



Expanding Reach: Growing Alumni Engagement at a National Scale

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Objectives

1. Gain a general background on ways in which KU Libraries has successfully scaled advancement & alumni engagement strategies to yield measurable, lucrative results
2. Learn tactical, implementable ways to engage alumni to raise money & keep your academic library top-of-mind as a unique, meaningful giving opportunity



Overview

- Establishing local engagement
- Developing partnership
- Phase I: Exploration
- Assessment & modification
- Phase II: Evolution
- Recommendations
- Questions



Program development

A brief overview of the development KU Libraries' Office of Communication & Advancement

- When our prior dean started in 2006, there was no existing communications/ advancement program, and no dedicated fundraising support from our Endowment. One of her first priorities was to hire a Director of Communications & Advancement early the following year. A student intern and communications coordinator soon joined the team.
- By mid-2008, thanks to the group's early successes and strong advocacy of the dean, Endowment began to acknowledge the importance of the libraries from a fundraising standpoint – understanding how the critical role we play in student success can translate into viable giving opportunities for donors and alums. At last, we succeeded in convincing Endowment to dedicate the support of a half-time Development Director for the libraries.
- In early 2009, Courtney rounded out our early team as part-graphic designer, part-events coordinator (with an intern as well).

A few notes:

- This team is responsible not only for library advancement efforts, but for a comprehensive marketing and outreach program, implementing strategic



Local Engagement

- At the outset, our team’s early focus was not so much to expand, as to create a donor base from the ground up
- Just prior to our dean’s arrival, an existing “friends of the library” group had been disbanded, leaving some lingering sense of discontent. That said, it’s worth noting that this was really not a giving society; the average member’s gift (beyond dues) was only \$16/year – most likely because they were never really asked
- Engaging with donors through events is one of the more expensive approaches. However, we were faced with a bind that many others may understand, in that our Endowment would not allow us to contact anyone who had not previously made a gift to the libraries. Thus, events became the essential means for us to allow interested individuals to self-identify – after which we could continue to engage with them
- To mitigate the investment, we began with the most cost-effective starting point: our own backyard (it’s lower cost, local friends are more likely to give, potentially higher return on a lower investment)

Goals at outset

- Increase knowledge/awareness of KU Libraries as giving opportunity
- To do through the missing link – with an ask, as we encouraged membership

Local engagement

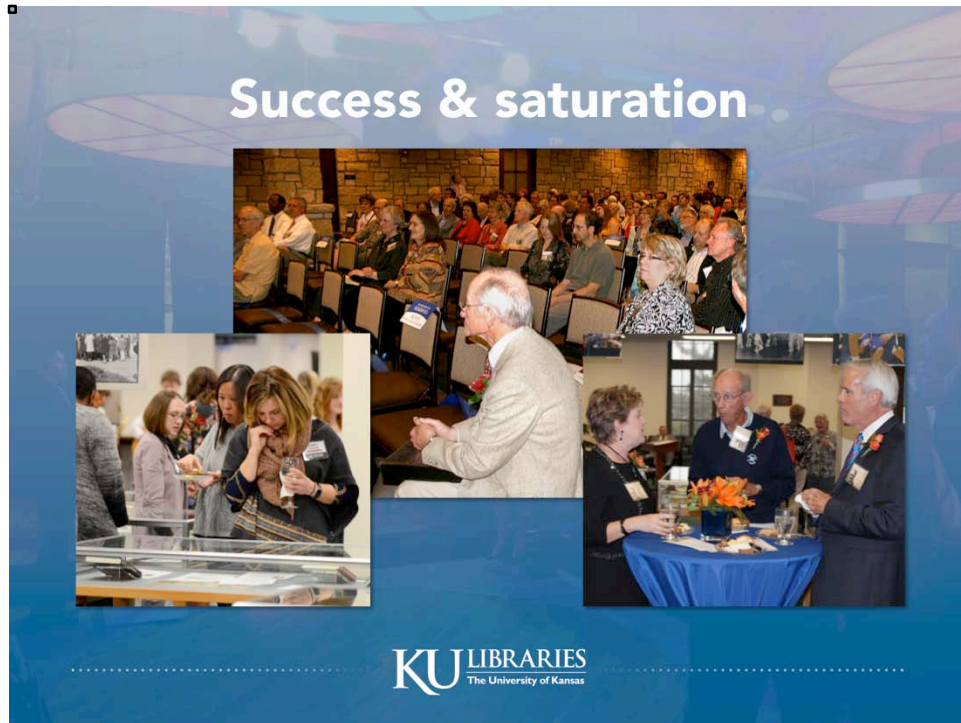
- Donor communications



Local engagement

Donor communications

- During our events, we would capture contact information on an events sign-up list, which was critical in allowing us to begin to develop ongoing relationships
- Our team established several communications tactics to stay in touch and cultivate awareness of the libraries as a giving opportunity:
 - A printed donor newsletter (*Bibliophile*), which we sent out twice a year, featuring donor profiles and gift announcements
 - Also an Annual Report and brochures about our annual giving society



Success & saturation

- After 3 to 4 years, the success of this engagement strategy was truly apparent ...
 - Robust engagement with the Lawrence/campus communities
 - Avg. attendance: 80-100/event (with a number well over – toward 200-300)
 - Avg. gift size and number of gifts increased consistently
- After several years of consistent, significant increases in the number and size of gifts, we began to see that growth slow – indicating that we may be reaching a saturation point with our local engagement efforts
 - That said, even as we are not adding as many new donors, existing donors continue to give at increasing levels year after year
- This seemed like an opportune time to taper back in local engagement and begin to look outside of Lawrence – in particular through a valuable growing partnership with our Alumni Association...

KU Alumni Association



ALUMNI ASSOCIATION

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*Strengthen KU by informing, engaging and
mobilizing the KU community through
programs and communications*

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KU Alumni Association

magazine readership
40,000

400 events

50,000 attendees

2,400 volunteers

164,000 points of e-communication

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KU Alumni Association

Facts & figures

- * *huge international reach* *
- 400 events (2013-14) with 50,000 attendees
- More than 2,400 volunteers
- 1,795 emails sent that reached 164,000 people
- Award-winning *Kansas Alumni* magazine (6 issues/year) with readership of 40,000

KU Alumni Association

- Early pilot events:
 - Traveling national exhibition event
 - *Explore KU* for local alumni chapter



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KU Alumni Association

- A bit of background on our Initial piloting of collaborative events ...
 - KU Libraries partnered on a smaller level before with KAAA
 - “The History of the Jayhawk” locally and across country in LA, held at Bel Air Country Club
 - Jayhawk is our school’s beloved mascot
 - Featured reception + formal lecture/presentation
 - Also held “Explore KU” for local chapter at Spencer Research Library
 - behind-the-scenes tour of Special Collections Library

Expanding the Partnership

Mutual benefit:

KU Alumni Association (KUAA):

- Interest in offering more academic programming

KU Libraries:

- Ability to leverage established national presence (KUAA) to engage with new alumni



Expanding the Partnership

- Mutually-beneficial for both organizations [KU Libraries & KU Alumni Association]
 - KUAA: interest in expanding academic programming [heard feedback]
 - Libraries: Ability to leverage established national presence (KUAA) to engage with new alumni because we have no “graduates”
 - Worth noting there are complications with contacting people who haven’t already given us money through KU Endowment
 - Needed to leverage existing, established national presence to increase potential donor pool and overall reach
- This also dovetailed nicely with the completion of our strategic plan in 2012...

Strategic growth = expanded support

Strategic Directions, Goal 4:

- 4-C.2 – Create & grow partnerships to expand our potential donor base
- 4-C.3 – Prioritize & expand fundraising goals to support the Libraries' strategic priorities
- 4-C.4 – Expand engagement efforts & activities at the local, state, regional & national level

Strategic Directions

Events Coordinator

STABILIZE AND GROW existing funding sources, secure new funding opportunities and enhance public accountability

GOAL 4

Commitment to BOLD ASPIRATIONS Goal 4 (Strategies 3-A and 4-C)

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Strategic growth = expanded support

- In early 2012, we were completing our five-year strategic plan. One of our four goals focused on increasing donor support through such strategies as:
 - *4-C.2 Create and grow partnerships to expand our potential donor base.*
 - *4-C.3 Prioritize and expand fundraising goals to support the Libraries' strategic priorities.*
 - *4-C.4 Expand engagement efforts and activities at the local, state, regional and national level (most notable)*
- With evidence of our program's success and the additional impetus of our strategic goals, we justified hiring a full-time Events Coordinator (and then an intern) in 2012 to enable increased focus on our expanded engagement program.
- Created a "perfect storm," combined with opportunity for outward growth and KUAA's interest, so we embarked upon initial iteration of our collaboration...



Phase I: Exploration

Goals & objectives

- The primary goal of our “Phase I” exploration was to reach out to a new group of potential donors – with the primary objective of increasing alumni membership in our annual giving society

Concept

- In concept, we set out to approach this similarly to our local donor cultivation, through regular event interaction (1-2 visits / city / semester, if possible)
- Developed event programming which highlighted our unique resources and staff expertise, generally academic in nature, but compelling enough to appeal to a wide variety of audiences (e.g., athletics/traditions focus)
 - Travel with a small exhibit of themed collection materials. Similar to our local events, the format would be primarily reception-style, maximizing the ability to talk to all attendees. Some examples:
 - “An Evening with Naismith: Artifacts of a KU Legend” [James Naismith, inventor of basketball, who

Phase I: Exploration

- **Events:**

- Staffing | Structure | Budget



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Phase I: Exploration

Events

Staff:

- Take several staff members along:
 - Always a KU Libraries OCA unit staff member & the University Archivist
 - Dean and Development Director when possible
 - One KUAA representative

Program:

- Maintained unstructured receptions...
- 90-minute cocktail reception with light hors d'oeuvres
- Brief, casual remarks by KU Libraries and KUAA representatives
 - Also highlighted ways KU Libraries contribute to the student experience/intellectual vibrancy of university
 - Highlighted membership in annual giving society
- We continued to capture alumni contact info through event sign-up lists, allowing us to communicate thereafter

Cost/budget:

- As with our local events, these were all free to attend, as long



Phase I: Exploration

Regional / national outreach summary

- So this exploratory phase was rather fast-paced...
- From March 2013 to December 2014 we hosted 10 regional events (by regional, we mean across the state excluding Lawrence), and another 30 events in cities outside of Kansas
 - With crowds ranged from 25 in smaller cities to 150 in larger cities
- Visited large number of cities KUAA recommended
 - Large alumni populations with engaged local chapters
 - Requested academic programming

Summary: between March 2013 and December 2014 we took 4 traveling exhibits out to 40 regional/national events, covering nearly 25,000 miles and meeting with roughly 2,000 alumni

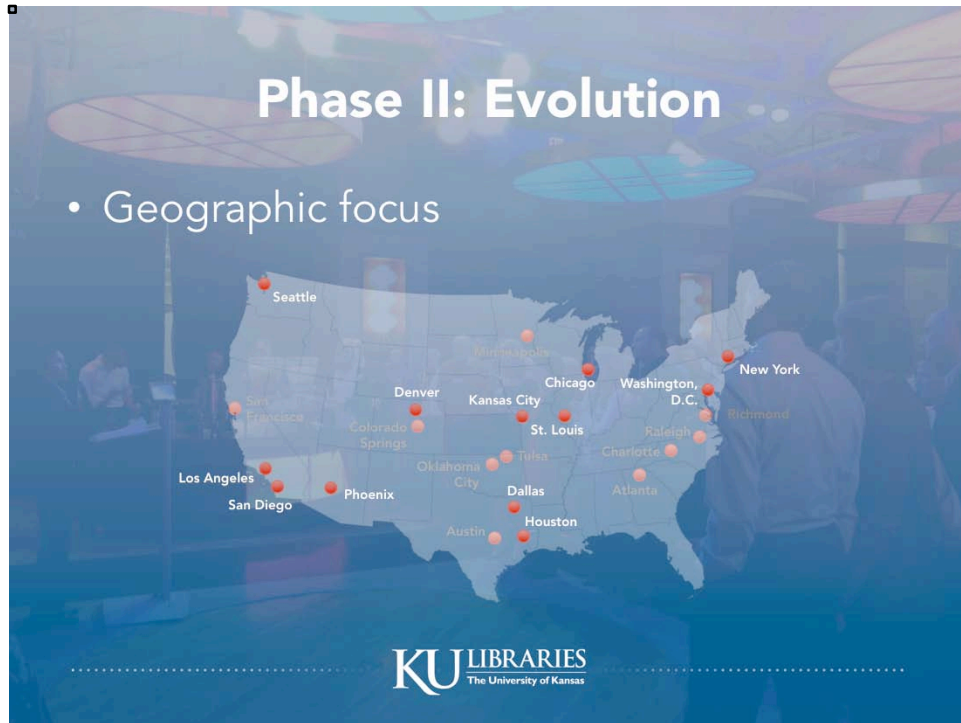
Impetus for change

- Initial assessment: resources & response
 - Budgetary limitations
 - Emerging differences in priorities
 - Limited staff time
 - Quest for engaging exhibits/programming
 - Attendee feedback



Impetus for change

- Throughout this period, we were constantly assessing and evolving, working to streamline and staying cost efficient
 - In particular, we tracked our use of resources:
 - Planning/staffing time
 - Travel & cost of events themselves
 - Response
 - Quantity – Number of people attending
 - Quality – What cities/programs brought the most connections / prospects
- Several factors began to emerge later last year which spoke for an impetus to change / evolve our approach:
 - Budgetary limitations
 - Non-contract pricing outside of Lawrence taking a toll
 - High travel costs
 - Emerging differences in organizational priorities
 - Quantity of visits [KUAA] vs. *quality* of crowds [KU Libraries]
 - Fundraising [KU Libraries] vs. *engagement* [KUAA]
 - Limited staff time



Phase II: Evolution

- What we actually changed ...
 - Started targeting certain communities with more of a geographic focus
 - Once we determined, after one to two previous visits, which cities had alumni more apt to connect with KU Libraries we focused on visiting them more
 - Focused on 12 main cities, identified to align with KUAA's targeted national cities [prioritized from 30 just prior]
 - New York City
 - Seattle
 - Chicago
 - St. Louis
 - Dallas
 - Houston
 - Kansas City
 - Los Angeles
 - Denver
 - Phoenix
 - San Diego
 - Washington, D.C.

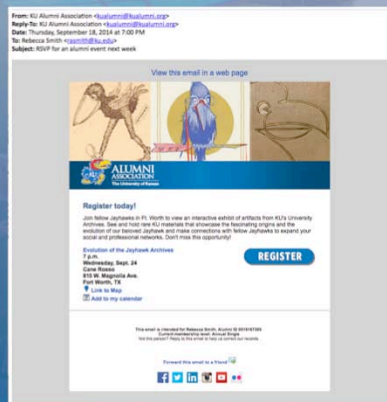


Phase II: Evolution

- We also made adjustments to the events themselves
 - The overall feel is different ...
 - Created a more casual environment with lighter fare and less décor to focus on exhibit
 - Cash-only bar to decrease out-of-pocket costs for planning organizations
 - Changed time of events (from right after work to a little later) to encourage attendance
 - We made exhibit changes
 - Created supplementary signage and looked for more touchable / 3D materials and artifacts to create a dynamic exhibit
 - Resembled an installed rather than a traveling one
 - Name tag / material updates
 - Stick-on vs. pre-printed (in-line with more casual feel of Phase II events)
 - No more event signup sheets
 - Cloisonné/pin cards vs. Vosper brochures (our annual giving society's old name)

Phase II: Evolution

- Financial adjustments
- Fundraising tactics
- Promotion tactics



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Phase II: Evolution

- We also made significant financial adjustments
 - Addition of attendance fees to offset event costs
 - Equal cost-sharing between two organizations, split 50/50 at end of FY
- Change in fundraising tactics
 - Moved from a *soft-ish* ask (we always reminded people of our annual giving society and awareness-building) to major gift prospect development
 - We became more aggressive in assessing the capacity of those we spoke to in our conversations (had to maximize our limited opportunities to connect with people outside Lawrence)
 - One-on-one conversations to measure giving proclivity
- Promotion tactics changed as well
 - Leveraged existing digital approach to communications platforms from KUAA
 - **Increased reach** (1,700 + emails that reached over 100K people)

Phase II: Evolution

- Communications changes

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Phase II: Evolution

- In addition to these communication changes at the front end with promotion, we also adjusted some of our tactics during and after the events
 - Direction for these changes was informed by:
 - Feedback from our event attendees / staff
 - We also took this as an opportunity to seek input from our Board of Advocates – conducted focus groups during a meeting to seek their perceptions “as donors”
 - At the events:
 - Rather than distributing full trifold brochures about our annual giving society, we developed small takeaway cards – including a cloisonné pin with our iconic library window, and directing them to our giving webpage
 - Follow-up communications
 - Consistently send follow-up message to all event attendees (emails via MailChimp)
 - Direct to more information re: event (e.g., online resources or exhibits) and make a direct ask
 - We do more high-touch follow-up with those whom staff present “starred” as showing good potential inclination/capacity:

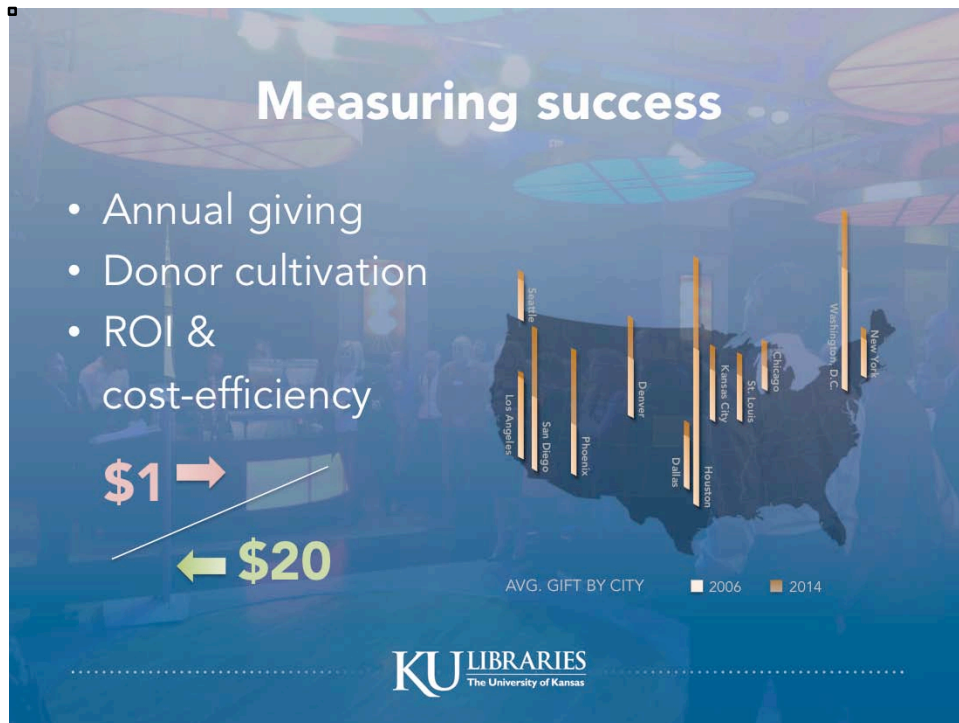


Phase II: Evolution

- Events and event-related follow-up are not the only means of engagement we have with potential donors.
- In addition to our events, we also engage with alumni through these other means:
 - Library publications:
 - *Bibliophile* publication – 4 touchpoints through the year (2 print, 2 electronic)
 - Annual Review (print)
 - - Earned & paid media:
 - Paid: Series of 6 full-page ads in the *Kansas Alumni* magazine / “Official sponsor of...” campaign
 - Earned: We’ve been receiving great coverage from KUAA in most every issue of their magazine – likely aided by the strength of our partnership
 - Alumni access to databases:
 - Last summer, we rolled out a program offering access to select online databases to members of KUAA

Phase II: Evolution

- Fewer visits to each city, but with more meaningful contact focused less on annual giving and more on specific donor cultivation / identification
- Focus on continual improvement in all aspects of event planning, execution and follow-up for **cost-efficiency & time-efficiency**



Measuring success

- How can we tell if we're on the right track?
- Luckily, our results are overwhelmingly positive and prove our constant attention to detail and willingness to change have yielded remarkable data and growth for KU Libraries
- When looking at annual giving data ...
 - Percentage of alumni supporting KU Libraries is up 300% since 2006
 - Average gift size is up 62% since 2006
 - Dallas: # of alumni making a gift up 51%
 - Phoenix: average gift size up 140%
 - We've also seen success in donor cultivation / identification
 - Always looking for anything they're wearing, things they're saying that could give us clue into proclivity
 - "just came back from a trip around the world"
 - "have multiple houses" etc.
 - Specific example: met couple @ Feb. 2013 OKC event, identified qualifiers that we thought showed major gift potential, KUEA prequalified and contacted, now

Final thoughts

Measure ROI and continually evolve every aspect of your event and outreach program, based on ongoing and thoughtful evaluation with all partners, to ensure you are meeting your goals and staying in-line with your organization's mission and/or strategic priorities

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Final thoughts

* Measuring return on investment is how we can prove we need support and that what we're doing is yielding results*

Applying this to your institution

1. Determine goals & budget
2. Seek support from library administration
3. Develop strategic partnerships
4. Piggy-back on existing, well-known events
5. Establish clear cost-sharing arrangement
6. Make use of existing communication channels
7. Maintain regular engagement throughout year
8. Continually assess & evolve

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Questions?
