

**CASE Institute for Alumni Relations Professionals**  
**Impact of a Dues-Paying Alumni Association**  
**April, 2008**

CASE INSTITUTE FOR  
Conferences Senior  
Alumni Relations  
Professionals

Selected findings from  
a survey of Advancement Professionals on:

***The Impact of Association Status***  
***(Dues Paying or Non-Dues Paying Association)***  
***on Alumni Giving and Engagement***

April, 2008

An Alumni Attitude Study® Research Project

Presented by:



Additional findings are scheduled for the October 2007 issue of CASE *Currents*. For an in-depth understanding of the issues highlighted herein, contact Rob Shoss at 866-471-8600 or [rshoss@peg ltd.com](mailto:rshoss@peg ltd.com).

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***The Perceived Impact of Association Status***  
***on Alumni Giving and Participation:***

*A Survey of Development, Communication and Alumni Professionals*

**Background:** As part of the *Alumni Attitude Study's* ongoing research, an effort was undertaken to better understand the perceptions of advancement professionals regarding the potential impact of alumni association status, defined as either a dues paying or non dues paying association, on the overall university-alumnus/a relationship.

**Purpose:** The survey was designed to identify and compare perceptions regarding the relative ability of the two types of associations (dues paying and non dues paying) to support alumni involvement, giving and programs. Respondents were also asked to identify which universities exemplified "best practices" among dues-paying and non-dues-paying institutions.

**Scope:** Survey recipients included development, communication and alumni relations professionals at universities and alumni associations and was designed to measure and compare their perception of "Importance" and "Performance" across a range of issues. Results are segmented in a number of ways, including by institution size, public/private, association status, and advancement function.

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Slide 1



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192 Introduction  
Senior Alumni Relations Professionals

### Distribution and Response Rate

- 3,566 surveys distributed
- 483 returned email (bad addresses)
- 3,083 presumed delivered
- 540 responses
- 17.52% response rate

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### Who Responded

- 433 schools and organizations participated
- 48 States and five Canadian provinces represented
- 37% were private and 63% were public
- 57% did not have a dues paying alumni association and 43% did

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Size of Responding Institutions

- 32% had less than 5,000 students (small)
- 23% had between 5,000 and 10,000 (medium)
- 45% had more than 10,000 (large)

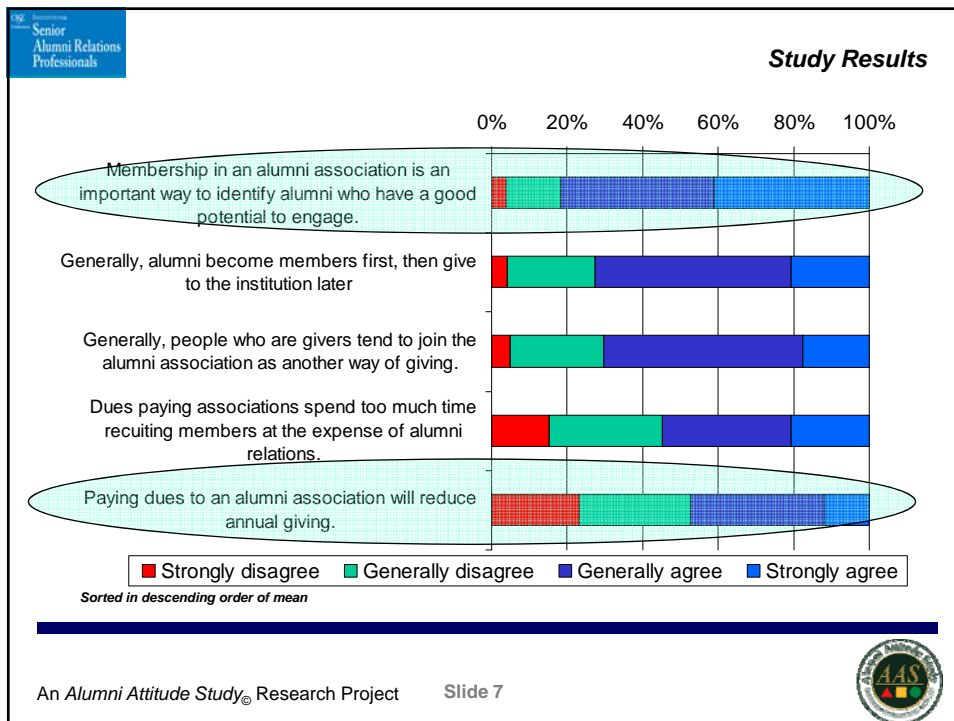
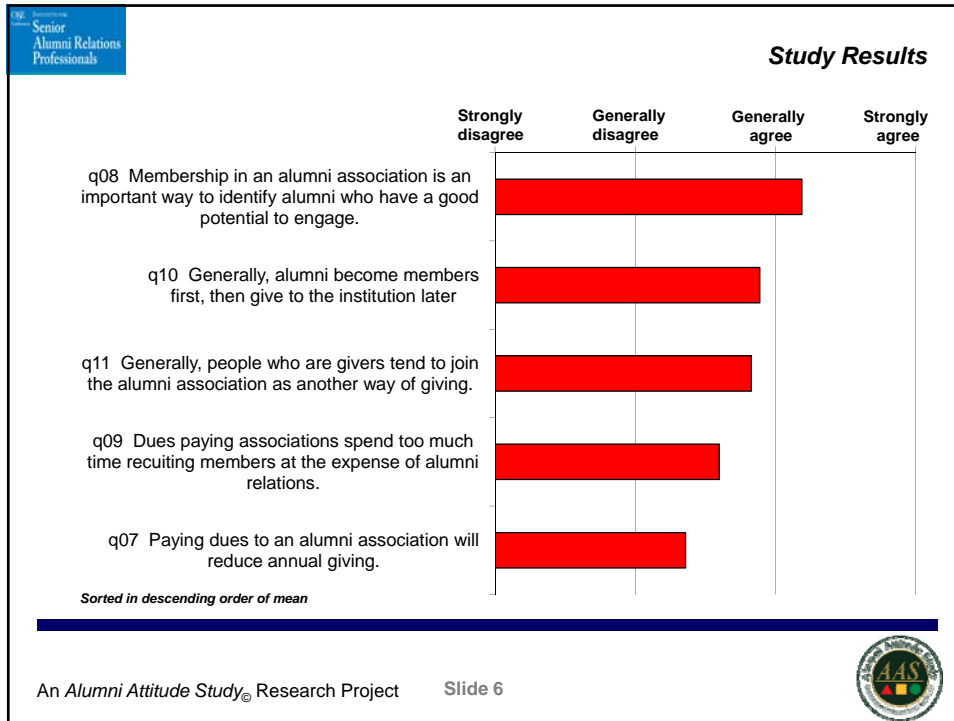


Overall Findings and thoughts from the study

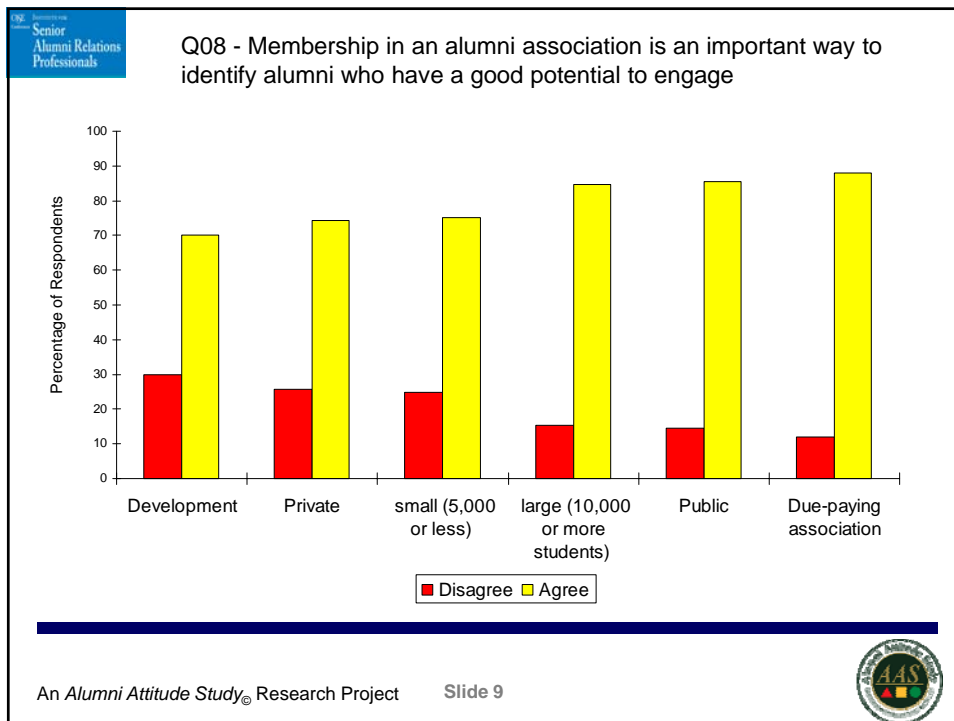
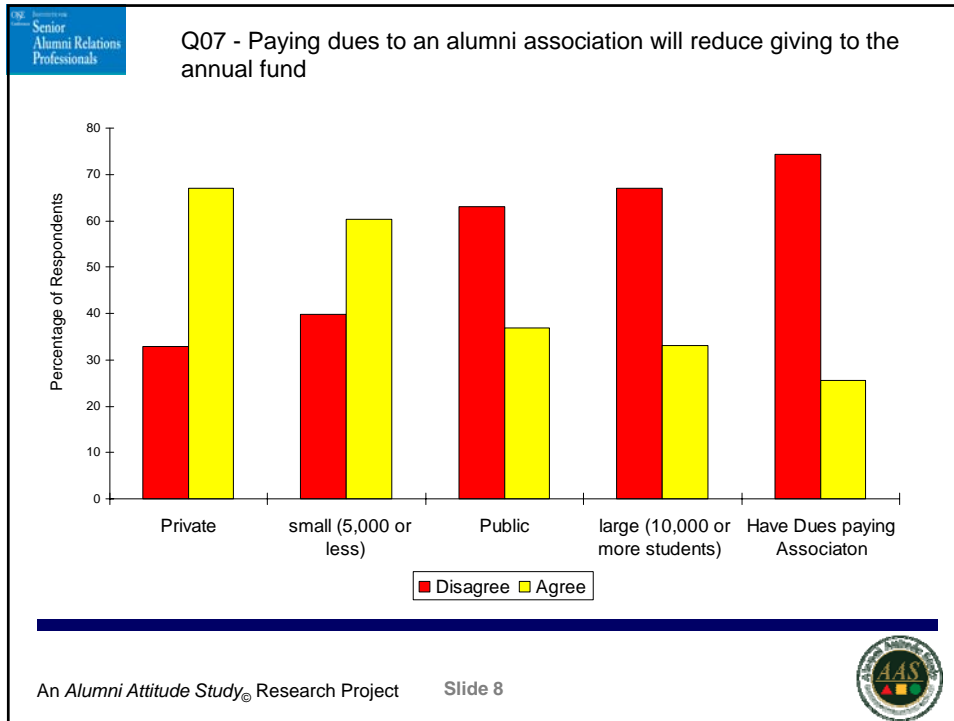
- Plenty of research suggesting that dues does not adversely affect annual fund in established programs
- New programs have varying levels of success possibly driven by motivation for initiating a program
- No question that a membership program can act as a very effective way to get alumni to begin a process of giving
- Type of institution may drive decision (i.e. Public/Private)
- Giving away memberships does not work well
- Younger alumni are attracted by tangible (stuff) benefits more than older alumni
- More Institutions change back and forth than expected



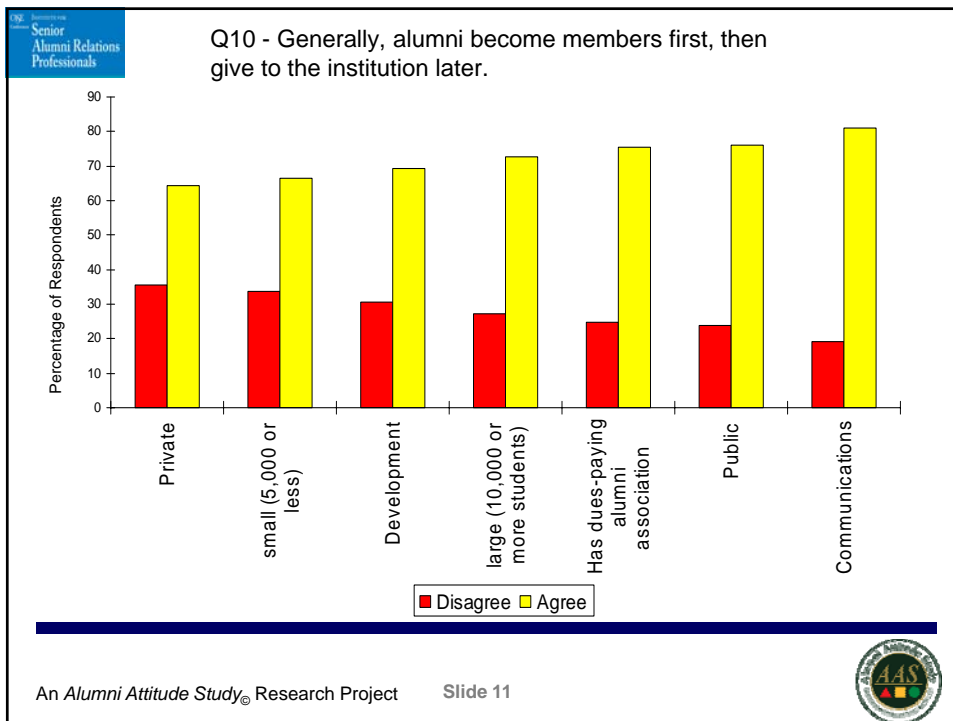
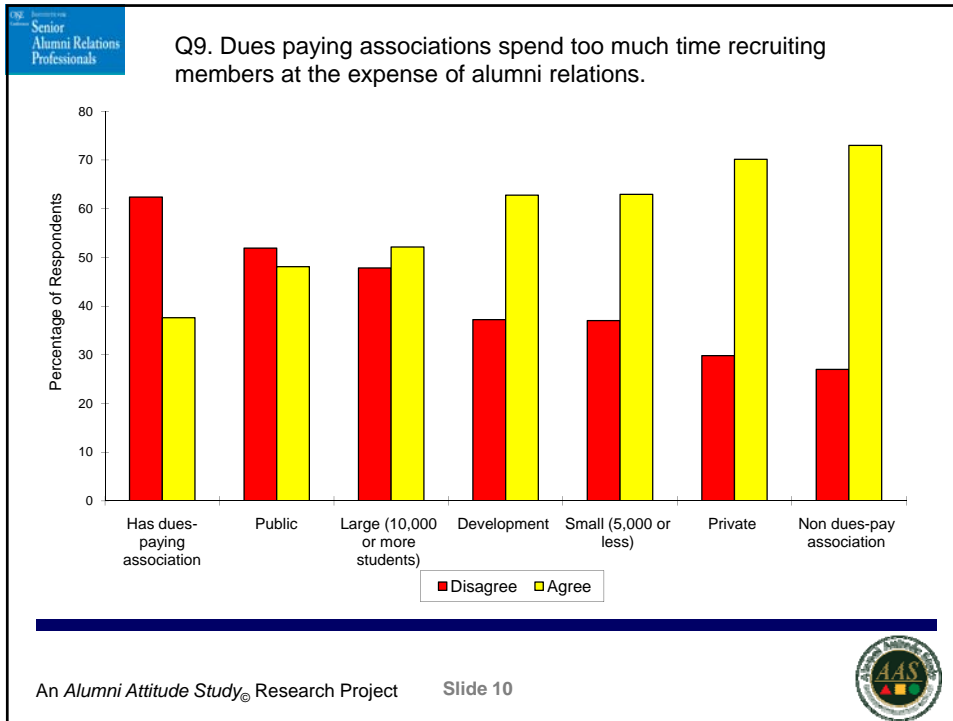
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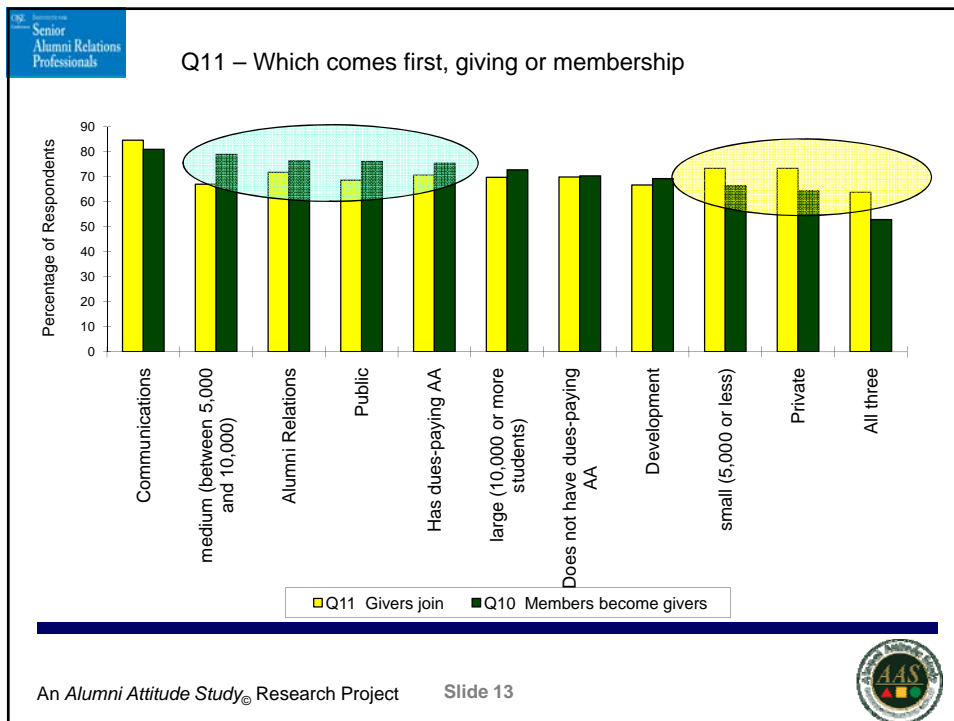
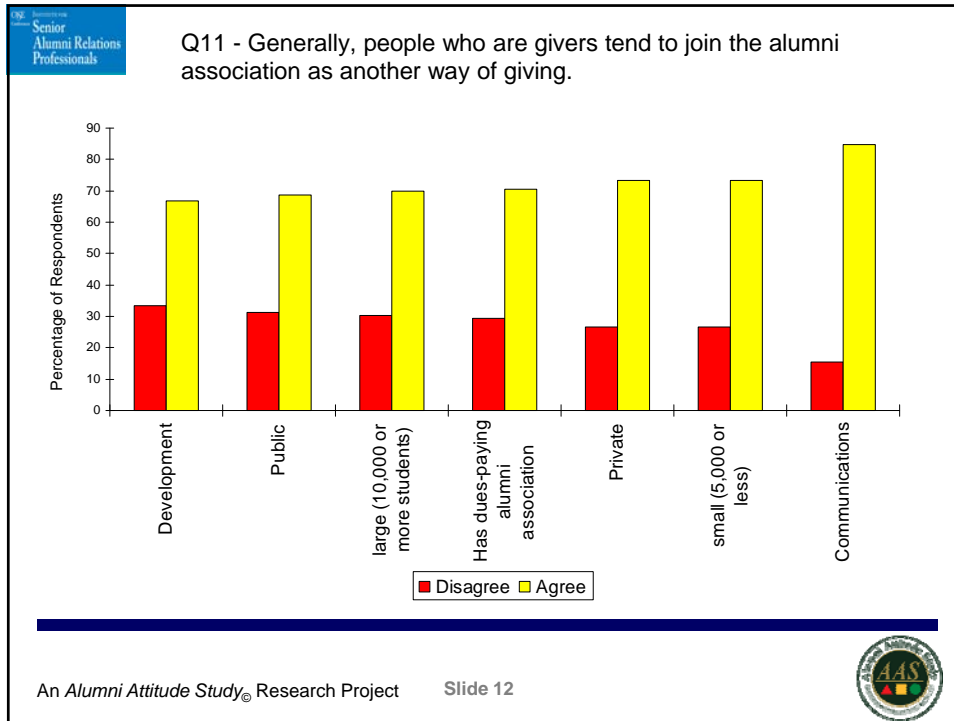
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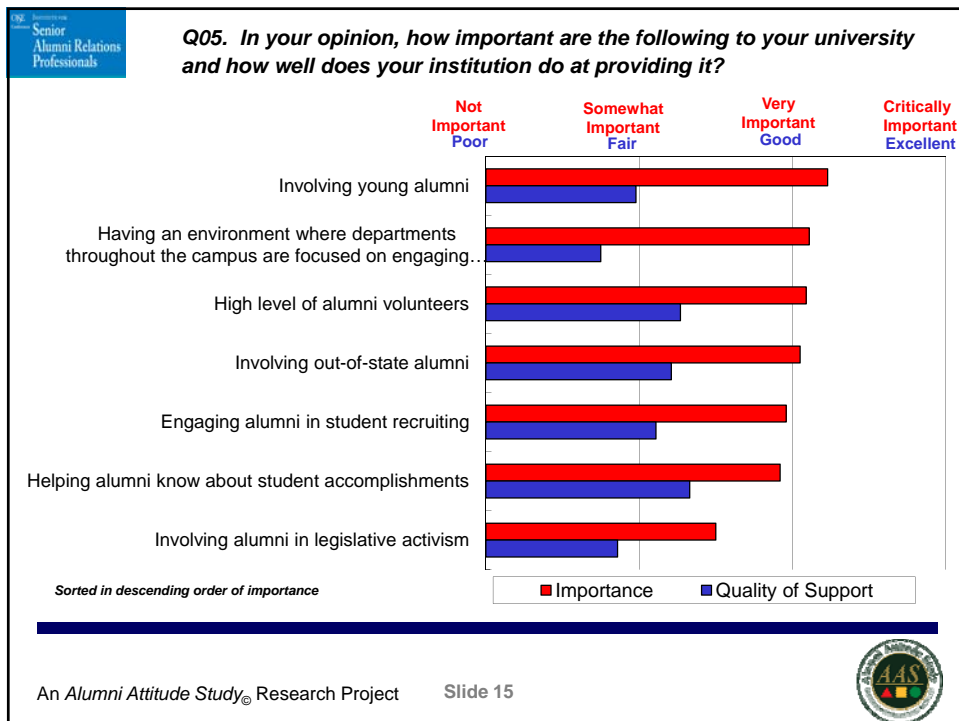
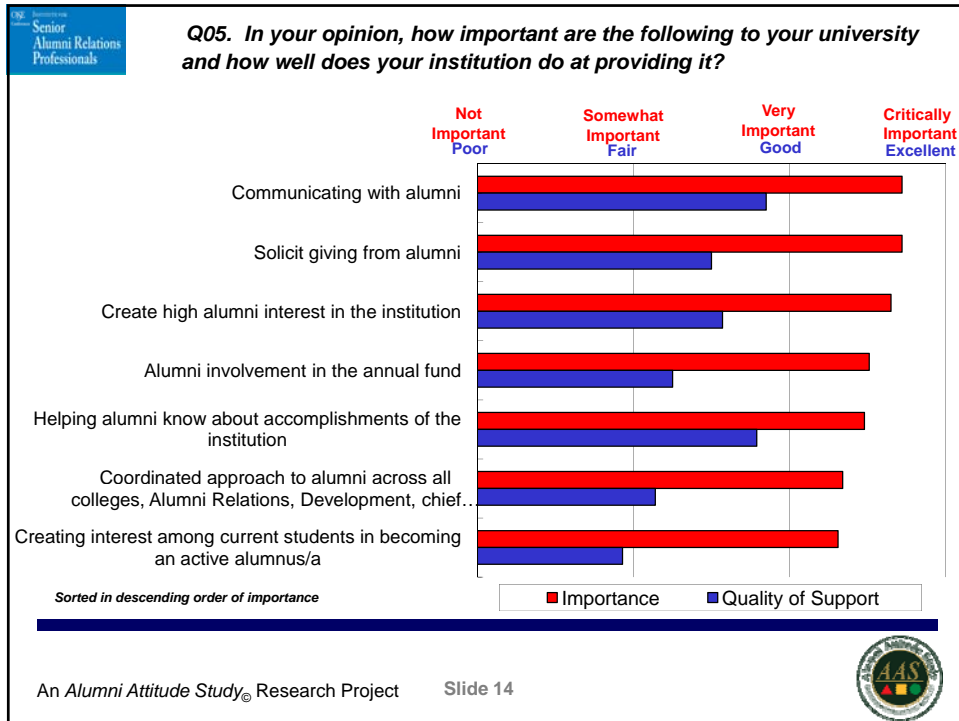
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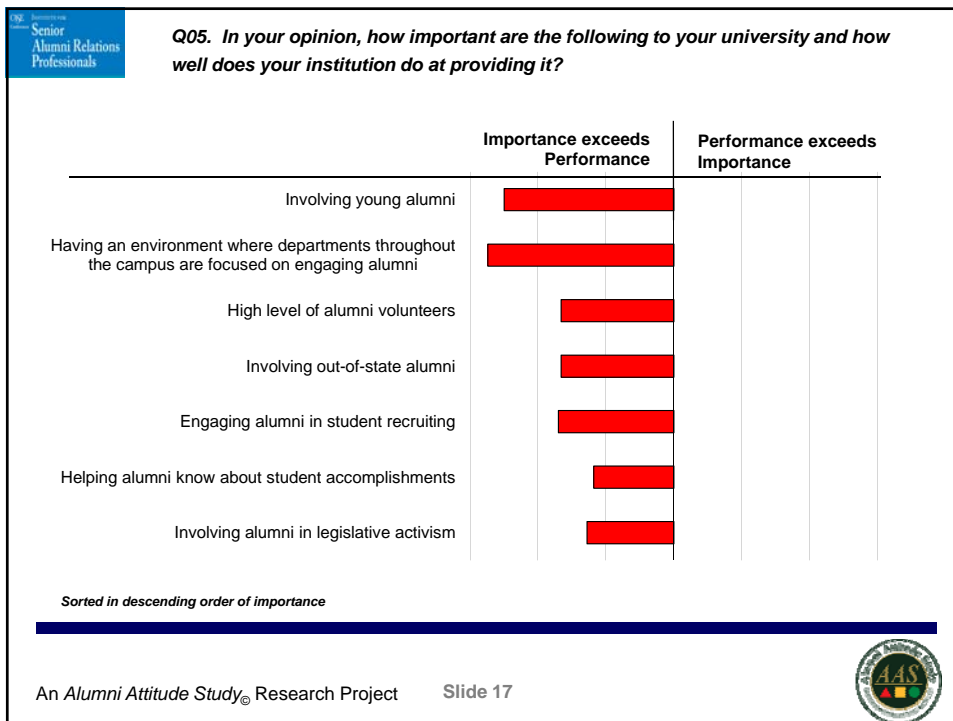
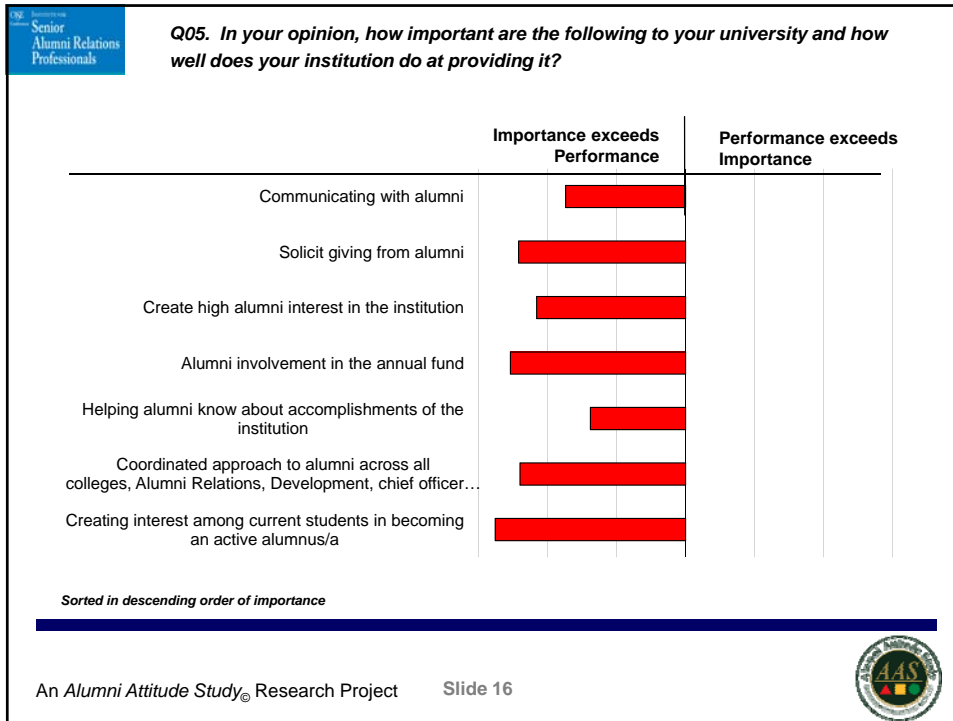
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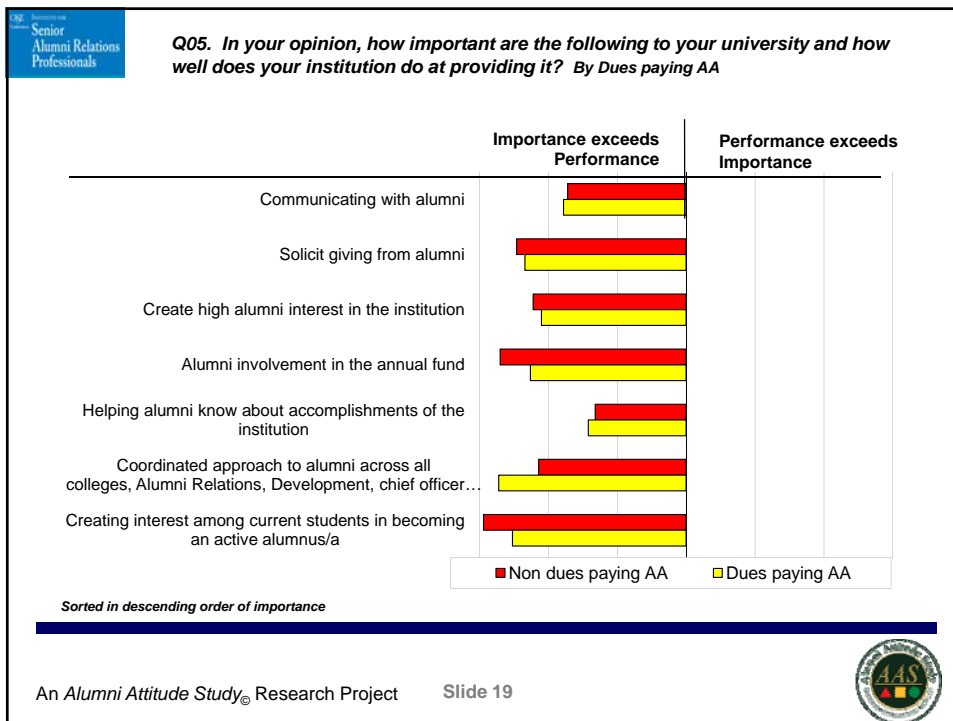
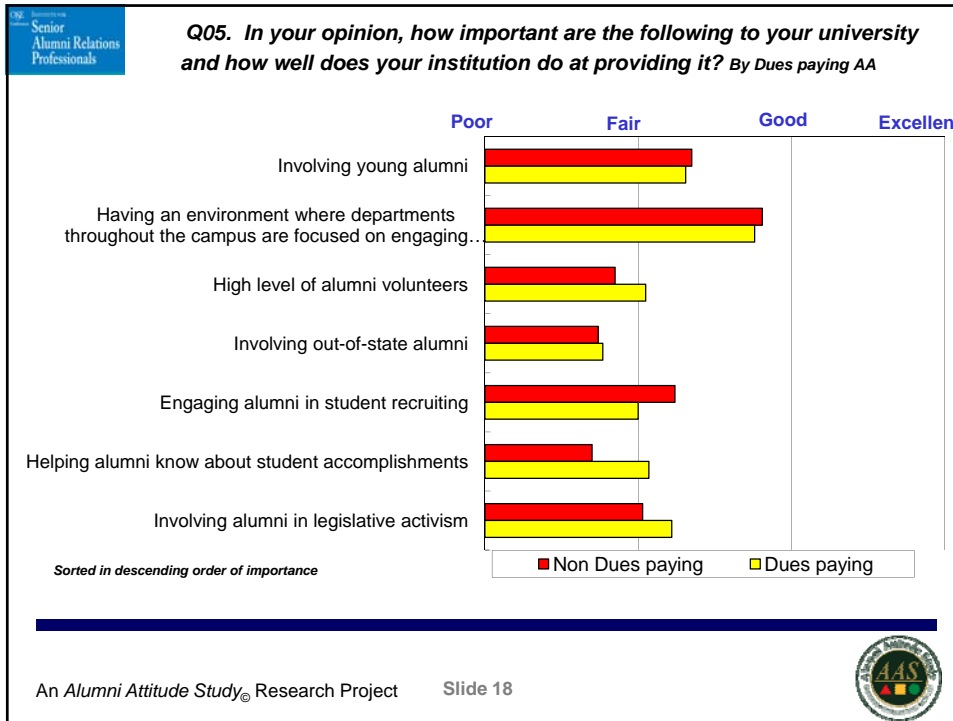
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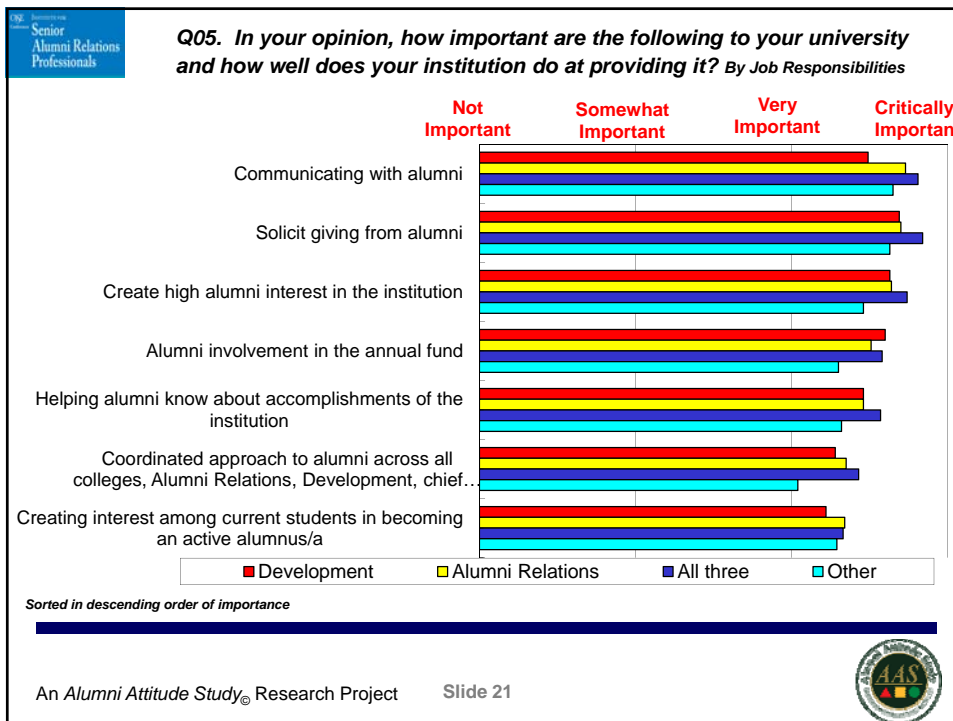
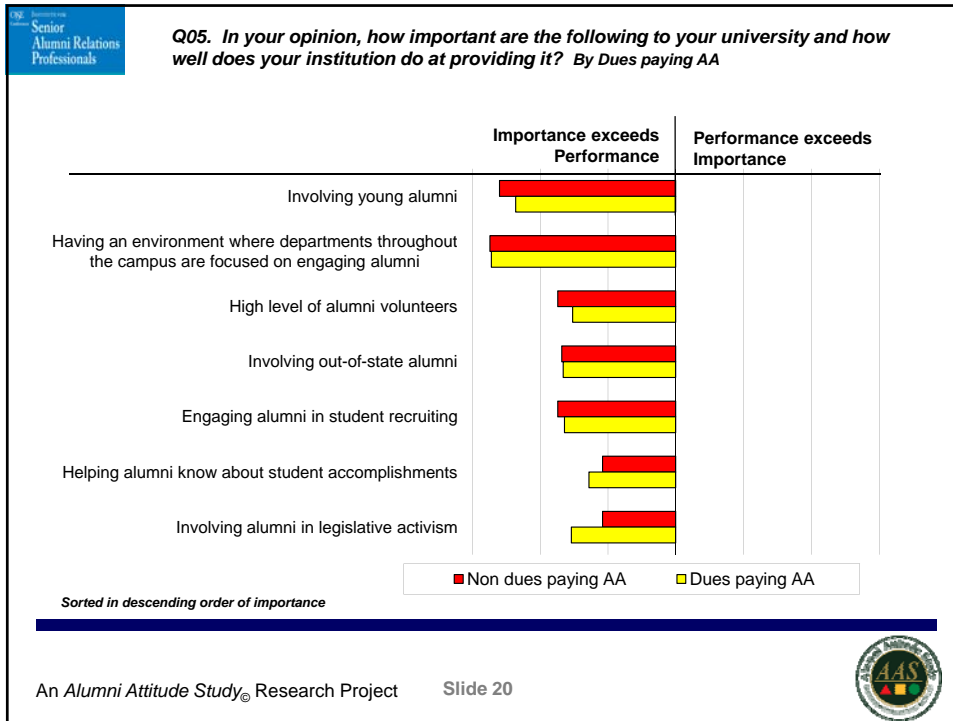
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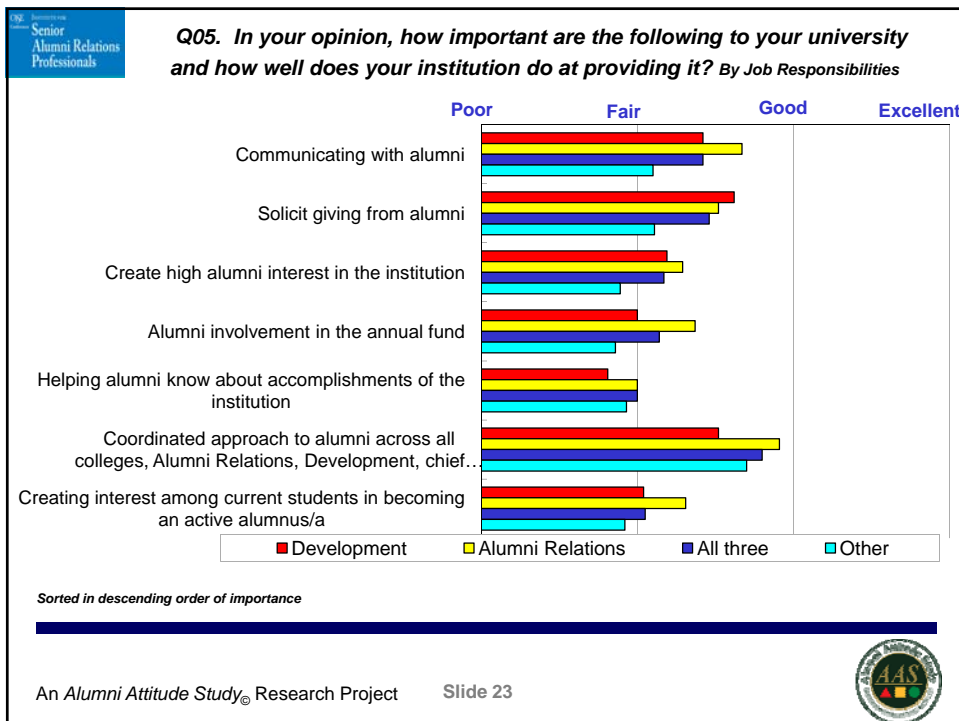
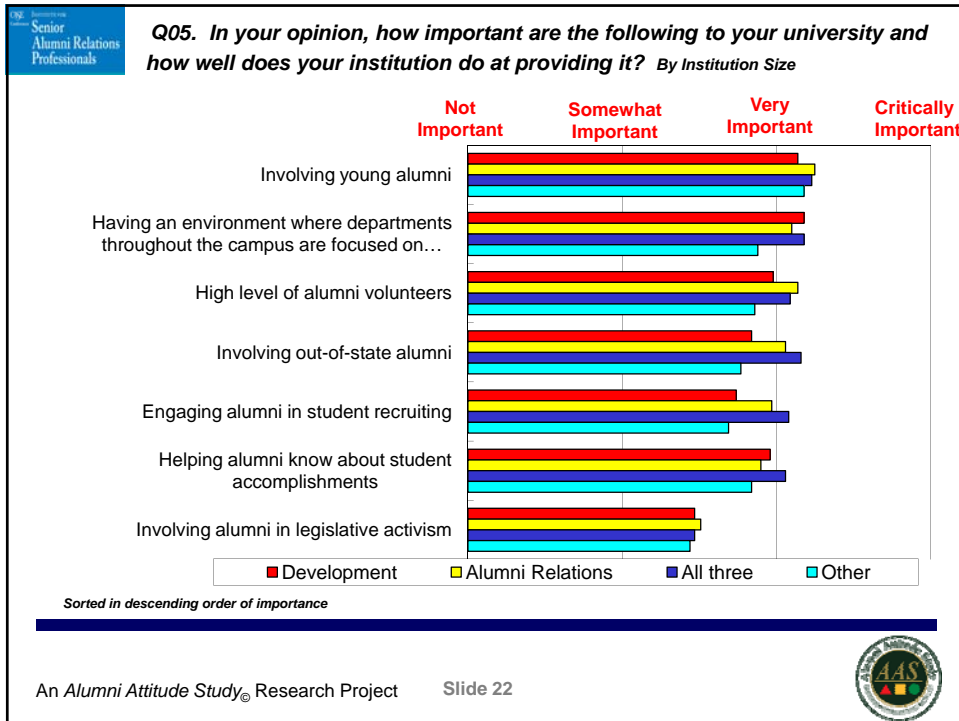
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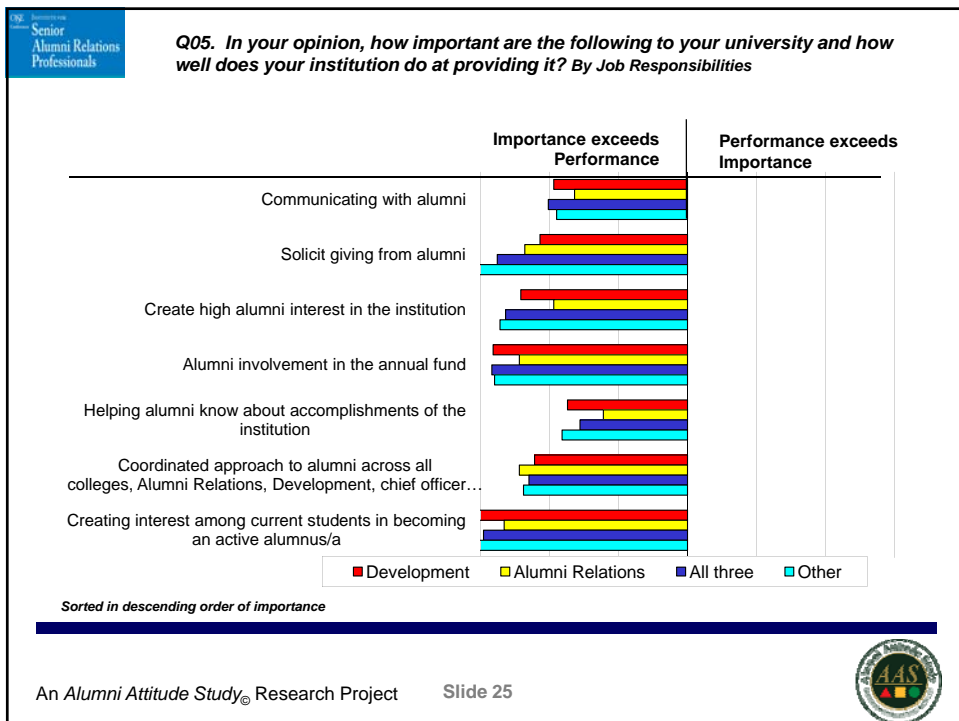
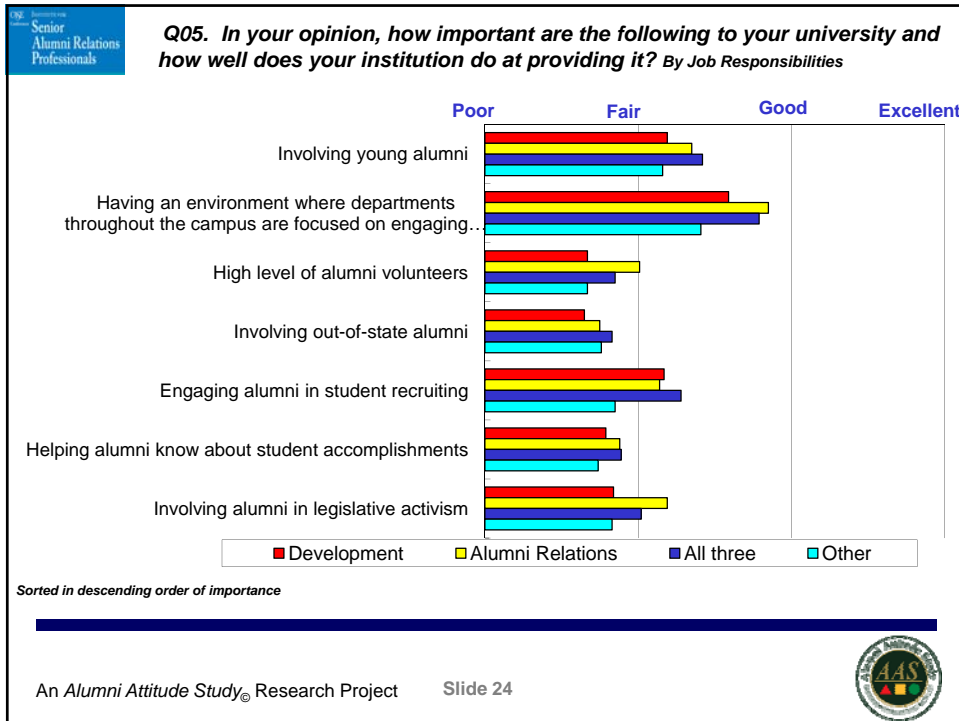
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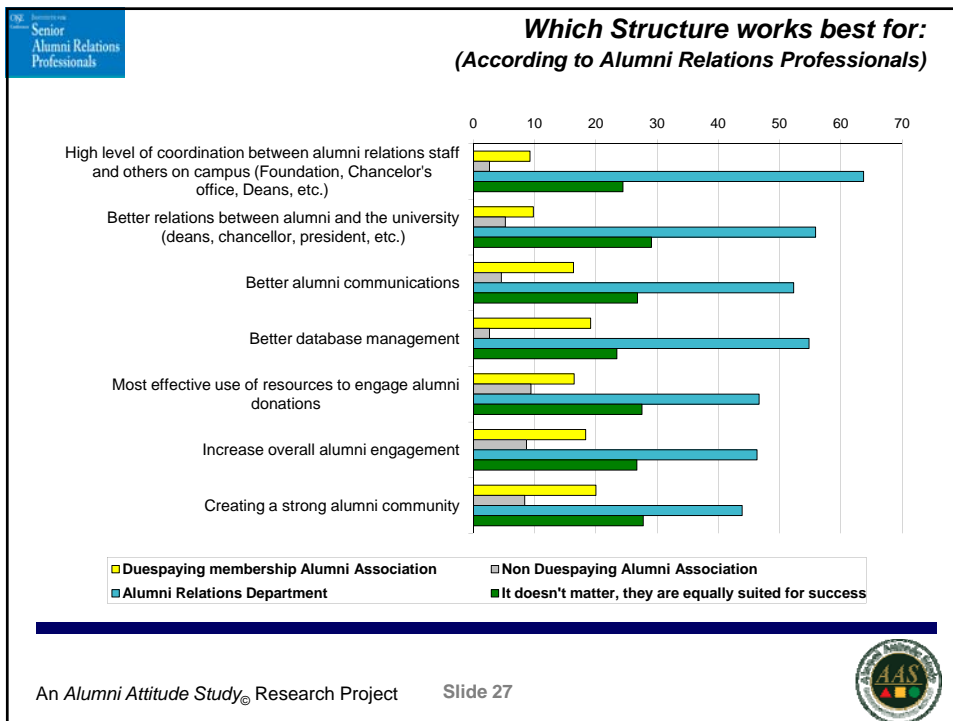
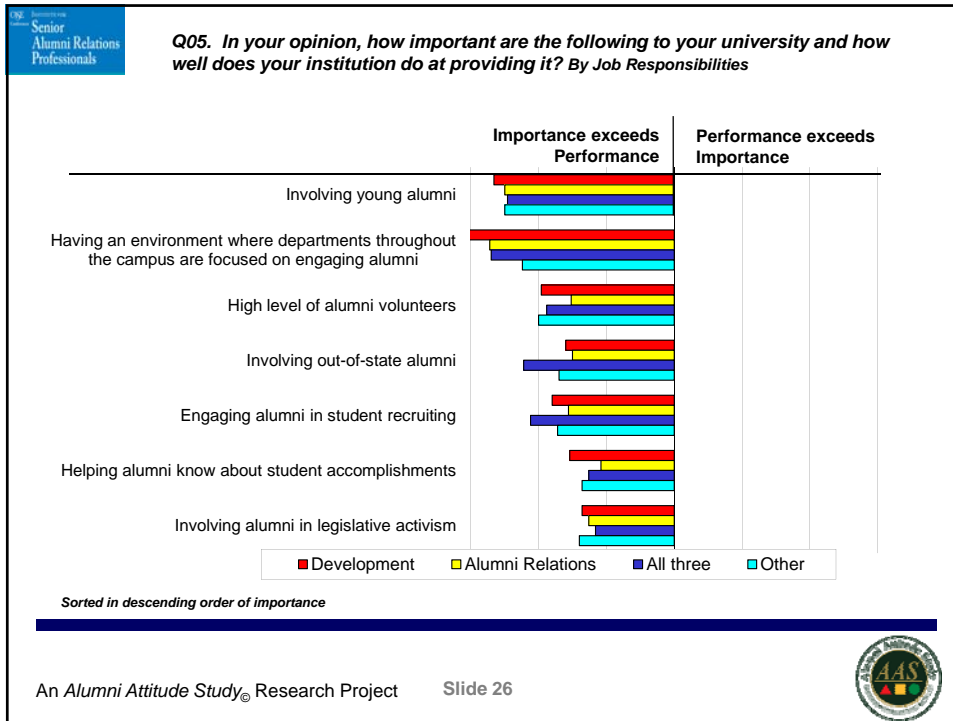
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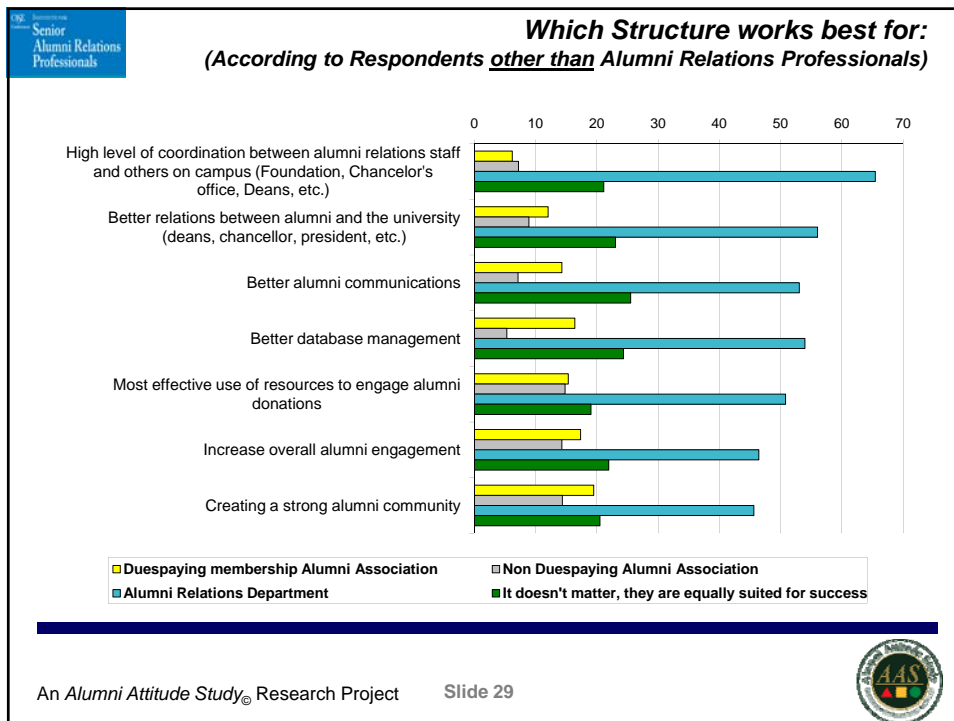
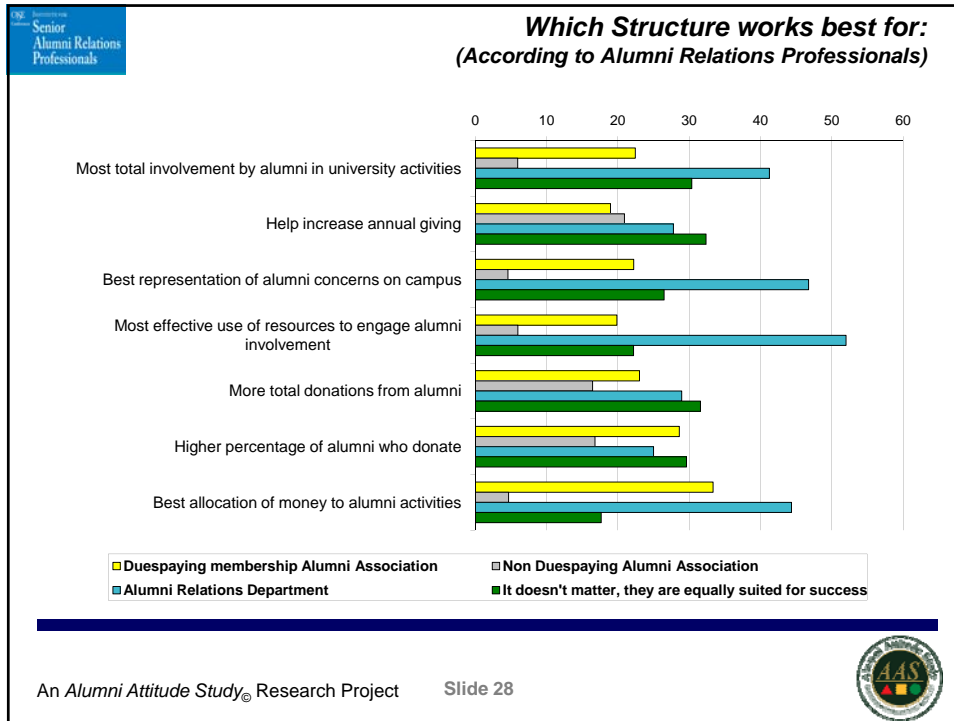
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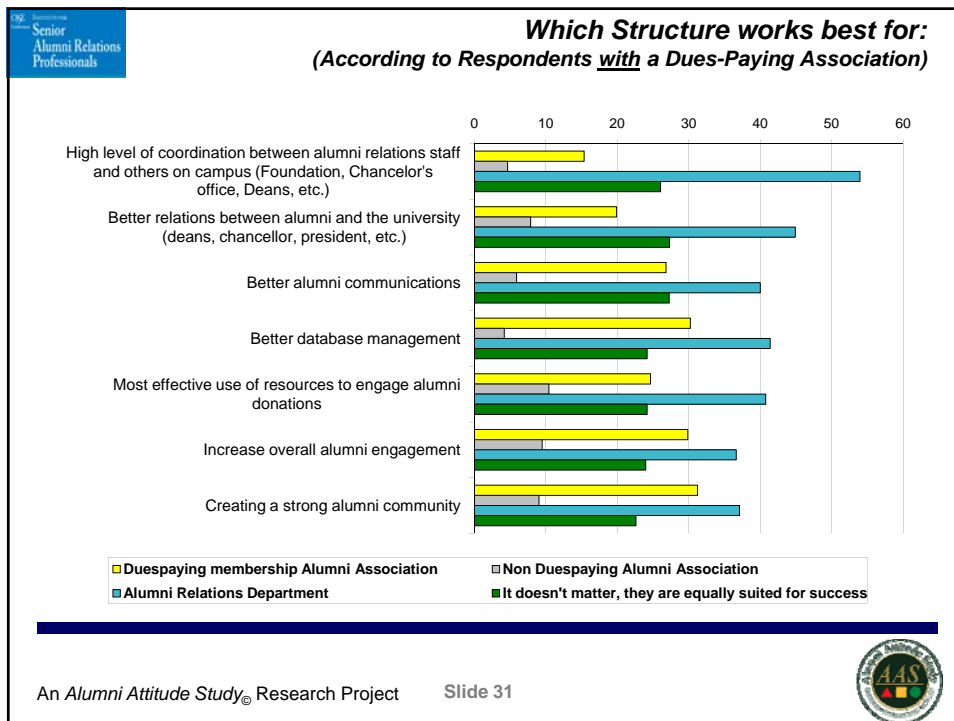
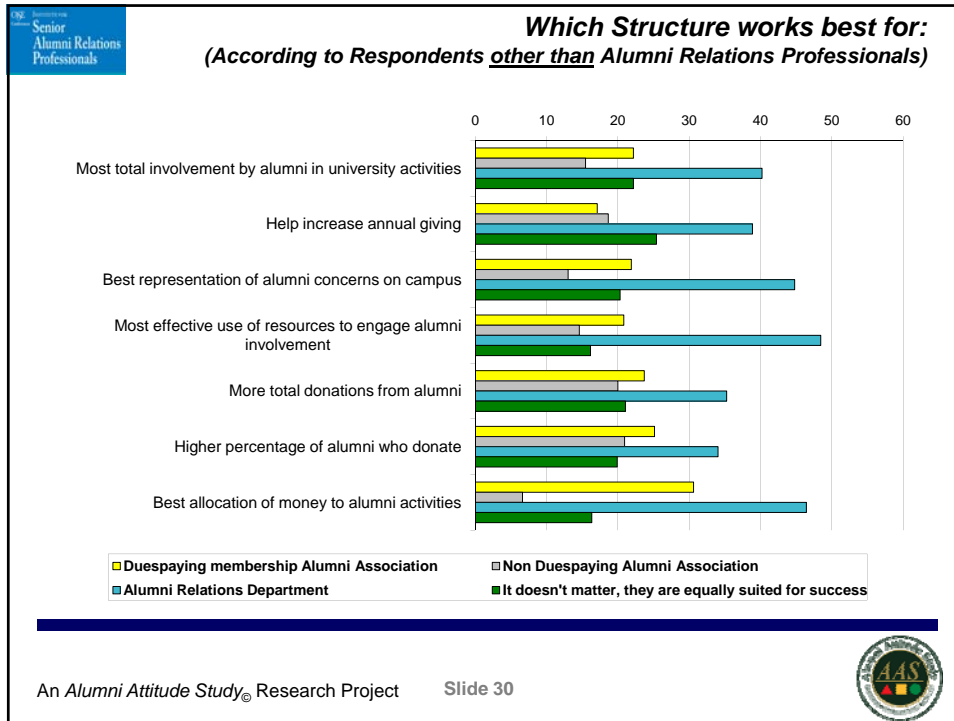
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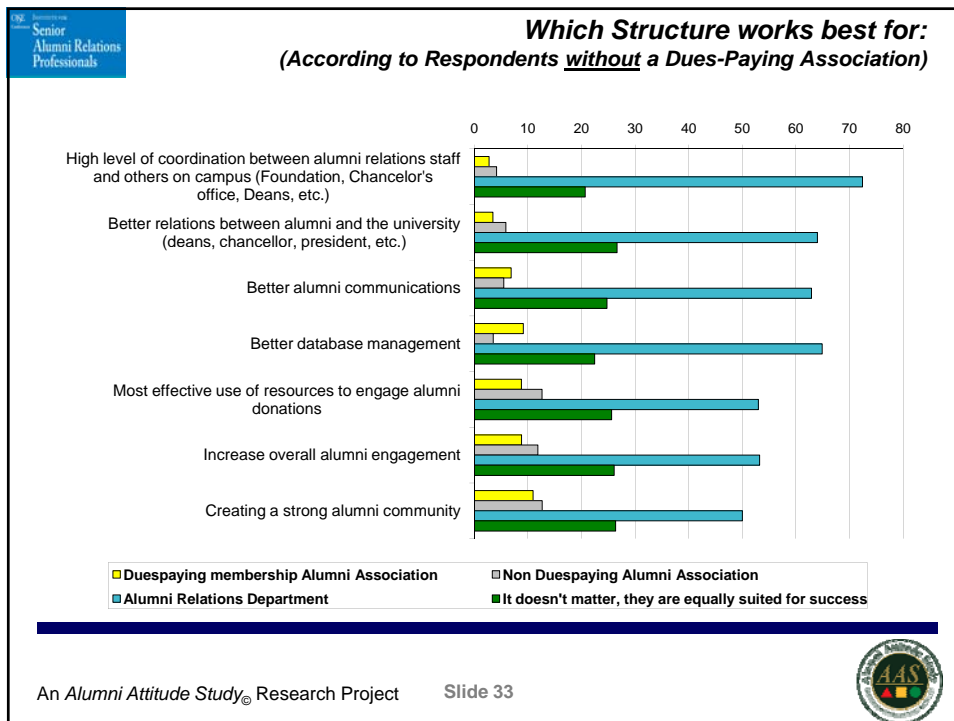
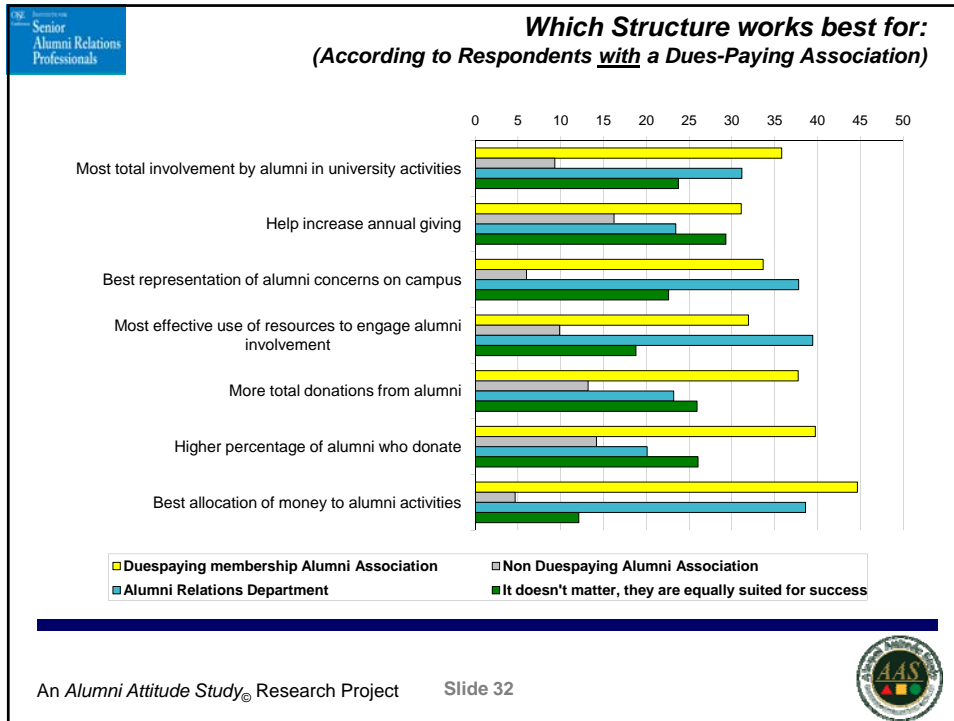
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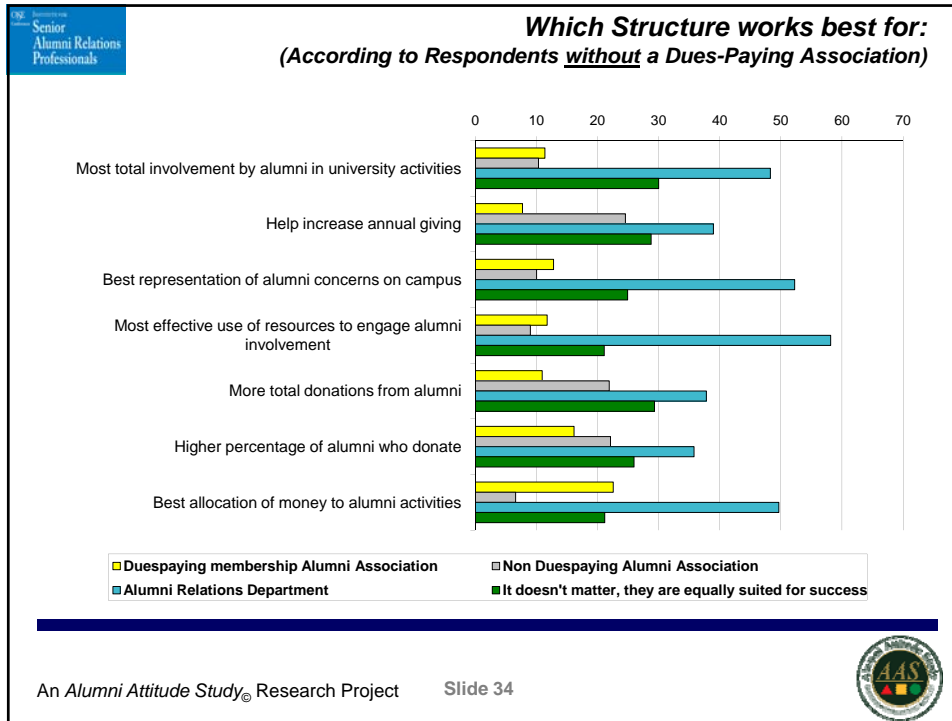
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- Benchmark schools**
- Penn State mentioned as benchmark 36 times (dues paying AA)
  - Ohio State – 27 times (dues paying AA)
  - North Carolina – 19 times (dues paying AA)
  - Michigan was mentioned as benchmark 19 times (dues paying AA)
  - Texas A&M – 17 times (non dues paying AA)
  - Stanford – 17 times (non dues paying AA)
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Senior Alumni Relations Professionals			<b>Benchmarks</b>
<b>Tier 1</b>	<b>Tier 2</b>	<b>Tier 3</b>	
Penn State	UCLA	Nebraska*	
Ohio State	Kansas State	UConn	
University of Michigan*	Duke	Ball State	
Stanford	Northwestern*	Harvard	
Texas A&M*	University of Southern California	Notre Dame	
North Carolina	Indiana*	Ohio University*	
Mizzou*	UCF*	University of Kansas*	
University of Texas	Dartmouth	Pitt*	
Illinois	Georgia Tech	University of Florida	

\* = Represents AAS participants

Schools in **Blue** are top two mentioned dues paying AAs.  
Schools in **Red** are top two mentioned non dues paying AAs

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Senior Alumni Relations Professionals		<u>Overall Findings and thoughts from the study</u>
		<ul style="list-style-type: none"> <li>• Plenty of research suggesting that dues does not adversely affect annual fund in established programs</li> <li>• New programs have varying levels of success possibly driven by motivation for initiating a program</li> <li>• No question that a membership program can act as a very effective way to get alumni to begin a process of giving</li> <li>• Type of institution may drive decision (i.e. Public/Private)</li> <li>• Giving away memberships does not work well</li> <li>• Younger alumni are attracted by tangible (stuff) benefits more than older alumni</li> <li>• More Institutions change back and forth than expected</li> </ul>

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192 Institutional Senior Alumni Relations Addition

## 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

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