

# The perfect synergy: Alumni, donors, students, employers — A case study in Silicon Valley

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## Abstract

*This is a case study about overcoming internal institutional silos to develop a new market for alumni engagement, donor cultivation, and student and alumni job opportunities. Simon Fraser University (SFU) was unknown in the Bay Area until three key areas of the university banded together to form the Bay Area Working Group — a cross-functional team to develop a comprehensive strategy for that region. The paper discusses specific strategies that were developed to address the following goals: (1) increasing the number of activities delivered in the region, while maximising strategic outcomes for broader institutional needs, (2) coordinating a single delegation to participate in one or two annual trips to the region, (3) increasing the number of organisations that hired co-op students by using alumni as door openers, (4) integrating current students into alumni-based activities in the region, (5) increasing university pride and loyalty held by alumni in the region, and (6) increasing recognition and acknowledgment of the SFU brand. Five years later, SFU is a leader in the region with record levels of alumni engagement, an increase in the number of financial gifts being realised, significant growth in the number of student co-op positions being posted, and the likes of Facebook, Google, Microsoft and Apple recruiting on an active basis on campus. A list of recommendations are provided to guide others who are keen to both enhance the outcomes realised in existing areas and expand activities into new markets.*

## Keywords

*collaboration, regional engagement, job development, strategy, relationships, loyalty, pride*

## INTRODUCTION

Simon Fraser University (SFU) is Canada's leading community-engaged research university. Built in 1965, SFU has become Canada's top comprehensive university with vibrant campuses in British Columbia's largest municipalities — Vancouver, Burnaby and Surrey — and deep roots in partner communities throughout the province and the world. SFU quickly obtained a reputation as the 'Berkeley of the North' and is known to be 'radical by design'. The institution operates on a tri-semester system, prides itself on its interdisciplinary approaches that encourage students to study across multiple academic faculties, and invests significant effort towards engaging local communities beyond research-specific interests. SFU is a commuter campus, as the majority of students reside in local communities, and approximately 75 per cent of SFU's 160,000 alumni still live in the area; the remainder are spread across 140 countries

with large concentrations in Hong Kong, Singapore, Toronto (Canada), and the San Francisco Bay Area (United States).

With a relatively small alumni relations team of five full-time equivalents (FTEs) and an advancement team consisting of approximately 50 staff (including from advancement services), SFU needed to be strategic with their approaches to engaging alumni and prospects beyond their local region. This paper focuses on the efforts invested in identifying and cultivating a new market for engagement in the San Francisco Bay Area (consisting of nine counties in Northern California). The main goals were to identify, develop and grow the level of engagement and activity with alumni in that region to strategically benefit both the graduates and the university alike. Specifically, the paper discusses how alumni relations, advancement and co-op education — separate units that each initially had its own respective interests and activities in the region — banded together to

develop a comprehensive and cohesive strategy that increased overall engagement, philanthropic contributions, student engagement and paid internship programme growth, and overall job prospects for alumni in the region.

## THE SITUATION

With the limited human resources within the university's alumni relations and advancement teams, engagement and donor cultivation efforts were invested in regions where it was believed the largest populations of alumni and prospects resided. The university's database indicated that only approximately 64 alumni lived in the entire state of California; therefore, the region did not meet the threshold for engagement activity (generally a few hundred people), and few resources were allocated towards activity in that region.

Students who were taking part in co-operative education (co-op — paid internship programmes) in the Bay Area were, however, being visited on a semi-regular basis by their co-op instructors as part of their assessments. During those visits, the co-op instructors quickly began to uncover large numbers of SFU graduates who were working and residing in the region. While the instructors were keen to share the general information with the alumni relations team, they were reluctant to disclose all contact details because the graduates had expressed concern about being contacted solely for financial solicitations from the institution; they were not incorrect either, given that there were no other opportunities identified to engage graduates in their area.

Additionally, the relationships between the co-op, alumni relations and advancement teams were challenging; there was

no history of collaboration between the units. The co-op team were guarded and fearful that their valued and important relationships would be jeopardised by aggressive requests to make a financial contribution to the institution by advancement or alumni relations. It is important to note that this was based on historic experience.

Given the lack of self-reported data to the institution by alumni in the region, the alumni relations team chose to identify an additional source for data verification and turned to LinkedIn's alumni tool (accessed via a university's page on LinkedIn and within the alumni section<sup>1</sup>). The results were staggering, indicating that more than 700 alumni self-identified as residing in the Bay Area region. It was agreed that the alumni relations and advancement teams would send a small delegation to host an event in the region. The goal was to meet with alumni and prospects at their workplaces and assess their appetite for broader engagement. A modest event was organised, and conversations began with alumni in the region.

Over the span of two years, the alumni relations team focused on increasing alumni activities in the region through hosting more social and networking events. Growth was slow; nevertheless, the calibre of alumni who were engaging through those events was very high. Many were in positions of influence within their companies or were connected to interesting individuals through their personal or professional networks. Eventually, the team began hosting events with the university's president on an annual basis and also partnered with a Canadian expat group called the Digital Moose Lounge,<sup>2</sup> who hosted numerous social and networking events for Canadian-based alumni in the region.

Throughout this period, numerous staffing changes occurred within the alumni relations and advancement teams and that resulted in new and refreshed relationships with co-op team members.

The alumni relations, advancement and co-op teams were now engaging simultaneously in the region; there was, however, lack of coordination and collaboration between them. Working within their own silos and having separate itineraries resulted in duplicate meeting requests to the same individuals on the same dates: ‘We’re relationship builders, yet we were missing our own inside relationships’, notes Harriet Chicoine, then programme manager for the applied sciences co-op team. ‘There was no coordination. It was both embarrassing for the SFU team and also created frustration among the organisations that were recognizing that we were not coordinating our efforts and proving to be inefficient with their employees’ time’. This was the tipping point for change.

### **A POSITIVE INTERVENTION: TAKING A COLLABORATIVE AND STRATEGIC APPROACH**

It was acknowledged that a gestalt approach could yield the best results for the institution as well as the individual units that had specific interests in the region. Consequently, in early 2015, the director of alumni relations, with approval from the vice president of advancement and alumni engagement, formed the Bay Area Working Group (BAWG) as a grass-roots cross-functional team with representatives from alumni relations, advancement and co-op. The working group was facilitated by the alumni relations team; this was intentional as alumni relations had the largest discretionary budget to host

activities in the region. A former co-op staff member who moved to California several years prior was also onboarded as a paid consultant to assist with providing perspective and connections.

The primary objectives for the working group were to:

- Establish a forum to discuss individual goals and objectives and therefore identify shared goals and objectives.
- Identify opportunities to collaborate and support each unit’s individual and collective goals and objectives.
- Pool resources to minimise expenditure, maximise impact and improve efficiencies.

Meetings occurred approximately every six to eight weeks to maintain momentum and were typically held for two hours. In the beginning, a core focus was for group members to educate each other on their respective ‘business’ — helping others to understand each other’s core objectives, principles, challenges and identified opportunities. For example, it was not obvious to all working group members as to why co-op was so interested in expanding their number of employers in the Bay Area.

As trust was building among the teams with greater understanding and appreciation of each other’s work, discussion began on core interests specifically in the Bay Area region. Consequently, the following goals and subsequent strategies emerged over time.

### **Increasing the number of activities delivered in the region, while maximising strategic outcomes for broader institutional needs**

The first step taken was to identify opportunities for collaboration based on

existing activities that were occurring. Of note, by this point, alumni relations was investing significant resources into hosting an annual president's reception in the region. The BAWG determined that this activity served as a high-impact event for the university's broader current and future stakeholders. Consequently, the guest list was expanded to include all co-op employers, current co-op students, government officials, donors and advancement prospects in the region. The core objective still remained to engage alumni in the region; it was also acknowledged that by expanding the scope, it could enhance the networking ability for those in attendance and also diversify the university's supporter-base in the region.

Additionally, the co-op team provided great input into some faculty members from their academic units, who had compelling research backgrounds. Consequently, the president's reception, which formerly served as a platform for the president to primarily provide institutional updates, began to feature at least one keynote faculty member who could engage the audience in their ground-breaking research. One year later, a Tech Talks event was hosted that featured four faculty members in separate breakout sessions, followed by a networking social.

As mentioned previously, alumni relations had limited human capital to support the delivery of broad-based activity in the region. Consequently, the Digital Moose Lounge group was engaged to partner on delivering social, cultural and professional development events that augmented some of the university's official activities. Much of this also stemmed from the findings through multiple interviews with alumni that their connection to each other was much

more than just through their SFU connection; it was through their Canadian cultural identity. In fact, alumni from SFU were very keen to be connecting with alumni from all Canadian institutions. They expected SFU to help them expand their networks beyond their fellow SFU graduates. As a result, alumni relations began to connect with other Canadian institutions to host joint-university alumni activities, which were well attended.

Clarity was also provided to BAWG members on the intended engagement opportunities that were hoped for through the delivery of events. Notably, it was important to leverage the events to:

- Identify potential regional ambassadors who could serve as the institution's lead contacts in the region to provide ideas for future event topics and themes.
- Connect with contacts who could provide access to unique venues and spaces for future events.
- Uncover potential future event speakers, co-op employers, donors and parents of future student applicants.

### **Coordinating a single delegation to participate in one or two annual trips to the region**

This goal had two underlying objectives: to overcome the negative impression held by organisations and alumni due to the teams' inability to appear as a united front and to be more fiscally strategic and responsible. To address these goals, the BAWG determined that it was integral to work together and decided to share the cost to hire a trip planner who was located in the Bay Area. The trip planner was a former university employee who

had moved to the region several years prior — she was familiar with SFU and had a clear understanding on the trips' intended outcomes. She served as the single point of contact between the university and local organisations, arranging all of the visits as well as coordinating all travel (including on-the-ground logistics). Her work ensured that the delegation was maximising their time in meetings and minimising travel time.

Deeper cost savings were realised by making group hotel reservations (to get better room rates); some individuals opted to share rooms to reap additional savings, and a communal rental car or shuttle bus was also arranged (depending on the number of delegates per trip). Even details such as coordinated gift-giving was arranged to ensure that alumni or employers were receiving one meaningful gift that was 'SFU branded' instead of several subpar items that had disparate branding; this had the added benefit of larger bulk discounts. Finally, the teams coordinated the shipping of items to the region in advance and saved money by making one shipment versus multiple ones and also saved staff hours by having one person manage the arrangements.

Furthermore, traveling as a delegation yielded the benefit of a more diverse group of representatives from the institution who could contribute to more meaningful and diverse conversations with alumni, donors and prospects and employers. For example, if an alumnus asked about how to make a gift to the institution, then the advancement officer could provide an immediate response. If they then asked about how to hire co-op students, the representative from the co-op office could provide immediate advice. If the alumnus inquired about how they can best help support the

university in the region, the alumni relations team member could inform them of the various involvement opportunities available. The power of the collective group to immediately respond and obtain action was far superior to past meetings where individuals would have to meet with someone alone and say, 'Let me get back to you'.

While hosting or participating in events during each trip, members of the delegation were able to collectively steward alumni and special guests as needed. This afforded more meaningful conversations and additional points of connection. Furthermore, staff could take shifts to oversee administrative elements of events (eg overseeing a booth or registration table) to ensure that everyone had an opportunity to actively engage with guests.

### **Integrating current students into alumni-based activities in the region**

A key approach to the Bay Area strategy was to leverage current SFU students as a means of encouraging alumni to engage and consider making philanthropic contributions to their alma mater. Research indicates that connecting alumni and students has positive implications for giving, and the team was keen to explore this from a general engagement perspective as well. For instance, Clotfelter<sup>3</sup> who explored alumni giving predictors among alumni from 35 private universities and colleges in the United States found that if a student had a mentor (be it staff, faculty or alumni), this proved to be the most significant factor to predict future giving when they became a graduate. In addition, when Hummel<sup>4</sup> asked alumni from the University of Lethbridge what would entice them



to make a financial gift to the institution, the highest ranked option was their 'desire to support students'. It was also true that this was the reason that would compel alumni to volunteer. By actively connecting students with alumni in the Bay Area, it was believed that the students would benefit from the opportunity to visit with and learn more from alumni, while the alumni could in turn feel they were making a meaningful contribution by informally mentoring a student.

In addition, Monks,<sup>5</sup> who conducted a large-scale study involving 10,511 alumni from 28 private colleges and universities in the United States, identified that giving was primarily motivated by both the perceived quality of the undergraduate experience and the graduate's 'feelings about the current state of the institution'. The SFU team felt that students who were directly infused into alumni activities would serve as the best ambassadors to directly showcase and speak to how successful their current student experience was and could speak to latest projects and activities they completed during their studies.

As a result, during the delegation's third trip to the region, a partnership was formed with SFU's Computing Science Student Society, and a group of ten undergraduate students joined the delegation to participate in company tours and informal mentoring lunches with alumni at various companies. The delegation discovered this was a winning strategy; companies and alumni immediately responded to requests for visits and meetings, alumni commented that they had incredibly meaningful interactions with the students, and students noted that the experience was a highlight of their undergraduate studies. Efforts have since expanded to also include a cohort

of MBA students during the delegation's annual trip.

### **Increasing university pride and loyalty held by alumni in the region**

While it may be considered trivial by some, the quality and calibre of gifts provided to alumni in particular was a critical decision. It was noted by several delegation members early in the exploration phase that individuals in the Bay Area 'wear their pride' and would often be seen in the workplace and in social settings in their schools' gear or have work stations that prominently featured tokens from their alma maters. It was agreed that the most important aspect to profile in the region was the university's name versus department or faculty affiliations — this would both help with local name recognition and also provide a consistent visual approach. Institution-branded scarves, hats and gifts were given away and received rave reviews.

It was also important that the group reinforce the Canadian connection — something that alumni commented on was in fact their strongest bond. Consequently, effort was invested to give away Canadian-branded swag (eg Canadian Mounted Police thermoses, Hudson Bay blankets, etc.), potato chips and types of chocolate bars that could only be obtained in Canada. Alumni were overjoyed to receive items that reminded them of home and that provided a simultaneous sense of nostalgia, novelty and comfort. This also assisted in humanising the institution and its representatives.

During all events, whether casual or formal in nature, post-event messages were distributed to attendees to thank them for attending and included 'pride

points' of university accomplishments or successes that they could in turn share with their networks. Post-event surveys also asked participants to indicate if their level of pride and affiliation with SFU had increased as a result of their attendance, and the measure consistently ranked highly.

### **Increasing recognition and acknowledgment of the Simon Fraser University brand**

One significant complaint that alumni in the region shared with staff on an ongoing basis was that they felt a sense of frustration that there was no brand recognition for their university in the region. This also resonated strongly with the co-op instructors: 'When our Co-op instructors would be conducting their visits and attempting to develop more co-op job opportunities, they were often met by employers with looks of confusion when they remarked they were from SFU — they'd respond by saying, "Oh, San Francisco University!"' notes Chicoine.

SFU was not a name that resonated. This raised concerns among alumni about the perceived value of their credential(s) and overall affiliation with their alma mater. Schlenker (1980, as cited in Hummel)<sup>6</sup> developed the 'basking in reflected glory' (BIRG) effect to describe how one's affiliation with a successful entity — like their alma mater — increases their own perception of success. Consequently, as institutions become more successful and renowned, Schlenker argues that their alumni develop a greater sense of pride and willingness to become involved. The BAWG knew strategies were needed to increase the recognition and reputation of SFU in the region.

One tactic employed to raise the university's profile, brand recognition and alumni pride was to feature impressive faculty researchers, alumni and their work. From hosting tech talks to featured presentations to recognising the generous contributions of the engaged alumni — the institution began to continually highlight what makes SFU outstanding and, in turn, instilled pride and passion within graduates. As a result, the university began to realise some interesting outcomes, such as seeing leading Bay Area-based employers recruiting on SFU's campus.

### **Increasing the number of organisations that hired co-op students through using alumni as door openers**

Co-op and alumni relations began to collaborate on organisations to target hiring of students. A list of alumni in the region was identified on LinkedIn,<sup>7</sup> and those who were previous co-op students and/or known alumni were approached on an individual basis to meet jointly with members of the co-op and alumni teams to discuss potential opportunities. Also, when co-op instructors would conduct their annual site visits, they would make a point to reach out to meet with alumni who worked in the organisation and to connect those alumni with the students who were there on work terms.

### **SUCCESS REVEALED: FIVE YEARS LATER**

The list of accomplishments achieved through the BAWG's efforts is substantial, although one challenge has been immediate measurement. Much



of the work was relational and, as a result, requires time to cultivate and materialise. Most of the initiatives or relationships that began five years ago are only today being realised as more defined outcomes. It is thus critical to take a longer-term approach towards a strategy and investment when building a new region for engagement as the tactics that are employed to build relationships and change perspective take time to realise.

Overall, SFU experienced a more than 600 per cent increase in alumni and prospect activity in the region over a five-year period. Highlights include:

- A 15 per cent increase in the number of donors in the region
- One six-figure major gift realised, and one endowment established
- More than 1,000 interactions recorded in the customer relationship management (CRM) for alumni and prospects in the region
- A doubling of the number of co-op student placements in the region
- Elevated university brand awareness in the region to the point where companies such as Facebook, Apple, Google and PayPal now actively recruit on campus for SFU students and graduates

More broad-based accomplishments to date include:

- Strengthened relationships with colleagues within the university to ensure more inclusive, transparent and communicative planning
- Improved intelligence regarding the needs, wants and challenges of alumni and prospects in the region to provide more intentional programming that highlighted and leveraged faculty, alumni and/or champions as content experts

In part, due to the successes realised in the region, the alumni relations team did manage to advocate for more dedicated resources towards regional engagement activities. A new manager of alumni programmes and services was hired in 2019, to help focus on building out further activities in other regions using a similar approach to what has been realised in the Bay Area. Due to onboarding timing, efforts are only now beginning to be applied to other regions and it is too early to assess impact.

## LESSONS LEARNED AND RECOMMENDATIONS

The significant effort and resources that have been invested in BAWG's activity in the region over the past five years have yielded significant learning. The following are general recommendations that can be provided to those who are considering the development of a specific regional engagement strategy:

- 'It's not about me, it's about we': While each unit will have its own respective goals, it is important to recognise that assisting colleagues to achieve their goals will not necessarily cannibalise one's own goals. This approach also bodes well from an external perspective whereby representatives from an institution are viewed as exactly that, and are not only viewed as representatives from a specific area: 'We're all in this together and the stronger we are a united front, the more appreciative our contacts are and the stronger our relationships become', notes Chicoine.
- Maintain a single-point person for master planning: Identifying a key-point person for a delegation's planning is critical. This approach enables the more effective management of a

central trip planning calendar where all activities are noted, possible collaboration can be identified and discussed and communications/requests can be coordinated. All BAWG members are kept apprised of updates as they are made.

- **Be informed:** When traveling, members of the delegation are expected to think of themselves as university representatives versus independent unit representatives. This requires some additional education in advance of a trip, which avoids embarrassment and increases service delivery when engaging with alumni, donors or employers.
- **Pivot where and when needed:** Feedback from alumni, donors and employers is continually solicited and reported back to the BAWG to help refine approaches and take advantage of new opportunities. While having a general strategy is important to remain focused, it is critical to continually seek intelligence to indicate that efforts are the most effective. Given the nature of the region, it was acknowledged that flexibility and a constant need to reassess efforts were core requirements of the group's strategy. Asking questions of the alumni and stakeholders to ensure delivery and understanding of what alumni expect is vital. For example, the delegation's original efforts were focused on San Francisco; feedback from alumni and government officials in the region, however, strongly encouraged additional activity to be created in Silicon Valley. Consequently, the delegation now visits two areas (San Francisco and Silicon Valley) during each trip and provides programming in both locations to cater to different demographics.
- **Leverage as many colleagues as possible:** Strategies and activities will be

richer if more units are involved in the planning and implementation phases. Lisa Jung, senior associate director of alumni relations comments, 'The synergy of working together has been infectious — the success of working together has attracted more members to the working group'. In particular, the BAWG expanded each year to include additional representatives from university recruitment, the international office, academic faculties and marketing and communications. This made for richer discussions, increased opportunities and additional resources to be leveraged. It has also led to planning and processes that have become more sophisticated, resulting in better coordination, less mistakes and improved communication.

Have patience. During the first couple of years, people were questioning the approach that was being taken by the BAWG given that it was a new market and initial results were not significant. The working group had faith given the environmental factors that existed — notably the highly successful graduates who were relatively affluent or connected and positive feedback from those who were initially engaged.

The model of the BAWG was so successful that it has evolved and broadened in scope to become the Regional Engagement Working Group; this collective now focuses on developing engagement strategies for all of the university's major alumni and donor markets. It meets on a bimonthly basis and continues to expand its membership. As Jung notes, 'It's been exciting for us, it's like having a larger team — and who doesn't want a larger team? It was there all along and now we are finally recognizing the great benefit of working together'.

## REFERENCES

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