

Commitment Committee Minutes

The committee met briefly as a whole to review the overall objectives for the year, and to hear about the objectives of each sub-committee for this particular board meeting. Carmichael reminded everyone that the overall objective for the committee is to help think about and recommend ways for the DAA to communicate with its constituencies more effectively, using some very broad categories of alumni demographics as a starting point: engaged, formerly engaged, and never engaged.

George reviewed the goals of each sub-committee so that everyone understood their particular assignment for the afternoon. These goals are stated below in the sub-committee reports.

Committed sub-committee

- Two objectives for the meeting
 - Define the criteria for committed/engaged
 - Ideas and Strategy for Retention

CRITERIA

- Criteria broken down into three broad categories:
 - Attending
 - Volunteering
 - Participating
- Many activities will fall under these broad categories (ex...paying dues, donating money, updating address, attending Duke basketball game, etc...)
- Create a simple matrix to list each activity and connect it with a major categories
- The initial measurement will be binary—if an alum demonstrates any act that falls into the categories then we will count them as committed/engaged
- Discussion included length of time as part of engagement. There is a need to identify those individuals that are on the edge of slipping into the “formerly committed” category. We want to target these individuals to push them “off of the edge” where they are back in the middle of the pack:
 - Determine how long ago it has been for the individual since the last qualifying act—when does it no longer count? E.g., should attending a reunion count for five years of engagement?
 - Determine how many qualifying acts are achieved by the individual—add up the total number of points
 - New ideas for engagement categories include submitting a class note, submitting a letter to the editor, submitting classified ads (all in *Duke Magazine*)
- Next steps for criteria are to (1) complete the matrix and (2) determine how to qualify someone as “on the edge.” Some method that is not too difficult for the alumni affairs office to do for every person.

RETENTION

- We want to recognized every alumni in the committed category and even reward several of the most active individuals

- One goal could be to touch every engaged alumni in some way that will matter to them. Give them something thoughtful, something personal, something Duke, and something inexpensive.
- Learn from some businesses like airline-travel programs
- Some creative thoughts to initially consider:
 - Forever Duke Honor Roll with emailed certificate
 - Seeds from Duke Gardens
 - Discounted gifts from the Duke Stores or vendors like Replay Photo
- Next steps for retention is to brainstorm and list ideas. Make sure to form a retention strategy that is complementary and convergent with “Formerly Committed” sub-committee. Consider talking with Sam Wang who is the marketing group at Citigroup where they consider similar issues with managing account holders.

Another topic we discussed is measuring overall success of our efforts. Perhaps simply tracking the increase of donors over time.

Also important to measure the overall health or strength of the engaged pool. Some years the growth numbers may dip but the overall health may still increase because of the quality of the activity.

Formerly Engaged Committee Notes

Background:

Commitment Committee members divided and contacted a list of “Formerly Engaged” alumni to learn possible reasons for their lack of engagement in the past 5 years

Research:

- Out of 11 attempted phone calls, only one person answered
 - The one who answered was from the same area as the committee member who called (both had PA area codes)
- Out of the attempted emails, only two were returned
- Respondent One – Female, Class of 1987
 - Still feels connected
 - Now has kids
 - Came to Reunions and loved doing AAAC interviews
 - Felt disconnected after the lacrosse incident
 - Has mixed feelings; felt in the dark
 - Doesn’t know if it’s the same Duke
 - Enjoys: DukeReads, interviewing, intellectual events
 - Doesn’t enjoy: Happy Hours, Hoops Watches
 - These events seem dominant due to the high volume of emails
 - Is “starving for intellectual stimulation”
 - Would like for interviewers to be gathered for a local State of the University (wants to stay current) – could be given by recent graduates
 - Would possibly return for a Women’s Weekend on campus
 - Reads online information and *Duke Magazine*

- Likes to hear about professors and books
- Returned in 2007 for Reunions (?)
- Respondent Two – Female, Class of 1968
 - Gives money, but doesn't visit
 - Specific areas of interest include Women's Studies (was on the council)
 - Moves a lot and finds it difficult to get involved
 - Enjoyed sports, etc., when she was younger; now wishes for more intellectual events
 - Could be engaged by: networking with alumni of her age, public service events, women's studies events, seminars
 - Reads emails and articles online
 - Husband is into environment and law
 - Returned for 40th Reunion in 2008 (?)
- Respondent Three – Male, Class of 1984
 - Architect
 - Enjoys basketball and time with friends
 - Feels a pull to his high school and graduate school
 - Lives in Boston; has a quiet social life
 - Would like to speak with local students about careers
 - Hasn't been back since 1984; doesn't desire to return
 - Reads *Duke Magazine*
 - Responded immediately
- Respondent Four - Male, class of 1971
 - We want to be involved, but not in charge
 - We want to know what's going in our immediate community that is Duke-related
 - We love hearing from students
 - Provide inter-generational events

Findings:

- One-on-one outreach is effective (email more so than phone)
- We need to narrow the definition of engagement
- People are constrained by their regions; prefer to stay local
- They are generally content with their level of engagement
 - Don't need/want to be constantly engaged
- Small towns inhibit engagement
 - Look at geography/age spans to see if there are concentrations of unengaged people
- University perceptions have changed since lacrosse; now more intellectual

Therefore:

- Who are we (the DAA) benefiting?
- Determine personal next steps and specific next steps for the committee
- Define engagement – passive versus active?

- There is a gradient
- There is both emotional and physical engagement

Ideas:

- “More Connected Community”
- “Everything You Wanted to Know About Duke But Were Afraid to Ask”
 - Publish FAQ, a blog to keep people informed in a passive way
- Tailor events to life stages
 - Provide a variety of regional activities
- Utilize the Internet more
- Create a general DAA email address to random inquiries about anything
- Establish re-connections
- Provide intellectual stimulation
- Allow for alumni to specify the news they want
 - Provide better, more tailored information to alumni needs
- Work on segmented marketing
- “We want you, not your money”
- Feature alumni in different areas so that people can say “if they can do it, I can”
- Family programming
 - Regionally
- Create “Bring a Friend” events

To Do:

- Check data to see if people are in the right group
 - Said they came to Reunions; check if registered
- Get an idea of geographic concentrations of unengaged
 - Are there more unengaged alumni in areas further from big cities
- Get an idea of ages of unengaged
- Consider re-organizing programming for life stages
- Tailor messages to the appropriate groups

“Never Engaged” Subcommittee of the Commitment Committee

February 20, 2009, Minutes

Present: Ann Elliott (chair), Melanie Burkett (staff), Sarah Bray, Alethea Duncan, Allison Haltom, Lee Roberts, Mike Schwartz, Torraine Williams, Sam Hull (staff), Zoe Ingalls (staff), Jennifer Torres (staff)

Absent: Artyn Gardner

Objectives for the meeting:

- Review and discuss “profile of the never engaged” report
- Discuss criteria to use in selecting groups to target (Are sheer numbers most important? Capturing underrepresented groups?)
- Identify key groups to focus on
- Brainstorm communication strategies for selected groups

Review of report:

A few questions came up about the methodology and abilities of the database system. It was suggested that online directory users be coded in the system and then excluded from the list. It was thought that alumni card holders should also be excluded; more research is needed to determine if they were or not. Alethea was curious to see a breakdown of the Graduate School alumni, specifically, by “degree” and “no degree.”

There was some interest in more data on the international alumni. Lee wondered if engagement varied by country (possible to determine, just not done in the initial report) and if there was a difference in engagement based on why the alum was living overseas. Based on his experience in London, “natives” and long-term expats would not be engaged, but short-term expats would be very engaged. Unfortunately, this data cannot be easily discerned from the database.

Groups to target:

There was a brief discussion about North Carolina alumni, a group which, it was decided, didn’t warrant high priority as a target group. The group felt that NC alumni are most likely to be involved in ways currently not captured, given their proximity to campus. This would be especially true for alumni employees. It was also suspected that there are a disproportionate number of incorrect data from students who never changed their addresses when they left Duke.

The group agreed that young alumni and Graduate School alumni should be targeted. Torraine raised the question of whether graduate alumni are even possible to engage, given that the graduate experience is so different than undergrad, with many treating their time at Duke as a job.

On a smaller level, Lee suggested trying to identify and reach out to groups, which amount to affinity groups, at other schools and large firms/corporations (for example, Dukies at Wharton or Morgan Stanley).

Communication strategies:

A widespread, quick survey was suggested, with questions such as “Do you think you are engaged?” and “Do you want to be engaged?” This would be fairly easy to do electronically.

Torraine felt that one-on-one communication is the most effective strategy. While this may not be the most practical on a large scale, it would hopefully become viral, thus magnifying the effects. The group agreed to ask for volunteers from the entire Board of Directors who would be willing to review the list of “never engaged” people from their surrounding class years and make phone calls to people they know. Board members should not be expected to make these calls blindly, however, and the committee will create a conversation “cheat sheet” based on Torraine’s suggestions.

For young alumni, the group suggested reaching out with a “we love you” letter, giving a few quick ways to get involved. Since DAA already sends numerous communications to this group, it was suggested that

the communication come (or appear to come) from alumni who were leaders as students. Open rates on e-mail may be higher if the recipient recognizes the name of the sender.

For grad students, a different approach is needed. Alethea shared that many graduate students do not enjoy their Duke experience and creating good feelings needs to begin while the students are still on campus. After they leave, messages need to be tailored to grad alumni. Most grad alumni assume DAA is mostly for undergraduates. Even addressing e-mails as “Dear undergraduate, graduate, and professional alumni” will help graduate alumni know that a message is truly for them.

Graduate alumni also need to be approached more as many affinity groups (by department) rather than as a homogenous group. Reunions will not appeal to graduate alumni, since graduation date can become quite fluid as they complete their degrees and they spend many more years on campus than the average professional and even undergraduate student. While on campus, there is also little “mixing” between academic departments.

Next steps:

- Melanie to type up draft of conversation “cheat sheet” and send to subcommittee for feedback
- When meeting minutes are sent out, ask for volunteers from the board to reach out to never engaged people they know.
- Melanie to send cohort list and conversation cheat sheet to volunteers.