



Elevating Your Strategy with Engagement Scoring

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Advancement offices are increasingly being asked to track more data points on their constituents to help demonstrate activity and progress toward goals. While dollars raised has always been relatively easy to track, the more difficult data points to track are engagement-related. Your institution may be tracking email open rates to event participation to the number of volunteers, as well as additional metrics. Tracking this type of information can be helpful in demonstrating the value that your team is bringing to the institution, and specifically, the advancement division, as increased engagement leads to other positive results.

Other than showing what your team is helping to achieve, which is valuable in and of itself, this type of data also helps you to begin to connect the dots around engagement. As an example,

iModules research has shown that individuals who have not engaged with email over a three-year period are 80 percent less likely to be engaged in other areas, including attending an event, or making a gift.

This could be because they do not have a valid email address in your database, are not looking at your communications, or for other reasons.



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Email is clearly the easiest way to engage for constituents, but this also highlights the importance of having valid email addresses for your graduates. Having no engagement in email showed the highest difference by far in the analysis.

Having no email engagement was followed by individuals who had not made a gift over a three-year period—their overall engagement in other areas was 37 percent lower than the average constituent.

This type of analysis highlights key opportunities and demonstrates the linkage between various types of engagement activities. We likely all feel that if a graduate or supporter engages in one area, they are more likely to also engage in other areas – this data supports that. This is one way that tracking different data elements can be helpful and can be used to better understand how your graduates are connecting with the institution, and where there are opportunities to increase that connection.

Data such as this can also help you to better understand where there are differences in engagement as you look at your graduates. If, for example, graduates from the 1960's attend more events, adjustments can be made using that information. And it's possible that events may not resonate with other groups, and therefore, programming strategies should change. On the other hand, there is also an opportunity to increase communications about events to 1960's graduates to potentially further increase their participation. However, looking at data in this way can be challenging if you are looking across various data elements (i.e. giving, events, email...) to identify themes and groups to focus on.

That's where an engagement score can be truly beneficial.

The goal of an engagement score should be to provide a measurement of the overall engagement of your graduates across a number of engagement points to better understand your constituency and identify new opportunities.

An engagement score should be based on actual activity that shows engagement – think email response, event participation, making a gift, etc. Having an engagement score for each graduate demonstrates their connection with the institution and allows you to look at groups of similar individuals to understand a group's comparative engagement. For example, this might help to identify class years who are more engaged and thus, more likely to respond to a class-based event.

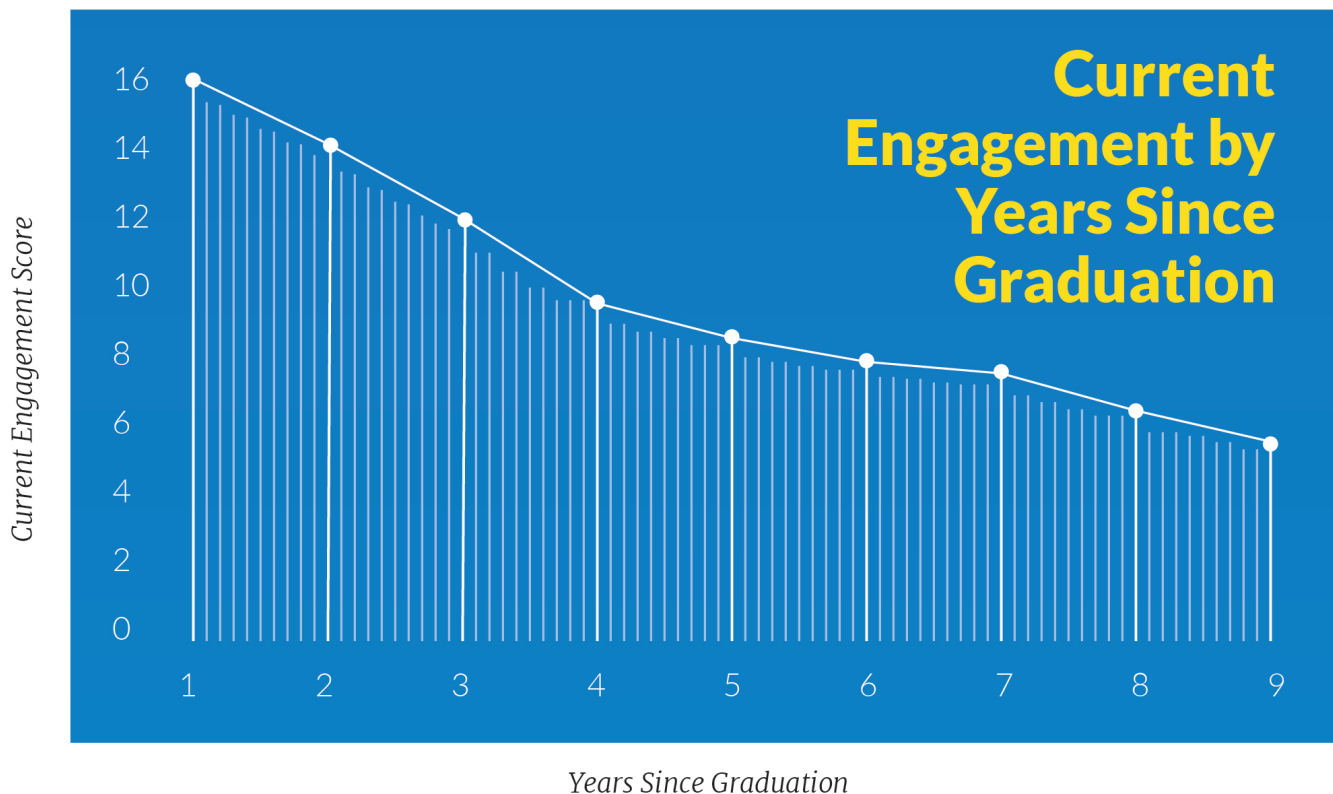


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What we've learned along the way

Having an engagement score allows you to think differently about communications and programming, not only at the individual level, but also at the cohort level. For example, individuals who have high engagement should be encouraged to be volunteers or asked to be social media ambassadors. Perhaps you could choose to increase communications to all individuals with high email engagement regardless of their engagement level, taking the strategy a step further in customizing communications based on engagement level and how individuals are engaging. Having the data allows you to treat individuals who have comparatively high engagement differently from those who have not engaged with the institution recently. It's also important that any engagement score provides more information about where someone's engagement is coming from.

We looked at the results of engagement scoring across a number of iModules partner institutions and have identified trends. One of the key areas of focus for many institutions are GOLD alumni – Graduates of the Last Decade – which is an important group to focus time and energy on. If this group can be engaged early, they are more likely to remain engaged and your institution does not have to seek to re-engage them. In looking at data on recent graduate engagement, this group is generally more highly engaged than other graduate classes. However, it is important to note that the majority of their engagement occurs within the first few years after graduation and then their engagement trails off.



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While a ten-year approach to communications may generally work, our research indicates that for GOLD alumni it is more likely that there are several subgroups within the ten years of graduates. For that population specifically, so much is changing in their lives that individuals who graduated one or two years ago are looking for different opportunities than those who graduated five, or even ten years ago.

An area where there is more variation across institutions is related to the school of graduation or major. Having overarching engagement data at this level can support conversations with school or department leadership about opportunities for engagement of their graduates. In fact, for many institutions it has helped the advancement office get better data on what schools and departments are already doing and has helped them get better data from schools on their alumni.



How can engagement scores be used to advance your program?

Having information on who and how someone is engaging can significantly impact where you focus your time and energy to help to move your program forward. Research shows us that the more tailored a communication or an experience is, the more likely the recipient will respond positively to it. The engagement score makes it much easier to tailor communications because you have a sense of how engaged an individual is and even where their engagement is primarily stemming from.

iModules partner institutions have used engagement scores in a number of ways in addition to adjusting broad communication strategies. For some schools, it has been an opportunity to prioritize individuals for email acquisition efforts. This allows them to focus resources on individuals who are most likely to engage, rather than all alumni without an email address.

Muhlenberg College has adjusted communications for groups with lower email engagement, focusing more on print communications for these groups, while also trying to gather updated email addresses. In addition, Muhlenberg has chosen to focus on a decade of graduates with lower overall engagement by adjusting communications and coupling that with a solicitation plan to seek to further engage this group.

Another way that communication strategies could be adjusted is to take the reverse approach. There may be parts of your constituency who do not have a history of engagement, are non-donors, and have low capacity. Institutions should consider reducing communications to groups like this in order to apply saved resources to other groups who have a higher likelihood of engaging. While this is a decision every institution must make on its own, engagement scoring data provides information to support these conversations.



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Moreover, engagement scoring can also be beneficial for annual giving and development. Indiana University of Pennsylvania has used the engagement score to prioritize donor research on individuals with comparatively high engagement who also have a giving capacity. In addition, IUP has included engagement information for phonathon callers so that students have a better understanding of how engaged graduates are with the institution. This gives students more insight prior to calling a potential donor.

There are a number of ways to use engagement scoring to help you improve programming and your strategies.

For more information about Engagement Scoring from iModules, please contact our team at sales@imodules.com. Additionally, current iModules clients should reach out to their account manager.



About The Author

Dr. Mirko Widenhorn joined the iModules team in July of 2013, bringing over 11 years of higher education experience. Most recently, he was the Director of Alumni Relations and Annual Giving at Wilkes University. At iModules, he provides consulting services related to engagement scoring, strategic planning as well as in-depth analyses of client websites and programming. Mirko is a Drew University graduate and recently completed his Ed.D. in higher education administration at Wilkes University, focusing on whether giving differs based on participation in different types of alumni programming.

About iModules

Powerful technology. Inspired engagement. Lifelong relationships. More than 800 higher education institutions partner with iModules to drive larger gifts, increase event attendance and membership, and improve participation rates through data-driven, meaningful engagement. Learn more at imodules.com.

