3-14-2019

The Relationship Between Young Alumni Participation and Giving

Glenn Kosse
gkosse@bellarmine.edu

Follow this and additional works at: https://scholarworks.bellarmine.edu/tdc

Part of the Higher Education Administration Commons

Recommended Citation
Kosse, Glenn, "The Relationship Between Young Alumni Participation and Giving" (2019). Graduate Theses, Dissertations, and Capstones. 66.
https://scholarworks.bellarmine.edu/tdc/66

This Dissertation is brought to you for free and open access by the Graduate Research at ScholarWorks@Bellarmine. It has been accepted for inclusion in Graduate Theses, Dissertations, and Capstones by an authorized administrator of ScholarWorks@Bellarmine. For more information, please contact jstemmer@bellarmine.edu, kpeers@bellarmine.edu.
The Relationship Between Young Alumni Participation and Giving

A Dissertation Submitted to

The Faculty of

The Annsley Frazier Thornton School of Education

Bellarmine University

In Partial Fulfillment of the

Requirements for the Degree

Doctor of Philosophy in Leadership in Higher Education

by

Glenn F. Kosse

March 2019
The Relationship Between Young Alumni Participation and Giving

Glenn F. Kosse

Dissertation Committee:

Committee Chair – Dr. David Paige
Committee Member – Dr. Michael Vetter
Committee Member – Dr. Perry Sangalli
Acknowledgements

I truly stand on the shoulders of giants as I complete this amazing chapter of my life. I began this journey under the mentorship of the late Dr. Joseph J. McGowan, who called me into his office on day in 2014 and firmly encouraged me to enroll in this program, and I complete this journey under the collaborative leadership of Dr. Susan Donovan, who supported me as I completed my classes and worked on my research and writing. Dr. David Paige provided essential direction and insight as my dissertation chair, and even though he was not officially on my committee, Dr. Grant Smith teamed with Dr. Paige to illuminate the basis for my ultimate research design. Dr. Michael Vetter and Dr. Perry Sangalli spent many hours reviewing my work and guiding me through a successful defense. All of these leaders of higher education played a great role in this project.

The Development and Alumni team at Bellarmine University deserve a special mention as they encouraged me throughout my studies and covered many events and activities for me when I was in class on so many weekends. They responded to requests for data and information and provided resources that assisted in my research. Special mention goes to Stephanie Pieper Reilly, who tirelessly extracted data from university databases so that I could work on my research before she left for her maternity leave.

My deepest thanks and my love goes to my wife, Kelley Helgeson. It has been said that no one can understand a Ph.D. program until they go through it themselves, but there is also a special appreciation earned for a program such as this by one’s partner. Thank you for putting up with so many nights and weekends when was either in class, studying, reading, writing or spending time frustrated and exhausted. I could not have done this without you and your love and support.
Abstract

This study sought to determine the relationship between young alumni participation in alumni association sponsored events and young alumni giving through the research questions (a) is there a relationship between young alumni participation and giving to the university?; and (b) is the giving behavior of young alumni who are donors to the university affected by attendance at alumni association events?

This study utilized a univariate analysis of variance (ANOVA) analysis with three separate dependent variables: pre-event giving, post-event giving, and total giving. The independent variables were factors describing specific young alumni behaviors: (a) attend but do not give, (b) do not attend but give, and (c) attend and give. Each of the three models were significant at $p \leq .001$. When the effect of event attendance was compared to post-event giving, young alumni who attended an event in fiscal year 2014 – 2015 gave an average of $164.42 in the three years following attendance, compared to the three year average giving of $77.26 of those who did not attend an event, confirming the first research question. The giving behaviors of young alumni who are already donors is positively affected by event attendance. Young alumni who were already donors and subsequently attended an event give at a much higher level post-event. Additionally, all three of the dependent variables were significantly correlated with each other and total attendance shows an increasingly significant positive relationship between pre-event giving ($r = .357$), post-event giving ($r = .433$), and total giving ($r = .581$), demonstrating that young alumni event attendance and giving are significantly correlated.
# Table of Contents

Acknowledgements ........................................................................................................... 3

Abstract ............................................................................................................................ 4

Chapter One: Introduction ................................................................................................. 8

Overview of Study .............................................................................................................. 8

Problem Statement ........................................................................................................... 9

Purpose of the Study ......................................................................................................... 10

Research Questions ......................................................................................................... 12

Assumptions and Limitations .......................................................................................... 12

Key Terms ......................................................................................................................... 13

Chapter Two: Literature Review ...................................................................................... 15

Introduction ...................................................................................................................... 15

Theoretical Framework ..................................................................................................... 16

Literature Review ............................................................................................................. 18

   Alumni giving and participation ................................................................................. 18

   Satisfaction ................................................................................................................... 28

   Athletics as a driver of giving and engagement ......................................................... 30

   Alumni engagement and volunteerism ..................................................................... 32

   Marketing influences on giving and engagement ..................................................... 34

   Young alumni participation and giving ..................................................................... 36
The Relationship Between Young Alumni Participation and Giving

Future Research ............................................................................................................. 71

References .................................................................................................................... 74
Chapter One: Introduction

University development and alumni offices are under growing pressure to provide increased monetary resources to their respective universities in a contemporary landscape that is constantly changing (Chan, 2016). Significant factors fueling this change include declining numbers of college age students, increased cost of attendance, and a shift in the public perception of the academy from a philanthropic entity to a direct service provider. These present-day dynamics lead to questions about the sustainability of small colleges and universities (Marcy, 2017). A college education is becoming more expensive and is facing increasing public scrutiny. Data from the College Board (2016) show that the average published tuition at a public four year college or university rose by 13% over the five years from 2010-11 to 2015-16. The same schools saw tuition rise by 24% over the previous five years. In another study conducted in 2014, a near unanimous 96% of Americans felt that going to college was important, while 79% of the same respondents felt that higher education in America was not affordable (Goldrick-Rab, 2016).

In response to this current situation, the demand for increased private funding from alumni is increasing as a necessary means of sustainability. (Mann, 2007; Marcy, 2017; Pucciarelli & Kaplan, 2016).

Overview of Study

The landscape of institutional advancement is drastically changing, highlighting the growing emphasis on giving (Marcy, 2017; Pucciarelli & Kaplan, 2016). This study explores the relationship between young alumni participation in alumni events and giving to that individual’s alma mater. This study takes place at Bellarmine University, a small liberal arts university in Louisville, KY. Using data from the university’s office of development and alumni affairs, a
quantitative analysis sought to determine what young alumni attendance at alumni events reveals about giving and explored if giving by young alumni is related to event attendance.

The motivations for alumni giving have a basis in research grounded in three different theories. Volkwein (1989) explored a theory of alumni giving through the lens of capacity and motivation. Weerts and Ronca (2007) developed a theoretical framework for giving viewed through a combination of social exchange theory, expectancy theory, and an investment model. Van Slyke and Brooks (2005) present a theory based on motivational triggers that lead to a better understanding of the drivers of young alumni giving through participation. These three theories provide a basis for the ensuing discussion and study regarding alumni engagement and giving.

**Problem Statement**

Total dollar giving to higher education is substantially increasing while the number of alumni who participate and give is decreasing (EAB, 2015; Kaplan, 2018). Fueling this rise in giving is the prevalence of large fundraising campaigns focused on large gifts from wealthy donors. In 2014-15, fifty-two universities were engaged in capital fundraising campaigns with goals that equaled or exceeded $1 billion (EAB, 2015). According to the 2017 Voluntary Support of Education (VSE) survey, overall charitable giving to all colleges and universities in the U.S. increased 6.3% in 2017 to $43.6 billion, the highest level reported since the survey’s inception in 1957 (Kaplan, 2018). Regardless of this increase in giving due to large gifts by wealthy donors, the rate of individual alumni giving is decreasing (Kaplan, 2018). Research by Le Blanc and Rucks (2009) confirms this dichotomy of giving, where very few large donors make substantial gifts while the majority of annual gifts are made in small amounts by a minority of the alumni base. Their research shows that 2.6% of alumni across multiple clusters account for 88% of total
giving, while 63.7% of all annual gifts, valued at $111 or less, came from just 20.1% of alumni (Le Blanc & Rucks, 2009).

Nationally, only 8.3% of alumni made a gift to their alma mater in 2014, down from 14% in 2001 (EAB, 2015). At Bellarmine University, the alumni participation rate fell from 29% to 12% between 2001 and 2018 (Bellarmine University, 2001, 2018a). This decline in participation is especially evident with millennial alumni, who do not display the same affinity for their alma mater exhibited by previous generations. According to a report on alumni participation by the Educational Advisory Board (EAB, 2015), 75% of millennial alumni are more likely to give to their favorite charity than their alma mater. High tuition and student loan debt lead to an increased perception among young alumni that a college degree is a transactional commodity and that an alumni’s alma mater is not a non-profit organization deserving of philanthropy (Wastyn, 2009).

Additionally, the rise of social media as means of creating connections between alumni has changed the traditional role of the alumni office (EAB, 2015). Historically, the alumni office created and maintained connections between alumni, deepening the value proposition between a graduate and his or her alma mater. Many of those connections are now readily available through social media. In this changing environment, developing, re-imagining, executing, and measuring an innovative and successful alumni engagement and development program is increasingly important.

**Purpose of the Study**

This study will examine young alumni participation and young alumni giving at Bellarmine University to determine if there is a link between the two. It is shown that alumni giving is declining both nationally and at Bellarmine (Bellarmine University, 2001, 2018a; EAB,
The Relationship Between Young Alumni Participation and Giving

Within this environment of declining giving, the alumni office at Bellarmine University seeks to engage and involve alumni in university activities and events. This is consistent with the mission statement of Bellarmine’s office of Development and Alumni Affairs:

The mission of the Office of Development and Alumni Relations is to engage alumni, parents, community leaders, friends, faculty, and administrators in the life of Bellarmine University. We seek to ensure an active and involved alumni community and to secure significant financial investments in Bellarmine University’s mission to serve the region, nation and world by educating diverse students in an educational environment committed to academic excellence and ethical awareness (Bellarmine University, 2017).

In pursuit of this objective, the alumni office conducted 101 events and programs in the 2017-2018 fiscal year designed to engage and involve university alumni. Over the past 11 years, the annual number of events offered by the alumni association grew from 38 to 101, a rise of 166%, and the total number of annual attendees increased from 3,300 to 11,091, a rise of 236% (Bellarmine University, 2018b).

An examination of event attendance records and overall giving records show that 40% of Bellarmine alumni either attended an alumni association event, participated in an alumni association program or made a gift to the university during the 2017-2018 fiscal year (Bellarmine University, 2018b). This relationship shows a link between giving and participation, but it does not reveal if participation in alumni events has any causal association with giving. The research presented in the literature review of this study demonstrates similar relationships between giving and participation, but there is little research showing a direct link between young alumni participation and giving. This particular study focuses on specific event attendance by young alumni of Bellarmine University in the 2014-15 fiscal year. The giving histories of all alumni in
the Bellarmine University database classified as young alumni in fiscal 2014-2015, regardless of
event attendance, were examined for the period between the 2009-2010 fiscal year through the
2017-2018 fiscal year. The giving behaviors of these young alumni for the three years prior and
the three years following the 2014-2015 fiscal year were studied to determine if young alumni
giving can be predicted by event attendance.

Research Questions

This study seeks to determine what young alumni attendance at alumni events reveals
about giving and if giving is related to event attendance through the following research
questions:

1. Is there a relationship between young alumni participation and subsequent giving to the
   university?
2. Is the giving behavior of young alumni who are donors to the university affected by
   attendance at alumni association events?

The answers to these research questions might provide higher education administrators
and alumni and development professionals increased knowledge about the relationship between
event attendance and giving, especially at a small private liberal arts university.

Assumptions and Limitations

Assumptions in this study include that university administrators are concerned about the
return on investment from alumni events and that linking the efforts behind alumni programming
and giving are relevant to fund raising efforts. An additional assumption is that these
administrators are interested in learning more about specific programming and its relationship to
giving.
Limitations to this study include that the study was conducted using event data from a single fiscal year at a single university. Only select alumni events that contained rsvp codes in the alumni database were studied, as they utilized the specific codes that allow for measurement. Another limitation is that while event attendance is being studied as a catalyst for subsequent giving, there are other factors that have been shown to have an effect on giving including, but not limited to, satisfaction as a student, financial aid awards, and post graduate success. Research by Clotfelter (2003); Dean (2007); Holmes (2009); McDearmon (2013); Monks (2003); Stephenson and Yerger (2014); Weerts and Ronca (2007) and others contained in this study’s literature review reveal much about this limitation. Because of the amount of prior research in this area, these alternate drivers to giving are not considered in this study. Additionally, other external factors might have an impact on the alumni’s decision to give, including a personal predisposition towards philanthropic giving, reciprocity in the form of college allegiance, and the potential to receive direct benefits such as notoriety, access, or increased college degree brand value (Mann, 2007).

Key Terms

There are several key terms used in this study that may be recognizable to alumni and development practitioners but not to the general reader, as well as some terms that can be specifically defined for clarity and understanding within the scope of this study.

*Alumni* – The Council for the Advancement and Support of Education (CASE) defines alumni as “graduates of the institution and others with a prior academic relationship, including non-graduates, certificate and credential holders, distance learners, lifelong learners, residents, post-docs, honorary degree recipients and honorary alumni” (Council for the Advancement and Support of Education, 2018, p. 5). For the purpose of this study and in accordance with
definitions provided by CASE, the term *alumni* will be used throughout, regardless of singular or plural tense or gender association (Council for the Advancement and Support of Education). Additionally, only alumni who received an undergraduate degree from Bellarmine University are included in this study.

*Alumni Participation* – CASE defines alumni participation as “activities that are valued by alumni, 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” (Council for the Advancement and Support of Education, 2018, p. 5). In this study, young alumni participated in specific alumni events and programs sponsored by the university’s alumni association. These events produced particular online rsvp codes that conform to attendance and are accessible through the university and alumni database.

*Institutional Advancement* – CASE defines institutional advancement as “a strategic, integrated method of managing relationships to increase understanding and support among an educational institution's key constituents, including alumni and friends, government policy makers, the media, members of the community and philanthropic entities of all types” (Council for the Advancement and Support of Education). At Bellarmine University, the term advancement includes the operations that make up the development, alumni affairs and special events departments.

*Young Alumni* – for the purpose of this study, an alumni is considered a young alumni if they are within ten years of receiving their undergraduate degree. The young alumni included in the data file for this study received their undergraduate degree from Bellarmine University between the years 2005 and 2014.
Chapter Two: Literature Review

Introduction

Alumni giving, as a form of private support to higher education, is increasingly important and essential in the current financial environment:

The result is that endowment and related funds often are the major sources of institutional discretionary funds by which innovations may be introduced, risks may be taken, and investments in the future may be made. Voluntary support frequently provides the margin of excellence, the element of vitality that separates one institution from another. (Leslie & Ramey, 1988, p. 115)

The purpose of this literature review is to examine contemporary research on both alumni giving and alumni participation in order to better understand the motivations and dynamics of alumni who are engaged with their alma mater. Literature focusing especially on young alumni engagement, event attendance, and giving is particularly relevant to the question of how young alumni engagement leads to young alumni giving.

Using electronic databases available through the Bellarmine University library, search terms such as “alumni giving,” “alumni participation,” and “young alumni giving” yielded a significant number of studies that focused on the motivations of alumni giving and participation. Because of contemporary changes in the private funding of higher education that result in fewer numbers of alumni making financial gifts to their alma mater while total dollars contributed are increasing due to the prevalence of significant gifts (EAB, 2015; Kaplan, 2018), this literature review is generally limited to studies published since 2000. However, several older studies are included as they provide longitudinal breadth and depth and serve as a benchmark for current research (Baade & Sundberg, 1996; Okunade & Berl, 1997; Willemain, Goyal, Van Deven, &
The Relationship Between Young Alumni Participation and Giving

Thukral, 1994). This review is categorized by several major themes revealed during the research. These themes include alumni giving and participation, satisfaction, athletics as a driver of giving and engagement, alumni engagement and volunteerism, marketing influences on giving and engagement, young alumni participation and giving, and young alumni and student giving.

Theoretical Framework

The relationships between event attendance, engagement and giving has roots in development theory. Volkwein (1989) developed a model where “gift giving behavior is viewed as a function of both capacity and motivation” (p. 6). Capacity to give is determined by alumni demographics such as graduation year, social-economic status, gender, income, ethnicity, and occupation. Motivations for giving include satisfaction as an undergraduate, major, undergraduate engagement, belonging to an alumni family, and alumni engagement. It is the interplay of these two factors, capacity and motivation, that Volkwein (1989) argues influences the framework for determining alumni gift giving behaviors.

Weerts and Ronca (2007) propose a theoretical framework based on Volkwein’s gift-giving behavior theory (1989) that examines alumni motivation to give and volunteer through the combination of social exchange theory, expectancy theory, and an investment model. Social exchange theory holds that alumni perceive the relationship with their alma mater as one where the costs and benefits of the affiliation are measured. An alumni might think that it is worthwhile to make a gift because of their involvement and attendance at university events as “alumni support is associated with the alum’s perceptions about the value of his or her current and past experiences with the institution” (Weerts & Ronca, 2007, p. 23). The extent to which an alumni views their past and present interactions with their alma mater creates an influence on that alumni’s willingness to give or participate. Similar ideas relevant to social exchange theory are
found in other studies regarding alumni engagement (Clotfelter, 2003; McAlexander, Koenig, & DuFault, 2014; Monks, 2003; Newman & Petrosko, 2011; Porter, Hartman, & Johnson, 2011; Sun, Hoffman, & Grady, 2007).

The second element of the model proposed by Weerts and Ronca (2007) is expectancy theory. The expectancy theory model posits that alumni construct personal desired outcomes for the university and they design their future engagement in order to better influence those desired outcomes. Alumni make decisions about their involvement in alumni events and giving back to the university in monetary form based upon those expectations. In turn, those expectations can be managed by the university through marketing and programming designed to influence the perceptions of expectation (Levine, 2008; McAlexander et al., 2014; Okunade & Berl, 1997; Peruta, Helm, & Benson, 2015; Root, Taylor, Rose, & Lauderdale, 2017; Stephenson & Yerger, 2014). In this model, alumni proactively act to influence the future trajectory of the university through engagement and giving.

Weerts and Ronca (2007) complete their theoretical model through the inclusion of an investment model. This model is related to the cost and benefit aspect of social exchange theory. Alumni that make an investment of time might be more willing to make a financial investment as well if they are satisfied with their own cost and benefit analysis of this engagement. Additionally, positive alumni engagement experiences and the value proposition the university provides through these experiences can create an investment proposition that has a greater return than other available or alternative personal relationships. The combination of these positive outcomes, return on personal investment, and the quality of the experience creates an emotional attachment that leads to participation and giving. This investment model concept is similar to the
findings regarding alumni identity and engagement in studies by McDearmon (2013) and Weerts and Ronca (2009) that will be addressed later in this review.

Related to the theory proposed by Weerts and Ronca (2007) is the engagement and giving model provided by Van Slyke and Brooks (2005). They offer a framework that, among other factors, focuses on the concept that volunteers are likely to give because they feel a sense of community with the organization with which they are involved. These volunteers give because the organization helped them or someone they knew personally. Because of this connection, these engaged individuals are likely to involve other volunteers as well. Ultimately, Van Slyke and Brooks (2005) developed a theoretical model that identifies personal factors such as the ability to give, demographics, knowledge, and experience that activate personal behavioral triggers. These triggers include a sense of duty, tax advantages, a personal solicitation, or a request to volunteer. When activated, these triggers can lead to participation, volunteering, and giving to the organization.

It is through the connection of these three theoretical models that the role of alumni participation in giving is examined. The intersection of Volkwein’s (1989) capacity and motivation theory, Weerts and Ronca’s (2007) exploration of social exchange theory, expectancy theory and an investment model, and Van Slyke and Brooks’ (2005) trigger theory lead to a better understanding of the motivations of alumni giving through participation.

**Literature Review**

**Alumni giving and participation.**

In a revealing qualitative study, Wastyn (2009) sought to learn more about the decision making processes that consistent non-donors use when they decide not to contribute to their alma mater. Using a collective case study approach, the author examined the responses from twelve
non-donor alumni of a medium sized religiously affiliated university. Wastyn (2009) used the research of Van Slyke and Brooks (2005) as a framework to “understand the association of background and economic factors with the triggers [emphasis added] to give and volunteer. These can be thought of as fund-raising strategies that work for organizations seeking to leverage financial and human capital” (Van Slyke & Brooks, 2005, p. 205). It is these triggers that Wastyn (2009) uses to determine why non-donors do not give.

Even though the non-donor alumni in this study (Wastyn, 2009) revealed similar positive undergraduate and graduate alumni experiences as donors from other studies (Clotfelter, 2003; Gaier, 2005), the non-donors create their own “personal narratives” (Wastyn, 2009, p. 100) that define why they do not give. These non-donor triggers are broken down into four categories: the university does not need their money, the university is not a charity but a paid commodity, the non-donor has issues in general with giving, and the non-donors do not make logical giving decisions. The author concludes that descriptively, donors and non-donors look alike but make different decisions regarding giving: “It appears that the key difference between non-donors and donors occurs during the internalization of their college experiences which impacts the intrapersonal decision making process of whether or not to make a gift” (Wastyn, 2009, p. 103). The non-donors in the study differed in the manner in which they perceived the school due to the personal narratives they constructed. Wastyn (2009) concludes that administrators should create and perfect a new narrative for the school that educates students about the experience, value and the need for future support.

The purpose of a later study by Weerts and Ronca (2009) is two-fold: to determine what separates donors from non-donors and to determine the relationship between donor traits and giving levels. This quantitative study reviewed alumni of a large public university between the
ages of thirty and seventy who had been active with at least one alumni association board. Key findings include that (a) alumni give because of the perceived value of their gift, (b) households with incomes over $90,000 are more likely to give at higher levels, (c) donors that keep in touch with the university give more, (d) giving back to one’s alma mater may be related to religious upbringing, and (e) the experience the alum had as a student plays a role in their giving. This relates to findings by Clotfelter (2003), Monks (2003), and Sun et al. (2007). The higher giving levels for households earning over $90,000 only applied to those with one degree, indicating that holding more than one degree might mean more competition for donor dollars from other universities. This finding is similar to research by Newman & Petrosko (2011). Also, the fact that those who keep in touch with the university tend to give more indicated the importance of a strong communications presence in alumni affairs, as also shown by Levine (2008) and Sun et al. (2007).

In an effort to learn more about how alumni perceive their alma mater and how those perceptions affect engagement and giving, McDearmon (2013) studied nearly seventy years of alumni data from a large Midwestern public university. Focusing on self-described traits of alumni distinctiveness that were quantified in the survey, the author categorizes three dimensions of alumni identity: joining the alumni association, attending university sponsored events, and charitable giving (McDearmon, 2013, p. 283). The author posits that if one’s own identity with their alma mater is important post-graduation, and if that part of one’s personal identity associates with being an alumni, then that individual is more likely to attend an event, join the alumni association, or make a gift. The results from this study parallel findings by Weerts and Ronca (2009) showing that alumni labeled as supportive made gifts or got involved and that one does not necessarily need to be a donor to experience meaningful engagement. This is key
information for development and alumni practitioners as it reinforces the positive correlations between alumni engagement and giving:

One thing that can be derived from this study is the importance of looking at the personal relationships that alumni can have with their alma maters and how those relationships can greatly impact both the individual alumnus(a) [sic] and the future of the college or university in question. (McDearmon, 2013, p. 301)

Thus the level of personal identification that an alumni has for his or her alma mater is a key determinant in their engagement, involvement and giving, which is similar to findings by Stephenson and Yerger (2014).

In a similar study that examined alumni donor motivation, Gottfried (2008) employed longitudinal survey data to determine the “crowd-in” (p. 51) effect that non-alumni gifts from sources such as foundations, corporations, and parents have on alumni giving. The key finding in this study shows that there is a positive correlation between outside giving and increased alumni giving: “the relationship between non-alumni private donations and alumni contributions can have a major impact on the structure of future alumni solicitation” (Gottfried, 2008, p. 69). The direct impact of non-alumni support on alumni giving gives rise to the concept that increased prestige might affect alumni giving (Holmes, 2009; Stephenson & Yerger, 2014).

Weerts and Ronca (2007) use data from a large research university to examine the different support characteristics of four alumni categories: inactive alumni, alumni who give, alumni who volunteer, and alumni who both give and volunteer. The study explores three different forms of alumni support – gifts of money, volunteering, and advocacy in the political arena – in order to define the factors that separate these different levels of engaged alumni. Significant past research shows that experience while an undergraduate influences giving as an
alumni (Clotfelter, 2003; Dean, 2007; Monks, 2003). This study takes those findings deeper, determining that there is little difference between active alumni who both give and volunteer and inactive alumni when only social and academic engagement as an undergraduate is measured. Instead, what separates engaged alumni from inactive alumni are attitudes regarding the need the school has for them and the engaged alumni’s feelings of responsibility towards helping their alma mater. Alumni who give and volunteer form deeper connections with their alma mater than those who do not, making them more aware of institutional need and their role with their alma mater. Taking this a step further, development offices must look for those alumni who might already be donors or event attendees and invite them to become even more engaged.

A highly cited, longitudinal study by Okunade and Berl (1997) examines the inclination of business school alumni to give back to their alma mater. The authors examined 2,000 responses to surveys from 1955-1991 graduates of a large public doctoral school of business. Results show that there is an increased probability of giving that is significantly related to time since graduation, degree, willingness to recommend the school to others, household attributes, family ties, and the availability of matching gifts. Specifically, each successively older decade of graduates was more likely to give than the previous decade. Spousal alumni giving followed a similar pattern. Alumni holding degrees in finance, insurance or real estate were 15% more likely to give. This might equate higher earning power with propensity to give. Alumni who worked at a matching gift company were 8% more likely to give. Effective school communications were drivers of giving (Levine, 2008; McAlexander et al., 2014; Stephenson & Yerger, 2014; Sun et al., 2007), as were crowding-in tendencies, the concept that “the charitable behavior of parents, corporations, and foundations positively influences alumni donating behavior” (Gottfried, 2008, p. 52). Interestingly, gender, race and marital status were not significant drivers of giving, and
having children over 12 years of age has a negative influence on giving. The propensity to give increases with income, but not at the same rate, showing that increases in income are not matched with proportionate increases in giving. Providing advice to university development practitioners, Okunade and Berl (1997) hold that the most important prospects at a business school can be identified as finance, insurance or real estate majors working at a matching gift company, alumni families with an alumni spouse, alumni who are not employed in a service related industry, alumni who know and recommend other alumni, and alumni who have increasing incomes.

Durango-Cohen and Balasubramanian (2015) studied alumni giving data from a large private university to create a descriptive model of consistent alumni support utilizing the longitudinal aspects of donors who exhibited three years of sequential giving. Engaged donors are defined as those who gave at a level at or below $25,000 for three consecutive years during the period between 2000 and 2010. The study discusses the importance of researching, segmenting, and targeting specific alumni donor prospects. Alumni who gave at a high consistent level were found to have the same potential to make a large gift as those alumni with a lower giving average but more variance in their giving levels. The results of this research demonstrate the importance of targeting potential alumni donors based on their own motivations and personal characteristics as well as their demonstrated average giving.

A study of consistent alumni donors at an elite private university by Wunnava and Lauze (2001) sought to identify donor characteristics that can predict alumni giving to one’s alma mater. Unique to this study is a data set that includes donors that had made a gift every year for a twenty-three year period. Key findings include the identification of certain distinctive characteristics among these consistent donors, including participating as a varsity athlete, serving
as university volunteers, having a social science major, coming from a family of alumni (Holmes, 2009), participating in a local alumni chapter, and employment in the financial industry. The results of this study suggests that evidenced based targeting and segmentation of alumni donors may result in increased giving. Supporting this research, Gottfried and Johnson (2006) found convincing empirical evidence that more frequent solicitations result in higher levels of alumni support.

Lara and Johnson (2014) use alumni data from a small rural liberal arts school to examine alumni characteristics unique to the university. Alumni who participated in alumni events were more likely to give, demonstrating a 7.3% increased probability of making a gift. Additional event attendance resulted in a $278 increase in giving per event attended. Alumni who come from a family of graduates are more likely to give, consistent with research by Clotfelter (2003), Holmes (2009), and Wunnava & Lauze (2001). Several key findings of this study do not align with trends found in other studies. Alumni with modest incomes were more likely to give than their wealthy counterparts, contrary to the findings of other research (Holmes, 2009; Monks, 2003; Okunade & Berl, 1997; Skari, 2014; Weerts & Ronca, 2009). Participation as a student did not result in increased giving as an alumni and when active undergraduates did give, they gave less than their non-active peers. This finding is also inconsistent with other, similar research (Clotfelter, 2003; Dean, 2007; Monks, 2003; Porter et al., 2011; Sun et al., 2007). Perhaps due to the college’s remote location, alumni that live farther away give more than those who live close to the school. The authors concur with Monks (2003) in that this modeling of individual alumni behaviors is an exercise that development departments should undertake to better design their own giving campaigns, as there are trends that are unique to each individual school.
Using data from 419 two- and four-year colleges, Cunningham and Cochi-Ficano (2002) examine various determinants of alumni giving that tie back to unique characteristics of each institution. In this study, giving rates were lower for graduates of large state schools and schools with high business school enrollments. These findings regarding business school alumni contradict Okunade and Berl (1997) and Dean (2007) but affirm work by Clotfelter (2003) showing that liberal arts students might give more. More importantly, academic reputation and low student/faculty ratios were indicators of increased giving, as was the aptitude of incoming students. The average alumni gift thirteen years after graduation increases in proportion to higher incoming SAT scores. The authors conclude that contemporary decisions made by administrators in the selection of students and the educational processes that are unique to individual schools can affect subsequent giving in later years.

Gunsalus (2005) used a quantitative study to measure factors prominent at top-tier master’s level universities determining what university characteristics have the greatest effect on fundraising success. Prior studies concentrated on alumni characteristics, development standards, and external conditions (Clotfelter, 2003; Okunade & Berl, 1997; Willemain et al., 1994), but this study sought to determine individual university characteristics for benchmarking purposes. The findings of the study show that graduation rates and total undergraduate population size have the biggest determining effect on giving. The setting of the school also was significant, with rural schools showing a higher alumni giving rate than suburban or urban schools. Limitations to the research include the fact that it is assumed that school characteristics do not change over time, while in fact an older alum might have attended a very different school fifty years ago. The author also suggests that further studies could include school characteristics compared with other external issues such as alumni traits and external setting.
Holmes (2009) studied fifteen years of giving and demographic data from a small elite private university to determine the reason why and how alumni give back to their alma mater. Multiple giving indicators were revealed, most prominently that wealthy alumni are more generous in states with tax deductions for giving. Recent female graduates are more generous, as are local, wealthier alumni. Alumni who have relatives as alumni give more, as do alumni who were engaged on campus as students. The similar findings of Wunnava & Lauze (2001) are relevant to this study.

Butcher, Kearns, and McEwan (2013) sought to determine if alumni are motivated to give to their alma mater in order to influence the potential admission of their teenage children as they reach college age. The authors studied graduates of an elite all-girls school in order to use the male children of the same alumni as a control group. Butcher et al. (2013) found that alumnae are statistically more likely to make a substantial gift of $5,000 or more to their alma mater when their oldest daughter is between eleven and eighteen years old. There was no difference in giving for parents of male children who would not be eligible for attendance at the all-girls school. The study demonstrates that alumni will significantly increase giving in an attempt to influence the admissions decisions for their children, showing the importance of legacy giving and identifying legacy parents for future solicitations.

In a study of community college alumni, Skari (2014) sought to determine if giving behaviors at this level are similar to those of four year colleges. Utilizing data from over 7,300 community college alumni from eighteen colleges in six states, Skari (2014) concluded that undergraduate experience, age, wealth, and charitable characteristics are significant in predicting alumni giving, comparable to the finding of similar studies of four year graduates (Monks, 2003; Wastyn, 2009). Findings unique to two year community college students include the fact that
community college alumni with an associate’s degree are twice as likely to give as those without an associate’s degree and those alumni who went on to get their four year degree are four times as likely to be a donor. Skari (2014) found similarities to comparable research at four-year colleges in that undergraduate student experience is very predictive over three measures: satisfaction, student involvement, and relationships at school (Clotfelter, 2003; Gaier, 2005; Hoyt, 2004; McDearmon & Shirley, 2009; Monks, 2003; Porter et al., 2011; Sun et al., 2007). Additionally, demographic characteristics such as age, proximity, income, and gifts to other organizations are predictors of giving as well (Clotfelter, 2003; Monks, 2003; Sun et al., 2007).

The giving patterns of faculty and staff relative to their status as alumni or non-alumni of the institution where they work is a relative engagement factor to consider. Borden, Shaker and Kienker (2014) used data from a large state system with approximately 20,000 faculty and staff members to examine propensity to give based upon alumni and non-alumni status in addition to multiple demographic and employee variables. Generally, alumni employees gave more, and level of employment status was also a positive factor, in that tenured faculty and administrative staff gave more and at higher rates. Targets of giving were not explored, such as gifts to athletics or to scholarships, but the authors do note that many faculty and staff who are also alumni might get dual and conflicting appeals. This concern was echoed in a study of faculty and staff giving at a large Midwestern public institution by Knight (2004). The alumni faculty and staff in this study gave at a higher rate than their non-alumni peers, but expressed frustration at receiving multiple and conflicting appeals for support. The results of these two studies indicate that engagement characteristics such as alumni status, commitment to one’s employer, and identification as an alumni have an effect on giving and should be considered when developing faculty staff fundraising campaigns.
Satisfaction.

Several studies explore the relationship between undergraduate engagement and alumni giving, particularly the satisfaction that an alumni feels for their own undergraduate experience. In a study of graduates of thirty-four highly selective universities, Clotfelter (2003) found a strong correlation between alumni giving and the satisfaction that the alumni had with their alma mater. This is consistent with research that shows that alumni satisfaction with the undergraduate experience is a stronger prediction for giving than it is for alumni participation (Gaier, 2005). Clotfelter (2003) determined that the three most significant factors of alumni satisfaction are whether or not the college attended was the first choice of the respondent, whether or not someone at the school served as a mentor while they were a student, and if the respondent is generally happy with their current life situation. Those respondents who recognize an important faculty or staff mentor in their undergraduate experience were twice as likely to be satisfied with their experience as those without a mentor. “Donations that alumni made to their alma mater were highly correlated to their own college experiences and other measures of satisfaction with the institution” (Clotfelter, 2003, p. 119).

Additionally, alumni that came from a family of graduates tend to give more. This is consistent with Holmes, Meditz and Sommers (2008), Lara and Johnson (2014), and Wunnava and Lauze (2001). Alumni who received need-based financial aid gave 23% less than other alumni. This finding is parallels research by Meer and Rosen (2012) but disputes findings by Marr, Mullin, and Siegfried (2005) and Monks (2003). The combination of these last two giving biases - being from a family of alumni who did not need financial aid - may explain, according to Clotfelter (2003), why elite schools tend to raise more development money than their non-elite
counterparts, as they might have more students who enroll from families with generational wealth.

Sun, Hoffman and Grady (2007) show the results of a quantitative study testing the impact of four factors: student experience, alumni experience, alumni motivation, and demographic variables on the propensity of an alumni to give at a large Midwestern public research university. The first three factors – student experience, alumni experience, and alumni motivation were found to be significant predictors of giving, while only age and gender were significant predictors among various demographic variables. Specifically, the study found that a satisfying student experience is a strong predictor of future alumni giving, and that satisfaction as a student was greater for those who developed deep relationships with faculty and staff while on campus. This is similar to research findings by Clotfelter (2003), Dean (2007) and Monks (2003). Donors have more satisfying alumni experiences than non-donors and engaged alumni are more likely to give. The most significant predictor of giving is age, as the likelihood of an alumni making a gift increases as they grow older. This finding is similar to Okunade and Berl (1997) and Willemain et al. (1994). Women also gave more than men in this study. The authors advise universities to work with current students to increase their engagement in order to increase the likelihood of future giving (Clotfelter, 2003; McDearmon, 2010; Monks, 2003; Wastyn, 2009). This study stresses the importance of strong alumni services and holds that universities should develop a comprehensive communications strategy to engage donors and suggest that donors be invited to help design this strategy.

Student satisfaction as a predictor of giving is confirmed in research by Porter et al. (2011). In this study of 110 alumni from 74 different schools, “increasing alumni’s sense of oneness with the alma mater has a direct impact on alumni donations and university promotions”
The authors refer to oneness as the measure of how an alumni identifies with their alma mater. The most significant and specific identifier of alumni oneness in this study is the depth of participation at the school as an undergraduate. Greater levels of student engagement led to greater propensity to give. This finding is consistent with other, similar research (Clotfelter, 2003; Dean, 2007; Monks, 2003; Sun et al., 2007). While positive alumni perception of their alma mater as a graduate helps develops this connection, the actual selectivity of the school is not a factor, leading the authors to suggest that alumni communication vehicles are a productive method of developing oneness for alumni. This finding is consistent with Levine (2008) and Stephenson and Yerger (2014).

**Athletics as a driver of giving and engagement.**

Participation in athletics as a student, as well as school success on the playing field, are shown to influence alumni giving and participation. Meer and Rosen (2009) sought to determine the effect of an individual’s participation in varsity sports on their giving as an alumni. Using data from a selective university, the authors found a difference in the giving behaviors of male and female alumni who participated in varsity sports as an undergraduate. When all sports were examined, male alumni who participated in a varsity sport in college had a propensity to give that was proportionate to the success of their team both as a student and currently as an alumni. Male athletes who played on successful teams were more likely to make large gifts to the athletic program as an alumni. Athletic success does not affect giving patterns for female athlete alumni. Interestingly, the contemporary success of marquee sports such as football and basketball has a statistically insignificant effect on the giving of alumni of those teams. Even though this is data from one school, the participation of undergraduates in athletics is shown to have a mixed effect on future giving, similar to findings by Wunnava and Lauze (2001).
In a large, longitudinal study contradicting some of the findings of Meer and Rosen (2012), Baade and Sundberg (1996) investigated data from 48 private doctoral, 94 public doctoral, and 167 liberal arts colleges from the years 1973-90 to determine if there was a link between athletic success and alumni giving. Their results varied widely depending on the type of school, the sport, and magnitude of success. Playing in bowl games and NCAA basketball appearances were predictors of increased giving, especially at public schools. However, routine wins by marquee teams were not predictors of giving, especially at liberal arts schools. The authors warn that the mixed results of alumni giving depending on athletic success found in this study make participation in sports a poor predictor of alumni giving.

Holmes, Meditz and Sommers (2008) found that participation in a high profile sport as an undergraduate has an effect on annual giving as an alumni. Using fifteen years of data from a selective private university, the authors found that alumni who participated as varsity athletes are significantly more likely to give than alumni who were not athletes. This is consistent with findings by Wunnava and Lauze (2001). Older athletic alumni are marginally less generous than their younger alumni counterparts, contradicting other research that shows aging as a positive factor towards giving (Lara & Johnson, 2014; McDearmon & Shirley, 2009). During the period of this study, the university’s hockey team won six national championships, resulting in a significant increase in the likelihood and amount of giving by team alumni. Contradictorily, football success resulted in a lower likelihood and amount of giving, especially among young alumni. In a later study, Holmes (2009) found an inverse relationship between athletic and academic success. Giving increases when the school’s athletic programs are successful and enjoy greater prestige, but giving decreases when academic prestige declines, as measured by US News and World Report rankings.


**Alumni engagement and volunteerism.**

Studies show that engagement as a student leads to increased engagement in the local community and with the university as an alumni. Examining survey data from graduates of a large public university, Besser (2012) reveals that undergraduate participation in student life activities predicts community engagement as an alumni, leading to enhanced social capital and civic benefit:

In today’s climate in which institutions of higher learning are closely scrutinized and must justify the support they receive from the public, donors, and alumni, it is critical that they be able to articulate and document their contributions to the public good. (Besser, 2012, p. 324)

The college experience is shown to have a positive effect on alumni behavior that is beneficial to both the university and to society in general.

Weerts and Ronca (2008) sought to create a profile of alumni donors from a large public university that are more likely to volunteer at their alma mater as members of an advisory board, as political advocates, or as alumni club members. Providing strategic advice to practitioners who recruit volunteers, this profile shows that the typical alumni volunteer is nearly twice as likely to be a local, civically engaged woman. This civic engagement predictor complements the findings of Besser (2012). Additionally, openness to volunteering is linked to academic quality as a student, personal beliefs about volunteering, and number of degrees. The academic quality perceptions related to student engagement are similar to Wastyn (2009) and Wunnava and Lauze (2001).

In a similar, mixed methods study of alumni at a large public institution, Weerts, Cabrera, and Sanford (2010) found that successful methods for alumni engagement exist beyond giving,
including political advocacy and volunteering. The authors hold that alumni offices typically classify individual alumni support as either being a donor or a volunteer, but a third category of involvement, political advocacy, should be included when measuring alumni engagement. This is increasingly important in the current political space as “prominent alumni are lending their experiences and expertise to help higher education leaders formulate strategic directions for their institution” (Weerts et al., 2010, p. 346). Additionally, engagement through volunteer activities such as recruiting incoming students, mentoring, and participation in social events are significant methods of non-monetary support.

Newman and Petrosko (2011) examined the factors that compel alumni of a large public university institution to join a dues paying, membership based alumni association. Analysis shows that alumni association membership was more likely if the subject was either a donor, had a phone number on file, was older, has positive experiences as an alumni, was aware of other alumni in the group, or was frequently involved with the school as an alumni. Alumni were less likely to join if they were employed by the university, earned more than just a bachelor’s degree, or had high measures of positive university perceptions. These attitudes regarding university perception contradict research by Weerts and Ronca (2008), Wastyn (2009), and Wunnava and Lauze (2001). Exploring these findings, the authors show that those alumni who know other association members were 2.45 times as likely to give. Okunade and Berl (1997) found linkage between peer pressure and involvement and this might be the case here, as is the similar finding that current donors are more likely to be members. Those who held several degrees are less likely to join, perhaps because of competition among multiple alma maters. This is similar to findings by Weerts & Ronca (2009). Graduates who are also university employees were only one third as likely to join, perhaps because they already have access to many of the same benefits of
membership as an employee. An intriguing finding is that those with a good perception of the university were less likely to join is similar to findings by Holmes (2009). The authors speculate that a decrease in giving because of perceived academic prestige might be due to feelings that the university is already successful and therefore not a likely candidate for philanthropic support.

**Marketing influences on giving and engagement.**

A qualitative study by Levine (2008) sought to determine the relative effect of a university’s communication efforts on undergraduate alumni giving. Development directors at fifty-eight private universities provided survey data to determine if there is a correlation between the type and frequency of communications and alumni giving. Four hypotheses were tested for effect on giving: the frequency and type of communication, the frequency of alumni magazines, the frequency of appeal letters, and that smaller colleges would have a higher participation rate than larger universities. The results show that there is no general correlation between the quantity of pieces mailed and the number and size of alumni gifts. However, alumni magazines and alumni email newsletters had a positive effect on giving. A higher frequency of appeal letters for the annual fund had a positive effect while appeal letters for a capital campaign did not. Finally, smaller schools had a larger participation rate than larger schools. This study confirms the concept that higher engagement through university communication can have a positive effect on alumni giving and participation.

McAlexander, Koenig and DuFault (2014) conducted a quantitative study using alumni data from a large western university to explore the role that affinity of donors for their alma mater has on giving. Written from a marketing perspective, this study seeks to determine how marketing strategies can increase giving. Independent variables for capacity to give, number of years of giving, total amount of lifetime giving, and affinity to the university were tested as
predictors for intent to give in the next twelve months. The results show that affinity was a much stronger predictor of intent than capacity, as increasing wealth was not a factor in the intent to give. Higher alumni affinity increased the intent to give, showing the value of marketing the university’s brand and the importance of communication vehicles. The authors note:

We find that wealth screening alone is not only a poor predictor of which wealthy alumni intend to donate, but it lacks any of the elegant data that can predict and help manage wealthy alumni relationships for a mutually beneficial and rewarding partnership.

(McAlexander et al., 2014, p. 253)

Instead of looking at wealth as the driving indicator of the potential to give, this study shows that building affinity through engagement and measuring it might be more effective. A study of university social media platforms by Peruta et al. (2015) found that “communication is what increases identification amongst users and builds a sense of community” (p. 143) while Stephenson and Yerger (2014) and Levine (2008) show similar marketing focused results. Root et al. (2017) found evidence that engaged alumni prefer to receive such communication through mail, email and Facebook.

Stephenson and Yerger (2014) examined the effects of institutional brand identification on alumni behaviors at a state university in the mid-Atlantic region. This study shows the importance that personal brand identification holds for potential alumni giving, noting that “the research provides empirical evidence that, when alumni define the self in terms of their association with the university, identification yields positive results” (Stephenson & Yerger, 2014, p. 773). Additionally, factors such as satisfaction with student affairs, participation, prestige, and association with the brand led to the level of brand identification that impacts giving. This finding is similar to other research on this topic, including Weerts and Ronca
The Relationship Between Young Alumni Participation and Giving (2009), Clotfelter (2003), and Monks (2003). This study differs from these others studies in the importance it gives to brand identification versus the other factors listed. Specifically, it finds that brand interpretation is 6.7 times more powerful at influencing identification than participation, 7.4 times more influential than student affairs satisfaction as an undergrad, and 5.9 times more influential than any prestige factors. This dramatic call for a focus on brand engagement to increase identification and therefore giving is similar to findings and recommendations of Levine (2008), McAlexander et al. (2014), and Sun et al. (2007).

A mixed methods study of alumni at a large public university (Farrow & Yuan, 2011) sought to determine the relationship between an alumni’s strength of social media engagement through Facebook and the effect on engagement and giving, as well as how social media can affect the linkage between attitudes and behaviors about one’s alma mater. While social media was not found as a significant determiner of attitudes, the results show a direct correlation between social media usage and both giving and volunteering, primarily through social media event invites and giving links. Similar to the findings of Root et al. (2017), frequency of communication and the emotional ties associated with a developed Facebook network can influence giving and volunteering behavior. This is a valuable study in that it empirically shows that social media is indeed a positive driver of alumni behaviors.

Young alumni participation and giving.

Monks (2003) uses young alumni survey data from a group of twenty-eight highly selective institutions to determine the individual characteristics of young alumni donors. Perhaps most importantly, the author found that overall satisfaction with an alumni’s undergraduate experience is a significant driver of giving, findings that are consistent with other research on this topic (Clotfelter, 2003; Gaier, 2005; Hoyt, 2004; McDearmon & Shirley, 2009; Porter et al.,
Gender did not have any statistical impact on giving. MBA and law school graduates gave higher amounts than those who earned a Ph.D. This is tied to the findings in the study that related higher household income with giving, as MBA and law graduates might enter careers with higher potential incomes than the academic career that many doctoral students pursue. Every increase of $10,000 in individual income raises giving amounts by 2%, while similar increases in household income increase giving by 9%. Similar research reveals that young alumni who participated in educational experiences such as community service or study abroad as an undergraduate displayed a negative correlation to giving, perhaps because they were furthering their education in graduate school or choosing careers that were more likely to be service oriented, thus limiting their financial resources and ability to give. This parallels findings by Moore (2008).

McDearmon and Shirley (2009) conducted a quantitative study at a large public university that compared young alumni donors and non-donors to determine shared characteristics as well as factors that cause a young alumni to give. Young alumni who lived on campus as an undergrad, received financial aid awards, and had a positive experience while in school that were also currently charitably active and residing in-state were more likely to become alumni donors. A positive undergraduate experience has been linked to an increased likelihood of giving by other researchers (Clotfelter, 2003; Gaier, 2005; Hoyt, 2004; Monks, 2003; Porter et al., 2011; Sun et al., 2007; Weerts & Ronca, 2009). Other research indicates that age is a factor in alumni giving (Okunade & Berl, 1997; Sun et al., 2007; Willemain et al., 1994) while McDearmon and Shirley (2009) found that age is a factor in young alumni giving as well. The results of this study show that 82% of recent graduates had never made a gift while 74% of young alumni ten years removed from graduation stated that they had made a gift.
In a study of alumni from a large public university, Gaier (2005) determined that a positive undergraduate experience contributed to both increased alumni giving and participation (Clotfelter, 2003; Hoyt, 2004; McDearmon & Shirley, 2009; Monks, 2003; Porter et al., 2011; Sun et al., 2007; Weerts & Ronca, 2009). Additional findings from this study show that young alumni in their first ten years after graduation are more likely to participate in alumni activities than older alumni but are less likely to give. Age as a determinant of giving is similar to other research on the topic (McDearmon & Shirley, 2009; Okunade & Berl, 1997; Sun et al., 2007; Willemain et al., 1994). Gaier (2005) speculates that increased participation by young alumni in alumni activities might be due to the lack of family responsibilities inherent with young alumni as well as current social ties with recent classmates. This research also shows that young alumni who reside in state are more likely to be involved with their alma mater than those recent graduates who live out of state.

Meer (2013) studied sixteen years of giving data from an anonymous private university to determine if successfully soliciting gifts from young alumni resulted in the development of giving habits that result in more and larger gifts in the future. The results show that, all things being the same, a young alumni donor is 5.6 times more likely to give in the future than a young alumni non-donor. Being a frequent young alumni donor did not have a statistically significant effect on the amount that is given in the future, but this research shows that giving habits can be developed in young alumni that will benefit the university in the future.

In a seminal study examining fifty years of alumni giving at Princeton University, Willemain et al. (1994) analyzed giving data of individual graduating classes and found a consistent decrease in the participation and giving rates among alumni over time. Younger alumni are not as engaged as their more senior counterparts. Similar to the findings of more
recent studies (EAB, 2015; Kaplan, 2018; Le Blanc & Rucks, 2009), Willemain et al. (1994) found that increasing major gift dollars are being realized from fewer, older donors and alumni participation rates over all are declining, especially among younger alumni. While this study is older than others used in this literature review, it is important to the body of research because of the fifty-year breadth of the study.

Using qualitative measures, McDearmon (2010) explored the attitudes of 204 non-donor young alumni at a large public university. As a result, three young alumni non-donor themes emerged that are very instructive regarding young alumni giving: “the desire for enhanced career preparation, seeking incentives in exchange for gifts and only showing interest in giving to specific areas of an institution” (McDearmon, 2010, p. 46). Respondents were frustrated with the level of career services at the university as students and alumni. Many young alumni who are not enjoying the career success they anticipated blame the university and do not give. Ironically, the university studied has an extensive career center that students and alumni can use free of charge. The second theme focuses on incentives. Non-donors expressed a desire for incentives in return for their gifts, such as school gear or access to resources such as the library. Others mentioned a need for more alumni services from the university in the form of email, on-line directories, library access, and career services. The young alumni in this study expressed a desire for quid pro quo benefits that was perceived as unavailable but was actually available. The same holds true for the third theme for not giving: the ability to direct their gift. Non-donors did not want to make an unrestricted gift to the university, even though the ability to make a restricted gift to the department or designation of their choice is freely available. This study confirms other studies that show the need for better outreach with students and young alumni (Clotfelter, 2003; Monks, 2003; Sun et al., 2007; Wastyn, 2009).
A study by Rau and Erwin (2015) that examined student engagement and educational experience at a public university predicted giving by the same individuals to their alma mater eight years later. Although this study found that satisfaction with the undergraduate experience was a predictor of giving, Clotfelter (2003) found it to be a greater predictor (Rau & Erwin, 2015). This study “gives credence to identifying students who are involved and invested in the university and finding ways to engage them as they become alumni” (Rau & Erwin, 2015, p. 109). An invitation to an alumni event was the greatest predictor of donor behavior, although interestingly, it is not clear from the data studied if the invitation came before or after a gift was made. This study aligns with research by Weerts and Ronca (2007) showing that alumni engagement, giving, and satisfaction as a student are related. Additional evidence holds that invitations to alumni events that match demonstrated affinity are more productive than general initiations to random alumni events.

A study at a state university in the southeast shows that young alumni want to remain connected to their alma mater and that they prefer to receive communication through mail, email and Facebook (Root et al., 2017). These alumni expressed an interest in remaining connected with their alma mater through opportunities to mentor students, speak in class, serve on an advisory board in their major, attend events, or volunteer. They also showed an interest in exploring job opportunities. While showing direct interest in alumni engagement, they displayed mixed results regarding their willingness to make a financial contribution. The results of this study show the importance of engaging young alumni through meaningful participation in order to build the connections for future contributions to the university.

The effects of online learning, engagement, and future alumni giving is the focus of a study by Tiger and Preston (2013). Using data from a medium size private liberal arts school,
Tiger and Preston (2013) found that there is a negative correlation between completed online courses and alumni giving. The authors hypothesize that online course participation led to decreased on-campus interactions and therefore decreased alumni giving. These are findings similar to the engagement results of Sun et al. (2007). Limitations to these findings include the narrow scope of data from only one school and also that a study of online course completion is inherent to younger alumni, and other research shows that increased age is a key driver of giving (Okunade & Berl, 1997).

The importance of the positive perception of one’s alma mater as a means of engagement is explored by Newbold, Mehta, and Forbus (2010). This mixed method study involved graduating seniors at a mid-sized state university in Texas. Newbold et al. (2010) found that seniors who viewed their school as distinct or prestigious are significantly inclined to maintain a relationship with the alumni association as young alumni after graduation. Those students residing in geographic proximity to the campus were also more likely to remain involved. Combining these factors leads to the theory that universities should strive to maintain a high prestigious profile and distinguish themselves from other schools in the region in order to maintain engagement. Holmes (2009) determined a similar increase in affinity due to athletic prestige, but found just the opposite with academic prestige, maintaining that alumni had a “warm glow” response when athletic teams won, but tended to give more when academic prestige ratings fell in order to maintain the value of their diploma. Interestingly, Newbold et al. (2010) did not find involvement as an undergraduate as a significant predictor of engagement as an alumni, unlike other studies (Clotfelter, 2003; Monks, 2003; Porter et al., 2011; Sun et al., 2007).
Conflicting data exists regarding the effect that financial aid awards and student loans have on future alumni giving. Meer and Rosen (2012) sought to determine if financial aid awards as a student, in the form of loans, scholarships and student work, has an effect on giving as an alumni. In a study of young alumni from a large research university, these researchers determined that taking out a student loan as an undergraduate decreases the likelihood of a gift being made as an alumni. When an alumni with student loans did make a gift, the size of the gift is inversely proportionate to the size of the loan: larger loans result in smaller gifts. Financial aid scholarships and awards had no effect on the propensity to give but did decrease the amount given. Aid in the form of student work had no effect on giving. Monks (2003) found that financial aid awardees gave 5% more than those who did not receive financial aid while those who took out loans as an undergraduate gave 10% less than those who did not. A study of Vanderbilt alumni by Marr et al. (2005) demonstrates that undergraduate loans resulted in a decrease in the probability of young alumni making a donation by 8-16%, while those young alumni who received financial aid grants as an undergrad were 5-13% more likely to give. McDearmon and Shirley (2009) found that both financial aid and student loans were not predictors of giving. They speculate that this might be a societal factor in that the graduates in this study are more recent graduates than in other studies and that these newer graduates might have different perspectives on the financial commitments associated with college.

Young alumni and student giving.

Freeland, Spenner, and McCalmon (2015) studied the giving records of over 1,200 students from two separate four-year cohorts at a private university to determine if there is a link between undergraduate participation in a senior giving campaign and subsequent giving as a young alumni. Of those students who participated in the senior giving campaign, 47.9% also
made a gift as a young alumni. Among the alumni who did not make a senior gift, only 4.6% made a gift as a young alumni. This demonstrates that “giving to the senior gift campaign is highly indicative of giving among young alumni” (Freeland et al., 2015, p. 770). The authors speculate that student giving exposes those pre-disposed to give while also creating a culture of giving among participants by educating these future alumni about the university’s needs and case for philanthropic support. An unwanted result from senior giving campaigns could be the establishment of a cadre of non-donors who are turned off from giving due to the perception of high pressure tactics experienced as a student.

In a mixed model survey at a large regional public institution, Olberding (2012) found that students who participated in a philanthropy class exhibited increased philanthropic activity and awareness post-graduation. Specifically, 86% of these graduates identified themselves as donors, 71% identified themselves as community volunteers, and 15% as volunteers on the boards of nonprofit agencies. These are participation rates that are significantly higher than the general population (Olberding, 2012). This is a unique study using a small sample of data from a single school and Olberding (2012) suggests that further study is needed to determine the efficacy of teaching philanthropy as a strategy to increase philanthropic behaviors post-graduation.

Responding to the increase in student debt and the increasing costs of higher education in general, Pottick, Giordano, and Chirico (2015) present a case study of a student-led fundraising campaign in an MSW program at Rutgers University. This campaign successfully engaged faculty, alumni and students alike in a grassroots effort to create an endowment to support scholarships. Utilizing strong and progressive leadership from both the dean and the development office, a student committee was organized to lead the campaign. Overcoming
objections from many areas, the campaign was successful, leading to a giving participation rate from the graduating class that grew from 0.5% in 2009 to a 53.2% young alumni giving rate in 2014. The results of the study confirm other research (Freeland et al., 2015) that shows student giving leads to higher rates of alumni giving. In this study, the post graduate young alumni giving among the MSW students doubled the overall young alumni giving rate for the entire university. This is a direct case that shows student engagement leads to increased alumni giving (Clotfelter, 2003; Monks, 2003; Porter et al., 2011; Sun et al., 2007).

Attempting to learn more about declining alumni participation at various schools in the California State system, Pumerantz (2005) proposes the concept of treating students as “alumni in training” (p. 289) in order to engage them as future donors. In a study that included interviews and data from thirty-six administrators at four schools in the California State system with the most productive fundraising operations, along with data from four other peer institutions, Pumerantz (2005) advocates treating students as alumni with the hope and expectation that they will become young alumni donors as a result. This research suggests that there are advantages to linking alumni with students through methods such as mentoring and recruitment activities.

**Summary**

Considerable research exists detailing the connections between alumni giving and participation. Factors such as satisfaction with the student experience, athletics participation and success, engagement as a student, university marketing, young alumni engagement, and student giving are shown to be related to alumni giving and particularly on young alumni giving and participation. Henry Rosso, who founded The Fundraising School in 1974, which later became an integral part of the Center on Philanthropy at Indiana University (Haddad, 2017), held that “fundraising is at its best when it strives to match the needs of the not-for-profit organization
with the contributor’s need and desire to give” (Rosso, 2003, p. 9). In the case of an alumni’s relationship with the university, the “need and desire” (Rosso, 2003, p. 9) to contribute is influenced by the engagements that alumni create and experience with their alma mater.

However, as this literature review demonstrates, there is a gap in the research detailing how young alumni participation in alumni events might have a direct effect on the giving behaviors of these same young alumni at a small private university. This study is important as it fills a gap in the existing research.

Many of the studies cited in this review use data from public or large universities (Besser, 2012; Borden et al., 2014; Durango-Cohen & Balasubramanian, 2015; Farrow & Yuan, 2011; Gaier, 2005; Hoyt, 2004; Knight, 2004; McAlexander et al., 2014; McDearmon, 2010, 2013; McDearmon & Shirley, 2009; Meer & Rosen, 2012; Newbold et al., 2010; Newman & Petrosko, 2011; Okunade & Berl, 1997; Olberding, 2012; Pottick et al., 2015; Pumerantz, 2005; Rau & Erwin, 2015; Root et al., 2017; Stephenson & Yerger, 2014; Sun et al., 2007; Weerts et al., 2010; Weerts & Ronca, 2007, 2008), while a significant amount of research was conducted at selective private schools (Butcher et al., 2013; Clotfelter, 2003; Freeland et al., 2015; Gunsalus, 2005; Holmes, 2009; Holmes et al., 2008; Marr et al., 2005; Meer, 2013; Meer & Rosen, 2009; Monks, 2003; Porter et al., 2011; Sun et al., 2007; Willemain et al., 1994; Wunnava & Lauze, 2001).

Additionally, several studies on alumni giving and participation utilized large data sets to obtain a comprehensive view of the subject (Baade & Sundberg, 1996; Cunningham & Cochi-Ficano, 2002; Dean, 2007; Gottfried, 2008; Gottfried & Johnson, 2006; Levine, 2008; Monks, 2003; Porter et al., 2011; Skari, 2014; Weerts & Ronca, 2009).

The research on alumni participation and giving is rarely conducted at small or medium sized private colleges and universities (Lara & Johnson, 2014; Tiger & Preston, 2013; Wastyn,
The Relationship Between Young Alumni Participation and Giving 2009). This study aims to significantly add to the scholarship by conducting research that examines the relationship between young alumni participation and giving at a small private liberal arts university.

**Research Questions and Hypothesis**

This study seeks to determine what young alumni attendance at alumni events reveals about giving and if giving is related to event attendance through the following research questions:

1. Is there a relationship between young alumni participation and subsequent giving to the university?
2. Is the giving behavior of young alumni who are donors to the university affected by attendance at alumni association events?

The answers to these research questions might provide higher education administrators and alumni and development professionals increased knowledge about the relationship between event attendance and giving, especially at a small private liberal arts university.
Chapter Three: Methodology

Participants

The participants in this study are young alumni at Bellarmine University that took part in one or more specific events sponsored by the Bellarmine Alumni Association in the fiscal year 2014-2015. The Alumni Association’s mission centers on the concept of engaging alumni “in the life of the university…to ensure an active and involved alumni community and to secure significant financial investments” (Bellarmine University, 2017). Alumni engagement takes place through a wide range of activities including social events, reunions, dinners, service activities, mentoring, athletic engagement, and educational assistance. Young alumni are a key segment of the alumni community. An alumni is considered a young alumni in the first ten years after receiving their undergraduate degree.

In the 2014-2015 fiscal year, there were 21,557 alumni of record in the university database (Bellarmine University, 2015). Alumni of record are those living alumni for whom the university has an accurate address. During the 2014-2015 fiscal year, the alumni association conducted 111 separate events with a total attendance of 11,007 alumni and guests. Of this total number of attendees, 6,665 are identified as Bellarmine alumni. Allowing for the fact that some alumni attended more than one event, a total of 2,898 unique alumni attended an alumni event in 2014-2015 (Bellarmine University, 2015).

Alumni events play an important role in alumni engagement as over 15,000 Bellarmine alumni live within a 40 mile radius of Louisville (Bellarmine University, 2015). This large number of local alumni provides an opportunity to engage a high percentage of all alumni through coordinated events sponsored and managed by the alumni association. In comparison, the next largest concentration of alumni live in the Cincinnati area and is significantly smaller,
totaling only 611 total alumni (Bellarmine University, 2015). Table 1 displays the geographic areas that contain 100 or more alumni in 2015.

Table 1

<table>
<thead>
<tr>
<th>Regional Area</th>
<th>Radius in Miles</th>
<th>Number of Alumni</th>
</tr>
</thead>
<tbody>
<tr>
<td>Louisville</td>
<td>40</td>
<td>15,075</td>
</tr>
<tr>
<td>Cincinnati, OH/Northern KY</td>
<td>50</td>
<td>611</td>
</tr>
<tr>
<td>Lexington, KY</td>
<td>40</td>
<td>424</td>
</tr>
<tr>
<td>Bardstown, KY</td>
<td>30</td>
<td>335</td>
</tr>
<tr>
<td>Indianapolis, IN</td>
<td>50</td>
<td>258</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>50</td>
<td>223</td>
</tr>
<tr>
<td>Nashville, TN</td>
<td>50</td>
<td>208</td>
</tr>
<tr>
<td>Atlanta, GA</td>
<td>50</td>
<td>202</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>50</td>
<td>197</td>
</tr>
<tr>
<td>St. Louis, MO</td>
<td>50</td>
<td>181</td>
</tr>
<tr>
<td>New York, NY</td>
<td>50</td>
<td>135</td>
</tr>
<tr>
<td>Tampa, FL</td>
<td>50</td>
<td>130</td>
</tr>
</tbody>
</table>


Bellarmine is a young school that opened its doors in 1950 and graduated its first class in 1954. The Alumni Association maintains records on all living and engaged alumni from every graduating class. It is informative to view Bellarmine alumni grouped by the decade of graduation to see the importance of engaging young alumni. As graduating class size has grown over the years, the alumni base has become younger, with nearly two-thirds (64%) graduating in the past twenty-five years (Table 2). Participation at alumni events in the 2014-2015 year was relatively similar for each decade of alumni represented, ranging from 7% to 13.3%. However, nearly 29.2% of young alumni from the most recent half decade, 2010 to 2015, attended an alumni event in 2015 (Bellarmine University, 2015). This high concentration of the young alumni population combined with the increased engagement by this same group provides
additional context and relevance to this study. A further examination of alumni population and event attendance by decade of graduation is contained in Table 2.

Table 2

*Alumni population and event attendance in fiscal year 2014-2015 by decade of graduation*

<table>
<thead>
<tr>
<th>Decade of Graduation</th>
<th>Total Number of Alumni</th>
<th>Percentage of Alumni</th>
<th>Number of Alumni Attending</th>
<th>Percentage Attending</th>
</tr>
</thead>
<tbody>
<tr>
<td>1954-1959</td>
<td>384</td>
<td>1.8</td>
<td>51</td>
<td>13.2</td>
</tr>
<tr>
<td>1960-1969</td>
<td>1877</td>
<td>8.7</td>
<td>185</td>
<td>9.9</td>
</tr>
<tr>
<td>1970-1979</td>
<td>2214</td>
<td>10.3</td>
<td>237</td>
<td>10.7</td>
</tr>
<tr>
<td>1980-1989</td>
<td>3230</td>
<td>14.9</td>
<td>267</td>
<td>8.3</td>
</tr>
<tr>
<td>1990-1999</td>
<td>4041</td>
<td>18.7</td>
<td>282</td>
<td>7.0</td>
</tr>
<tr>
<td>2000-2009</td>
<td>5649</td>
<td>26.2</td>
<td>750</td>
<td>13.3</td>
</tr>
<tr>
<td>2010-2015</td>
<td>4162</td>
<td>19.3</td>
<td>1216</td>
<td>29.2</td>
</tr>
</tbody>
</table>


Data

The data used in this study was gathered by the development and alumni office at Bellarmine University using information from two different university databases, Ellucian Colleague and iModules (Ellucian, 2014; iModules, 2018). The use of one or more secondary data sets is a reliable and useful method of conducting research:

An investigation of secondary sources provides an opportunity to learn what is already known, and what remains to be learned, about a particular topic. It may suggest methods for studying a particular problem. It is often possible to combine the information from several different sources to reach conclusions that are not suggested by any one source.

(Stewart & Kamins, 1993, p. 2)

The combined use of data from these two university databases, Colleague and iModules, provide an opportunity to analyze raw data and draw conclusions regarding young alumni participation.
and giving. Significant research on the subject of alumni giving uses existing university data files, as evidenced by the research cited in this study’s literature review.

The university keeps detailed records of all students, alumni and other constituents through the use of the Colleague database software that is provided by the educational database vendor Ellucian. This database keeps demographic and giving records for all alumni and former students of the university, as well as information and data for other constituents such as donors, employees, vendors, students and prospective students (Ellucian, 2014). When a high school student applies for admission to Bellarmine, a record for that individual is created in the Colleague database. Upon enrollment, student data including grades, activities, honors, and awards is populated in that student’s record in the Colleague database. Upon graduation, an alumni record is created that includes biographical and giving data for that alumni. The development and alumni office uses this information to maintain contact with the alumni. This alumni record in Colleague is used to store information such as giving activity, geographical and biographical updates, and employment history. The ability to add or change information is controlled, with only a few individuals having the ability to do so. The researcher in this study does not have the ability to input or change data in the system.

Additionally, the office of Development and Alumni Relations utilizes the services of a constituent engagement management provider named iModules. Through the use of this software, development and alumni professionals can provide email services, event registration, web management, e-commerce, social media integration and online giving (iModules, 2018). The iModules platform stores email addresses for alumni and is used as a portal for email communications. Additionally, the iModules platform hosts a giving page on the university’s website that allows alumni, faculty, staff and friends of the university to make online gifts.
iModules also serves as an event management and registration platform. Certain events that are marketed by the alumni association require RSVPs that are managed through an iModules interface. Of the 111 events conducted by alumni association in fiscal year 2014-2015, twenty-five required an online RSVP.

For this study, alumni graduating year and giving data was obtained through the Colleague database and alumni event participation data was gathered through the iModules database. Accurate administration of both of these databases is considered a key university practice.

As the Vice President for Development and Alumni Relations, this researcher has access to these databases and the contents within as a primary job responsibility, along with members of the development and alumni team. Numerous queries and data requests are made on a daily basis using one or both of these databases in the course of regular business. Alumni demographic, giving, and attendance data is kept very confidential outside of the development and alumni office but is accessed with regularity on a normal internal basis.

The data gathered for this study came from both of these data bases. Alumni records and giving history were gathered from the Ellucian database and event attendance information was gathered from iModules. In order to avoid researcher bias, this researcher did not personally gather any of this data. Using provided guidelines, the Alumni Association’s Director for Alumni Events conducted all of the queries and created the data sets required for this research. The data was presented in an anonymous manner, with individual names, addresses and any other personal information redacted. The unique identification number attached to each Bellarmine constituent was provided, merely as a means to keep individual records separate. Each constituent’s undergraduate class year was also provided, as this was necessary in order to
determine if the constituent was a young alumni in this study with a graduation year between 2005 and 2014. As the subjects were all university graduates, no subjects were minors or were singled out for any particular reason other than having voluntarily attended one or more alumni events during the 2014-2015 academic year.

**Context**

This study uses alumni giving and participation data from Bellarmine University, a private Catholic liberal arts university located in Louisville, Kentucky. Founded in 1950 by the Archdiocese of Louisville, Bellarmine was one of the first schools in Kentucky that was open to students of all races. The university began as a small all-male school and counted only forty-two alumni after the first graduation in the spring of 1954. In 1968, Bellarmine merged with Ursuline College, a local private Catholic women’s school, to become co-ed. At this same time, the university became an independent Catholic school with its own self-perpetuating board (Bellarmine University).

Since those early days, Bellarmine has grown to become a university with over sixty undergraduate majors in the arts and sciences, nursing and health studies, business, education, communication and environmental science. Additionally, there are considerable graduate offerings, including MBAs and Masters Programs, as well as several doctorate programs, including a Ph.D. in Leadership in Higher Education. Students at Bellarmine come from 43 states and 26 foreign countries. Total enrollment in 2018 was 3,759, with 68% of those students studying for undergraduate degrees (Bellarmine University).

With a student-faculty ratio of 12 -1 and an average incoming student ACT score of 25, Bellarmine students enjoy a high graduation rate and success after college as alumni (Bellarmine University). With a six-year graduation rate in 2015 of 67%, Bellarmine ranked seventeen
percentage points above the average graduation rate for Kentucky public schools and eighteen percentage points above the national average (Bellarmine University). Additionally, young alumni find success in the job market. Six months after the class of 2017 graduated, 99% of these young alumni were either employed, in graduate school or serving in the military. Of this same group, 91% were employed in their career field of interest (Bellarmine University, 2018c). A study commissioned by the Brookings Institute found that Bellarmine alumni have the highest mid-career salaries of any school in Kentucky and that these same mid-career salaries are 16% higher than the national average (Kulkarni & Rothwell, 2015).

**Sampling and Approach**

At the end of the fiscal year 2014-2015, there were 21,557 Bellarmine alumni of record in the Colleague database (Bellarmine University, 2015). The young alumni identified in this study were considered young alumni in the 2014-2015 fiscal year, meaning they received their undergraduate degree from Bellarmine University between the years 2005 and 2014. Information from the Colleague database identified 5,089 young alumni with graduation years between 2005 and 2014 that will be considered the young alumni in this study.

The Colleague database information also included personal giving histories for these young alumni between the fiscal year 2011-2012 and the fiscal year 2017-2018. Because this study looks at the potential effect of event attendance on giving, it is important to view the personal giving histories of the young alumni in the study for the three years before and the three years after the event attendance. A total of 1,054 young alumni in this study made a gift during this time frame.

Of the 111 alumni association events conducted in the fiscal year 2014-2015, twenty-five that were available to young alumni required pre-registration through the iModules platform.
Reasons for pre-registration include the need for tickets, payments, venue headcounts, table assignments, or for other organizational purposes. The remainder of the alumni events did not require an iModules pre-registration as attendance numbers or payments were not required in advance. At these events, alumni checked in at the event or were counted by university staff in attendance. Using an iModules database query function, 460 total young alumni were identified who attended at least one event in fiscal year 2014-2015 that required an online registration through an iModules interface.

The twenty-five events attended by young alumni that required an online reservation code reflect the varied event offerings provided by the Bellarmine Alumni Association and represent many of the most significant events sponsored by the Association. Eleven of the events were general alumni association events such as homecoming, reunion, trivia night, a Louisville Bats baseball game, Christmas Tree lighting, a Halloween event, or an awards dinner. Five of the events were more specific constituent centric events such as an accounting alumni lunch, a Mass of Remembrance, or a club gathering. Four of the events were regional events held in Cincinnati, OH, Chicago, IL, Indianapolis, IN, or Bardstown, KY. Three were sport specific events for alumni of the soccer, golf and cheerleading squads and two were alumni mentoring events.

The remaining alumni events that did not require a reservation code or that were not open to young alumni include many general social events surrounding the basketball team and their run to the NCAA Division II Elite Eight, graduate student alumni events, alumni committee or board meetings, small athletic team gatherings, and general university events that included a gathering to celebrate the naming of a building, a lecture by an NPR correspondent, a celebration to recognize a retiring professor, and the groundbreaking for a new building on campus. Because
of the open nature of these events, they did not require pre-registration. Other events, such as a fifty-year reunion or a high donor event, were not marketed to young alumni.

Using giving data as of fiscal year 2014-2015, three new variables were created in the SPSS database: PreEventGive, PostEventGive, and TotalGive. PreEventGive quantifies total young alumni giving in the three years before the measured events in fiscal year 2014-2015. PostEventGive quantifies total young alumni giving in the three years following fiscal year 2014-2015, and TotalGive quantifies total giving for the three years prior and the three years after the event measurement in fiscal year 2014-2015. An additional variable, AttendTotal, nominally breaks the combination of giving and event attendance down into three factors: attend but do not give, give but do not attend, and attend and give. These three categories represent the 1,279 young alumni included in this study. These alumni giving and event attendance figures are detailed in Table 3.

Table 3

<table>
<thead>
<tr>
<th>Alumni giving and participation data for 2014-2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
</tr>
<tr>
<td>-----------------------------------------</td>
</tr>
<tr>
<td>Total alumni</td>
</tr>
<tr>
<td>Total alumni registered for event</td>
</tr>
<tr>
<td>Young alumni (YA)</td>
</tr>
<tr>
<td>YA registered for event</td>
</tr>
<tr>
<td>YA gave</td>
</tr>
<tr>
<td>YA gave and attended event</td>
</tr>
<tr>
<td>YA gave and did not attend event</td>
</tr>
<tr>
<td>YA did not give and attended event</td>
</tr>
<tr>
<td>Total alumni events</td>
</tr>
<tr>
<td>Registration events</td>
</tr>
</tbody>
</table>

Chapter Four: Results

This study seeks to determine what young alumni attendance at alumni events reveals about giving and if giving is related to event attendance through the following research questions:

1. Is there a relationship between young alumni participation and giving to the university?
2. Is the giving behavior of young alumni who are donors to the university affected by attendance at alumni association events?

Research Question #1

The first research question seeks to determine if a relationship exists between young alumni participation in alumni events and young alumni giving. A total of 1,279 young alumni are studied. Young alumni event attendance and giving is represented in the total attendance (AttendTotal) variable and is nominally categorized as: (a) attend but do not give, (b) do not attend but give, and (c) attend and give. Young alumni giving in this study is represented numerically through: (a) pre-event giving (PreEventGive) in the three years prior to the measured event attendance in fiscal 2014 - 2015, (b) post-event giving (PostEventGive) in the three years after the measured event attendance in fiscal 2014 - 2015, and (c) total giving (TotalGive) for the three years prior to and the three years after the measured event attendance in fiscal 2014 - 2015.

Using post-event giving as the dependent variable, descriptive statistics are presented in Table 5. An examination of the means show that those who were donors but did not attend gave an average of $77.26 in the three years following fiscal year 2014 - 2015. The giving level of those who both attended an event in fiscal 2014 - 2015 and who were also donors gave an
average of $164.42 in the three years following the event attendance. This indicates that those young alumni who both made a gift and attended an event made gifts that were more than two times greater in size than those who gave without attending an event, suggesting that young alumni participation may share a relationship with giving.

Table 5

<table>
<thead>
<tr>
<th>Category</th>
<th>Mean</th>
<th>Standard Deviation</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend but Don't Give</td>
<td>.00</td>
<td>.000</td>
<td>225</td>
</tr>
<tr>
<td>Don't Attend But Give</td>
<td>77.26</td>
<td>271.211</td>
<td>819</td>
</tr>
<tr>
<td>Attend and Give</td>
<td>164.42</td>
<td>472.861</td>
<td>235</td>
</tr>
<tr>
<td>Total</td>
<td>79.68</td>
<td>300.770</td>
<td>1279</td>
</tr>
</tbody>
</table>

As the total attendance variable uses rank order data, a series of Spearman Rho calculations were performed to determine the relationships between total attendance, pre-event giving, post-event giving, and total giving. The results, displayed in Table 6, indicate significant two-tailed correlations between all of the variables at \( p \leq .01 \).

Table 6

<table>
<thead>
<tr>
<th></th>
<th>AttendTotal</th>
<th>PreEventGive</th>
<th>PostEventGive</th>
<th>TotalGive</th>
</tr>
</thead>
<tbody>
<tr>
<td>AttendTotal</td>
<td>1.0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PreEventGive</td>
<td>.357</td>
<td>1.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PostEventGive</td>
<td>.433</td>
<td>-.080</td>
<td>1.0</td>
<td></td>
</tr>
<tr>
<td>TotalGive</td>
<td>.581</td>
<td>.527</td>
<td>.700</td>
<td>1.0</td>
</tr>
</tbody>
</table>

*Note: All correlations are significant at the \( p < 0.01 \) level (2-tailed). \( N = 1279 \).*

A significant relationship exists between all of the variables. Not surprisingly, total giving is highly correlated with both post-event giving \( (r = .700) \) and pre-event giving \( (r = .527) \). A slight negative relationship exists between pre-event giving and post-event giving \( (r = -.080) \),
suggestion that in the absence of event attendance, giving habits before and after an unrelated fiscal year do not share a meaningful relationship. Most importantly however, total attendance shares an increasingly positive relationship with pre-event giving \((r = .357)\), post-event giving \((r = .433)\), and total giving \((r = .581)\), demonstrating that young alumni event attendance is significantly correlated to giving.

**Research Question #2**

The second research question seeks to determine if the giving behaviors of young alumni who are already donors to the university are affected by attendance at alumni association events. In doing so, this analysis seeks to determine the statistical significance of the effect that young alumni participation has on giving, measured successively by the dependent variables of pre-event giving, post-event giving and total giving.

**Pre-event giving.**

Pre-event giving includes the amount contributed by young alumni in the three years prior to fiscal year 2014-2015. An examination of the means displayed in Table 7 shows that those who were donors but did not attend an event gave an average of $38.43 (140.569) in the three years before fiscal year 2014 - 2015. The giving level of those donors who attended an event in fiscal year 2014-2015 gave an average of $76.37 (238.309) in the three years preceding the event attendance. This indicates that those young alumni donors who attended an event in fiscal year 2014-2015 were already donors at twice the level than those who gave without attending an event. This suggests that alumni events attract young alumni donors who donate at a higher level than those young alumni donors who do not attend events.
Table 7

Means and Standard Deviations of Pre-Event Giving by Donor Category

<table>
<thead>
<tr>
<th>Category</th>
<th>Mean</th>
<th>Standard Deviation</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend but Don't Give</td>
<td>.00</td>
<td>.000</td>
<td>225</td>
</tr>
<tr>
<td>Don't Attend but Give</td>
<td>38.43</td>
<td>140.569</td>
<td>819</td>
</tr>
<tr>
<td>Attend and Give</td>
<td>76.37</td>
<td>238.309</td>
<td>235</td>
</tr>
<tr>
<td>Total</td>
<td>38.64</td>
<td>153.527</td>
<td>1279</td>
</tr>
</tbody>
</table>

A univariate analysis of variance (ANOVA) was conducted to determine the effects of event attendance on pre-event giving, post-event giving and total giving (see Table 8). Partial eta squared ($\eta_p^2$) is a suitable effect size measurement when using an ANOVA (Cohen, 1988). Effect size benchmarks of 0.02 (small), 0.13 (medium) and 0.26 (large) are used throughout this study (Miles & Shevlin, 2001). The main effects for pre-event giving and event attendance were significant $F(1, 2) = 14.526$, $p = .001$, with the predictor explaining 2.2% of the variance ($\eta_p^2 = .022$). Pre-event giving is significantly affected by event attendance, but only a small percentage of the variance is explained by this model.

Table 8

Tests of Between-Subjects Effects

<table>
<thead>
<tr>
<th>Source</th>
<th>$F(df)$</th>
<th>$\eta_p^2$</th>
</tr>
</thead>
<tbody>
<tr>
<td>PreEventGiving</td>
<td>14.53 (1,2)</td>
<td>.022</td>
</tr>
<tr>
<td>PostEventGiving</td>
<td>17.70 (1,2)</td>
<td>.027</td>
</tr>
<tr>
<td>TotalGiving</td>
<td>24.17 (1,2)</td>
<td>.037</td>
</tr>
</tbody>
</table>

Note: All effects significant at $p < .01$.

Pairwise comparisons using a Bonferroni adjustment comparison to adjust for inflated Type I error rates with pre-event giving as the dependent variable show statistically significant
results for attend but do not give and do not attend and give ($p < .002$), for attend but do not give and attend and give ($p < .001$), and do not attend and attend and give ($p < .002$).

**Post-event giving.**

A univariate analysis of variance (ANOVA) was conducted to show the effects of event attendance on post-event giving (see Table 8). Post-event giving includes young alumni giving data for the three years following fiscal year 2014-2015. The main effects for event attendance were significant $F(1, 2) = 17.699$, $p = .001$, with the predictor in this model explaining 2.7% of the variance ($\eta^2_p = .027$). This indicates that post event giving is significantly affected by event attendance, but with a small effect size.

Pairwise comparisons using a Bonferroni adjustment comparison to adjust for inflated Type I error rates with post-event giving as the dependent variable show statistically significant results for attend but do not give and do not attend and give ($p < .002$), for attend but do not give and attend and give ($p < .001$), and do not attend and attend and give ($p < .002$). An examination of this means in Table 5 shows that those who attended an event gave $164.42 (472.861)$, more than twice as much as the $77.26 (271.211)$ given by those who did not attend an event.

**Total giving.**

The variable total giving is made up of the amounts contributed by young alumni in the three years prior to and the three years after fiscal year 2014-2015. Using total giving as the dependent variable, an examination of the means in Table 9 show that those who were donors but did not attend an event gave an average total of $115.69 (317.317)$ in the three years before and after fiscal year 2014-2015. The giving level of those who were donors and who attended an event in fiscal year 2014-2015 gave an average total of $240.79 (633.681)$ in the three years
precedes and the three years after the event attendance. This indicates that those young alumni who attended an event in fiscal year 2014-2015 and who made a gift in the three years before or after fiscal year 2014-2015 are donors at more than twice the level than those who gave without attending an event. This demonstrates that young alumni attendance at events is strongly related to total giving by those same alumni.

Table 9

<table>
<thead>
<tr>
<th>Category</th>
<th>Mean</th>
<th>Standard Deviation</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend but Don't Give</td>
<td>.00</td>
<td>.000</td>
<td>225</td>
</tr>
<tr>
<td>Don't Attend but Give</td>
<td>115.69</td>
<td>317.317</td>
<td>819</td>
</tr>
<tr>
<td>Attend and Give</td>
<td>240.79</td>
<td>633.681</td>
<td>235</td>
</tr>
<tr>
<td>Total</td>
<td>118.33</td>
<td>378.416</td>
<td>1279</td>
</tr>
</tbody>
</table>

A univariate analysis of variance (ANOVA) was conducted to show the effects of event attendance on total giving. The results are displayed in Table 8. The main effects for event attendance were significant $F(1, 2) = 24.172, p = .001, \eta^2 = .037$. This indicates that total giving is significantly affected by event attendance, representing a small effect of 3.7% of the variance in the model.

Pairwise comparisons using a Bonferroni adjustment comparison to adjust for inflated Type I error rates with total giving as the dependent variable shows statistically significant results for attend but do not give and do not attend and give ($p < .001$), for attend but do not give and attend and give ($p < .001$), and do not attend and attend and give ($p < .001$).
Chapter Five: The Relationship between Young Alumni Participation and Giving

Findings, Conclusions, and Implications

Introduction

This study sought to determine the relationship between young alumni participation in alumni association sponsored events and young alumni giving. This chapter reviews the purpose of the study and the context used to examine the stated research questions. The findings of the study are presented and implications discussed, followed by limitations of the study and recommendations for future research.

Change is happening across the higher education landscape and as a result, colleges and universities in the United States are simultaneously undergoing a fundraising transition. College is becoming more expensive, students and families are balking at paying higher tuition and taking on more student debt, the overall value proposition of higher education is being questioned, and as a result, colleges and universities are relying more and more on private philanthropy from alumni to ease these burdens (Chan, 2016; College Board, 2016; Goldrick-Rab, 2016; Mann, 2007; Marcy, 2017; Pucciarelli & Kaplan, 2016). Total philanthropic dollars raised for higher education are increasing significantly while the number of alumni who give back to their alma mater is decreasing (EAB, 2015; Kaplan, 2018). Total giving to U.S. universities in 2017 rose by 6.3% to $43.6 billion, while the number of overall alumni donors is declining on an annual basis (Kaplan, 2018). In 2001, 14% of alumni nationally made a gift to their alma mater. By 2014, the participation rate had declined to only 8.3% (EAB, 2015). Among the alumni that this study examines at Bellarmine University, the alumni participation rate fell from 29% to 12% between 2001 and 2018 (Bellarmine University, 2001, 2018a). Young alumni are especially at risk to remain non-donors to their alma mater, as factors such as high tuition and
student loan debt lead to an increasing perception that a college degree is a transactional commodity and that universities are not a viable philanthropic alternative (Wastyn, 2009). According to a report on alumni participation, 75% of millennials are inclined to remain charitably active, but prefer to support their favorite charity rather than their alma mater (EAB, 2015). Additionally, social media has transformed the way that alumni communicate with each other. In the past, a university alumni association provided the principle means for alumni to remain in contact. As social media has assumed that role, alumni departments must work to provide context and added value to an alumni’s relationship with their alma mater in different and more substantive ways (EAB, 2015).

The engagement of alumni from recent years at Bellarmine is especially important as they now make up the majority of graduates. Bellarmine is a young school, founded in 1950, and due to recent growth, 64% of the alumni population in fiscal year 2014-2015 graduated between 1990 and 2015 (Bellarmine University, 2015). In this changing context of alumni engagement, the Bellarmine University Alumni Association seeks to engage alumni in the life of the university through various activities and events (Bellarmine University, 2017). Between the fiscal years of 2007-2008 and 2017-2018, the number of alumni events conducted by the alumni association increased by 166% to 101 and the number of alumni attendees increased by 236% to 11,091 (Bellarmine University, 2018b).

An examination of event data reveal that 40% of Bellarmine alumni attended an event, participated in a program, or made a financial gift to the university in fiscal 2017-2018 (Bellarmine University, 2018b). This participation rate does not reveal if attendance at events has a direct link with giving and leads to the following research questions, both of which are affirmed by statistical analysis in this study:
1. Is there a relationship between young alumni participation and giving to the university?

2. Is the giving behavior of young alumni who are donors to the university affected by attendance at alumni association events?

The motivations for alumni giving have a basis in research that can be viewed through three different, yet related theories. Volkwein (1989) explored a theory of alumni giving through the lens of capacity and motivation, arguing that it is the combination of these two factors that lead to giving. Weerts and Ronca (2007) built upon Volkwein’s (1989) model to theorize that alumni give and volunteer through a combination of social exchange theory, expectancy theory, and an investment model. Van Slyke and Brooks (2005) present a theory based on motivational triggers that lead to a better understanding of the drivers of young alumni giving and participation. These three theories provide a basis for the ensuing discussion and study regarding alumni engagement and giving.

**Findings**

This study utilized a univariate analysis of variance (ANOVA) analysis with three separate dependent variables: pre-event giving, post-event giving, and total giving. The independent variables were factors describing specific young alumni behaviors: (a) attend but do not give, (b) do not attend but give, and (c) attend and give. Each of the three models were significant at $p \leq .001$.

All three of the dependent variables were significantly correlated with each other and total attendance $r \geq .35$ with the exception of a slight negative correlation of $r = -.080$ between pre-event giving and post-event giving. Total attendance shows an increasingly significant positive relationship between pre-event giving ($r = .357$), post-event giving ($r = .433$), and total giving ($r = .581$), demonstrating that young alumni event attendance and giving are significantly
correlated. Post-event giving and total giving have a higher correlation ($r = .700$) than pre-event giving and total giving ($r = .527$). This might be explained by the increased age of the young alumni represented in the post-event giving variable, as the young alumni in this study graduated between the years of 2005 and 2014 and the post-event giving variable includes the years 2016 to 2018. The alumni included in post-event giving are at least two to four years or more removed from their graduation, showing that as alumni age, potential capacity to give increases. This is consistent with research by Gaier (2005); Okunade and Berl (1997); Sun et al. (2007); Willemain et al. (1994) and others that show that time since graduation is a significant predictor of giving. Additionally, McDearmon and Shirley (2009) found in a study of young alumni that 82% of first year graduates were not donors while 74% of young alumni who were ten years removed from graduation had subsequently made a gift.

Three separate univariate analysis of variance (ANOVA) models were run to compare the effect of event attendance on pre-event giving, post-event giving, and total giving. All three models were significant at the $p \leq .001$ level, indicating that event attendance has a significant effect on giving. When the effect of event attendance was compared to post-event giving, young alumni who attended an event in fiscal year 2014 – 2015 gave an average of $164.42 in the three years following attendance, compared to the three year average giving of $77.26 of those who did not attend an event. This initial analysis conclusively confirms the first research question that event attendance by young alumni results in subsequent giving, as the post-event giving of attendees is more than double the giving over the same time period of those young alumni who did not attend an event.

The significant relationship between event attendances in fiscal year 2014-2015 and pre-event giving in the three years prior might indicate that those who are already donors are more
likely to attend an alumni event. This aligns with similar research implying that giving leads to engagement. Newman and Petrosko (2011) found that existing donors are more likely to join a membership based alumni association, Rau and Erwin (2015) hold that an invitation to an alumni event is a significant predictor of giving, and Wunnava and Lauze (2001) found that consistent alumni donors tend to become volunteers.

Event attendance has a significant effect on total giving, both before and after the event. This concept of event attendance having the greatest monetary impact on total giving is relevant to research by Sun et al. (2007). They found that alumni experience and alumni motivation are among several strong predictors of giving in their study, which also held that donors have a more satisfying alumni experience than non-donors and that engaged donors are more likely to give.

While the positive effect of attendance on total giving might seem intuitive after separately determining the affirmative effects of attendance on both pre-event and post-event giving individually, post hoc Bonferroni comparisons show the greatest influence of event attendance is on total giving. The mean amount given ($M = 240.79$, $SD = 633.681$) for total giving as the dependent variable is nearly 50% more than only post-event giving ($M = 164.42$, $SD = 472.861$) and more than three times the effect on only pre-event giving ($M = 76.37$, $SD = 238.309$). This substantial increase in giving from pre-event to post-event and then to total giving confirms the second research question in this study. The giving behaviors of young alumni who are already donors is positively affected by event attendance. Young alumni who were already donors and subsequently attended an event give at a much higher level post-event.

However, all three models displayed small partial eta squared ($\eta_p^2$) values that only represent between 2.5% and 3.7% of the variance in the model: pre-event giving ($\eta_p^2 = .022$), post-event giving ($\eta_p^2 = .027$), and total giving ($\eta_p^2 = .037$). These small partial eta squared
values (Miles & Shevlin, 2001) are best explained by an examination of the research contained within this study’s literature review that show there are many different and substantial factors in addition to event attendance that can lead to and help explain alumni giving. Both positive undergraduate experiences and significant engagements as a student are key determinants of giving highlighted in several studies, including Clotfelter (2003), Monks (2003), Porter et al. (2011), Sun et al. (2007), and Weerts and Ronca (2009). Effective communication between the university and alumni is a driver of giving (Levine, 2008; McAlexander et al., 2014; Okunade & Berl, 1997; Stephenson & Yerger, 2014; Sun et al., 2007). The financial capacity of an alumni to make a gift is often a pre-requisite condition that has a very high effect on philanthropy (Holmes, 2009; Lara & Johnson, 2014; Monks, 2003; Okunade & Berl, 1997; Skari, 2014; Weerts & Ronca, 2009). Additionally, in the current higher education landscape where price and cost is such a determinant, studies show that receiving financial aid can have a positive effect on giving while taking out student loans might have a negative effect on giving (Marr et al., 2005; Meer & Rosen, 2012; Monks, 2003).

**Implications**

The results of this study have implications for college administrators as well as development and alumni professionals at all levels of institutions, including small private liberal arts universities. It has been shown that there is increasing pressure on development departments and alumni associations to provide additional funding to support student aid and university operations (Chan, 2016). The financial sustainability of colleges and universities due to changing factors such as declining number of college age students and reluctance of students and families to fund an increasingly expensive college education leads administrators to seek alternative funding sources (Marcy, 2017). The demonstrated link in this study between young alumni
attendance at events and subsequent giving provides a return on investment that can aid in the
effort to find new and sustainable funding sources. The resources that are expended on alumni
association event management result in an increase in the amount of money that is raised by
development departments and utilized by the university.

Nationally, the number of alumni donors is declining while the total dollar amount raised
due to major gifts is increasing (EAB, 2015; Kaplan, 2018). A dichotomy of giving exists that
shows a small number of donors making increasingly large gifts while the majority of gifts to
higher education are smaller in size yet come from a minority of the alumni population. There is
a need to build the size of this small level donor pipeline so that future large donors can be
developed (Le Blanc & Rucks, 2009). It is shown earlier in this chapter that there are many set
conditions inherent to an alumni that affect giving, such as positive experiences and engagement
as a student, financial capability to make a gift, receiving financial aid as a student, and the
presence or lack thereof of student loans. Factors such as these are built in to an alumni base
through the experiences of individual alumni and their resulting effect on giving might already
be set without the introduction of new and proactive interventions.

This study demonstrates a positive relationship between event attendance and increased
giving, providing higher education practitioners with a practical and pre-emptive intervention
that can result in increased revenue for operational needs. In the theoretical framework for this
study, Weerts and Ronca (2007) discuss the difference between engaged alumni and inactive
alumni. Alumni who become engaged and give form deep connections with their alma mater that
makes them more aware of institutional need and their role with their alma mater. Weerts and
Ronca (2007) advocate that development and alumni professionals should proactively seek out
those alumni who might already be donors or event attendees and invite them to become even
more engaged. Continuing the relationship with the theoretical framework for this study, the engagement of alumni provides the motivation to give, leaving capacity as the required variable (Volkwein, 1989). The community that is created through alumni engagement creates the environment that makes giving more likely, revealed through behavioral triggers such as sense of duty, tax advantages, personal solicitations and requests to participate. Ultimately, this can lead to giving back to one’s alma mater (Van Slyke & Brooks, 2005).

Finally, having demonstrated that young alumni attendance at events leads to giving, the higher education administrator and development officer should remain confident that this will lead to continued giving in the future as the young alumni donor ages. This increased return on investment on alumni events should guide budget and funding decisions leading to increased resources for development and alumni operations. This confidence in the return on investment is heightened by other research on this topic holding that engaged alumni are more likely to give (Sun et al., 2007). Newman and Petrosko (2011) found that engaged alumni who know other alumni, which is a logical result of event attendance, are 2.45 times more likely to make a gift in the future. Young alumni donors are 5.6 times more likely to make a gift later in life than other young alumni who are not yet donors (Meer, 2013). And in two studies that examined senior class giving campaigns (Freeland et al., 2015; Pottick et al., 2015), alumni who gave while in their senior year of study were twice as likely to make a gift later in their alumni experience as those who were not already donors.

Limitations

As in any study such as this, there are limitations that the researcher must address, including the fact that this study was conducted by a novice student researcher who is a
development administrator at the school being studied. While the researcher attempted to remove any personal bias throughout the study, the disclosure of this possibility is necessary.

While looking at the effects of event attendance on young alumni giving, this study does not account for those who might be pre-disposed not to give, regardless of any event intervention. Wastyn (2009) identified four non-donor triggers that explain why gifts are not made: the university does not need their money, the university is not a charity but a paid commodity, the non-donor has issues in general with giving, and the non-donors do not make logical giving decisions. Alternately, other external factors might have a positive impact on an alumni’s decision to give, including an existing predisposition towards philanthropic giving, the desire for reciprocity in the form of college allegiance, and the potential to receive direct benefits such as notoriety, access, or increased college degree brand value (Mann, 2007). Any of these qualities might pre-exist with young alumni attendees and affect the results of the study in a positive or negative manner.

An additional limitation to this study exists in the location and design itself. The young alumni studied graduated from a single, small liberal arts university. The data set itself consisted of a total of 1,279 young alumni from a single fiscal year who either attended and gave, attended and did not give, or gave but did not attend. While this data set represents a statistically relevant 25% of the total young alumni population at Bellarmine University, it is a very small and narrow population size relative to the total young alumni population throughout higher education institutions in the U.S. Additionally, an assumption in the data exists whereas a positive rsvp code in the alumni iModules system signifies actual attendance. This does not reflect the possibility that an alumni would make an event rsvp and actually not attend the event in question. This study also defines young alumni as undergraduate degree holders within the past
ten years. It does not include others who might be considered alumni, such as those “with a prior academic relationship, including non-graduates, certificate and credential holders, distance learners, lifelong learners, residents, post-docs, honorary degree recipients and honorary alumni” (Council for the Advancement and Support of Education, 2018, p. 5).

Even though the study was conducted at a small university, the alumni association at Bellarmine is very active and growing. Over the past eleven years the number of event offerings have increased by 166% resulting in a 236% increase in the number of event attendees over the same time period. Seventy percent of the total alumni population resides within forty miles of the university and 40% of all alumni either attended an event, participated in a program, or made a gift in fiscal year 2017-2018 (Bellarmine University, 2018b). It can be argued that a limitation to this study lies in the fact that the alumni being studied are already highly engaged and active and might have a predisposition to give that might affect the results. This factor might not be as evident at other institutions that are larger or have a more geographically diverse alumni population.

Future Research

A study such as this, regardless of the significance of its findings, naturally leads to opportunities for further research. As discussed earlier in this section, while the results of this study were statically significant, the partial eta squared had a small effect (Miles & Shevlin, 2001), indicating that there are many other possible variables that can affect this model. Future research could expand this model to include the many other factors that are shown earlier in this section to influence young alumni giving. While this study seeks to determine if young alumni event attendance has an effect on giving, a future model could add additional environmental variables such as financial means, satisfaction as an undergraduate, receiving financial aid, and
the existence of student debt. Additionally, demographic variables could be studied, including
gender make-up donors compared to the gender make-up of the alumni base, specific years since
graduation of the young alumni, major, address, involvement as an undergraduate, social
economic status, and career success.

This study measured total event attendance during one fiscal year at a single university. This model would increase in value if attendance was measured longitudinally over a period of years to determine the effect of multiple event attendances on giving. The addition of data sets from multiple colleges and universities might provide results with a larger effect size. The effects on giving by event attendance could be viewed by the type of school, exploring if the same effects exist for young alumni that graduate from different type institutions such as state schools, large private research institutions or community colleges.

Additionally, the effect of attendance at different type events might be measured. Within the catalogue of total alumni events exist a wide variety of engagements such as athletic, social, service, reunion and alumni leadership events. Future research could seek to determine if the type of event attended has differing results on giving. For example, a premier alumni engagement at Bellarmine University is the Alumni Mentoring Program. In fiscal 2017-2018, over 380 Bellarmine students participated in an alumni mentoring program that personally paired them with alumni mentors who are professionally active in the student’s field of study (Bellarmine University, 2018b). Using this program as an example, alumni engagement data that includes both existing alumni mentor engagement in this unique opportunity and young alumni who participated as an undergraduate mentee could be studied to see if this personal, career focused engagement has a different effect on giving than other more traditional, attendance based events.
While this study focused only on young alumni involvement, further research could include all alumni or additional sub-groups of alumni at the university to determine the overall influence that event engagement might have on giving. The future giving of young alumni as they age could provide additional cost benefit analysis to the effectiveness of young alumni programming. Additional research projects could also employ a mixed methods approach, using statistical findings regarding engagement along with personal interviews of donors and non-donors alike to provide an even more nuanced approach to the study of alumni engagement and giving. This current study shows that those who were donors both before and after the event attendance gave substantially more than those who either gave only before or after the event. An additional qualitative element might reveal more about why this is the case and provide even more opportunities for development and alumni offices to align events and giving.
References


Bellarmine University. About bellarmine. Retrieved from https://www.bellarmine.edu/about/


Bellarmine University. History of bellarmine university. Retrieved from https://www.bellarmine.edu/about/History/


The Relationship Between Young Alumni Participation and Giving


The Relationship Between Young Alumni Participation and Giving


doi:[http://dx.doi.org/10.1016/S0272-7757(02)00036-5](http://dx.doi.org/10.1016/S0272-7757(02)00036-5)


