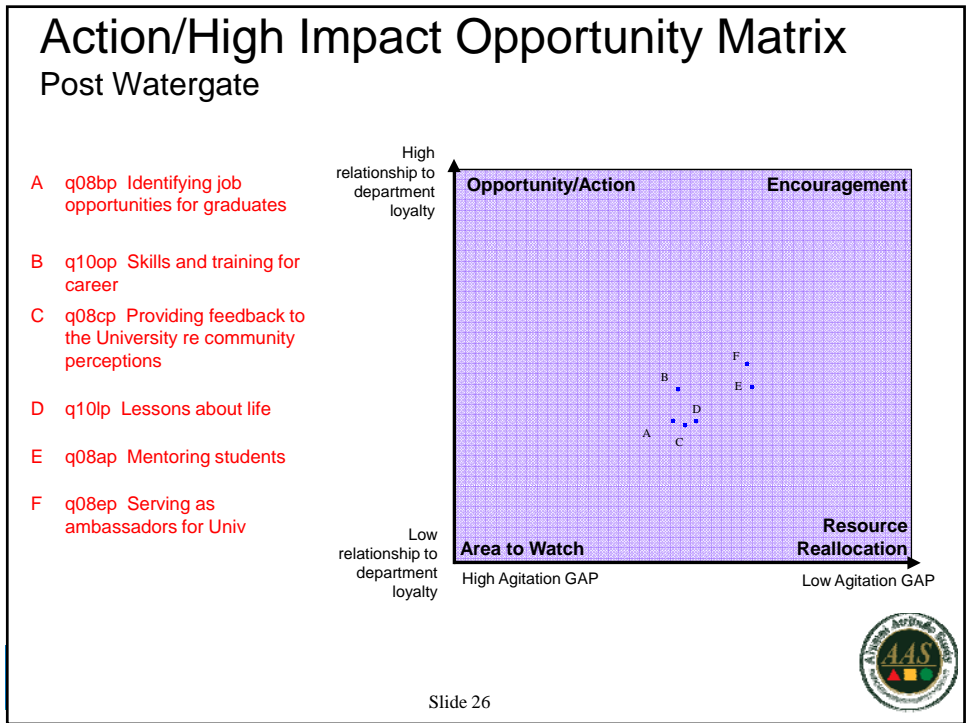
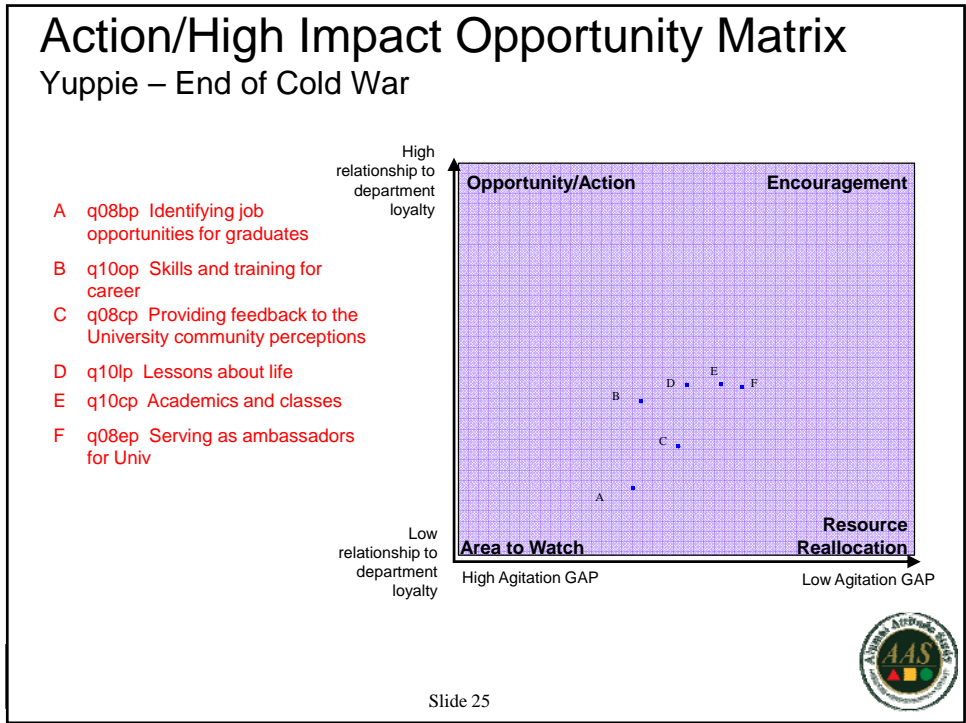
- A q10cp Academics and classes
- B q10lp Skills and training for career
- C q10op Traditions or values learned on campus
- D q10mp Lessons about life
- E q08cp Providing feedback to the University regarding community perceptions
- F q08ap Mentoring students
- G q08ep Serving as ambassadors for University
- H q10np Exposure to new things
- I q08gp Networking with other alumni
- J q08bp Identifying job opportunities for graduates
- K q08dp Recruiting students
- L q10pp Opportunity to interact with alumni



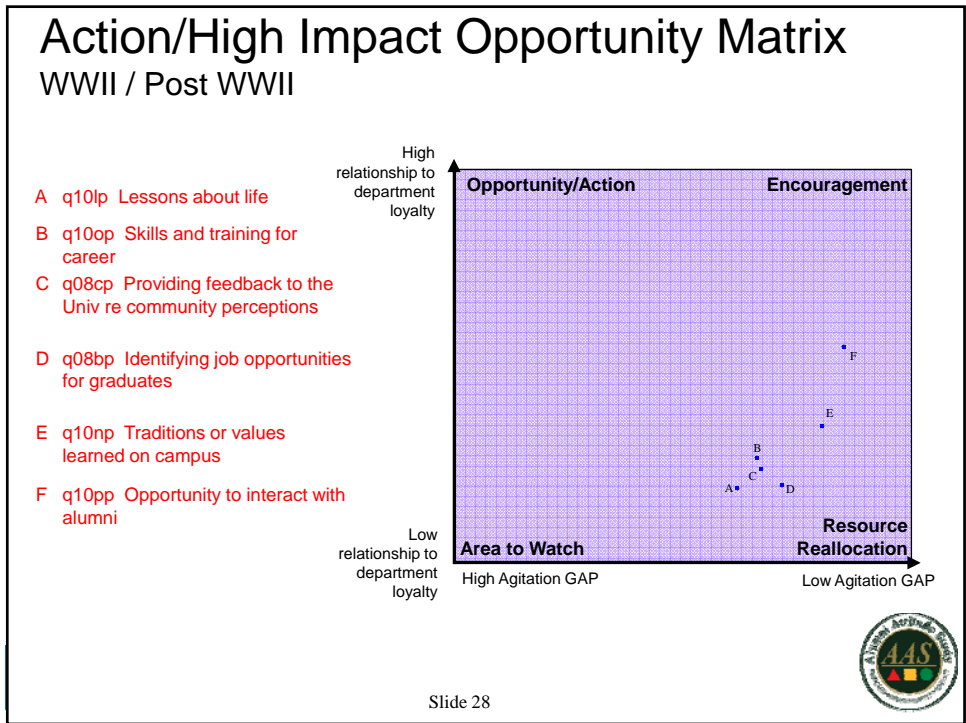
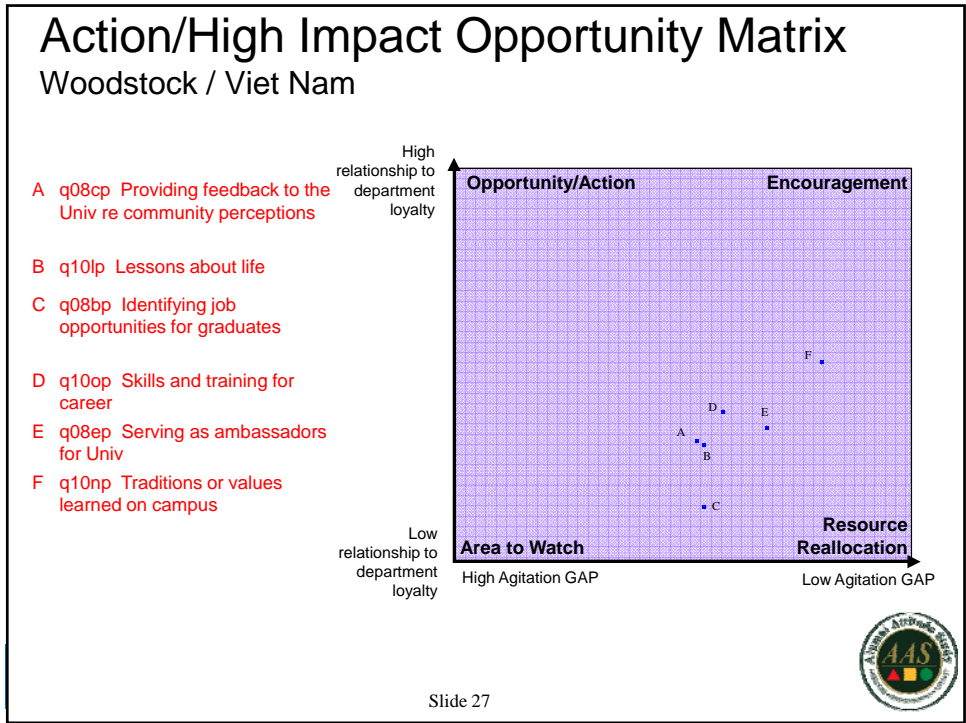
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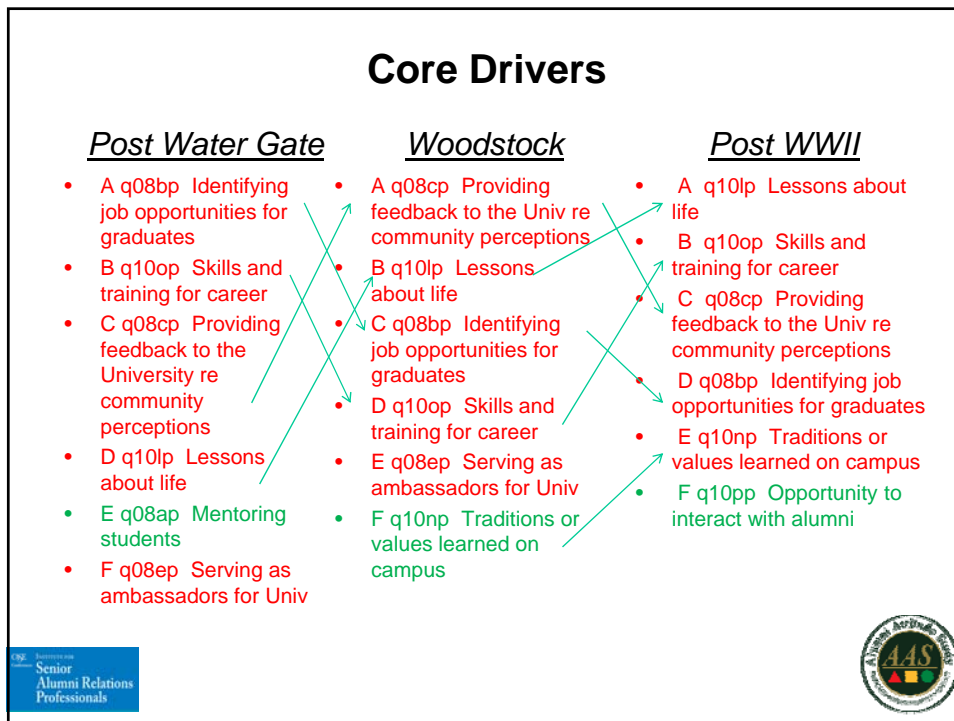
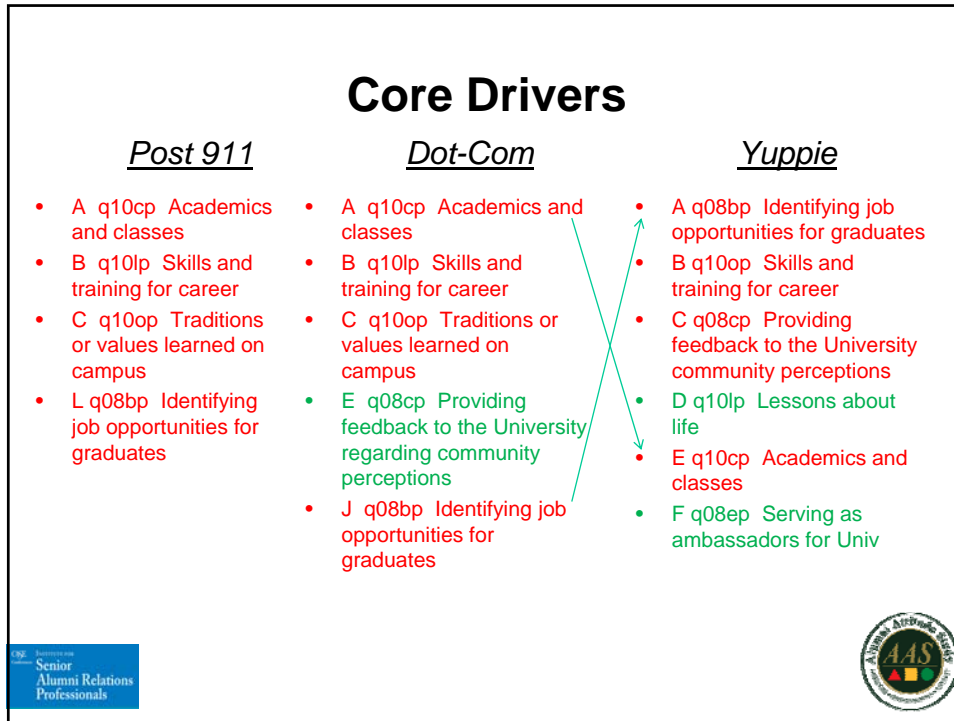
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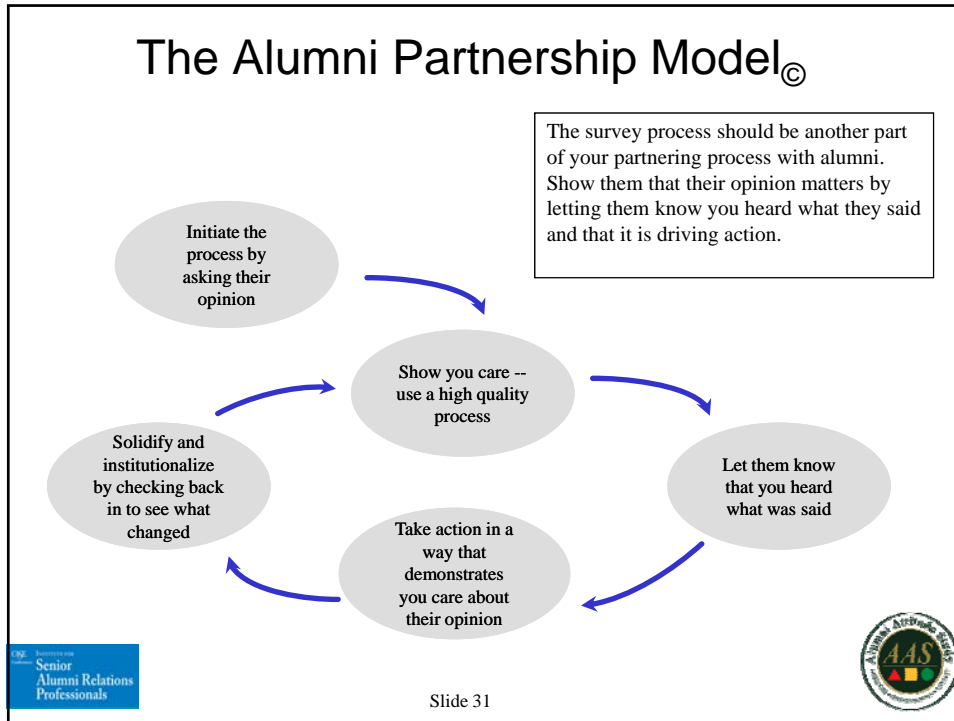


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More Information

CASE Currents articles

- 2007 October Page 40
Dues and Don'ts
To charge dues or not, that is the alumni association's question
- 2005 March Page 54
CONVERSATION PIECE
Alumni surveys provide helpful data—and encourage communication between alumni and alma mater
- 2004 May/June Page 18
The Ones to Watch
With their large numbers and economic influence baby boomers shape alumni programs to their tastes

Upcoming presentations

- [CASE District III Conference](#) February 17 – 20, 2008 – Atlanta, MA
- [CASE District IV Conference](#) April 5 – 9, 2008 – Little Rock, AR
- [CASE Senior Alumni Relations Professionals](#) April 16 – 18, 2008 - St. Pete Beach, FL
- [Past Participant Workshop](#) January, 2008 - Teleconference

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