

**Activating Alumni Engagement:**  
The impact of an engaged alumni community  
on an institution's strategic goals

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## Abstract

**Purpose:** Engaged alumni have the potential to make a profound impact on an institution's strategic goals as mentors, teaching partners, advisors, lifelong learners, employers and donors. Although alumni relations and engagement have been studied for decades, few researchers have attempted to connect the impact of alumni involvement to the goals and objectives of an institution's strategic plan. This study aims to close that gap by asking, in what capacity do alumni want to be involved in activities that may help advance the strategic goals of their alma mater? **Method:** Through semi-structured, one-on-one interviews with five engaged alumni from the Southern Alberta Institute of Technology, this qualitative study connects alumni engagement activities to the objectives outlined in the institution's five-year strategic plan. **Results:** The results strongly indicate that an engaged alumni population can significantly impact an institution's strategic goals and that alumni engagement professionals should be seen as valuable partners on its road to success. **Value:** The data presented in this study provide alumni engagement offices with ideas for future alumni programming and research opportunities that may inform those programs.

**Keywords:** Post-secondary, higher education, alumni, alumni engagement, alumni relations, advancement, alumni programming, strategic plans, communications, philanthropy

**Paper Category:** MACT Capstone Project

## Chapter 1: Introduction

For years, post-secondary institutions in Canada have been grappling with rising costs, reduced government funding, and a rapidly evolving digital economy that has disrupted everything from their curriculums and teaching methods to the way they operate and function. Unfortunately, these conditions were exacerbated by the COVID-19 pandemic that gripped the world in 2020 and brought with it physical distancing rules, mandatory isolation, and work-from-home orders. Campuses across the country were closed, and post-secondary institutions had to scramble to deliver traditional, in-person curriculums online. Enrollment dropped drastically, and revenues plummeted, resulting in layoffs and cutbacks at many institutions. A KPMG report, *The future of higher education in a disruptive world*, addresses this unsettling trend and suggests that change in higher education is inevitable. “In the interest of their own survival, post-secondary institutions will have to transform to meet the needs of individual students who will power the workforce of our rapidly changing economy (Parker, 2020, p.3). To do this, KPMG says this transformation should not only be “about the curriculum, learning delivery, student support and research,” but also about “the back office, the operating model, the technology and, fundamentally, the sum of capabilities that reside in the organization.” (Parker, 2020, p. 3) In other words, post-secondary institutions will not only have to evolve their curriculums and program delivery options to adjust to the changing economy, but they will also have to examine the way they are managed and operated.

In this environment, graduates — an institution’s only permanent stakeholder group — can be of enormous value. After graduation, alumni venture into the workforce, representing themselves as a product of the institution that trained them. They are natural advocates for the reputation of their alma mater. Unfortunately, alumni engagement departments at many

post-secondary institutions remain undervalued and under-resourced (Cates, 2020). And as the pressure on institutions increases, there is a tendency for administrations to prioritize alumni fundraising over engagement — despite evidence that an engaged alumni population can bring more than just financial gains (Cates, 2021; Gallo, 2018). Involving alumni in the student experience through mentorship programs and guest lectures, allowing them to be involved in student recruitment, or opening up seats on advisory councils are also valuable and meaningful ways to engage alumni. In this way, alumni engagement goes beyond the transactional relationship of alumni as former students or future donors to a more transformational engagement model where alumni participation becomes the fabric of an institution's culture.

## **Purpose**

I have been a communications specialist in the Alumni and Development department at the Southern Alberta Institute of Technology (SAIT) for 14 years. I have seen many changes to the institution and the department in that time. Given the enormous pressure put on higher education over the past decade, there has been an increased need for the Alumni and Development department at SAIT to prove that it is making a significant difference to the institution's success. Executive management wants to know that our activities are making a difference to the bottom line. Are alumni returning to take additional credentials? Are they willing to promote SAIT to their peers, or provide testimonials about the merits of a SAIT education to potential students? Primarily, they want to see that our alumni relations efforts are resulting in an increase in donors and fundraising dollars. This focus on fundraising, however, may conceal the long-term benefits of having an engaged alumni population. Working in alumni relations, I see enormous value in engaging with an institution's alumni beyond fundraising. By offering meaningful volunteer opportunities to alumni and connecting them with current and

prospective students, alumni can enhance the student experience, bring real-life success stories into the classroom, create networking opportunities through industry connections, and advocate for the value of the institution's programs. This research project sheds light on these observations by demonstrating that the many ways alumni want to contribute to their alma maters can have a direct and positive impact on the institute's strategic priorities.

Although alumni relations and engagement have been heavily studied for decades, few researchers have attempted to connect the impact of alumni involvement to the goals and objectives of an institution's strategic plan. This study aims to close that gap by looking at one institution and asking a small group of alumni how they want to be engaged. By showing how those identified activities could impact specific goals from the institution's strategic plan, I make the case that alumni have the potential to bring enormous value to an institution, in addition to their philanthropic donations. This project was designed to be a small-scale, exploratory study to discover areas for further research and knowledge to advance SAIT's current alumni relations program. The qualitative data was collected through five semi-structured interviews. Because of the small-scale, qualitative nature of the study, the results are limited to this case and are not meant to be replicated outside of this scenario. The evidence presented below is illuminating, however. And although no correlations are made, and the outcomes cannot be assumed to be true for an entire population, the findings are compelling enough to advise that alumni relationships should be nurtured and engaged alumni should be considered valuable stakeholders, committed to an institution's success.

## Preview of the Literature

In Chapter 2, the literature review summarizes the extensive research available within the fields of advancement and alumni engagement. Overwhelmingly, these studies suggest that post-secondary institutions can benefit from an engaged alumni community. Much of the literature reviewed indicates that by building meaningful, lifelong relationships with alumni, these institutions gain financial benefits and valuable reputational and operational rewards. For the literature review in this study, I focused my search on alumni engagement and alumni relations at higher education or post-secondary institutions, including universities, colleges, and polytechnics. My research looked explicitly at alumni relations activities, fundraising, and alumni communications.

The research published by Maria Gallo heavily influenced my paper. In her study, *Beyond Philanthropy: Recognising the value of alumni to benefit higher education institutions*, she explains that HEIs (higher education institutions) can gain a lot from building affinity and loyalty within their alumni communities. “If an HEI adopts a model of building lifelong alumni relationships, instead of focusing on fundraising, there is the potential to gain wider, more meaningful benefits” (Gallo, 2012, p. 52). David Weerts echoes Gallo by encouraging institutions to adopt an engagement model where alumni, donors, and students become true partners” (2007, p. 99) in the operation and success of an institution. This advice was realized at the University of British Columbia, which adopted such an engagement model in 2014 and saw enormous success. The institution advises: “The alumni association needs to continue to strengthen the ways in which it supports the university itself, with alumni acting as advocates, volunteers, and mentors — not just donors. ” (Todd, 2019, p. 27).

These three researchers — along with the many cited in the literature review below — suggest that by investing in building meaningful, lifelong relationships with their students and

graduates, the benefits extend far beyond philanthropy. As Gallo expresses, engaged alumni become “lifelong ambassadors,” enhancing the student experience through mentorship programs and internships, volunteering on advisory councils, and promoting the institution as a catalyst in their own success (Gallo, 2018, p. 93-95). Although there is a vast amount of research to support Gallo, few researchers have asked alumni what activities they would like to participate in, nor do these studies show how these activities may impact an institution’s strategic priorities. This study addresses this gap by asking alumni if they would be interested in participating in activities that could positively impact SAIT’s institutional objectives. To understand how alumni might want to be involved, I conducted five semi-structured video interviews with alumni from the institution. The participants were invited to take part in this small-scale study because of their previous engagement with SAIT. The questions asked in those interviews were designed to explore their feelings towards SAIT and their preferences for future engagement with the institution.

### **Preview of the Methodology**

This study aimed to explore the relationship between alumni engagement and an institution’s strategic plans and identify areas for future development or research. As stated earlier, the results of this study were not intended to apply to all SAIT alumni, nor were they meant to be relevant to other institutions. Therefore, conducting a small exploratory study was appropriate to the project's scope. I considered conducting a large-scale quantitative survey so that the results could be generalized outside of the small case presented below. However, given the short time allotted for this assignment and my limited personal budget, I decided to keep the project scope relatively narrow. As I explain in more detail in Chapter 3, a quantitative survey would have taken longer to execute and analyze, and it may have been challenging to acquire permission for the complete list of SAIT alumni required to conduct the research.

The five interviews conducted for this project resulted in rich, personal accounts from SAIT alumni who described in detail why they continue to engage with the institution, what would make them want to continue to be involved, and how they thought they could contribute to the institution's future success. The results from these interviews are presented in Chapter 4 below and validate what Gallo, Weerts, and Todd suggest — that engaged alumni can positively impact an institution's strategic priorities.

## **Summary**

Specifically, this study asks: in what capacity do alumni want to be involved in activities that may help advance the strategic goals of their alma mater? The outcome of this project identifies ways in which alumni want to get involved and links those activities to the strategic objectives of their former institution. The literature review overwhelmingly shows the vast benefits of alumni engagement but fails to ask alumni what activities would interest them. Additionally, it fails to link those activities to the impact they may have on an institution's strategic priorities. This study aims to address that gap by interviewing engaged alumni from SAIT and asking them if they would be interested in investing their time, talents and treasures towards helping SAIT achieve its goals.

The following chapter reviews the available research on advancement and alumni engagement. Then, in Chapter 3, I explain my research design and methodology. Finally, in Chapter 4, I present the results of my research and discuss the implications of my findings. Ultimately, the findings presented below will demonstrate that there is much to gain from nurturing and maintaining an engaged alumni community at post-secondary institutions. The literature review in the next chapter sets the stage for this discussion and provides the foundational knowledge necessary to understand the future of alumni engagement.

## Chapter 2: Literature Review

The Council for the Advancement and Support of Education (CASE) defines alumni engagement as “activities that alumni value, build enduring and mutually beneficial relationships, inspire loyalty and financial support, strengthen the institution’s reputation and involve alumni in meaningful activities to advance the institution’s mission” (CASE Alumni Engagement Metrics Task Force, 2018, p. 5). Critical within this definition is “the belief that these activities must have significant value to alumni while also supporting the institution’s mission” (2018, p. 5). Although there is ample research available on alumni engagement, few studies focus on how having alumni engaged in activities like mentoring students, sitting on advisory boards, guest speaking in classrooms, or advocating for the institution can support its strategic objectives. Further, the research fails to ask whether alumni are interested in participating in these activities. The research I conducted for this project aimed to fill this knowledge gap by asking alumni how they want to engage with their institution. Specifically, this study asks: in what capacity do alumni want to be involved in activities that may help advance the strategic goals of their alma mater? The outcome of this project identifies ways in which alumni want to get involved with their alma mater and links those activities to the strategic objectives of their former institution.

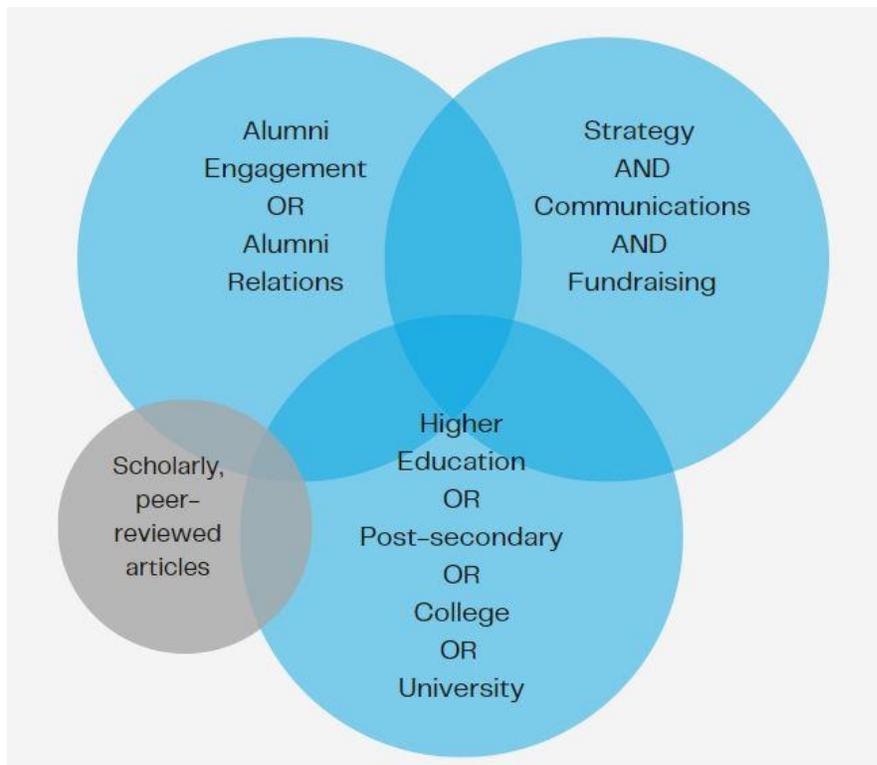
The following sections of this literature review provide evidence of the advantages that alumni participation can have on an institution. I begin by explaining how I conducted my research and the theoretical perspectives that helped guide my search. This is followed by exploring the roles that Institutional Advancement (IA) and alumni engagement departments play in higher education. Next, the various outcomes of alumni engagement are analyzed, including monetary and non-monetary alumni participation. Finally, the impact of the student

experience on a graduate’s loyalty is discussed. I conclude with a statement on my proposed research project and how it will contribute to the current literature in the field.

### **Search methodology**

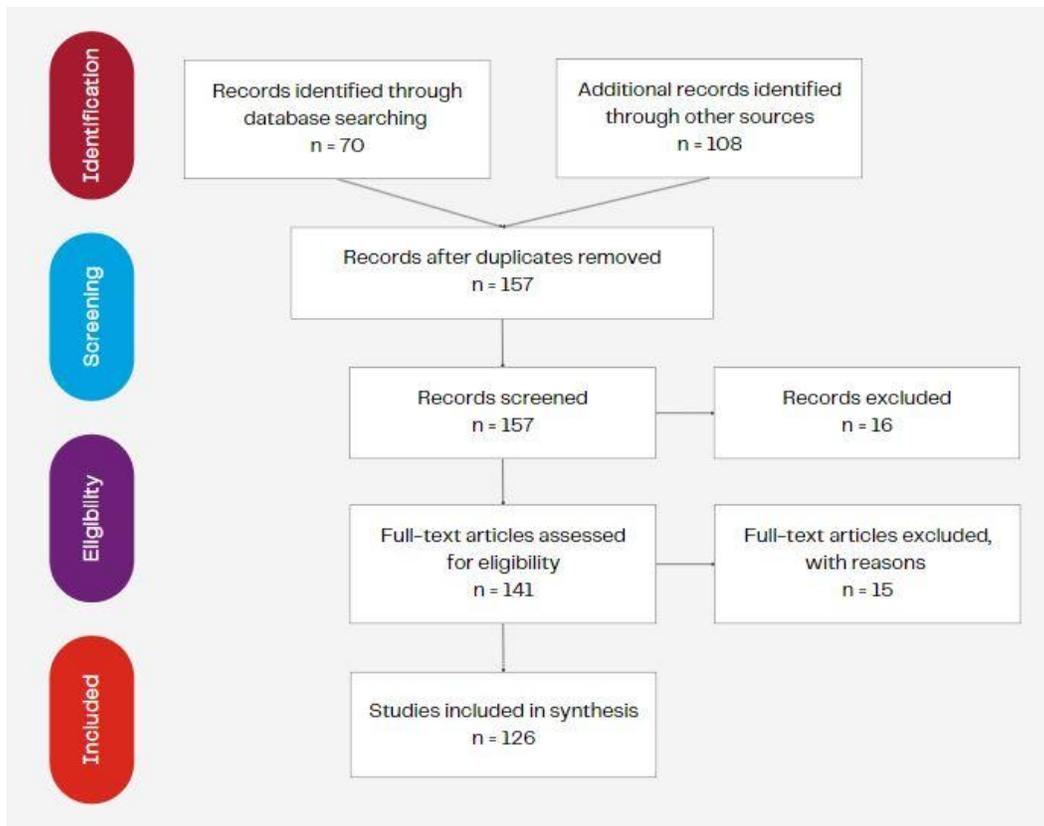
For this literature review, a series of searches were conducted on various databases and platforms, including Academic Search Complete, ProQuest, ERIC, Communications and Mass Media, JSTOR, and Google Scholar. Early searches included the following terms and phrases: alumni engagement, alumni relations, alumni association, strategic plans, alumni communications, fundraising, higher education, college, university, and post-secondary. Results were sorted by most recent articles and included only scholarly journals in English. The Venn diagram below illustrates the search terms used to conduct my research (Figure 2.1).

**Figure 2.1: Search terms used to conduct research**



Initial searches garnered 66 results, including some identified during the preliminary discovery research phase. These results were then screened for duplicates and relevancy, resulting in a total of 58 articles that were added to my bibliographic database in Zotero. Subsequent readings of these initial articles led me to explore some additional referenced sources. As a result of this exploration, 94 additional articles were added to my database. Finally, a second-round search was conducted to identify if more articles explored the role of institutional strategy in the alumni engagement literature. Only 18 new articles were found, and 12 of those were duplicates. Additionally, articles dated earlier than 1990 were excluded as this period was before digital communications and data analytics, making many of these articles outdated or irrelevant to the current study. In the end, 126 papers were analyzed for this literature review. The results of my research are represented in the following flow chart (Figure 2.2).

**Figure 2.2: Flow chart representing results of research**



## **Theoretical perspectives**

Two theoretical perspectives guided the research for this literature review: relationship marketing theory and organizational identity theory. Both offer foundational views for research in the alumni engagement arena. While relationship marketing theory explains alumni engagement activities, organizational identity theory provides insight into alumni motivations and behaviours.

### **Relationship marketing theory**

Relationship marketing theory aims to “establish, develop, and maintain successful relational exchanges” (Schlesinger et al., 2017, p. 2179). According to researchers Keith MacMillan, Kevin Money, Arthur Money, and Steve Downing, the popular theory emphasizes the “importance of developing long-term supportive relationships with existing customers and posits that energy and resources are better spent on this group rather than attempting to attract new customers” (2005, p. 807). It is also a popular lens through which researchers have examined the alumni relationship in the higher education arena (Cownie & Gallo, 2021; Iskhakova et al., 2017; Kelleher, 2011; MacMillan et al., 2005; McAlexander & Koenig, 2001; Schlesinger et al., 2017; Stevick, 2010). Kevin Fleming, for one, maintains that relationship marketing theory presupposes that “alumni must trust in, commit to, and be satisfied with their alma maters” to maintain a lifelong connection (2019, p. 106). Iida Pedro, Júlio Mendes, and Luís Pereira (2020) suggest that sustaining long-term relationships requires all parties to be committed to it. “Commitment binds partners to the relationship, forming a solid base for its maintenance” (Pedro et al., 2020, p. 3). Waleska Schlesinger, Amparo Cervera, and Carmen Pérez-Cabañero (2017) add shared values and institutional image to this list of variables impacting alumni relationships. Their research suggests that “if graduates share values and ideals

with their universities, they assess their institution more positively” (Schlesinger et al., 2017, p. 2190). They also found that “universities with positive images are better positioned to foster graduate satisfaction” (Schlesinger et al., 2017, 2189).

For advancement professionals, relationship marketing theory helps explain the conditions under which alumni would be most likely to remain connected with their former institutions. The research above illustrates that long-term relationships with an institution’s only permanent stakeholder group are more likely if alumni are satisfied with their student experience, trust the institution, and feel committed to the brand.

### **Organizational identity theory**

Organizational identity is also prominent throughout the research on alumni engagement (Borden et al., 2014; Dreaner & Pizmoney-Levy, 2021; Ebert et al., 2015; Etzelmueller, 2014; Frisby et al., 2019; Mael & Ashforth, 1992; McNamee, 2021; Newbold et al., 2010). Kristen Etzelmueller describes it as a “perceived oneness with an association” (2014, p. 1). In her study, alumni used terms such as value system, identity, strong influence, finesse, and sense of community when describing their relationship with their alma mater (Etzelmueller, 2014, p. 48). Significantly, the participants in Etzelmueller’s study indicated their pride as graduates of their alma mater, leading to a desire to pay it forward as advocates and supporters of the university (2014, p. 54). Additionally, a study by Michael McNamee revealed that “while both engagement and identity are key to predicting donations, identity is more crucial to the initial giving decision, and engagement is fundamental to the formation of long-term giving habits and increased amounts of support” (2020 p. 4).

Organizational identity is often closely associated with brand identity (Alves et al., 2010; Martin et al., 2015; McAlexander et al., 2006; Stephenson & Bell, 2014a; Stephenson & Yerger,

2014b), and there appears to be a strong connection between alumni affinity and brand identity in the research (Charbonneau-Gowdy & Magaña, 2020; McAlexander et al., 2006). James McAlexander, Harold Koenig, and John Schouten (2006) conducted an empirical study of university alumni to measure critical relationships associated with a healthy university brand. Their study showed that “integration in a brand community in higher education can contribute to such valued behaviours as donations, college referrals, engagement in alumni groups, and participation in continuing education (McAlexander et al., 2006, p. 115).

Organizational and brand identity fall short in describing the role individual identity plays in alumni engagement. Researchers have referred to this as “alumni role identity” (Dillon, 2017; McDearmon, 2013). Rather than focusing on the influence of the organization or its brand, alumni role identity focuses on the individual and their altruistic behaviours and attitudes (McDearmon, 2013). In his study on how alumni view their role with their former institutions after graduation, McDearmon found that college graduates vary in how they perceive their roles as alumni of an institution. These varying perceptions could impact their engagement after graduation (2013, p. 301). Significantly, McDearmon found that alumni with increased role identity or a sense of responsibility towards their alma mater “may be more likely to support their institution through attending events, volunteering, joining the alumni association, and making financial contributions (2013, p. 298).

In summary, both relationship marketing theory and organizational identity theory suggest that through building relationships and creating a connection with their institution, alumni gain a sense of affinity or loyalty towards their alma mater, ultimately leading to engagement and support. While relationship marketing theory explains what would encourage long-term engagement, organizational identity theory helps explain the personal feelings and

attitudes necessary to maintain engagement. These theories offer guidance to those working and researching the field of alumni relations by helping to create the foundation for engagement strategies and programming.

## **Discussion of the Literature**

The research papers reviewed for this study explore the breadth of topics across the alumni engagement arena. The following sections will examine and discuss the field, including the role of institutional advancement and alumni relations, the theories about alumni engagement, and the importance of the student experience to long-term connections with graduates.

### **Institutional Advancement**

Institutional advancement (IA) refers to the department within an institution that is responsible for alumni relations, fundraising, communications, and marketing. In her paper, *Beyond Philanthropy: Recognising the value of alumni to benefit higher education institutions*, Gallo points to the term itself in defining its purpose as “to advance and improve the institution and enable stakeholders to play a key role in this change” (2012, p. 43). Success for these departments is often measured through their fundraising activities. However, Gallo’s study shows there is more to gain from engaging alumni and building affinity with students, graduates, and donors. “If an HEI [higher education institution] adopts a model of building lifelong alumni relationships, instead of focusing on fundraising, there is potential to gain wider, more meaningful benefits from the alumni constituency” (2012, p. 52). Her empirical case study showed that engaged alumni mentored students, represented on governance boards, and hired future graduates (2012, p. 48).

David Weerts (2007) agrees with Gallo and suggests an engagement model be applied to institutional advancement practices. By this, he means that institutions should turn away from traditional, linear, transactional models of alumni engagement and operate under a “two-way knowledge flow model” (2007, p. 93). “In this environment, advancement staff work together to facilitate an interactive process of teaching, learning, and problem-solving in which institutions and external partners exchange perspectives, knowledge, materials, and resources” (Weerts, 2007, p. 93). In this way, Weerts suggests that “alumni, donors, and prospects become true partners” (2007, p. 99) in the operation and success of an institution.

### **Alumni Engagement**

The work of alumni engagement follows the definition provided by CASE in the introduction above: “activities that alumni value, build enduring and mutually beneficial relationships, inspire loyalty and financial support, strengthen the institution’s reputation and involve alumni in meaningful activities to advance the institution’s mission” (CASE Alumni Engagement Metrics Task Force, 2018, p. 5). Although programming from one institution to another may differ, the desired outcome of alumni engagement activities is generally alumni support, whether through fundraising, volunteering, or advocating for the institution.

There is a significant amount of research on alumni behaviours and attitudes towards their former institutions (Carvalho & de Oliveira Mota, 2010; Dreaner et al., 2020; Dreaner & Pizmoney-Levy, 2021; Farrow & Yuan, 2011; Fleming, 2019; Goldsberry, 2007; Heckman & Guskey, 1998; Maynard, 2011; McDearmon, 2010; Morgan, 2014; Painter, 2017; Palmer & Koenig-Lewis, 2008; Rau & Erwin, 2015; Shen & Sha, 2020; Siller, 2016; Singer & Hughey, 2002; Smith et al., 2019; Weerts, 2008; Weerts & Ronca, 2007; Zhimin et al., 2016). Kevin Fleming identifies five main ingredients that may motivate alumni to engage with their

institution: personal values, perceived institutional integrity, connectedness, commitment, and a sense of fulfillment (2019, p. 114). Fleming describes these ingredients as coming together into a “central pot,” determining its overall temperature (2019, p. 127). “The five dimensions through which alumni understand their relationship with their alma mater blend together to determine the nature and level of engagement” (Fleming, 2019, p. 127).

Young alumni and their post-graduation behaviours and motivations towards support have been singled out as a popular segment for alumni engagement research (Freeland et al., 2015; Goldsberry, 2007; Horseman, 2011; McDearmon, 2010; McDonough, 2017). McDearmon, for example, found that younger graduates seek greater satisfaction from their institutions in preparing them for their careers — specifically through enhanced career services (2010, p. 36). In addition, he found that young alumni like to receive incentives in exchange for their support, such as branded clothing and mugs (McDearmon, 2010, p. 38).

Both alumni loyalty and affinity are critical objectives of alumni engagement practices (Breland, 2012; Charbonneau-Gowdy & Magaña, 2020; Cownie & Gallo, 2021; Farrow & Yuan, 2011; Iskhakova et al., 2017; Martin et al., 2015; McAlexander & Koenig, 2001; McAlexander et al., 2006; McAlexander et al., 2014; Pedro & Andraz, 2021; Pedro et al., 2018; Schlesinger et al., 2017; Snijders et al., 2019). While loyalty is associated with faithfulness towards an organization or a brand, affinity refers to a feeling of pride or association with an organization. Ingrid Snijders, Lisette Wijnia, Remy Rikers, and Sofie Loyens (2019) demonstrated that alumni who developed strong relationships at the university as students developed feelings of satisfaction, trust, and commitment after graduation. These feelings led to long-term alumni loyalty (Snijders et al., 2019, p. 623). Conversely, in their study on philanthropy at post-secondary institutions, James McAlexander, Harold Koenig, and Beth

DuFault found a link between brand affinity and alumni giving (2014, p. 254). They suggest there is significant value in creating “opportunities for alumni to share meaningful experiences that can foster strong interpersonal ties and build institutional identity” (McAlexander et al., 2014, p. 254).

In 2014, the University of British Columbia (UBC) elevated its alumni engagement programming by cementing alumni engagement as critical to institutional success and creating a culture of affinity and loyalty among its alumni stakeholders (Todd, 2019). The strategy involved conducting a broad and in-depth survey of their alumni, developing an Engagement Value Proposition, and segmenting their alumni in a way that allowed the association to deliver personalized engagement opportunities based on the known preferences of their stakeholders (Todd, 2019). UBC’s formula has quickly become a model program for alumni engagement professionals (Todd, 2019, p. 26). In his essay on the university’s experience, Jeff Todd concludes:

*Engagement professionals need to protect the ethos within the institutions that alumni are a critical part of the overall faculty-student-staff-alumni stakeholder equation. The alumni association needs to continue to strengthen the ways in which it supports the university itself, with alumni acting as advocates, volunteers, and mentors – not just donors. Ultimately, the sustainable path forward for alumni UBC – and for every alumni association – is to be a strategic partner to the university; at UBC, this is now formally enshrined with ‘alumni engagement’ as a specific goal in the new university strategic plans (Todd, 2019, p. 27).*

In other words, alumni must be seen as essential to an institution’s overall success. Not only through philanthropy but also by helping current students succeed, encouraging prospective students to apply, and providing opportunities for new graduates. In this way, alumni become more than merely potential donors but also “strategic partners” in the institution's advancement and committed to its success.

Despite the potential importance that alumni can have on an institution's success, few of the studies referred to in this literature review focused on institutional strategic plans and how alumni engagement activities fit into them. In a later study by Gallo in 2018, she reviewed the strategic plans at Irish institutions and concluded that the words "graduate" and "alumni" are used somewhat differently. While graduates are viewed as the "desired output of the university's efforts," alumni are seen as the "outcome" (Gallo, 2018, p. 94). Expressly, graduates are the product of an institution, while successful alumni result from the university's excellence. Gallo also notes that in the strategic plans studied, alumni were seen as having a strategic role in philanthropic activities and occasionally involved in enhancing the student experience (2018, p. 93). Ghosh et al. (2001) turn this research around to look at how higher education institutions can control costs while not negatively impacting student and stakeholder trust. The researchers collected data from 250 students and alumni. They found that strategic plans that improve the college's perceived sincerity, expertise, and congeniality can be successfully used to increase student trust and mitigate any perceived adverse outcomes due to tightened budgets.

Both these studies suggest that strategic plans are an essential element of stakeholder engagement, and there is a mutual need for institutions and alumni to see these plans succeed. However, there appears to be little research conducted on the role of alumni engagement in achieving the goals laid out in the strategic plans of higher education institutions.

### **Measuring Engagement**

The goal for IA and alumni engagement professionals is to impact the institution's strategic priorities through engagement tactics. But how does one measure successful engagement? Research has been done on the effects of alumni studies (Volkwein, 2010), and alumni surveys appear to be a popular method of gauging the success of IA activities, how

satisfied alumni are, and whether they feel inclined to support the institution (Cabrera et al., 2005; Collins et al., 1999; Pearson, 1999). Yet, there remained no best practices for measuring alumni engagement. That is why the Council for Advancement and Support of Education (CASE) made measuring alumni engagement its mission in 2016. The result was an Alumni Engagement Task Force dedicated to addressing the need for an industry-wide framework to measure alumni engagement (CASE Alumni Engagement Metrics Task Force, 2018, p. 4). The Task Force agreed on four engagement categories: volunteering, experiences, philanthropy, and communications (2018, p. 6). By tracking the alumni who engage in the above activities, the Task Force suggests that institutions will be able to assess the impact of their engagement activities, evaluate programs, and develop strategic engagement goals over time. “Data can also be used to build correlations to demonstrate the impact that engagement has on alumni behaviour, including giving, hiring the institution’s graduates, or recommending the institution to potential students (2018, p. 9). In 2019, CASE launched the global Alumni Engagement Metrics (AEM) survey to capture data relating to investments in alumni engagement and alumni behaviour (Smith & Kaplan, 2021, p. 4). Survey responses came from 372 institutions spanning 16 countries and provided critical inputs on the four categories of engagement listed above (2021, p. 4). According to the report released in 2021, findings indicate that only 25.8 per cent of engagement is philanthropic, underscoring the importance of alumni engagement beyond alumni giving (2021, p. 4).

The evidence provided through the AEM survey in 2019 shows that developing robust alumni engagement programs is integral to the success of IA departments and institutions. However, do these metrics get to the heart of why alumni engage with their institutions, what motivates their behaviour, and what do alumni expect in return for their participation? As

discussed in the introduction of this paper, the organization's definition of alumni engagement states the importance of "meaningful opportunities" for alumni. Still, its means for measuring engagement appear to leave out alumni points of view. My research project will add additional context to the alumni engagement story by asking alumni their preferences, interests, and attitudes towards their alma maters.

### **Alumni giving**

In reviewing the research on alumni engagement, one of the most common topics examined relates to philanthropy and fundraising at post-secondary institutions, and civic engagement is a common theme throughout this discussion (Daly, 2013; Furco, 2010; Goldsberry, 2007; Guzman, 2015; Li & Frieze, 2016; Maynard, 2011; McDearmon & Shirley, 2009; Osborn et al., 2015; Weerts & Cabrera, 2018; Weerts & Ronca, 2008; Weerts et al., 2010). In their study on the characteristics of young alumni donors and non-donors, Travis McDearmon and Kathryn Shirley (2009) found that making donations to other charitable organizations was a "significant predictor" of young alumni who may give to the university (2009, p. 92). Additionally, researchers have delved into the importance of alumni engagement in fundraising (Langseth & McVeety, 2007), tailoring fundraising to community colleges (Akin, 2005), and even the propensity of alumni employees to give to their alma mater-turned-employer (Borden et al., 2014).

Much of this research on the relationship between alumni engagement and philanthropy discusses predicting alumni giving behaviours (Belfield & Beney, 2000; Gibson, 2015; Golden, 2010; Gunsalus, 2005; Hall, 2016; Levine, 2008; McDearmon & Shirley, 2009; Naccarato, 2019; Skari, 2014; Sun et al., 2007; Taylor & Martin, 1995; Tsao & Coll, 2005). Factors such as demographics (McDearmon & Shirley, 2009; Naccarato, 2019; Skari, 2014; Taylor & Martin,

1995), student experience (Belfield & Beney, 2000; Gibson, 2015; Gunsalus, 2005; Naccarato, 2019; Skari, 2014; Tsao & Coll, 2005), alumni engagement (Hall, 2016; Langseth & McVeety, 2007; Naccarato, 2019), solicitation frequency and quality (Golden, 2010; Levine, 2008; Sun et al., 2007; Tsao & Coll, 2005), and giving to other organizations (McDearmon & Shirley, 2009; Skari, 2014) are among the many factors that researchers show can predict philanthropic giving. Xiaogeng Sun, Sharon Hoffman, and Marilyn Grady (2007) conducted a two-year alumni survey at a Midwest public university in the United States that demonstrated many ways institutions could enhance their philanthropic efforts. These suggestions included: creating a comprehensive communications strategy to reach alumni (Sun et al., 2007, p. 326); focusing on current students as future funders and providing quality educational experiences to them (2007, p. 329); encouraging relationship-building between faculty and current students and graduates (2007, p. 329); enhancing alumni services based on stakeholder needs (2007, p. 329); and expanding efforts to connect with older female alumni (2007, p. 330).

Additionally, much alumni engagement literature is preoccupied with donors' perceptions, attitudes, and identities (Dreaner et al., 2020; Drezner, 2018; McAlexander & Koenig, 2012; Wastyn, 2009; Weerts & Ronca, 2007). In her study on “Why alumni don’t give,” Linda Wastyn found that donors and non-donors differ “in how they socially construct their college experiences to create their realities” (2009, p. 96). A graduate’s perception of their student experience can influence their attitude towards giving and future support of their alma mater. Further, David Weerts and Justin Ronca found in their study that “supporter alumni are distinguished by their attitudes and expectations about university needs, and their responsibility to give and volunteer at the university” (2007, p. 32). Weerts and Ronca (2007) are among other researchers (Borden et al., 2014; Dreaner, 2018) who discuss the influence of a donor’s identity

when deciding whether to give back to one's alma mater. However, as discussed above, the institution's identity is also a factor that influences alumni giving (Golden, 2010; McAlexander & Koenig, 2012). James McAlexander and Harold Koenig studied the importance of brand community related to the giving behaviours of alumni and found a positive relationship between the two (2012, p. 123). They discuss the concept of "brand community integration," or "how strongly an alumnus feels about the collective connections of community that include: institutional identity (the brand), the education that was received (the product), the institution behind the brand, and fellow alumni/peers" (McAlexander & Koenig, 2012, p. 124). In other words, as much as one's attitudes and philanthropic identities matter, it is also essential to consider how these perceptions and constructs are influenced by or tied to the institution itself.

### **Engagement beyond philanthropy**

Alumni engagement or alumni relations programs and activities are often described as a precursor to philanthropic donations (Aslinger, 2018; Gallo, 2013; Harrison et al., 1995; Kundzina et al., 2020; McGill et al., 2009; Newman & Petrosko, 2011; Newman, 2011; Widenhorn, 2017). Maria Gallo describes this as "the friend-raising before the fundraising" (Gallo, 2018, p. 93), but she stresses that alumni can also become lifelong ambassadors for their alma maters. Involving alumni in the student experience through mentorship programs (Gallo, 2018, p. 93), offering internships and work placements for students (Gallo, 2018, p. 93), and involving alumni in advisory councils (Gallo, 2018, p. 95) are also meaningful ways to engage the alumni community beyond philanthropy.

Along with many of her fellow researchers in the field (Dillon, 2017; Goldsberry, 2007; McDearmon, 2013; Weerts & Ronca, 2007), Gallo also recognizes an institution's graduates as valuable "shareholders in the institution, with a vested interest in its reputation and

advancement” (2013, p. 1151). David Weerts adds to this conversation by suggesting that engaged institutions also have the potential to leverage engagement as a way to differentiate themselves from their competitors (2019, p. 15). He theorizes that under certain conditions, an institution’s engagement identity — such as valuing two-way reciprocal engagement — can be leveraged to improve its competitive position and distinguish itself from other institutions (Weerts, 2019, p. 15).

Increasing student success and satisfaction is another way alumni add value to an institution’s objectives while positively influencing its reputation (Dollinger et al., 2019; Hunt et al., 2017; Larsson et al., 2021; Singer & Hughey, 2002). Specifically, student-alumni opportunities, such as mentoring programs (Cownie & Gallo, 2021; Dollinger et al., 2019; Larsson et al., 2021; Washington & Mondisa, 2021), guest speaking opportunities (Cownie & Gallo, 2021; Dollinger et al., 2019), career service and advice (Larsson et al., 2021; McDearmon, 2010), and advisory councils (Hunt et al., 2017; Larsson et al., 2021; Weerts & Ronca, 2008), have been reviewed through various studies. Carl Larsson, Brooks Marshall, and Bill Ritchie (2021) empirically tested a student-alumni program as part of a business school curriculum. They found that students who completed the project reported growth in interviewing skills, improved career discernment, a better understanding of how coursework can be applied in practice, and an overall increase in learning retention (Larsson et al., 2021, p. 8). Unfortunately, this study didn’t ask alumni how they felt about the program or whether they found personal value in participating. Conversely, Mollie Dollinger, Sophia Arkoudis, and Samantha Marangell (2019) found that alumni mentors viewed these programs as worthwhile in their research at three Australian institutions. The researchers found that the “majority of mentors felt connected to the university and committed to participating in alumni programs” (Dollinger et al., 2019, p. 383).

Significantly, 58 per cent of the alumni surveyed for this research indicated “they would like to participate in other alumni opportunities such as guest lecturing or helping inform industry-related curriculum (Dollinger et al., 2019, p. 384).

### **The student experience**

The student experience is a common topic in the realm of alumni engagement. A significant amount of research has been conducted on the impact of the student experience on a student’s enduring loyalty beyond graduation (Brown & Mazzarol, 2009; Carvalho & de Oliveira Mota, 2010; Gillan, 2018; Lawley, 2008; Nguyen & LeBlanc, 2001; Pedro et al., 2020; Vanderbout, 2010; Wells, 2015). Some of the key influencing factors include emotions generated by the convocation ceremony (Palmer & Koenig-Lewis, 2008), cultivating good relationships with students (Sung & Yang, 2009), involvement in extracurricular activities (Lawley, 2008), and satisfaction with their learning environment and outcomes (Brown & Mazzarol, 2009; Gaier, 2005; Golz, 2013; Hummel, 2011; Monks, 2003; Rau & Erwin, 2015; Sung & Yang, 2008).

The student experience and exposure to civic engagement opportunities while attending the institution appear to be core influences of post-graduation support and engagement (Goldsberry, 2007; Li & Frieze, 2016; Maynard, 2011). For example, Timothy Maynard (2011) studied the relationship between undergraduate community service and engagement post-graduation. He found that a strong relationship existed “between undergraduate community service and community involvement of alumni” and that this relationship was “enduring long after graduation” (Maynard, 2011, p. 88). Nga Nguyen and Gaston LeBlanc found that customers (or students) were more likely to demonstrate loyalty when “perceptions of both institutional reputation and institutional image are favourable (2011, p.303). They point to

critical elements like faculty, employees, and the campus itself, which may impact a student's perception of the image or reputation of higher education (Nguyen & LeBlanc, 2011, p. 309).

Ruth Hummel (2011) examined the student experience factors that impacted their future engagement with the institution after graduation. She found that “engaged students are more likely to become engaged alumni and future alumni volunteers or donors” (Hummel, 2011, 128). Hummel concludes that “positive interactions between students and other university constituents (e.g., faculty, staff, and other students) benefit alumni programs years later” (2011, 127). She points to the relationship between faculty and students as “paramount” (Hummel, 2011, 127) to this conclusion, and she is not alone. Research on the impact of the instructor-student relationship demonstrates that it significantly influences student satisfaction with their learning experience and their continued loyalty after graduation (Carvalho & de Oliveira Mota, 2010; Frisby et al., 2019; Sung & Yan, 2009, Vanderbout, 2010).

### **Student engagement**

Because student satisfaction is essential to the success of alumni engagement activities, professionals often describe students as future alumni and treat them as such. In this way, student engagement has become a vital component of alumni engagement activities and strategies (Bay & Daniel, 2001; Drew-Branch, 2011; Field, 2011; Freeland et al., 2015; McDonough, 2017; Morgan, 2014; Pedro et al., 2020; Pumerantz, 2005). Richard Pumerantz uses the term “Alumni-in-Training” to describe this philosophy (2005, p. 289). His research examined the effectiveness of this approach, which he describes as “engaging students as if they were already alumni,” leading them to become “more supportive alumni” (2005, p. 290). Pumerantz concludes:

*While many factors have been and will continue to be researched, student experiences are the greatest determining factor for future support as alumni. Happy students become happy alumni; dissatisfied students become lost alumni. The implementation of this philosophy of promoting positive student experiences and fostering an institutional culture of philanthropy will lead to successful alumni involvement (2005, p. 297).*

However, Pumerantz is somewhat vague in suggesting how to implement this philosophy. What strategies can institutional advancement departments and alumni engagement professionals take to ensure the student experience is positive, foster a culture of philanthropy, and expose students to the benefits of an engaged alumni community? In her chapter on “Student Affairs and Alumni Relations,” Patricia Rissmeyer (2010) suggests creating a collaborative culture between the Student Affairs and the Alumni Relations teams within post-secondary institutions could provide a solution. She points to programs and activities typically delivered by student affairs departments, such as orientation, events and programs, career development, and athletics (Rissmeyer, 2010, p. 28). She theorizes that with alumni involvement, these programs may potentially strengthen the institutional image and enhance student commitment (Rissmeyer, 2010, p. 28). “All student affairs professionals can have a positive impact on the lifelong relationship that alumni relations officers strive to achieve with alumni. A partnership between the two is invaluable to higher education today” (Rissmeyer, 2010, p. 29).

### **Analysis of the findings**

The research above overwhelmingly supports the notion that alumni engagement is valuable to post-secondary institutions in various ways. Still, much of the available research focuses on how alumni engagement benefits the institution, leaving alumni needs out of the equation. Many researchers conducted alumni surveys, focus groups, and case studies to determine why alumni support their alma maters, but few asked them directly *how* they wanted

to be engaged. Few asked about their specific interests or what would motivate them to participate. This project aims to close this gap by asking alumni about their preferences, attitudes, and motivations towards engaging with their alma mater. Specifically, this study will expand on Gallo's research that determined alumni have value to add to institutions beyond philanthropic participation. This study will evaluate how alumni may want to participate and then link those activities to the strategic goals of their alma maters — demonstrating the potential institutional impact of alumni engagement.

Building off the theories of relationship marketing and organizational identity that suggest feelings of affinity, loyalty and commitment are necessary for engagement, semi-structured interviews were conducted with five engaged alumni, exploring their attitudes and dedication towards their former institutions. These alumni were asked specific questions to explore why they remain engaged, what motivated them to get involved, and how they would like to be involved in the future. Questions were also asked about their commitment to seeing the institution succeed and how they thought they could contribute to that success. Data pulled from interview transcripts illustrates alumni engagement's impact on an institution's strategic goals, adding to the evidence that having a robust institutional advancement program focused on meaningful engagement should be one of an institution's highest priorities.

## **Summary**

This chapter provided a wealth of knowledge on the advantages that alumni participation can have on an institution. In all the research conducted, not one article indicated that investing in alumni engagement would result in adverse outcomes. The evidence overwhelmingly points to the many advantages post-secondary institutions have to gain from strategically aligning their institutional priorities with their alumni engagement goals, objectives, and activities.

Specifically, the research indicates that when post-secondary institutions invest in building lifelong relationships with their students and graduates, they reap the reputational benefits of a responsive and proactive alumni community willing to give back through their time, talents, and treasures. As Mark Pastorella puts it in his chapter on alumni development in community colleges: “Involved alumni are alumni who will give, and then ask how they can do more. If a college knows how to cultivate and engage its alumni, it is well on the way to financial health and growth” (2003, p. 75).

This research project will expand on this knowledge and ask alumni specifically how they would like to be involved in activities that may help advance the strategic goals of their alma mater. The following chapter describes the design of this research project in detail. It provides justifications for the sample population chosen, the research methodology, and the instrument used to conduct the study. Next, the data from the five interviews is presented and the resulting outcomes are discussed.

## Chapter 3: Research Design and Methodology

As the Literature Review chapter indicates, engaged alumni have the potential to make a profound impact on an institution's strategic goals as mentors, teaching partners, lifelong learners, employers and donors. Involving alumni in the student experience through mentorship programs and guest lectures, allowing them to be involved in student recruitment, or opening up seats on advisory councils are valuable ways to engage alumni meaningfully. In this way, alumni engagement goes beyond the transactional relationship of alumni as former students or future donors to a more transformational engagement model where alumni participation becomes the fabric of an institution's culture.

But do alumni want to be involved in this way? Are they interested in becoming mentors, taking continuing education courses, recruiting future students or hiring new graduates? This research project examined how alumni prefer to engage with their former institutions and asked them if they are interested in contributing through their time, talents, and networks. Specifically, this research project aimed to discover:

**RQ: In what capacity do alumni want to be involved in activities that may help advance the strategic goals of their alma mater?**

My research strategy involved collecting qualitative data through semi-structured video interviews. The research participants included five engaged alumni from SAIT. The participants were invited to take part in this small-scale study because of their previous engagement with the institution. The questions asked in those interviews were designed to explore their feelings towards SAIT and their preferences for future engagement with the institution. The following sections of this chapter will discuss my research design in more detail, including the justification for my sample population, the setting for my research, the instruments I used to collect my data,

and how I analyzed the interview transcripts. I conclude by discussing the reliability, credibility, and limitations of my analysis before briefly introducing my findings.

## **Design**

This project was a small-scale study exploring opportunities for growth within SAIT's alumni engagement program. Five SAIT alumni currently engaged with the institution were recruited for the study. According to Denscombe, this specific sample could be defined as a "purposive sample" as "it allows the researcher to focus on the people or events which there are good grounds for believing they will be critical for the research" (Denscombe, 2010, p. 35). In this case, SAIT alumni were recruited purposefully for this project based on their previous engagement with the institution, which included volunteering, attending events, donating, and interacting with the institution's communications. Their involvement with the SAIT community provided the rich insight required to help explore the research topic.

The qualitative data for this project was collected through one-on-one, semi-structured interviews. Semi-structured interviews are a flexible tool, consisting of open-ended questions or guided discussion points that allow the interviewee to elaborate on the topic based on their individual experience (Denscombe, 2010, p. 175). Because I aimed to explore specific preferences for alumni engagement and identify areas for further research, the semi-structured interview offered the best opportunity to probe in-depth and ask follow-up questions when interviewees said something interesting. The merits of this choice are discussed in more detail in the Instruments section below.

I decided to conduct these meetings online using the Zoom platform. In April 2022, when these interviews were conducted, the COVID-19 pandemic remained a concern. Although people were beginning to open up their social circles and physical distancing was starting to relax,

people were generally still cautious. To respect this caution and make the interviewees feel comfortable participating, I thought it would be best to host the interviews through Zoom. Using the online platform also eliminated the cost and travel time often associated with in-person interviews. They were easy to schedule, and the platform allowed me to video record each discussion, making my analysis more manageable and accurate. In the Setting section below, I discuss the benefits and downsides of using online platforms for qualitative research in more detail.

## **Participants**

The sample population for this research came from the Southern Alberta Institute of Technology (SAIT). It is a polytechnic institution that educates students through hands-on, skills-based learning. In 2019, SAIT released its first-ever Alumni Engagement Strategy. The plan includes three key goals to support the institute's 2020-2025 Strategic Plan. These goals are: establishing SAIT as a lifelong learning partner for its graduates, building and supporting career-resilient alumni, and creating and facilitating knowledge networks within the SAIT community. Part of the motivation for this strategy was to provide a framework for SAIT's Alumni and Development department to evaluate the impact of the institution's alumni engagement activities on the institute's strategic objectives. SAIT has partnered with the CASE AMAtlas project to help accomplish this goal. As explained in the Literature Review chapter, the AMAtlas Task Force is dedicated to addressing the need for an industry-wide framework to measure engagement (CASE Alumni Engagement Metrics Task Force, 2018, p. 4). The project measures engagement based on four categories: volunteerism, alumni experiences (i.e., event attendance), philanthropic involvement, and meaningful and measurable interaction with the institute's communications (2018, p. 6). By tracking alumni who engage in these activities,

CASE suggests that over time institutions will be able to assess the impact of their engagement activities, evaluate programs, and develop strategic engagement goals (2018, p. 9). According to CASE, post-secondary institutions can use the data from this annual report to “build correlations that demonstrate the impact of engagement on alumni behaviour, including giving, hiring the institution’s graduates, or recommending the institution to potential students” (2018, p. 9).

All alumni invited to participate in this project were recruited because they are involved in at least three of the AMAtlas categories for engagement described above. Echoing Denscombe, authors Merrigan, Huston, and Johnston explain that purposive sampling allows the researcher to access the “right people” for the study (2012, p. 56). Unlike random sampling, where the researcher ensures that every member of the population — in this case, all SAIT alumni — would have an equal opportunity to participate in the study. Random sampling is often chosen when the study aims to be able to generalize the results to an entire population. Merrigan et al. explain that “the best way to ensure representativeness is to use random selection or another probability sampling method” (2012, p. 109). In other words, the best way to ensure a sample represents a population well is to choose a large number of people from that population randomly. This research project, however, aimed to examine a specific issue within a population. Its aim was not to generalize for an entire population but to discover future research and exploration opportunities. Merrigan et al. explain, “If you want to preserve participants’ subjective realities and describe in detail a specific communication context, you may prefer one of the non-random selection methods” (2012, p. 65). Following this advice, participants for this study were recruited purposely because of their previous engagement with SAIT. Using SAIT’s alumni database and the department’s engagement tracking software, PowerBI, a group of 50 alumni were identified based on their engagement score — tallied using the CASE AMAtlas

categories. These alumni were then sent a recruitment email (see Appendix A) explaining that I was looking for volunteers to be interviewed for the study. The five interviewed were randomly picked from a list of nine individuals who responded to the initial invitation, expressing their interest in participating.

Risks involved in the interviews were minimal, as all participants were above 18, and the subject matter was not personal nor controversial. Still, participants were informed about the purpose of the study, why they were being recruited, how to participate, how and when they could withdraw, how their identities would be protected, and how the data would be kept secure by the researcher at all times (Merrigan et al., 2012, p. 23). Electronic consent (see Appendix B) was obtained to establish trust and encourage participation, and steps were taken to protect the anonymity and confidentiality of participants. Interviewees were assigned aliases such as “Alum 1,” and those labels were used throughout the process to ensure anonymity. Additionally, data was stored in a password-protected folder within the University of Alberta Google Drive.

## **Setting**

The interviews were conducted virtually using the Zoom video-conferencing platform. Although I could have chosen to do the interviews in person on the SAIT campus, there were many good reasons to use video conferencing. For one, the COVID-19 pandemic that forced people to tighten their social circles and work from home for almost two years continued to be a concern at the time of this study. Although the Alberta government had begun lifting restrictions, many people were still cautious about their health and protecting others. Additionally, Zoom meetings were no longer an oddity; instead, they had become normalized, and most people had access to and were comfortable using video conferencing software. In their study on Zoom interviews, Oliffe, Kelly, Montaner, and Yu Ko express that the COVID-19 pandemic and the

resulting in-person restrictions that became the norm after March 2020 also changed the way qualitative research was conducted. “In-person interviews were pushed to virtual platforms, with the emphasis on safety (urged by research ethics boards), wherein e-interviews replaced in-person interviews as a necessity (not method or study design considerations)” (Olliffe et al., 2021, p. 2). Zoom, a reasonably popular tool during the pandemic, also ensured that many had already used the platform.

Qualitative researchers had been discussing the benefits and challenges of using online tools to conduct focus groups and interviews long before the pandemic. In contrast to online settings, Merrigan et al. explain that in-person interviews offer many benefits, including trust, a neutral environment, and the ability to better read social cues, body language, and facial expressions (2012, p. 111). However, for this study, I felt the benefits outweighed the costs. For one, as discussed above, the COVID-19 pandemic was still a concern; hosting the meetings online ensured the safety and comfort of the participants. Additionally, virtual meetings helped alleviate many hurdles associated with in-person meetings, such as time commitments, scheduling, and travel considerations (Merrigan et al., 2012, p. 114). Eliminating the travel time made it much easier to recruit participants who were also more willing to sit for an extended conversation. Using the online platform also allowed me to record the interviews, making data analysis easier and more accurate than only interview notes or audio recordings that don’t allow for visual memories of the interaction.

## **Instrument**

In addition to one-on-one interviews for data collection, I also considered using focus groups or a quantitative survey for this project. Although focus groups offer similar flexibility to semi-structured interviews, because they are conducted in a group setting, focus groups may be

more likely to encourage conversation and idea storming than one-on-one interviews (Merrigan et al., 2012, p. 112). For this project, however, I felt I could probe for more in-depth responses and clarify the opinions and ideas of individual participants better through one-on-one interviews (Merrigan et al., 2012, p. 112). The other option I considered for data collection was a quantitative survey. A survey would have allowed me to include a larger sample of alumni, making it a more accurate representation of the entire population (Denscombe, 2010, p. 12). As this study was designed to explore the topic of alumni engagement and identify opportunities for future research, I felt conducting a small number of interviews was more suited to the project's scope. Additionally, the small-scale study for this paper was manageable within my timeframe and allowable budget. A large-scale quantitative survey would have taken longer to execute and analyze the data, and it may have been challenging to acquire permission for the complete list of SAIT alumni required to conduct the research.

In the end, I used online, face-to-face, semi-structured interviews as the data collection method for this research project. I chose this method for its flexibility and because it would allow me, as the researcher, to probe further into points of interest without having to follow a strict guideline or survey format (Denscombe, 2010, p. 175). Additionally, the semi-structured interview allows the individual being interviewed to: “develop ideas and speak more widely on the issues raised by the researcher (Denscombe, 2010, p. 175). As noted by Denscombe, I followed the guidelines for being a good interviewer, including attentiveness, sensitivity, non-judgement, toleration of silences, and using prompts, probes, and checks (2010, p. 183).

Some of the critical discussion points for the interviews included their perceptions about SAIT's image, their current and past interactions with the institution, and how they'd like to see the alumni program at SAIT develop. Merrigan et al. explain that when conducting

semi-structured interviews, the researcher should use a discussion guide that lists topics of interest rather than a strict schedule, includes “experiences or concepts” related to the research topic, focuses on the “participant’s understanding” of the topic, and discusses topics that all participants have in common (2012, p. 115). Following this advice, I created an interview script that guided me through each interview (see Appendix C). This script was used as the guide for all five interviews, ensuring that the topics discussed remained consistent during each interview. It also allowed for the flexibility to explore each participant's unique experiences, opinions, and ideas as they arose. The topics identified within the interview guide were designed to anchor the discussion toward answering the research question. Specific topics were discussed in each interview, including their connection to SAIT, why they remain connected, how they would like to be involved in the future, and ways they thought they could help SAIT achieve its goals.

## **Procedures**

My first step when embarking on this project was to submit a detailed ethics application to the Alberta Research Information Services (ARISE) system through the University of Alberta. I applied on March 14, 2022, and secured approval to proceed on April 1, 2022, allowing me to begin recruiting subjects for the interviews. I sent an introductory email (see Appendix A) to 50 SAIT alumni that met the engagement criteria above, explaining my position as a graduate student, the nature of my research, and that I would need alumni participants willing to share their experiences for the project. I indicated that the interviews would be conducted online using Zoom between April 6 and 17, 2022 and that the conversation would take approximately 60 minutes. According to Denscombe, for participants to offer informed consent, they must give it voluntarily, without coercion, and they must be provided adequate information about the research and the commitment required (2010, p. 333). Following this advice, I also emphasized in the

initial email that their participation was optional and that they could withdraw at any time if their situation changed. I explained that the interviews would be recorded and that I would be taking notes during our conversation. I also assured them that their identity would remain anonymous and any data collected would be kept confidential. I also attached the consent form (see Appendix B) to the email so potential participants would be completely clear about my expectations.

In response to this initial email, nine people contacted me with interest in participating in the study, and five participants were randomly chosen from that list of respondents. Then, I emailed each selected participant, asking them to sign the consent form. To those who were not chosen, I sent an email indicating that I had secured enough volunteers for the study but would be keeping their information in case participants dropped out before the end of the study. Once the consent forms were signed, I booked a mutually convenient time to conduct the interview. I then created the meetings in the Zoom platform and sent the meeting invite to each participant individually with the link to join the discussion. The meeting invitation included a copy of their consent form and a short agenda for the hour. The meeting request was set up to remind participants of the meeting the day before their scheduled time and again 1 hour before the meeting. Each Zoom session was planned for 1 hour, including a 5-minute introduction and time for the participant to ask questions or get clarification about the project. This time was also used to set the tone for the interview, indicating that although I had a few points I wanted to cover, there would be room for open discussion.

After this brief introduction, I proceeded with my prepared research guide (see Appendix C), using prompts and probes when necessary. Although the interviews were recorded, I took notes, recording keywords, emotions, and anything else that seemed of interest. Once the

interview was completed, I thanked the participant and stopped the recording. I informed each participant that my next steps would be to transcribe the interviews, which would then be anonymized before saving them in a secure location on the University of Alberta Google Drive. I also let participants know that a backup file would be created that would be kept safe at my home.

After the interviews were completed, I used NVivo<sup>1</sup> software to transcribe the audio into written transcripts. I then edited the transcripts for accuracy and redacted any information that may be used to identify the individual participants. I labelled the interviews in sequence, based on the order they were conducted as Alum 1, 2, 3, 4 and 5. All participants randomly selected to participate in the study followed through with signing the consent forms and attending their scheduled interview meetings. After the interviews were transcribed, I made a list of prominent sentiments that had emerged, including loyalty, brand affinity, altruism, commitment, and interest in specific engagement opportunities that were discussed or mentioned. The results were then coded, categorized into themes, and analyzed for insights and recommendations. The following section of this paper explains my process of data analysis in more detail.

## **Analysis**

My first step in the analysis phase was to prepare and organize the data collected from the interview transcripts. I used the qualitative data analysis software program NVivo to help store my data (interview transcripts), code and categorize the content, and organize the data for analysis (Denscome, 2010, p. 278). I used a thematic analysis approach to analyze and code the interview transcripts. At one point, I considered using grounded theory to analyze the data, however as Nowell, Norris, White, and Moules (2017) explain, thematic analysis is a “more

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<sup>1</sup> Software used for transcription:  
<https://www.qsrinternational.com/nvivo-qualitative-data-analysis-software/about/nvivo/modules/transcription>

accessible form of analysis, particularly for those early in their research career” (2017, p. 2). The researchers describe thematic analysis as “a method for identifying, analyzing, organizing, describing, and reporting themes found within a data set” (2017, p. 2). The advantage of this approach is that it is “highly flexible” and can be “modified for the needs of many studies” (Nowell et al., 2017, p. 2). However, Nowell et al. also caution that this flexibility could lead to inconsistencies in how qualitative data is analyzed, drawing concerns about credibility (2017, p. 2). To combat this threat, they suggest the researcher create a detailed “audit trail” of their decision-making process while analyzing their data (Nowell et al., 2017, p. 3). These concerns are discussed in more detail in the Reliability and Validity sub-section below.

After reviewing the procedures involved in conducting a thematic analysis, I began by refamiliarizing myself with the data — reading and re-reading the transcripts, cross-referencing them with my field notes, and noting any prominent themes (Denscombe, 2010, Nowell et al., 2017). I then began to create codes that systemically linked bits of the data to ideas related to my analysis. At this stage, I decided what would be coded and possible themes I could use to organize the codes. The data I coded from the interviews referenced specific feelings and statements of affinity, pride, and loyalty and their preferences towards specific engagement activities. After assigning specific values to statements of significance in the transcripts, I began to organize the data under themes and subthemes. Throughout the process and working from Nowell et al.'s advice, I took detailed notes and memos about my decisions and coding strategies as they developed. Next, I examined the themes from the perspective of my research question and made adjustments to the thematic structure to better illustrate how the data provided insights into the research topic. Ultimately, this thematic analysis demonstrates how alumni engagement

could impact an institution's strategic goals. These findings are discussed in detail in Chapter 4 below.

### **Reliability and Validity**

This small-scale qualitative study aimed to shed light on an area of alumni engagement that few researchers have explored. Although the data presented below does paint an interesting picture, the reliability and validity could be questioned due, in part, to the qualitative nature of the study. Whereas a quantitative study relies on the dependability of the instrument and the accuracy of the data the research produces, Nahid Golafshani (2003) explains that in qualitative research, “reliability and validity are conceptualized as trustworthiness, rigor, and quality” (2003, p. 604). Nowell et al. agree, suggesting that trustworthiness, credibility, dependability, and confirmability can all be used to affirm the reliability of a study (2017, p. 3). To achieve this credibility in qualitative research, Golafshani recommends using triangulation or “a validity procedure where researchers search for convergence among multiple and different sources of information to form themes or categories in a study” (2003, p. 604). Nowell et al. recommend using audit trails to “provide readers with evidence of the decisions and choices made by the researcher” (2017, p. 3). The study suggests keeping “records of the raw data, field notes, transcripts, and a reflexive journal” so that other researchers can “clearly follow the decision trail” (2017, p. 3). To ensure this study’s credibility, I kept detailed records of my process and coding strategy and recorded my decision-making process throughout the analysis phase. Using the NVivo platform, I was able to write annotations to myself as I read the transcripts, and I wrote frequent memos about my thought process as I worked through the data. Additionally, I drew mind maps and concept maps to illustrate my thinking and made adjustments as new insights formed and themes emerged.

## **Limitations**

This study aimed to explore how alumni might want to participate in activities that could impact an institution's strategic objectives. Because this was a small-scale qualitative study, the results, interpretations, and suggestions presented below are not meant to be generalized or applied to other institutions or advancement offices. In qualitative research, Denscombe suggests that rather than generalizability, or the "probability of the data recurring elsewhere," qualitative research relies on "transferability" (2010, p. 301). He explains transferability as an "imaginative process" in which the reader uses the information presented to make conclusions about how it would apply in similar circumstances (2010, p. 301). In the case of this study, the data presented could be imagined as the general opinions, feelings, and desires of an engaged alumni population, and those sentiments could be transferred to similar populations at other institutions. Despite these limitations, this study does demonstrate the value of an engaged alumni community and may inspire further research as well as the impetus to create robust, collaborative, and well-resourced alumni programs.

## **Summary**

This exploratory research study set out to examine how alumni prefer to engage with their former institutions and asked them if they are interested in contributing through their time, talents, and networks to further their alma mater's strategic goals. Due to the exploratory nature of this small-scale study, I determined that one-on-one interviews would be the best instrument for discovery. Through purposeful sampling, I conducted semi-structured interviews with five engaged SAIT alumni. All five alumni were invited to participate in the project and were told that their identities would be anonymous and confidential. After the interviews were transcribed,

I analyzed the data using thematic analysis to organize and categorize the data before synthesizing my results.

The five interviews conducted provided a rich depth of information on my topic. I was able to gain valuable insight into the motivations and desires of engaged alumni at SAIT, how they want to be involved, and how their involvement could support the objectives of SAIT's institutional strategic plan. It also became clear that alumni — particularly those engaged with the institution — have a vested interest in seeing it succeed. The results of my study are discussed in more detail in Chapter 4.

## **Chapter 4: Findings and Discussion**

Alumni engagement or alumni relations programs and activities are often measured by the number of philanthropic donations institutions receive. However, as the literature review indicates, alumni can also become lifelong ambassadors of their alma maters. Involving alumni in the student experience through advisory committees and mentorship programs, providing them with meaningful opportunities like networking events, and inviting them into the classroom to speak to students are just a few of the ways alumni can further an institution's success beyond fundraising. But do alumni want to be involved in these kinds of activities? Do they see value in giving up their time to help current and future students succeed?

This small-scale study examined this problem by asking: In what capacity do alumni want to be involved in activities that may help advance the strategic goals of their alma mater? I conducted one-on-one, semi-structured interviews with five engaged alumni from the Southern Alberta Institute of Technology (SAIT) to answer this research question. These interviews provided deep personal stories that explained why they stay involved with SAIT, what motivates them to volunteer their time, and how they'd like to contribute in the future. The following sections of this chapter will detail how I analyzed the data from these interviews. Next, I present my findings, followed by an in-depth discussion about the data and how it relates to the research question. The chapter concludes with a summary of my findings and a brief discussion on the impact of the results and the study's limitations.

### **Data analysis**

To explore my research question and uncover if alumni may be interested in activities that would support SAIT's strategic direction, I conducted online, face-to-face, semi-structured interviews with five engaged SAIT alumni. As mentioned in the previous chapter, graduates

were invited to partake in the study if they had participated in at least three of the AMAtlas categories for alumni engagement, including volunteering, attending alumni events, donating to the institution, and measurable interaction with the institute’s communications (CASE Alumni Engagement Metrics Task Force, 2018, p. 6). The five participants were randomly chosen from a list of nine individuals who indicated they would be interested in participating in the research project. To maintain the anonymity of the interviewees, I have described the demographic characteristics of the sample as a whole rather than on an individual level. Out of the five participants, three were male, and two were female, all between the ages of 25 and 44. Their graduation dates ranged from the earliest being in 2007 (15 years after graduation) and the most recent being from the Class of 2018 (4 years after graduation).

Table 4.1 below illustrates how each participant has been involved with SAIT since graduation. You can see from this table that two participants are also employees of SAIT. These participants work in departments outside of Alumni and Development but are interested in collaborating with their fellow alumni in their current work. I included these volunteers in the study because I felt their experience and investment in the success of SAIT’s strategic goals would provide valuable insight into this study and highlight opportunities for cross-departmental collaboration that could result in more meaningful opportunities for alumni to get involved.

**Table 4.1: Study participants and their engagement with SAIT**

	Program / Field	Volunteer	Event Attendance	Communications	Donor	SAIT Employee
Alum 1	Finance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alum 2	Graphic Design	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alum 3	Marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alum 4	Business	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alum 5	Construction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

There is the possibility that including employees in the study whom I have distantly worked with could be seen as a conflict of interest. Additionally, I may have had email contact with some participants or met them at a SAIT event once or twice. Although these relationships were not influential to their involvement in this study, they could also be perceived as a threat to credibility. As Denscombe (2010) points out, this is a common concern with qualitative research. “As a participant-observer or interviewer, for example, the researcher becomes almost an integral part of the data collecting technique,” leading to the question of whether other researchers using the same methods would arrive at the same conclusions (2010, p. 299). To address these concerns, Denscombe advises the researcher to make “an explicit account of the methods, analysis and decision making and the provision of a fully reflexive account of procedures and methods,” to demonstrate in “as much detail as possible” how conclusions were made, and theories were developed (2010, p. 300). With this in mind, I considered how my role might influence how I interpreted the data. I evaluated my position as a SAIT employee and researcher for this project and how the two roles may affect the study. As I analyzed the data and made coding decisions, I asked myself if another researcher would make the same decisions I made. In addition to this scrutiny, I kept detailed notes about my coding strategies as they developed, which may help provide context and credibility to those decisions when asked or challenged.

Once the interviews with the five participants were finalized, I began by reviewing each transcription in detail. As discussed in Chapter 3, I used a thematic analysis to identify, analyze, organize, and describe my data. Nowell et al. describe thematic analysis as a 6-phase process that is not meant to be strictly linear but rather an “iterative and reflective process that develops over time and involves a constant moving back and forth between phases” (2017, p. 4). As I began to

make sense of the data, I used Nowell et al.'s 6-phase process as a guide. The six phases are as follows (2017, p. 4):

- Phase 1: Familiarizing yourself with your data
- Phase 2: Generating initial codes
- Phase 3 Searching for themes
- Phase 4: Reviewing themes
- Phase 5: Defining and naming themes
- Phase 6: Producing the report.

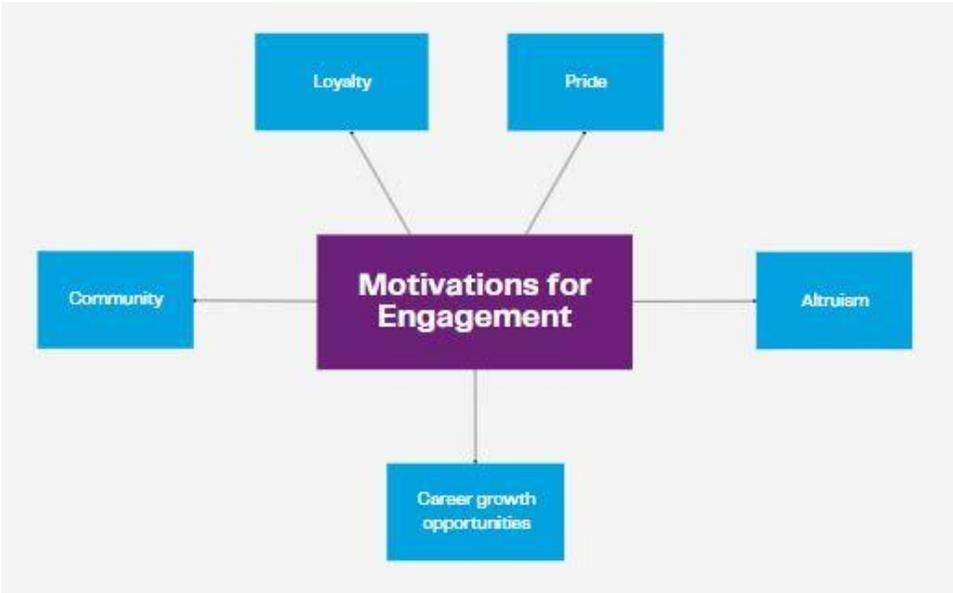
Through this process, many themes and commonalities began to emerge. My initial review of the transcripts involved familiarizing myself with the interviews. I read through each one several times before starting to group ideas or phrases into actual codes. At this stage, I also created memos for myself that summarized each interview for my reference. Once I moved into phase 2 and began coding, I used NVIVO software to highlight and label specific phrases, ideas and occasionally paragraphs as codes related to the research question. Nowell et al. explain that “qualitative coding is a process of reflection and a way of interacting and thinking about data” that allows the researcher to “simplify and focus on specific characteristics of the data” (2017, p. 5). Following the advice from this article, I identified areas of interest in the transcripts as I read through the data. I generated a list of codes while ensuring that I was not creating multiple or redundant codes. Nowell et al. explain that although “there can be as many levels of coding that the researcher finds useful,” too many levels can be “counterproductive to the goal of attaining clarity” (2017, p. 6). To keep my coding consistent, I also began an audit trail of my process in this phase. As described in Chapter 3, audit trails help maintain a detailed account of the research and analysis process. As I combed through the data, I wrote memos inside the NVivo software that chronicled my coding strategy, logged important decisions, and recorded my thoughts and ideas. In phase three, I began to think about potential themes. I created mind maps and used the knowledge drawn from the literature review to draw meaning from the coded data. In phase four,

I thought about how my current themes related to my research question and how I could better organize my data to help shed light on the research problem. And finally, in phase 6, I began to draw conclusions from the data and created a detailed project map of my thinking. The sections below illustrate how I analyzed my data and arrived at my conclusions.

**Generating codes and themes**

During the interviews, these five alumni made it clear they were motivated to engage with their former institution for various reasons. As Figure 4.1 below illustrates, feelings of pride and loyalty toward SAIT were prevalent. These alumni were also driven by a sense of community, feelings of altruism, and a need or desire to gain experiences, knowledge and connections that may help advance their careers.

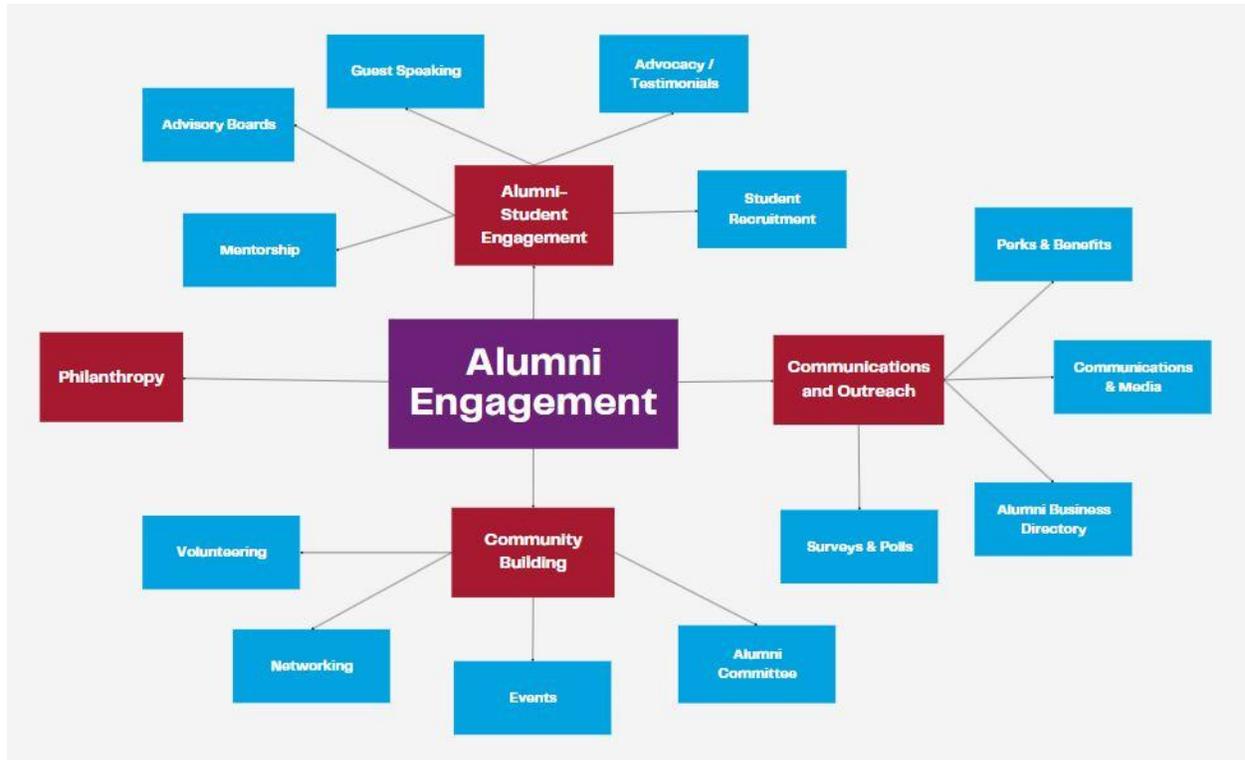
**Figure 4.1: Alumni motivations to engage**



Additionally, I created activity codes when participants said they were reading the alumni magazine, engaging on social media, volunteering, and attending events. Significantly, participants expressed interest in getting involved in additional activities. These activities

included guest speaking, mentorship, and networking opportunities. I organized these various codes into categories that related to the theme of alumni engagement. I labelled these high-level categories as alumni-student engagement, communications and outreach, community building, and philanthropy. Figure 4.2 below illustrates how I categorized the codes.

**Figure 4.2: How study participants want to engage with SAIT**

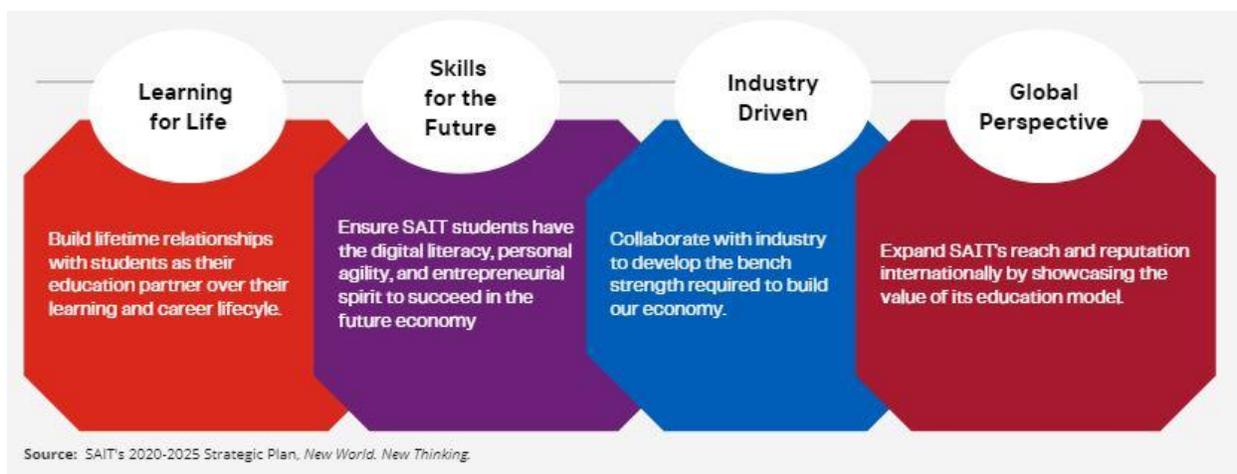


**Reviewing and defining themes — SAIT’s Strategic Plan**

Although these themes provided me with a visual representation of what alumni engagement was from the perspective of a handful of SAIT alumni, this illustration failed to show how alumni involvement could positively impact SAIT’s strategic goals. To accomplish this, I referred to the four objectives of SAIT’s 2020-2025 Strategic Plan: Learning for Life, Skills for the Future, Industry Driven, and Global Perspectives (see Figure 4.3 below). The four objectives became the main themes I used when organizing my data. I then placed related

activity codes taken from the interviews under each theme. I describe these four themes in more detail below, and in the section that follows, I present my data.

**Figure 4.3: The four objectives of SAIT’s 2020-2025 Strategic Plan**



### **Learning for Life**

In the next five years, SAIT aims to deliver a “world-class student experience to a growing network of learners that reinforces SAIT’s connection between education and career” (SAIT, 2020, p. 6). The institution explains that it will achieve this objective by delivering “professional development and corporate training programs through customized learning experiences aimed at upskilling and reskilling mid-career professionals” (2020, p. 6). Under this objective, SAIT has also prioritized its relationship with students, suggesting it is essential to “build lifetime relationships with them as their education partner” throughout their learning and career lifecycle (2020, p. 6).

### **Skills for the Future**

This objective refers to the skills SAIT hopes to deliver to the economy in the next five years. The institute is committed to ensuring that SAIT students have the “digital literacy, personal agility, and entrepreneurial spirit to succeed in a future driven by people, powered by

technology” (2020, p. 5). It aims to help students “flourish in their future careers by developing a growth mindset, entrepreneurial skills and experience” (2020, p. 5). Part of this objective involves creating “integrated workplace skills and elevating the role of workplace learning in all program areas by engaging industry representatives as active partners in the education of SAIT students” (2020, p. 5).

### **Industry-Driven**

By collaborating with industry experts, SAIT aims to develop the “bench strength required to build the economy and ensure SAIT graduates are not only ready to succeed in the jobs of tomorrow but to create them” (2020, p. 8). To do this, SAIT collaborates with industry representatives as co-leaders to understand workforce needs, solve problems, explore opportunities and build relationships (2020, p. 8).

### **Global Perspective**

SAIT asserts that “global partnerships expand its reach and reputation, while a global campus provides all students with opportunities to develop the cross-cultural awareness they need to be successful” (2020, p. 7). One of the ways SAIT hopes to achieve this goal is by increasing brand awareness about SAIT’s model of education and its value. By showcasing the success stories and community impact of applied education and promoting a SAIT credential as a pathway to successful careers and global citizenship, SAIT hopes to build this global perspective.

### **Reliability and validity**

These four categories became the high-level themes for my data. I then placed activity codes from the interviews that would impact the outcome of each of the four objectives under the

headings. In doing this, I was able to illustrate how alumni involvement could have an impact on the success of each institutional goal. As discussed in Chapter 3, the qualitative nature of this study relies on the trustworthiness of the researcher and the quality of the data presented. Like Nowell et al., Denscombe also recommends researchers maintain an audit trail of their process, so the reader can “follow the path and key decisions taken by the researcher from conception through to the findings and conclusions” (2012, p. 300). He explains that the audit trail documents research procedures and decision-making that can then be checked by other researchers to “confirm the existence of the data and evaluate the decisions made in relation to the data collection and analysis” (2012, p. 300). In this way, the audit trail provides credibility to the data and reliability to the results because other researchers can “see and evaluate” for themselves that the procedures used and the decisions made were logical and based on actual data (Denscombe, 2012, p. 300). With this in mind, I kept detailed notes and memos throughout the data process that documented my coding strategy and decision-making process once I began developing themes. The section below reveals the findings that resulted from the above process and includes a thematic map to illustrate the project outcomes.

## **Findings**

All of the subjects interviewed for this project indicated they had a desire — and in some cases — a vested interest in seeing the institution meet its goals. Some even expressed a sense of duty or a desire to pay it forward to future students. Alum 2 said he feels loyal to SAIT because he “believes in what it can do for students and the community.” Alum 3, on the other hand, had what she describes as a somewhat negative student experience but felt she could play a role in helping future students navigate life on campus better than she did. She sees her involvement with SAIT as a “win-win” but said getting something in return was not crucial to her. She says,

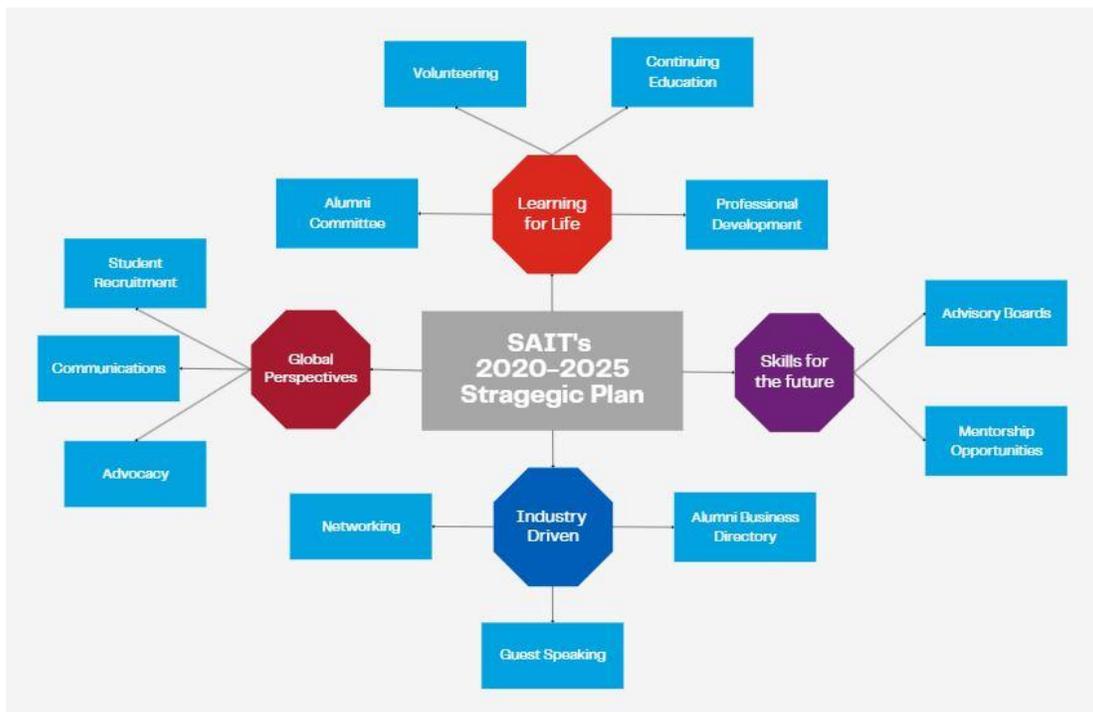
“If you’re winning, I’m winning.” These feelings of pride, loyalty and altruism were common among the participants. Everyone interviewed saw a benefit to being involved and expressed some interest in seeing SAIT succeed.

The interviewees also expressed interest in how they would like to continue to be involved with SAIT and provided input into how they would like to be engaged in the future. When I connected these activities to the objectives in SAIT’s strategic plan, I was able to show how alumni could positively impact their outcomes. Specifically, my research question asked:

**RQ: In what capacity do alumni want to be involved in activities that may help advance the strategic goals of their alma mater?**

Figure 4.4 below illustrates how I organized each category into the themes created using SAIT’s 2020-2025 Strategic Plan. In the following sections, I explain my rationale for coding and illustrate, through direct quotes from participants, how these SAIT alumni want to be involved.

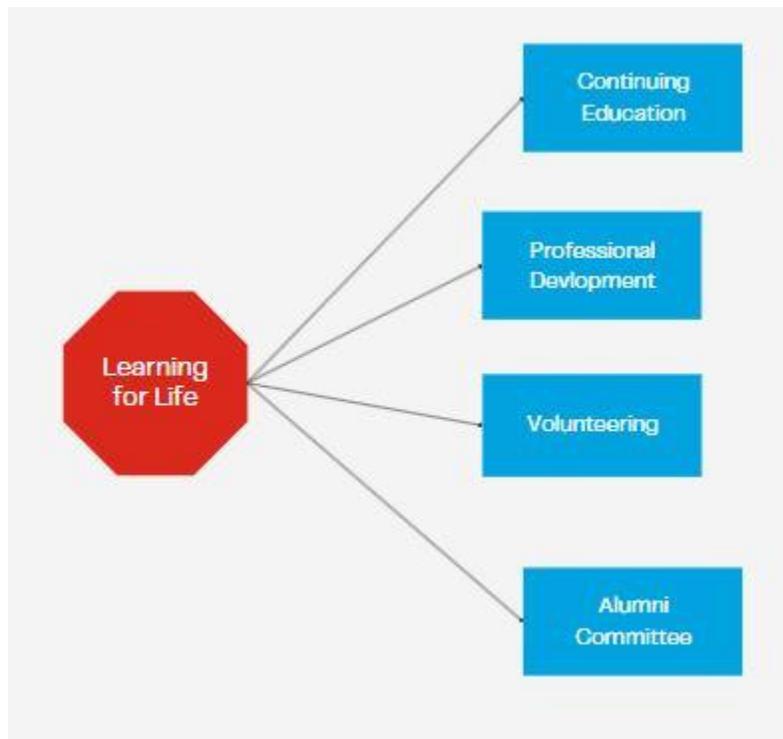
**Figure 4.4: Thematic map based on SAIT’s 2020-2025 Strategic Plan**



## Learning for Life

The Learning for Life bucket in SAIT’s 2020-2025 strategic plan is the most relevant to the alumni experience of all the other buckets. It focuses on nurturing and maintaining a lifelong connection to SAIT graduates and relies more on alumni participation than the other three objectives. Given this, it is not surprising that most coded data fell into this category. Under this theme, I placed comments from the interviews and coded them as continuing education, professional development, volunteering, and Alumni Committee. This arm of the thematic map is illustrated in Figure 4.5 below.

**Figure 4.5: Learning for Life**



As I indicated earlier, all participants suggested that individual career development is one of the key reasons they continue to engage with the institution. For example, Alum 1 says, “The main influence for me would be things that I can put on my resume and have that validated by SAIT.” And all five participants said something similar — resume and career development were

fundamental reasons for staying involved. Additionally, participants mentioned that continuing education courses and professional development opportunities would be valuable to them. Alum 5 said he is taking some continuing education courses right now to diversify his skill set.

“Instead of having to go to school again for four years, I can take a one-year or two-year class or online class and gain some additional skills.”

Complimentary to this was the mention of SAIT’s Level Up Alumni Award. This award was launched in 2020 and provided a scholarship exclusively to SAIT alumni who wanted to return for professional development, continuing education, and full-time credit courses. Alum 4 mentioned that she took advantage of the scholarship and “100% did a free course” through SAIT. She also said she reached out to a few alumni friends and told them to “watch out” for the next award offering “because it is an amazing opportunity, and they needed to take advantage of it.” Alum 2 agrees that the alumni student award is valuable, but he wonders if SAIT sees its full potential. He says, “You get the bursary; you get the money, you start your course but then like, if you’re not engaged with SAIT, you really sort of forget who gave you that. So how can we bring them back? After that free course, come together for an event, show them what SAIT can offer, and tell them about the perks and benefits.”

In addition to professional and career development courses, all five participants indicated that meaningful volunteer opportunities would be another reason to stay connected to SAIT. Alum 4 suggests three key reasons alumni like herself want to volunteer and give back to the SAIT community. She says, “(a) your giving back, (b) companies are expecting their employees to give back, and (c) it’s another way to develop your coaching and leadership skills.” Alum 2 had similar sentiments. “I think you have all types of audiences,” he said, “You have a certain type of audience that may feel really engaged with professional development or networking, but

you have other types that may feel more engaged with nostalgia or even getting free stuff.” Alum 2 also suggested that SAIT bring back events and volunteer opportunities like the Family Fun Day at Calaway Park and the Calgary River Pathway Clean-Up that SAIT discontinued a few years ago.

Alum 1 suggested that a meaningful way to keep alumni involved would be to implement an Alumni Committee or Council. He said he would be “keen” to get involved in this kind of group that took into account the alumni voice in deciding how the alumni engagement program operated, what sort of opportunities were offered, and how alumni could actively engage in the strategic objectives of the institution. This idea might be worth exploring further to see if other alumni might also be interested in forming a volunteer council or committee.

### **Skills for the Future**

The Skills for the Future objective in SAIT’s strategic plan is directed primarily at current and future students to develop essential skills needed to work and thrive in the future economy. Encouragingly, all alumni interviewed for this project expressed interest in helping current or prospective students succeed. In particular, interest in mentorship programs and curriculum or program advisory boards were mentioned by this group. This arm of the thematic map is illustrated in Figure 4.6 below.

**Figure 4.6: Skills for the Future**



Alum 1 said he would “love to get involved” in some kind of alumni advisory board at SAIT. “Staying involved and helping to make decisions about the future of the course that I took ... if I could offer feedback beyond just doing the post-graduate survey. I’m actually in industry now; this is what I’m seeing, and here’s some feedback for this course.” Advisory boards are one way that alumni can contribute or inform how curriculums and programs evolve at SAIT.

Another way is through mentorship of current students. All participants expressed interest in being mentors for current students. Alum 2 says, “Seeing others who have already walked the path can be encouraging and inspiring and also very helpful towards building your network.”

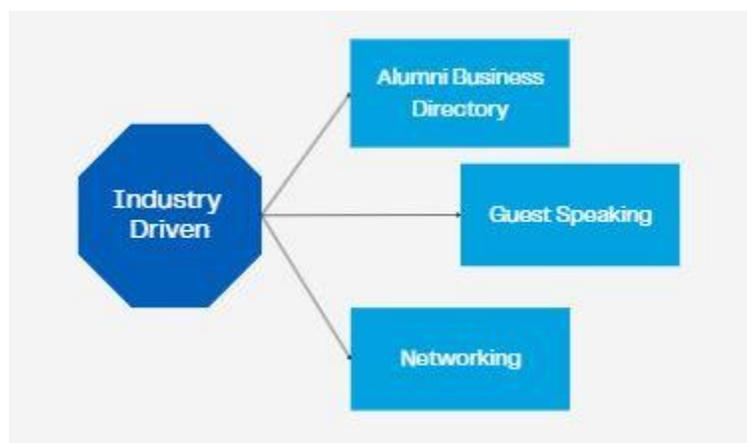
This also demonstrates how alumni see mentorship as a win-win: students benefit from the knowledge of someone who has been through SAIT and found their way to a profession, while alumni receive the coaching and leadership skills they desire for their career development.

Alum 4, a SAIT employee, says they often discuss mentorship as a way to help students. “One of the things we talk a lot about is really ensuring that students and prospective students know what to expect. What better way to do that than through alumni?” Alum 5 says he loves talking about his profession and sharing how he got to where he is today. “If they ever need me ... if they’re ever going to high schools and they want someone to come along and talk about business or engineering — I’m more than happy to come and talk about my experiences.” Alum 3 agrees, saying, “If I can give some insight to current or future students, then I will. I just want to give them what I wish I had.” Alum 3 also discusses the potential for matching international students with alumni mentors from similar backgrounds. “Imagine being an international student, and you don’t know anyone. I could be like, ‘Hey, I get what you’re going through’ Whatever it is, maybe there’s a language barrier, then I could translate for them. Just someone they can talk to — I’d be more than happy to do something like that.”

## Industry-Driven

Industry and industry professionals are the focus of this bucket within SAIT’s 2020-2025 Strategic Plan. The institute sees the value of collaborating with industry to understand workforce needs, solve problems, explore opportunities and build relationships (SAIT, 2020, p. 8). It only makes sense to assume that many individuals working in the fields that matter to SAIT are SAIT graduates. As demonstrated earlier, the alumni interviewed for this project expressed interest in mentoring students. SAIT is particularly interested in industry mentorship programs that bring experts from their field into the classroom for guest speaking opportunities and to campus for networking events. Additionally, three alumni interviewed mentioned the value of the Alumni Business Directory — a list of alumni-operated businesses on [sait.ca](http://sait.ca). All these activities could help strengthen SAIT’s connection to industry while simultaneously helping to achieve the second strategic objective to provide students with the skills they need to succeed in the future economy. The Industry-Driven theme and the coded activities mentioned above are illustrated in Figure 4.7 below.

**Figure 4.7: Industry-Driven**



Alum 4 says she sees the value of having representatives from industry speak to students. “I think it is very important to have our alumni speaking to students so that they really

understand what it is that they're walking into. They're going to trust them more than, you know, a SAIT person. And more and more, we are seeing alumni from industry that are looking to reach out to us and give back by offering their own advice and mentorship, or to be guest speakers.”

Networking also requires a relationship with industry professionals, but it is also about helping students succeed. Alum 2 explains that “from a professional perspective, networking activities are quite useful — it’s usually what gets you into the positions that you want. More than your credentials sometimes. It’s just knowing the right people and getting your foot in the door.” Alum 1 says that networking is a “key area” he’d like to develop. “Having a passion for networking and, you know, having an aim to build my own network — just being able to connect students to the right people to fulfill their needs and achieve their career goals.” Alum 1 also mentions the value of remaining connected to his former faculty. He said he finds “a lot of value” in engaging with them still.

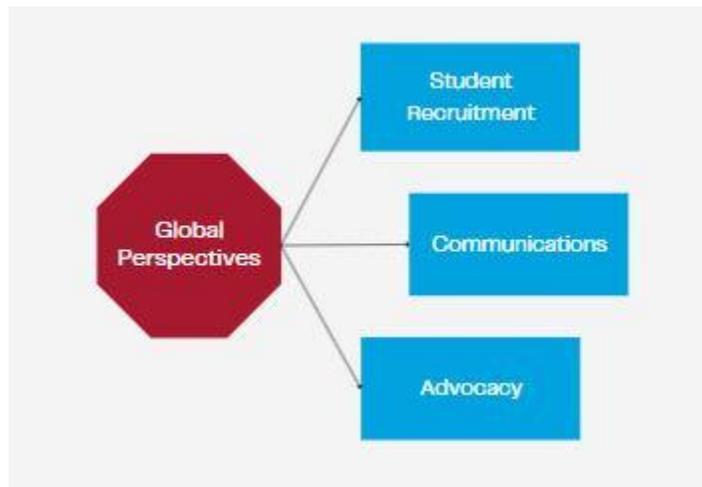
Additionally, participants viewed the Alumni Business Directory as a positive addition to SAIT’s alumni program. The Directory is a hyperlinked list of all known SAIT alumni-operated businesses. The list is often used to mine for interesting stories for the alumni magazine or to share on social media. Alum 3 credits the business directory as the reason she began reconnecting with SAIT after graduation. “You guys started contacting me about a year ago to start building the alumni business directory. You had sent emails before about buying insurance and alumni discounts and stuff like that. But this was someone actually reaching out and doing something for me. I notice you have started doing that more — reaching out to see how you can help us as alumni.” Alum 5 reached out to SAIT to be added to the business directory and

suggested that SAIT could take the directory a step further and make it an actual network. “We could connect with each other for business needs and to collaborate, for example.”

## Global Perspectives

This objective for SAIT focuses on making SAIT a global campus — a place where international students want to study. To accomplish this goal, SAIT hopes to expand the reach of its communications and marketing materials. The codes I have associated with this strategic arm are illustrated in Figure 4.8 below.

**Figure 4.8: Global Perspectives**



Alumni stories and testimonials are one way that SAIT graduates can contribute to the success of this bucket. Most study participants mentioned the alumni magazine and their appreciation for the monthly newsletters that keep them informed. A couple of participants had been featured or quoted in alumni stories for the magazine, newsletter, or social media. All of them were connected through the SAIT Alumni social media channels, although with varying levels of engagement. Those who owned businesses and connected through the Alumni Business Directory appreciated that SAIT Alumni followed their channels and shared their posts — expanding their network reach.

Some of the alumni interviewed expressed interest in advocating for SAIT and offering testimonials about how the institute contributed to their success. Alum 2 suggests that alumni testimonials are essential. “One of the main questions we get is about the employability rate, and we give them statistics, but that doesn’t make any sense by itself. But when you get a testimonial from an alum — someone who had gone through the program — that changes things. So, I’m just thinking having a chat with us — a roundtable of alumni during Open House, for example — would be really beneficial.” Alum 5 says he would be more than happy to advocate for SAIT. “I’m very passionate about what I do. And I just love talking to people about it and showing them that you don’t have to go to a traditional university to get a good education.” And Alum 4 agrees, “Students want to hear real-life stories from people that have walked in their shoes.”

This interest in advocating for SAIT can be linked to the participants’ interest in mentoring current and future students — particularly the idea of matching international students with alumni who may have walked similar paths. Alum 2 and Alum 3 expressed the need for SAIT to support international students on campus and how alumni could play a role. Alum 2 says, “You come from a different culture. You come from a different type of understanding of how things work, so sometimes you really need some guidance on things that, for someone that was born and raised here, it may seem more logical. So I think mentorship for newcomers could be very useful.”

In summary, this section of my report has illustrated how alumni might wish to participate in activities that could support SAIT’s strategic objectives. In the following section, I discuss these four themes further and provide additional context, suggestions for alumni engagement strategies, and opportunities for future research.

## **Discussion**

In her 2012 study, Gallo found that if a higher education institution “adopts a model of building lifelong alumni relationships, instead of focusing on fundraising, there is the potential to gain wider, more meaningful benefits from the alumni constituency” (Gallo, 2012, p. 5). She cites alumni mentoring students, representing on governance boards, and hiring future graduates as examples (2012, p. 48). My research supports her findings by asking alumni whether they would be interested in participating in these kinds of activities — specifically activities that would support the strategic objectives of an institution. Through one-on-one interviews with five SAIT alumni, this study has shown that, when given meaningful opportunities, alumni are likely to want to be involved. The following paragraphs explore the insights from the above research and make recommendations for alumni engagement programming and future research opportunities. This section concludes by discussing the limitations of this project.

### **Learning for Life**

If the intent is to nurture and maintain lifelong relationships with alumni, the responses of the five alumni interviewed for this project indicate that helping them add skills to their resumes is one way to encourage engagement. Participants mentioned that mentorship programs, networking events, and guest speaking invitations would interest them. Additionally, meaningful continuing education and professional development opportunities were cited as reasons to stay connected to SAIT. The Level Up Alumni Award is one way SAIT attempted to make alumni aware of its continuing education offerings and encourage them to choose SAIT as their partner in lifelong learning. McAlexander, Koenig, and Schouten (2006) refer to this as improving the institute's “brand identity.” As mentioned in the literature review above, their study showed that by integrating alumni into the brand identity of an institution, they are more likely to donate,

promote, get involved, and return for continuing education programs (2006, p. 115). The response from the five study participants concerning the scholarship was that it was a valuable addition to SAIT's offerings. Those who had heard about the program thought it was beneficial, and those that didn't hear about it said they wished they had. This suggests that SAIT could do a better job of promoting its brand as an institute that delivers a valuable and diverse menu of continuing education courses and that there is funding for alumni who wish to take them.

Additionally, as Alum 2 suggested above, the Level Up Alumni Award presents an opportunity to bring two-or-three time graduates back into the community — reminding them why they should stay connected to SAIT. This suggestion directly relates to relationship marketing theory. MacMillan, Money, Money, and Downing (2005) share that relationship marketing theory emphasizes the “importance of developing long-term supportive relationships with existing customers and posits that energy and resources are better spent on this group rather than attempting to attract new customers” (2005, p. 807). By giving alumni something of value, SAIT has re-engaged its customer group. It would be worth spending additional energy and resources to keep this group of alumni engaged.

### **Skills for the Future**

As noted in the above literature review, the student experience is a common topic of alumni engagement as it is an essential predictor of a student's loyalty beyond graduation. In her study on this topic, Hummel (2011) found that “engaged students are more likely to become engaged alumni and future alumni volunteers or donors” (2011, p. 128). Likewise, Pumerantz (2005) uses the term “Alumni-in-Training,” explaining that “engaging students as if they were already alumni” may make them more likely to become “supportive alumni” (2005, p. 290). However, it was also noted in the literature review that these studies lacked strategies on how to

make the student experience more positive. One approach may be to involve alumni in the student experience. The alumni interviewed for this study indicated that they would be interested in activities, such as advisory boards and mentorship programs, which would impact the student experience.

At SAIT, Advisory Boards or committees are designed to connect SAIT executives, deans and academic chairs to industry leaders, government, and community members to discuss and make recommendations about SAIT's programming. It makes sense to invite alumni to sit at this table — particularly alumni who have been successful in industry and want to participate in the future of their fields. Some alumni sit on these committees. However, the Alumni Relations office is rarely made aware of their involvement, nor is the department involved during the recruitment process, and this could be a missed opportunity. Alumni Relations officers are typically very connected to many graduates of the institution. They can make recommendations for the boards and help steward the relationships of those who volunteer, so they continue to participate and potentially help recruit new members from their networks.

Similarly, mentorship programs were mentioned by the five interviewees as an activity that would be interesting to them. In particular, two participants pointed out that mentorship for international students would be a valuable program for SAIT to consider. There are a handful of mentorship programs in action at SAIT right now, and the Alumni and Development department is starting to get more involved in recruiting alumni volunteers, but there is room to grow.

The examples above highlight the need for stronger collaboration between the Alumni and Development and student-focused departments at SAIT to benefit from alumni engagement. Rissmeyer (2010) discusses institutional collaboration in her book on student services. As stated in the literature review above, she theorizes that alumni involvement may strengthen the

institutional image and enhance student commitment (2010, p. 28). In this way, alumni become a critical component of students' success and an even more valuable asset to the institution.

### **Industry Driven**

The activities discussed in the Skills for the Future section above would not be possible without representation from industry. When an institution is connected to industry, it is more aware of the skills and expertise needed to thrive in the economy and, therefore, can provide the best, most advanced education for its students. As noted in the paragraphs above, alumni working and succeeding in their fields are valuable to an institution and the student experience.

The alumni interviewed for this project are all, in some way, working in their fields, and all of them felt that they could help students succeed. They expressed interest in being invited to speak at events or in the classroom, and they indicated that creating opportunities for networking events would be valuable additions to their alumni experience. Additionally, the Alumni Business Directory was seen as a worthwhile program. Still, participants suggested it could go beyond the contact list or catalogue of alumni-operated businesses it is now. These alumni felt it could be made into an actual working network. They would like SAIT to help them connect, collaborate, and share knowledge as business owners and entrepreneurs.

In developing strong industry and alumni partnerships, SAIT could have the potential to reach its goals of creating lifelong connections and furthering student success. In this way, alumni engagement goes beyond the “friend-raising before the fundraising” (Gallo, 2018, p. 93) it is traditionally seen as being. Alumni working in their fields become lifelong ambassadors of their alma maters — completely invested in its success.

## **Global Perspectives**

All of these objectives come together in SAIT's final goal — to make the institution a “global campus” by “putting SAIT on the map” (SAIT, 2020, p. 9) and ensuring the world knows that its model of education is among the best. Making alumni the primary ambassadors of an institution gives authentic credibility to the education it delivers. Positively, the five alumni interviewed for this project have said they would be happy to share their experiences and advocate for the value of SAIT's model of education. Conversely, by sharing their experiences and encouraging others to take the leap, they also foster a sense of pride and loyalty towards their alma mater. McAlexander, Koenig, and DuFault (2014) suggest that these sentiments or feelings further contribute to creating a solid brand identity for a graduate's alma mater. They indicate a significant value in creating “opportunities for alumni to share meaningful experiences that foster strong interpersonal ties and build institutional identity (2014, p. 254).

To extend SAIT's global reach, however, these testimonials, alumni success stories, mentors and networking opportunities need to reach the international community. To accomplish this, it would be beneficial for SAIT's Alumni and Development department to explore a partnership or collaboration with the International Centre. Additionally, future research could be conducted on how prospective international students view SAIT and choose where to study abroad.

In summary, it comes down to creating a deliberate and meaningful two-way partnership with alumni. This model departs from the transactional methods traditionally applied to alumni engagement programs. But as Weerts (2007) puts it, this “two-way flow model” allows advancement staff and alumni relations professionals to “facilitate an interactive process of teaching, learning, and problem-solving in which institutions and external partners exchange

perspectives, knowledge, materials, and resources” (2007, p. 93). Ultimately, making alumni and donors of an institution true partners in the success of its strategic goals.

## **Limitations**

This study aimed to explore how alumni might want to participate in activities that could impact an institution’s strategic objectives. Its small-scale nature — limiting research to five alumni at a single institution — means the results, interpretations, and suggestions cannot be applied to other institutions or advancement offices. The only way to confirm if the sentiments expressed by the alumni interviewed are common or generalizable would be to conduct a large-scale, quantitative alumni survey that asks about specific engagement preferences. The results of the current study indicate that further research would be valuable as it could provide validation for resources to be provided to alumni offices to expand their programs.

Additionally, as was discussed earlier in this chapter, my employment in SAIT’s Alumni and Development department and distant relationships with some of the participants could be seen as a threat to the credibility of my study results. However, my experience and knowledge in alumni engagement could also be seen as an asset. Having been involved in developing the Alumni Engagement Strategy for SAIT, I have first-hand knowledge of how it fits into SAIT’s overall strategic plan and the institutional practices employed by the department. Having said this, I did approach my research with a reflexive lens, asking myself if other researchers would make the same decisions and interpretations I was making while analyzing the data. I also, as indicated earlier, kept detailed notes about my coding strategies. Both of these practices give credibility to the results presented here.

## Summary

The literature review chapter of this paper revealed that much of the available research on alumni engagement focuses on the financial benefits to the institution, leaving what alumni want out of the equation. This study addresses that gap by asking what engagement offerings interest them. By relating their responses to the goals and objectives of SAIT's strategic plan, the analysis presented in this chapter indicates that alumni have the potential to positively impact the outcome of those goals beyond fundraising. Although this study's small-scale, qualitative nature limits the results from being applied to a larger alumni population or another institution, the data presented above remains compelling. The results strongly indicate that an engaged alumni population can significantly impact an institution's strategic goals and that alumni engagement professionals should be seen as valuable partners on its road to success. The following chapter will discuss the implications of these results for advancement offices and alumni engagement professionals.

## Chapter 5: Conclusion

Alumni engagement or alumni relations programs and activities are generally measured by the number of philanthropic donations institutions receive. Often referenced as the “friend-raising before the fundraising” (Gallo, 2018, p. 93), an engaged alumni community's true value is sometimes overlooked. However, as the data presented above indicates, alumni can also become lifelong ambassadors of their alma maters. Involving alumni in the student experience through advisory committees and mentorship programs, providing them with meaningful opportunities like networking events, and inviting them into the classroom to speak to students are just a few of the ways alumni can further an institution's success beyond fundraising. The literature review chapter above examined the vast amount of research that had been done on alumni engagement, but few asked alumni what activities would interest them. Even fewer studies addressed how alumni participation could impact their former institutions' strategic goals and objectives. This small-scale study aimed to address this gap by asking: In what capacity do alumni want to be involved in activities that may help advance the strategic goals of their alma mater?

Data was collected through semi-structured interviews conducted with five engaged SAIT alumni. This concluding chapter summarizes the findings of this qualitative study, beginning with a summary of the data presented in Chapter 4. At this stage, I also highlight the most compelling outcomes and their significance concerning the research question. Next, I explain the relevance of this study and my findings within the field of alumni relations and post-secondary advancement. In the final section of this chapter, I reiterate the limitations of this study and discuss the opportunities for future research and discovery.

## Summary of findings

The five interviews conducted for this study provided a wealth of information on alumni engagement. Their personal stories about being a student and then a graduate of SAIT provided insight into why they stay involved with the institution, what would motivate them to continue to volunteer their time, and how they'd like to contribute in the future. Upon initial analysis of the interview data, I drew a picture of what motivated these particular alumni to get involved with SAIT after graduation, as well as the kinds of activities they would like to participate in now and in the future. However, it wasn't until I took these activities and placed them under the categories of SAIT's strategic plan that the actual value of their involvement became apparent.

During the interviews, these five alumni made it clear they were motivated to engage with their former institution for various reasons. As Figure 4.1 on page 47 illustrates, these alumni stay involved because they are proud of their association with SAIT and feel loyal to the institution. They are also driven by a sense of community, feelings of altruism, and a need or desire to gain experiences, knowledge and connections that may help advance their careers. All of these sentiments align with the principles of relationship marketing. Relationship marketing is often used to inform alumni relations research and aims to establish, develop, and maintain successful relationships (Schlesinger et al., 2017, p. 2179). MacMillan, Money, Money, and Downing (2005) share that relationship marketing theory emphasizes the "importance of developing long-term supportive relationships with existing customers and posits that energy and resources are better spent on this group rather than attempting to attract new customers" (2005, p. 807). The feelings expressed by the engaged alumni who volunteered for this study suggest it would be worth spending time and resources on their continued engagement. They have indicated they are committed and invested in seeing SAIT succeed. Therefore it is more likely for the resources spent on their continued involvement would prove worthwhile. The more

significant risk would be losing these valuable partners if their engagement isn't meaningfully stewarded.

To that point, these alumni also expressed that they would be most interested in activities that helped them advance their careers. Specifically, they mentioned they would be interested in networking and leadership opportunities, invitations to sit on advisory councils or mentorship groups and be offered guest speaking opportunities. When the interview data was categorized under the four objectives of SAIT's 2020-2025 Strategic plan (see figure 4.3 on page 54), the data indicates that alumni have the potential to impact the outcome of SAIT's strategic goals positively. Most importantly, this study appears to show that when institutions invest in building lifelong, meaningful relationships with their alumni, the benefits extend far beyond fundraising and can even contribute to its long-term operational success.

### **Findings in context**

The results summarized above support Gallo's 2012 research that suggests when institutions adopt "a model of building lifelong alumni relationships, instead of focusing on fundraising, there is the potential to gain wider, more meaningful benefits from the alumni constituency" (Gallo, 2012, p. 5). The results of this study also add to the limited research conducted on the role alumni can play in the success of an institution's strategic plans. A later study by Gallo (2018) and another by Gosh et al. (2001) suggest that strategic plans are an essential element of stakeholder engagement and that alumni have a role to play. However, no specific roles were suggested, nor were the studies aimed at demonstrating the role of alumni engagement in achieving institutional objectives. By connecting specific activities that alumni have expressed interest in, to the outcomes of the goals outlined in SAIT's strategic plan, this study shows the value that alumni can play in achieving institutional success. Specifically, the

research indicates that when post-secondary institutions invest in building lifelong relationships with their students and graduates, they are rewarded with a responsive and proactive alumni community willing to give back through their time, talents, and treasures.

In practice, the results indicate that it would be valuable for alumni engagement professionals to consider ways to involve alumni in the student experience. The alumni interviewed for this study stated that they would be interested in activities, such as advisory boards and mentorship programs, which would impact the student experience. At SAIT, connecting alumni with students through mentorship programs or guest lecturing opportunities would achieve two goals: providing alumni with the leadership and career development experience they are looking for while also enhancing the educational experience of current students. Similarly, by involving alumni currently working in industry through networking events and advisory council opportunities, SAIT works toward the student success bucket while also developing strong industry connections. This becomes a win-win-win scenario where the institution makes valuable industry connections, alumni get leadership experience and networking opportunities, and students get the relevant, industry-ready education they need to succeed. These results also highlight the need for stronger collaboration between the Alumni and Development and student-focused departments at SAIT. To truly connect alumni to the student experience, it only makes sense to collaborate with the departments responsible for helping students succeed.

Although the results of this study are compelling, they are not intended to overshadow the importance of fundraising for post-secondary institutions. As indicated in the introduction of this paper, institutions across Canada are struggling financially, and fundraising remains an integral part of that solution. This is likely why so much of the research on alumni engagement

focuses on alumni giving. However, as Weerts and Ronca suggest, “supporter alumni are distinguished by their attitudes and expectations about university needs, and their responsibility to give and volunteer at the university” (2007, p. 32). In other words, alumni support depends on their attitudes towards the institution and their sense of responsibility towards it. This responsibility is not realized if alumni have no agency over the institution’s success. And agency isn’t created by simply making friends with alumni — it is realized by offering meaningful opportunities that help the institution succeed while also supporting alumni in advancing their careers.

Ultimately, the results of this study show that alumni should be seen as an essential component of an institution’s overall success. Not only through philanthropy but also by helping current students succeed and through sharing their industry experience and knowledge to advance the curriculum. In this way, alumni become more than merely potential donors but also strategic partners in the institution’s success. And alumni engagement, as a practice, goes beyond the “friend-raising before the fundraising” (Gallo, 2018, p. 93) to become the facilitators of these integral lifelong relationships and vital collaborators in the institution’s advancement.

### **Limitations and future opportunities**

Due to the small-scale nature of this qualitative study, the results, interpretations, and suggestions presented above are not meant to be generalized or applied to other institutions or advancement offices. One way to confirm if the sentiments expressed by the alumni interviewed are common or generalizable would be to conduct a large-scale, quantitative alumni survey that asks about specific engagement preferences that may be connected to that institution’s strategic objectives. Although this would be an enormous undertaking for alumni engagement offices that often struggle to find resources, the results of this project indicate that such a study would be

worth the effort and expense. As was mentioned above by MacMillan, Money, Money, and Downing, “energy and resources are better spent on” (2005, p. 807) customers who are already committed (i.e., successful students) to realize the benefits of long-term engagement (i.e., successful alumni).

For this reason, I would recommend institutions review their strategic plans and examine how alumni might be able to contribute to their success. Then, I would suggest that a quantitative study be designed to ask engaged and non-engaged alumni if they would be interested in participating in activities that would help their alma mater achieve those specific goals. I recommend asking both engaged alumni and those not currently engaged with the institution because it would be essential to understand why alumni don’t volunteer their time to the institution and what, if anything, would make them want to get involved in the future. Although this project did not look at this aspect of the problem, I believe a larger, more comprehensive survey could help alumni relations professionals understand the non-engaged perspective. Additionally, changing the program to meet the needs of those who may engage if offered the right opportunities could increase the number of alumni the institution can bring on as active partners in its success.

Given the current financial pressure on post-secondary institutions, there may be resistance to redirecting focus from funding initiatives to engagement programming. However, as the Literature Review uncovered, much of the research conducted on alumni giving demonstrates that meaningful engagement is a reliable predictor of future philanthropy. For example, Sun, Hoffman, and Grady suggest focusing on current students as future funders, encouraging strong relationships between faculty and graduates, and enhancing alumni services to address stakeholder needs (2007, p. 329), as ways to encourage alumni giving behaviours. The data

presented above supports these recommendations but further research on the impact of meaningful engagement on fundraising goals could provide useful evidence to support a shift in focus from alumni giving to alumni engagement.

## **Conclusion**

As the above chapters indicate, engaged alumni have the potential to make a profound impact on an institution's strategic goals as mentors, teaching partners, lifelong learners, employers and donors. Involving alumni in the student experience through mentorship programs and guest lectures, allowing them to be involved in student recruitment, or opening up seats on advisory councils are valuable ways to engage alumni meaningfully. To understand if alumni would be interested in participating in these activities, this research project asked alumni if they would like to get involved in activities that may help advance the strategic goals of their alma mater. The results show that when alumni are offered meaningful opportunities to get involved, they are likely to want to engage because those opportunities are also inherently designed to help them advance their individual career goals. In this way, the relationship becomes win-win or, as Weerts describes it — a “two-way flow model (2007, p. 93) — where alumni become partners in the institution's success, and the institution becomes a partner in their lifelong learning and success.

At the end of the day, alumni will decide how they will interact with their alma mater, and it is up to institutions to meet their needs. The data presented here provide alumni engagement offices with ideas for future alumni programming and research opportunities that may inform those programs. The evidence above also suggests that when alumni engagement offices are seen as strategic partners with an essential role in helping an institute succeed, it opens the door to collaboration with departments across campus. Finally, by making alumni a

vital part of an institution's operations, connecting them to current and future students, and recognizing them as true ambassadors of the institution's offerings, the lifelong alumni relationship can go from being one-dimensional and transactional to reciprocal and transformational — ultimately making alumni and donors of an institution true partners in the success of its strategic goals.

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# Appendices

## Appendix A: Introductory Email to Participants

**Subject Line:** Help improve SAIT's alumni engagement program

Hello <first name>,

My name is Alison O'Connor. I am the manager of communications for SAIT's Alumni and Development department. I am also a student in the Master of Arts in Communications and Technology program at the University of Alberta. As part of my degree, I am conducting a research study on how alumni prefer to engage with their alma maters. Given your experience with SAIT's alumni engagement programming and activities, I feel that you are well suited to provide insight into this topic, and I want to invite you to participate in my study.

I am recruiting volunteers to participate in online, one-on-one interviews. If you decide to partake, the interview will take approximately 60 minutes of your time and will be scheduled between April 11 and 29, 2022. The interviews will be conducted using Zoom and will be audio and video recorded to ensure accuracy when analyzing the data. During the interview, I will ask you about your perceptions of SAIT and its image, your feelings and opinions about your past interactions with the institute, and how you'd like to be involved in the future.

Your decision to participate or not will not influence your relationship with SAIT. By participating you will be providing insight and guidance towards improving SAIT's alumni engagement program and helping me complete my master's degree.

This study has been reviewed and has received ethics clearance through the University of Alberta Research Ethics Board. If you decide to participate, please respond to this email, and I will send you a consent form to sign. Your identity will be kept confidential and will be anonymized through the research process to the final report.

If you want to participate or require more information before deciding, please do not hesitate to contact me.

Sincerely,

**Alison O'Connor**

Manager of Communications  
SAIT Alumni and Development

Southern Alberta Institute of Technology  
1301 – 16 Avenue NW, Calgary AB, T2M 0L4  
(Cell) 403.819.4484

## **Appendix B: Participant Consent Form**

**Alison O'Connor**  
**Informed Consent Form – MACT Capstone 2022**  
**University of Alberta**

**Title of Project:** Activating Alumni Engagement

**Principal Investigator:**

Alison O'Connor  
Address: 927 Canaveral Crescent SW, Calgary, AB  
Phone (work): 403.819.4484  
Phone (home): 403.667.8455  
Email: [alison.oconnor@sait.ca](mailto:alison.oconnor@sait.ca)

**Advisor:**

Dr. Gordon Gow  
Professor, Faculty of Arts – Sociology Department  
University of Alberta  
Address: Room 4-26 Tory (H.M.), Building 11211  
Saskatchewan Drive NW, Edmonton, AB  
Phone: 780.492.2214  
Email: [ggow@ualberta.ca](mailto:ggow@ualberta.ca)

**Purpose of the Study**

The purpose of this research is to examine how meaningfully engaged alumni demonstrate their loyalty – not only by donating – but also through their time, talent, and networks. Through qualitative analysis, this paper will aim to answer the question: In what capacity do alumni want to be involved in activities that may help advance the strategic goals of their alma mater?

You have been invited to participate in this study because of your previous engagement with SAIT's alumni programs, events, and activities. Your personal experience will provide valuable insight into this research topic.

The completed study will be shared with the University of Alberta as the final requirement for the Master of Arts in Communications and Technology program. The study will also be provided to the Southern Alberta Institute of Technology and will provide insights towards helping the Alumni and Development department improve their alumni engagement programming.

## **Procedures to be followed**

You will be asked to participate in a 60-minute, one-on-one interview about your experiences. The interview will be conducted online using the Zoom platform, and it will be audio and video recorded to ensure accuracy when analyzing the data.

You can withdraw from the study, for any reason before April 30, 2022. Please send an email to the principal investigator if you want to withdraw. If you withdraw after the interview, the recording will be deleted, and files related to your participation will be shredded. Once the data analysis phase has been completed on April 30, 2022, you will no longer be able to withdraw from the study.

## **Discomforts and Risks**

There are no risks associated with participating in this research beyond those experienced in everyday life.

## **Benefits**

You will not receive any direct benefit for participating in this study. However, your involvement is an opportunity for you to help improve SAIT's alumni engagement program.

This research project will provide valuable insight into the motivations and desires of engaged alumni at SAIT, how they want to be involved, and what they want in return for their engagement. Results will be used to improve the school's current alumni engagement program and seek out areas for further research.

## **Duration/Time**

The interview will take approximately 60 minutes of your time. After the interview, the principal investigator may contact you to clarify or ask follow-up questions.

## **Statement of Confidentiality**

Your participation in this research is confidential, and your identity will be anonymized. Information regarding your identity will be encrypted and kept in a secure, password-protected folder on the University of Alberta Google Drive. Once the deadline to withdraw has passed on April 30, 2022, the master contact list containing your identity will be deleted. The original recording of the video interview will also be moved to an encrypted USB drive and kept securely at the researcher's home until 5 years after the project has been completed when it will be deleted along with all other remaining files and documents relating to this project.

Your identity on all documents, including interview transcripts, data analysis, and the final project will be anonymized. Meaning, that all identifying information about you will be removed, and an alias will be used in place of your name.

**Right to Ask Questions**

Please contact Alison O’Connor at 403.819.4484 or alison.oconnor@sait.ca with questions, complaints, or concerns about this research. You can also call this number if you feel this study has harmed you. Questions about your rights as a research participant may be directed to Dr. Gordon Gow, University of Alberta professor, at 780.492.2214 or ggow@ualberta.ca.

The plan for this study has been reviewed by a Research Ethics Board at the University of Alberta. If you have questions about your rights or how research should be conducted, please contact the Research Ethics Office at reoffice@ualberta.ca. This office is independent of the researchers.

**Voluntary Participation**

Your decision to participate in this research is voluntary, and will not influence your relationship with SAIT or the Alumni and Development department. You can stop at any time, and you do not have to answer any questions you do not want to answer. Refusal to participate in or withdraw from this study will involve no penalty or loss of benefits you would otherwise receive.

You must be 18 years of age or older to participate in this research study.

You will be given a copy of this form for your records.

I, \_\_\_\_\_, consent to participate in this project.  
(Print first and last name)

\_\_\_\_\_

Participant Signature

\_\_\_\_\_

Date: \_\_\_\_\_

Principal Investigator

\_\_\_\_\_

Date: \_\_\_\_\_

## Appendix C: Interview Script

**Alison O'Connor**

**Interview Script - MACT Capstone 2022**

**University of Alberta**

Thank you for participating in this research project. As you know, this interview, along with the others I am conducting, will explore how alumni — like you — prefer to engage with their former institutions. Research in the field of alumni engagement strongly focuses on philanthropy. However, there are many valuable ways that alumni can be involved beyond giving. My hope for this discussion is for you to provide your opinions and perceptions about your involvement with SAIT after graduation and explore opportunities for improvement and change going forward. This is meant to be an open discussion, but I do have some specific questions to guide the conversation. Please feel free to be candid in your responses and elaborate on your answers as much as possible.

Do you have any questions before we get started?

1. Can you tell me a little bit about yourself and what happened in your life after graduating from SAIT?

**Probes:** Did you attend convocation? Did you end up working in your field of study? When did you first hear from SAIT after graduation? What prompted you to get involved with the institution as an alum?

2. How strong would you say is your connection to SAIT?

**Probes:** How do you identify with the SAIT brand? Are you proud of your relationship with the institution? Do you recommend SAIT to your family and friends? Why or why not? Do you feel a sense of loyalty to SAIT? Do you feel invested in the institution's success?

3. What factors have contributed to your connection to SAIT?

**Probes:** Do you feel SAIT played an important role in your career? Is it still playing a role in your success? What else could SAIT be doing to support you?

4. What SAIT alumni activities, events and communications have you been involved with so far?

**Probes:** Have you attended any events recently? What is your opinion of the communications from SAIT Alumni and Development? Do you actively participate on social media? Do you support the institution financially? Are you happy with these activities? Why do you like to be involved? Are you receiving any benefit from your involvement?

5. Would you like to be more directly involved in some of the activities on the SAIT campus (i.e., student recruitment, guest lectures, mentorship programs, public speaking, or networking activities)?

**Probes:** Do you have skills or experience that could be valuable in helping students succeed? Would you be willing to participate in this way? Do you feel this level of involvement would be valuable to you and your career?

6. How do you think you may be able to contribute to SAIT's success? What would you like to receive in turn for this involvement?

**Probes:** Do you have ideas of ways you can be more involved. Do you think your peers or fellow alumni would be interested in this level of involvement as well?

7. Do you have any advice or feedback for SAIT's alumni engagement team that you would like to share?

8. Is there anything else you would like to add to this conversation?