CHANGING LANDSCAPE OF ALUMNI ENGAGEMENT: COMPARATIVE CASE STUDY

OF RESEARCH 1 INSTITUTIONS WITH CHANGING DEMOGRAPHICS

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ABSTRACT

CHANGING LANDSCAPE OF ALUMNI ENGAGEMENT: COMPARATIVE CASE STUDY

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ELIZABETH ROSENKRANTZ

Alumni demographics are rapidly changing, and alumni associations are looking for new ways to increase alumni engagement. Using Lewin's (1947) organizational change theory and Homans's (1958) social exchange theory, this study examines two Research 1 institutions in a comparative case study. By comparing the experiences of two institutions, alumni associations can identify successful practices and adapt them to their own context. One key finding of this study is the importance of creating community among alumni. By fostering a sense of belonging and a shared identity, alumni are more likely to engage with their alumni association and with each other. In addition, by providing value to alumni, alumni associations can build trust and loyalty, leading to increased engagement over time. By celebrating the achievements of alumni and showcasing their successes, alumni associations can inspire other alumni to engage with and become more active in the campus community. Alumni associations can use Lewin's organizational change theory and Homans's social exchange theory to develop effective strategies for engaging their alumni. By creating a community, connecting with alumni, and building alumni pride, associations can increase engagement and diversify their alumni base. The comparative case study approach offers a valuable tool for identifying successful practices and adapting them to individual contexts.

Keywords: alumni engagement, diversity, Hispanic student engagement, social exchange theory, organizational change theory, alumni affinity, community building, alumni community

ACKNOWLEDGMENTS

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DEDICATION

First and foremost, this work is dedicated to my guiding light and inspiration, my daughter, Violet. You have been part of my doctoral journey since day one. Violet, you were a hope in mommy and daddy's eyes when I started the doctoral program in May 2020 while also going through IVF. You became a reality as I finished my first year, and we met beautiful you during my second year in the program. We also had to say goodbye and "see you later" four days after meeting you. Through this trek of grief, you have been my guiding light and inspiration to finish. Thank you for making me your mommy and giving me the strength to continue. I yearn for the day we meet you again, Sweetness! Until then, I will continue to live in your honor and hope to make you proud. Dr. Mommy did it!

Secondly, this work is for all other alumni professionals who are dreamers and creators. I hope this helps you in moving alumni engagement forward. We are stronger together and will continue to move the needle to make a difference.

CHAPTER ONE: INTRODUCTION

"Graduation changes our relationship with the university from a state of *doing* to a state of

being" (Gallo, 2021, p. 11)

Introduction to the Study

The Council for Advancement and Support of Education (CASE, 2020) defined an

alumnus as a person who has attended or graduated from a particular school, college, or

university. An alumni association is a university department that organizes social events,

publishes newsletters or magazines, and raises funds for the organization (CASE, 2020).

Engaging alumni is a critical practice and the focus of alumni associations. Engaging alumni is

essential not just for alumni associations but also for the university. There are several ways

alumni can help sustain and move the university forward, some of those ways include their

community connections, word-of-mouth marketing, and philanthropic support. Many alumni

associations provide various benefits and services to help alumni maintain connections to their

educational institution and to their fellow graduates. Alumni association professionals use the

professional association CASE to guide their alumni mission and best practices. The CASE's

(2020) principles of practice are to "develop programs valued by alumni; build enduring and

mutually beneficial relationships, inspire loyalty, volunteerism, and financial support; strengthen

the institution's reputation, and involve alumni in meaningful activities to advance the

institution's mission" (p. 4).

Contemporary alumni engagement is not just focused on events or how much money

alumni give back to the university, as alumni are asking for more ways to connect to their alma

mater. Currently, many associations are seeing a decrease in attendance and engagement among

alumni. As alumni demographics and the ways alumni want to connect to their alma mater

change, alumni associations are looking for new ways to engage their alumni. The current trend at alumni associations is to find ways to focus on relationship building and finding ways to connect alumni to the university (Chase, 2021). Historically alumni connections included things like tailgates, attending homecoming activities, or local geographic university-sport watching activities. Modern alumni connections are incorporating additional activities like, career coaching, networking with peers, mentoring students, and more. Alumni associations create communities for specialized groups such as academic interest, student leadership, and demographic groups. Within the association, these often are called chapters or special interest groups. Examples include chapters or special interest groups for diverse demographics such as Black alumni, Hispanic alumni, and more. Often, these chapters are linked to student groups at the university, as the alumni in the chapters create mentor networks, scholarships, and connections upon graduation. As universities see an increase in diverse demographics, engaging these chapters is crucial for growing and diversifying alumni engagement. Using a comparative case study of two Research 1 (R1) universities, I sought to explore how two alumni associations found innovative ways to engage their diverse alumni groups. My research focused on Hispanic-serving institutions (HSIs) and the growth among this demographic in higher education, traditional alumni engagement, the overall size of a university, and the importance of adapting engagement efforts to meet the needs of the alumni to engage them in meaningful ways. I chose this research because university alumni demographics are changing, yet how alumni associations engage with alumni have not fully adapted to meet alumni needs. This study helped to uncover how alumni professionals can engage in meaningful ways with all demographics of alumni.

Importance of Alumni Engagement

Graduates of a higher education institution are assigned the title "alumni," conveying they have earned a degree from that institution (McDearmon, 2010). Although the title of alumni is common across higher education, the definition of alumni engagement can be described differently among institutions. Alumni engagement typically is used to explain alumni's investment in their institutions, including donating, mentoring campus organizations, referring students, or attending university or college events (Volin, 2016). The investment from alumni is necessary for the growth of colleges or universities.

Alumni engagement after graduation is as critical to the institution as engagement is during their time as a student. Universities invest vast resources to keep alumni engaged after graduation (McDearmon, 2010). Alumni engagement often includes in-person local events, like reunions, campus traditions, homecoming, and more. Just as research supports how to engage and retain students during their time at the university, there is also research supporting what alumni ask to remain involved in after graduation. For example, research has identified what young alumni are looking for regarding university engagement upon graduation (Volin, 2016; Weerts & Ronca, 2008). The current research on alumni engagement has focused on young alumni engagement and the link to their involvement when they were a student; studies have shown former student leaders often yield a more engaged alumnus (Fusch, 2010; Masterson, 2017; Weerts & Ronca, 2008). Creating connections can help build lifelong alumni, and Freeland et al. (2015) shared this same sentiment: "Creating a connection early upon graduation has provided a lifelong connection with the alumni for years to come" (p. 757). The current research on alumni engagement also has focused on what young alumni expect and want from their alma mater upon graduation to remain engaged. However, finding ways to engage diverse alumni is

not apparent. Although current studies have indicated the potential contributions of alumni associations, further research is needed to understand how associations understand, organize, and sustain themselves around the changing demographics of alumni.

Often, alumni engagement is linked to giving back financially to students' alma mater. Much of the research on alumni engagement is focused predominantly on giving rates and ways to increase giving. Instead of focusing on ways to increase giving among alumni, alumni associations can focus on other ways to engage their alumni as this could increase philanthropic giving. An example of specific engagement could be to focus on former student leaders. Former student leaders often have high affinity to the group(s) of which they were a part. It could be easier for associations to tap into that affinity and find ways for them to engage as alumni. With a focus on what makes students tied to the university, Chase (2021) stated:

> The relationship between alumni and institutions begins well before graduation. Institutions interact with students at multiple points across the student lifecycle. This means institutions have the perfect framework to develop a cohesive and engaging experience for students beginning early in recruitment and lasting until after students transition into alumni. (para. 3)

Focusing on relationship building, beginning when the student is an undergraduate, will support creating more robust relationships when they graduate. In turn, this focus could increase alumni relationships and the connection they have to their alma mater rather than focusing on giving monetarily to their alma mater.

Changes in Student Demographics and Alumni Engagement

According to Comevo (2020), university demographics have shifted as access to higher education has increased. Today, students are diverse—they are tradition and nontraditional,

culturally diverse, first generation, military veterans, parents, commuter students, living on campus, and more. These demographic characteristics comprise the diverse student population within institutions and in alumni demographics. There is not a one-size-fits-all approach to student or alumni engagement.

Researchers have asserted young alumni seek career development and early alumni engagement to remain connected to their institution after graduation rather than being asked for money (Fusch, 2010; Masterson, 2017; Weerts & Ronca, 2008). Finding ways to engage diverse alumni has not been studied widely. Although studies have indicated the potential contributions of engaging young alumni (Masterson, 2017; Volin, 2016; Weerts & Ronca, 2008), further study is needed to understand how associations understand, organize, and sustain themselves concerning the changing demographics of universities.

Current alumni research addresses traditional alumni engagement rooted in fundraising, tailgates, and alumni chapters. Alumni associations are vessels for keeping traditions alive at institutions of higher education; however, alumni associations must adopt more contemporary engagement relevant to the demographics of their recent graduates. By adopting more contemporary engagement efforts, associations can expand their alumni engagement.

Research Questions

For this study, I asked the following research questions:

1. How do university alumni associations address the changing demographics of the student population?

    a. How do alumni associations engage with diverse demographics and use their chapters and special interest groups in doing so?

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2. How do alumni associations narrate their experiences with diverse member engagement?

Statement of Problem

Higher education institutions focus on relationship building. Relationship building begins before a student becomes a student and does not end. According to Chase (2021), when students graduate, the student–institution relationship continues to evolve as needs and expectations change. After students graduate, staff look for new opportunities to continue adding value to the lives of their alumni. Chase (2021) wrote, "Proud alumni often serve as powerful ambassadors for their institution's brand and speak glowingly of their college years. Alumni are nostalgic and love opportunities to return to campus" (para. 12). With the growing demand of enrollment rates and retention, higher education institutions are seeking new ways to engage prospective students, current students, and alumni. As Rancour (2019) opined, "Alumni aren't just another revenue stream. They're a network of supporters who want to see your institution thrive and can serve as one of your most effective student engagement tools" (para. 1).

The changing marketplace and access to higher education have made attending college a reality for many. Today, the demographics of graduates have shifted from primarily White males to women and students of color. Increased access to higher education means a changing demographic of university students. Related to this shift, Vieira et al. (2021) wrote:

> The increase in access to higher education in the past twenty years is a result of many factors, including a set of driving forces including: economic development, rise in middle-class aspirations, growth of private institutions, and growth of distance education institutions. (para. 1)

As the student population continues to diversify, how these diverse alumni share their story, and their pride as alumni, will be critical for alumni association engagement efforts.

One recent significant impact on higher education outreach efforts was the COVID-19 pandemic. Amid the pandemic, institutions struggled to engage traditional and nontraditional students. Alumni associations uphold and maintain traditions, and the pandemic highlighted that associations needed to pivot and adjust how they honored traditions. Traditionally, alumni associations relied on in-person events top bring alumni together, which helped create a sense of nostalgia and togetherness while upholding traditions.

The pandemic also resulted in a rise in issues of social unrest. Institutions faced student and community demands to make changes to support marginalized students. Issues of diversity, equity, and inclusion are widespread and need to be addressed by higher education institutions on all levels, including by alumni associations. Universities have addressed and continue to address these issues for their current and incoming students: Diversity, equity, inclusion, and accessibility is a growing focus for many universities, but how it is done varies.

As demographics of institutions change, how alumni associations engage with alumni needs to shift to engage more diverse alums. Some alumni associations are working to find ways to adapt their alumni engagement outside of the traditional engagement examples. I overview these ideas of alumni engagement strategies in Chapter 4.

Purpose of This Study

This study aimed to understand how alumni associations in two R1 universities engage increasingly diverse students to facilitate early alumni involvement upon graduation. Intentional connection with alumni after graduation can create a strong community of alumni and pathways to engage diverse alumni. This engagement of diverse alumni will continue to grow an alumni

community that mirrors the institution's demographics. I used a qualitative comparative case study to explore the alumni engagement efforts at two R1 university alumni associations. The two R1 universities were given pseudonyms for this project: Saguaro University (SU) and Palm Tree University (PTU).

These two universities were chosen because they provide benchmarks for my home institution and have similar student demographics and enrollment. The emphasis of these institutions on the importance of HSIs match my home university's HSI status. Although this research did not focus only on Hispanic alumni engagement, learning how these two HSI universities engage this demographic of alumni is necessary. This research will assist in potentially adapting and creating alumni engagement to meet the needs of all alumni, including diverse alumni. Many alumni associations employ traditional engagement efforts. With the changing demographics of alumni, alumni associations need to adapt their engagement efforts to meet the needs of all alumni while maintaining their university's traditions.

Theory

In writing about student–alumni engagement, I drew on Homans's (1958) social exchange theory to guide my understanding of how and why alumni engage with their alma mater. In addition, Lewin's (1947) organizational change theory helped me analyze the comparative case study of two R1 universities and discover new ways to engage diverse alumni.

Social Exchange Theory

Most relationships are made up of a certain amount of give and take, but they are not always equal. Cherry (2022) wrote, "Social exchange suggests that valuing the benefits and costs of each relationship determines whether or not we choose to continue a social association" (para. 3). According to Cherry (2022), Homans (1958) was considered the pioneer in behavioral

sociology and was the first to talk about social behavior as an exchange. Social exchange theory suggests individuals essentially take the benefits of a relationship and subtract the costs to determine how much it is worth. Using the social exchange theory was critical to understanding the level at which alumni might want to engage and give back to their alma mater.

Organizational Change Theory

Changing environments demand organizations generate equally fast responses to thrive. Raza (2019) wrote about Lewin, the father of organizational change theory, who created a 3-step process for change. Lewin's model is known as unfreeze-change-refreeze, which can be seen in Figure 1. Unfreezing involves creating the motivation or willingness to change. This stage is important because it helps people in the organization understand why change is needed and creates the motivation to make it happen. To make changes successfully, Lewin argued an organization must understand why the change must occur (as cited in Raza, 2019). As the world changes, so do the demands on higher education. Alumni associations also can find new and innovative ways to adapt to and keep up with the changing demographics while upholding the university's traditions. If associations do not use this organizational development approach, they risk stagnating, engaging the same type of alumni, and not growing their outreach.

Figure 1

Lewin's Organizational Change Model

Note. From "What Makes Lewin's Change Theory Ideal for Businesses," by Lucidchart, n.d. (https://www.lucidchart.com/blog/lewins-change-theory).

Summary

Using organizational change theory to analyze the comparative case study of SU and PTU, I suggest ways to engage diverse alumni outside the current research on young alumni engagement. An analysis of alumni engagement also explains why sense of belonging and student involvement are important to creating engaged alumni. Overall, the research focused on the importance of social exchange and how it can assist in establishing engaged alumni. Traditionally, alumni engagement has relied on established traditions and practices, but the study looked at how these could be adapted to better meet the needs of more recent graduate who may have different expectations and experiences. Overall, the research has suggested universities can better engage and retain their graduates over the long term by focusing on social exchange and adapting traditional alumni engagement strategies to be more inclusive and responsive to the needs of a diverse alumni community.

Often, there can be an affinity toward social groups alumni were involved with as undergraduates (e.g., Greek life, student government). Understanding how alumni identify with these groups will help alumni associations create new meaningful engagement strategies. Alumni who relate to these groups feel tied to them and typically desire to give back to those groups but not necessarily to the university. Understanding how alumni think and how associations have worked to create opportunities to connect alumni will allow other associations to think of new ways to engage all alumni.

Rancour (2019) shared a vignette of what an engaged alumnus looks like. This vignette ties into the importance of sense of belonging and the social exchange theory in alumni connection:

My husband used to be very engaged with his university. He'd also get very excited when he heard talk of his alma mater—but he doesn't anymore.

Why? His university connected with him regularly when he was a student. He attended various alumni lectures and could see donors' impact on the university. He met with alumni and couldn't wait until he graduated and could support the university. And he did support them financially, but that didn't last very long.

What changed? His excitement and financial support dwindled over the years because he only heard from his old university when they wanted a donation. He started feeling like *an ATM instead of a valued alumnus*. They didn't continue to engage him after he graduated. If they had continued to engage him, he would have continued giving—just like the 80% of alumni that have remained connected to their school still give. (para. 9–11)

This vignette is a window into the research I uncovered. This story is not uncommon; and, it can be helpful to understand the multifaceted layers of what an engaged and unengaged alum looks like. This helps to understand potential engagement factors that will aid in new ways to engage all alum. My research focused on HSIs and the growth among this demographic in higher education, traditional alumni engagement, the overall size of a university, and the importance of adapting engagement to meet the needs of diverse alumni to engage them in meaningful ways.

Definitions of Key Terms

Alma Mater: An alma mater is the higher education institution from which alumni graduated (CASE, 2020).

Alumni: According to CASE (2020), alumni are considered graduates of the institution. They also include others with a prior academic relationship, including nongraduates, certificate and credential holders, distance learners, lifelong learners, residents, postdocs, honorary degree recipients, and honorary alumni. This term is used as a gender-neutral term.

Alumni Engagement: Alumni engagement is used to explain alumni's investment in their institutions. These investments include donating, mentoring campus organizations, referring students, or attending university or college events (Volin, 2016). Building mutually beneficial relationships for alumni can inspire loyalty and financial support as well as advance the institution's mission (Smith & Kaplan, 2021).

Alumni Membership: Alumni membership is a paid or nonmonetary membership to be part of the alumni association. This membership allows access to alumni events, magazines, networks, and more (Newman & Petrosko, 2011).

Alumni Associations: The CASE's (2020) principles of practice for alumni associations are to "develop programs that are valued by alumni; build enduring and mutually beneficial relationships, inspire loyalty, volunteerism, and financial support; strengthen the institution's reputation; and involve alumni in meaningful activities to advance the institution's mission" (p. 4).

Associations: The word associations is used in this study as a shorthand term for alumni associations.

Belonging: Belonging refers to a close, personal, or intimate relationship. Sense of belonging is psychological and measures students' feelings of connectedness to the institution and the campus community (Hurtado & Carter, 1997).

Donor: A donor is an alumnus who either gives financially or nonmonetarily to their alma mater (Caulkins et al., 2002).

Engaged Alum: An engaged alum is someone who participates in alumni events and/or gives on a continued basis after graduation (Volin, 2016).

Hispanic-Serving Institution (HSI): According to The White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity for Hispanics (2022), for an institution to be considered HSI, they must have at least 25% of their enrolled full-time students identify as Hispanic.

Nonmonetary Giving: An alumnus who gives back to their alma mater by volunteering or attending events is giving back in a nonmonetary way. This is also referred to as time and talent, where treasure is referred to monetary giving from alumni (Volin, 2016).

Philanthropy: Philanthropy is where individuals contribute their time, talent, and financial resources to institutions to improve society, the community, or social circumstances (Caulkins et al., 2002).

Student Engagement: Students' involvement in extracurricular activities on campus is referred to as student engagement (Astin, 1999). Astin (1999) predicted involvement in activities such as student organizations, leadership positions, and campus residence halls positively increases retention and academic achievement.

Unengaged Alum: An alum who does not participate in alumni events and/or gives after graduation is referred to as an unengaged alum (Volin, 2016).

Young Alumni: An alumnus who has graduated within 10 years is often called a young alum. This is not necessarily in reference to age but rather the time from graduation (Freeland et al., 2014; McDearmon, 2010). Young alumni also tend to be more diverse.

CHAPTER TWO: LITERATURE REVIEW

We are all alumni. We reclaimed this word as inclusive, not exclusive. We are all welcome

members of our alumni communities. While it is inclusive for our personal experience, the term

"alumni" is also universal. Universities don't own a patent on alumni connection. It's open to

anyone who wishes to reconnect with the past, formal shares experiences of life.

(Gallo, 2021, p. 176)

Gallo (2021) shared the term "alumni" is not exclusive but inclusive and a powerful

group to belong to. Embracing an alumni identity allows people to extend their connection to

their alma mater and creates a robust social exchange. Alumni associations are charged with

connecting alum from all over the world. They do this in various ways, and many are steeped in

traditions. This means many associations repeat the same events year after year without much

change. However, in the wake of the global pandemic, alumni associations were forced to make

immediate changes to their modality of engagement efforts. These changes included attempts to

increase diversity, equity, and inclusion (DEI) efforts; develop new engagement opportunities;

and research ways to engage the changing demographics of alumni.

I address the research questions on how university alumni associations engage and

strategize their outreach in response to higher education's changing demographics. To do this,

understanding the purpose of alumni associations and alumni engagement is needed first.

Homans's (1958) social exchange theory helped ground the importance of alumni engagement,

and Lewin's (1947) organizational change theory helped me understand the need for change in

staff structure to support alumni engagement. I weaved changing demographics, alumni

engagement, and student development theories to highlight how alumni associations can manage

and enhance their engagement efforts to engage the changing demographics of alumni.

The existing research has been steeped in surveys conveying what young alumni are looking for in connecting to their alma mater (Fusch, 2010; Masterson, 2017; Weerts & Ronca, 2008). It also has focused on how to increase alumni giving. The research has included quantitative analysis but has lacked qualitative depth and understanding. Much research on alumni engagement efforts has been published in doctoral dissertations. Overall, the research has been robust and has garnered insight into alumni mindsets that can be applied to institutions. However, more research is needed to aid alumni association staff in developing new strategies to learn how to engage the changing demographics of alumni, not just those termed "young alumni." In addition, research that extends beyond how to increase alumni giving is needed. The alumni association's goals are not just how to increase funding for the university. Associations are known as "friend-raisers." An association's goal is to create meaningful relationships with its alumni and not focus on fundraising. Instead, the university foundation will focus on fundraising efforts, building off the association's "friend-raising" efforts. Research is needed to learn how to friend-raise among demographics, potentially creating increased giving. Still, most importantly, it creates a pathway for a more engaged alum, which is the association's goal.

The remainder of this chapter is devoted to existing research on alumni associations, changes in alumni demographics, and engaged alums. Institutions that understand this history of alumni engagement can find new ways to enhance alumni engagement efforts.

History of Alumni Associations

The changing landscape of higher education has caused universities to invest resources in offices such as development and alumni relations (McDermott, 2013). The goal of these offices is to keep alumni engaged with the institution after graduation.

Worth (2002) shared the first organized alumni annual giving program started as early as 1643 when Harvard alumni returned to campus to attend commencement ceremonies and visit former classmates. The first formal alumni association was created during the late 1800s to perpetuate nostalgia and intellectual pursuits. Alumni funds then were designed to promote "living endowments" for the institution, and this concept continued well into the 20th century (Worth, 2002).

Many institutions have a process by which alumni must pay to be a member of their alumni association. My current institution is one of the few universities that does not require a paid membership, but this is not a common trend. Alumni who must pay to be a member of their association can pay for yearly or lifetime membership, ranging from hundreds to thousands of dollars. Benefits of a paid alumni membership include access to exclusive discounts with partnered companies, university-branded swag, and special invitations to events. However, paying to be part of an association at the institution from which you graduated can prevent an alumni association from gaining new members and limits access to alumni who want to stay connected to their alma mater. Often, young alumni do not see the worth of paying for membership as they just spent money on tuition. Alumni paid membership is typically dominated by White males (Monks, 2003). Monks (2003) suggested Whites are more likely to contribute to their alma mater than minority alumni. There is a lack of research on diverse demographics and giving patterns.

In Newman and Petrosko's (2011) research on alumni association membership, psychological factors related to alumni experiences and perceptions were associated positively with membership, as programs, events, and communications can control these factors. The most significant variable associated with alumni association membership was alumni association

perceptions. Newman and Petrosko also found the frequency of involvement was related to alumni association membership, which may inspire alumni professionals to expand or enhance alumni events and programs to impact membership positively. In addition, this research encouraged associations to modify and grow their engagement opportunities. Assessing where to enhance offerings meets the changing demographics of the institution.

By functioning as friend-raisers in contrast to the fundraising function of development offices, alumni associations serve an essential role in engaging alumni and providing a connection with the alma mater. Factors related to alumni involvement that impact giving positively include loyalty and emotional attachment to the alma mater (Newman & Petrosko, 2011). Alumni giving continues to be a primary philanthropic support to universities; however, the needs and demographics of alumni membership are changing. In addition, finding ways to engage alumni most effectively is a priority, and these changes in alumni demographics need to be understood further. Throughout the rest of this chapter, I will discuss who current alumni are, what makes an engaged alumnus, and how DEI plays a part in the changing landscape of alumni.

Who Are Engaged Alumni? Student Involvement Theory

Astin (1999) shared student involvement and where students felt a sense of belonging assisted in their retention and graduation rates. This same concept can assist alumni associations in knowing who a potentially engaged alumnus is, as those students felt connected during their time at the institution. According to Astin, student involvement is an important component of the college experience. Astin's longitudinal study of college dropouts showed factors contributing to students persisting suggested involvement, whereas those factors contributing to dropping out inferred lack of involvement. Astin's student involvement theory focuses on students' behavior;

what a student does and how they behave defines and identifies their involvement. It also emphasizes the active participation of the student in the learning process.

Alums who were more involved in academics and campus organizations during their undergraduate experience have been shown to be more likely to partake in alumni engagement activities (McDearmon, 2010; Volin, 2016; Weerts & Ronca, 2008). One aspect of student engagement is when a student is a member of a campus organization. According to Volin (2016), engagement opportunities could include acting as orientation leaders or participating in student government or Greek life. Volin even included collegiate athletes as engaged alumni. Volin also noted students who earn academic honors upon degree completion are likely to be engaged alumni. Volin found a 31% increase in alumni engagement from alumni who were involved. Institutional undergraduate organizational involvement creates an evident bond for alumni engagement (McDearmon, 2010; Volin, 2016; Weerts & Ronca, 2008). Alumni offices can use the connection of undergraduate involvement to improve and increase alumni engagement.

Student involvement theory and its impact on retention can help create effective alumni engagement. Gallo (2021) suggested the development of a more personalized alumni–alma mater interaction as part of the current relationship cycle and identified the stages as (a) affiliation, (b) affinity, (c) engagement, and (c) support (see Figure 2). Further, Gallo (2021) stated each stage of the relationship cycle must be increased so higher education institutions "define affiliation, build affinity, foster engagement, and secure support" (p. 50). In their case study, Gallo (2021) suggested a revised cycle using the expanded definitions to allow for progression to outcomes benefiting the institution (see Figure 3).

Figure 2

Basic Alumni Interaction Cycle
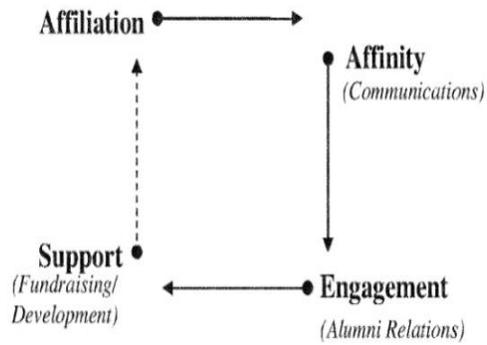
Note. From "Beyond Philanthropy: Recognizing the Value of Alumni to Benefit Higher Education," by M. Gallo, 2021, *Tertiary Education and Management, 18*(1), p. 41. Copyright 2021 by Taylor & Francis.

Figure 3

Annotated Alumni Interaction Cycle

Affiliation ●————————————————————→

Expand the quantity of alumni

Preserve quality of alumni

Outcome of Affiliation:
Informed critical mass of alumni

Outcome of Support:
Towards the enhancement and benefit to the institutional priorities

● **Affinity**

Building on nostalgia

Strategic change ↑

Building new affinity

Outcome of Affinity:
Creating loyal and informal ambassadors

Dynamic change

Support ●

Outcome of Engagement:
Captive audience of advocates; alumni value the institution and legitimise it with their action

←———————————————● **Engagement**

Understand and sustain motivations of alumni

Note. From "Beyond Philanthropy: Recognizing the Value of Alumni to Benefit Higher Education Institutions," by M. Gallo, 2021, *Tertiary Education and Management, 18*(1), p. 50. Copyright 2021 by Taylor & Francis.

Developing long-term relationships with alumni helps create authentic relationships that are crucial to long-term success and their sense of giving. Gallo (2021) shared building affinity begins by educating students on what it means to be alumni and "the lifelong relationship this represents" (p. 26).

Student–Alumni Identity Development

Students can identify with many groups at their university, including the academic colleges and departments, sport teams, student clubs and organizations, Greek life, and more. Such memberships and social ties contribute to individuals' development of identity (Leonard & Onyx, 2003). Alumni identification with their university influences their propensity to support it (Mael & Ashforth, 1992), as more robust ties between alumni and the university are consistent with higher levels of identification. Alumni identification with their university positively influences alumni attitudinal loyalty and intention to undertake behaviors that support the university (Koenig-Lewis et al., 2016).

The student-to-alumni identity shift is where alumni associations can focus energy to capitalize on and engage formerly active students. Formerly active students are more likely to have enjoyed their experience at their alma mater and therefore be more interested in continuing to engage. Linking these active students immediately upon graduation into their new alumni community creates a potential for a vibrant community of engaged alumni. This concept ties into how alumni associations can keep abreast of their alumni's changing demographics, needs, and desires to stay relevant and engage alumni. This takes active work, but if alumni associations can do this, they will produce more engaged alumni and a pipeline of engaged alumni committed to moving the university forward.

Wenger et al. (2002) emphasized, as communities evolve in their engagement, the activities needed to develop them also change. This means alumni associations cannot necessarily repeat the same thing year to year, as their communities may ask for new ways to continue their engagement.

Young Alumni Needs and Involvement

Universities rely on alumni to support the university in many ways. One way in which alumni support the institution is financial. Alumni often serve as volunteers and political advocates for their alma mater (Weerts & Ronca, 2008). To be an engaged alumnus, alumni meet these criteria: (a) financial giving, (b) serving in volunteer roles, or (c) attending events. Overall, alumni must have a sense of loyalty to their university to continue to be involved. Alumni loyalty intentions can be defined as "a desire to implement financial support, a desire to keep in touch with the university, interest in obtaining university news, and a willingness to be an alumni association member" (Iskhakova et al., 2016, p. 302).

Young alumni engagement is a challenge for many alumni associations. Young alumni are categorized as alumni who graduated within 10 years and often are the traditional students who graduated from an institution (Freeland et al., 2014; McDearmon, 2010). Young alumni often think to be engaged as an alumnus at a university means you need to give back financially. In terms of Homans's (1958) social exchange theory, many young alumni feel they already have invested in their degree and do not want to give more money. In addition, young alumni are typically just beginning their career and cannot financially give back to their alma mater. This is why engaging alumni outside of monetary ways is important for associations. Using the friend-raising model alumni associations strive toward can assist in debunking the myth that an engaged alumnus is equal to the monetary amount they give to their alma mater. Instead, alumni

associations can create new ways to engage with students before they graduate and engage with their alma mater in ways that do not include monetary giving.

Homans's (1958) social exchange theory describes social behavior as exchanging material and nonmaterial goods, like time, money, effort, approval, prestige, and power. Homans said people expect to receive as much reward as they give to another and will choose actions likely to provide the greatest reward. An age-old saying of "what's in it for me" comes to mind. Using Homans's theory, associations can find ways to engage alumni in other ways. McCort (1993) agreed with this theory and shared the importance of marketing to alum needs to be focused in a constructive and long-term, mutually beneficial way. If alumni engage quickly after graduation, they are more likely to remain engaged. Having engaged alumni helps the university in the long term. Masterson (2017) summarized that happy and engaged graduates become alumni who help promote and recommend their alma mater to others, create professional networks that benefit students and alumni, and volunteer their time on boards and give money.

Masterson (2017) summarized the importance of why alumni associations want engaged alumni. Colleges are looking for new ways to reach and connect with young alumni. Masterson shared young alumni have shifted how alumni associations connect to alumni, especially when it comes to giving money or time. Several tactics alumni associations can use to enhance young alumni connections include building services and programs for young alumni. These events could consist of career networking seminars, planning signature young alumni events on campus shortly after graduation, using peer-to-peer gift solicitation models rather than traditional impersonal methods, and leveraging social media in all activity messaging (Fusch, 2010).

According to Masterson (2017), Elon University found a unique way to engage with its young alumni. Elon University engages young alumni in three ways: as partners, as advocates,

and as investors. Elon University used its young alumni as partners and grew this alumni chapter three times by using social media and sharing university news locally. They also created a young alumni council that advises the alumni staff and meets with the university president. Giving their young alumni voices has increased their overall young alumni participation. Lastly, their hired alumni engagement officers, who were like advisors when these alumni were in college, have a caseload of young alumni who were involved and engaged as a college student. Having an alumni engagement officer assigned to young alumni supported the feeling of being appreciated by their alma mater.

Masterson (2017) summarized that creating and fostering a sense of community for young alumni is essential in creating more engaged alumni. Engaging with alumni before graduating makes them feel they are "true members of the community and identify with their alma mater" (Bent, 2012, p. 140). Skaggs (2015) found young alumni expressed a feeling of engagement when they felt passionate about an initiative and felt their time was worth the investment. Skaggs shared ways to communicate with young alumni. Although online communication was preferred, the university magazine is another primary mode of communication. To engage young alumni through the magazine, it is recommended they are profiled throughout the magazine.

The idea of sense of belonging stems from Maslow's (1968) hierarchy of needs, indicating "belongingness" is essential to an individual's growth and existence in a community. Hurtado and Carter (1997) defined sense of belonging as psychological and measures students' feelings of connectedness to the institution and the campus community. Although sense of belonging has long been an important construct in understanding student success in higher education, it is essential to know how this relates to alumni engagement.

Strayhorn (2019) found sense of belonging is "a basic human need, a fundamental motivation, sufficient to drive behaviors and perceptions" (p. 8). Sense of belonging is also associated with numerous positive, prosocial, and productive outcomes within higher education, including influences on academic achievement, retention, and persistence (Hausmann et al., 2007; Rhee, 2008). The conceptualization of sense of belonging allows researchers to explore alumni engagement while centering on graduates' interpersonal relationships rather than alumni's relationship with the institution (Drezner & Pizmony-Levy, 2021). Sense of belonging is distinct from organizational identification. It is the perception of the individual's placement within their alma mater rather than how or whether they define themselves as part of the institution (Drezner & Pizmony-Levy, 2021).

There have been many studies on young alumni engagement (McDearmon, 2010; Volin, 2016; Weerts & Ronca, 2008). Wampler (2013) shared the best indicator for alumni professionals to use when looking for alumni to get involved or give back is a positive student experience. The extent to which students get involved in cocurricular activities while in college can also impact their behaviors as young alumni and later in life. Using Pumerantz's (2005) "alumni-in-training" theory, connections with alumni are regular and rewarding. Current students will develop a "family" feeling about the institution before graduation, promoting staying connected after graduation. According to Wampler, alumni associations that can engage and steward their young alumni can change a culture and improve an institution over time and ultimately increase alumni engagement.

Asking young alumni for monetary giving can be difficult, and it is not the only way for them to be connected as alumni. McDearmon (2010) analyzed the attitudes of young alumni and assessed if more attention was given to connecting alumni with career services, their giving

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behavior might increase. McDearmon explained young alumni's experiences with and feelings toward career services greatly impacted their desire to give back to their institution. For example, if an alum feels the university helped them land a job, they are more willing to give back.

Alumni Engagement: Nonmonetary Giving, Volunteering, and Event Participation

Outside of financial contributions, alumni also can give back time. The desire to volunteer often is associated with the quality of the academic experience while an undergraduate student, beliefs about alumni volunteer roles, and the number of degrees earned at the institution (Weerts & Ronca, 2008). Alumni volunteers also are valuable to their institutions beyond their professional and social networks. Through college advisory boards, prominent alumni lend their experiences and expertise to help higher education leaders formulate strategic directions for their institutions (Weerts, 1998). Alumni volunteers can also serve as mentors, recruiters, and club leaders. All these types of volunteer roles can help increase their university profile.

Social exchange theory suggests relationships are give and take and sometimes have uneven balance among partners. Applied to alumni involvement in higher education, social exchange theory suggests the costs of volunteering are weighed against the benefits the alum has received from the university in the past or present. According to Weerts and Ronca (2008), these benefits include the quality of education, career gains, social connections, and prestige. Alumni will decide whether they would like to volunteer based on an analysis of this exchange.

Lastly, the ability to volunteer is also based on one's availability of time. Zuzanek and Smale (1999) shared life cycles play a substantial role in one's patterns of use of time. These patterns are based on four factors: age, marital status, children, and employment status. Understanding how a person analyzes their use of time is essential when looking for alumni volunteers. Certain lifestyles can determine the potential for an alumnus to volunteer.

Alumni Engagement: Monetary Giving

There is a correlation between alumni, their sense of belonging, and their level of alumni engagement. A sense of belonging has a significant "ripple effect" and can affect future levels of engagement and alumni giving (Drezner & Pizmony-Levy, 2021). This is especially true for alumni attitudes toward donations and other nonmonetary forms of alumni engagement.

Drezner and Pizmony-Levy (2021) found race and international status play a role in alumni engagement. More specifically, Black alumni were more likely to be donors if they had a strong sense of belonging. They shared more engagement was created among traditionally marginalized alumni when they felt race, racism, White supremacy, and the study of marginalized people were centered in the institution's curriculum and research. In addition, after accounting for sense of belonging in statistical analysis, Black, Asian, and international alumni showed more positive attitudes toward giving to specific designations, such as to help a student, than other groups (Drezner & Pizmony-Levy, 2021). The concept of sense of belonging is an essential construct in future and current alumni engagement that also includes giving. Still, more research is needed to understand the gap in giving among alumni of color.

High levels of identification and loyalty are consistent with solid ties built up over a long history of interaction (Leonard & Onyx, 2003). Time is needed to move relationships into loyal attitudes and behaviors. The more time since graduation, the stronger the impact of alumni identity is on alumni attitudinal loyalty and intention to undertake behaviors that support their university (Koenig-Lewis et al., 2016).

Homans's (1958) social exchange theory relates to the financial support provided for alumni during their time as students. For example, Dugan et al. (2000) found alumni donors who had an academic scholarship while in college were more likely to increase their gift size than

those who did not receive a scholarship. In another study by Monks (2003), those who gave more to their alma mater had financial aid as a student, and those who gave less had loan debt. These findings suggest a spirit of giving back to an institution that provided the alumnus with financial assistance while a student. Similarly, Weerts and Ronca (2008) indicated alumni donors may be more inclined to give back in volunteer time if they had assistance financing their education. Overall, if alumni feel the university provided for them as a student, there is an increase in the potential for alumni to give in any capacity.

Overall, the research has highlighted what makes an engaged alumnus and how student involvement theory and social exchange theory play a pivotal role. As alumni associations move into a more modern approach, understanding the more diverse alumni graduate will help alumni engagement evolve. Next, I focus on DEI in higher education, especially among Hispanic students and HSIs.

DEI in Higher Education

Today's college campuses are more diverse than in previous years. These changes match the increased access to higher education in recent years. Colleges have seen an increase in female students and students of color. Higher education access was once reserved only for rich White men. Although demographics are changing, affluent White males still dominate alumni associations' involved alumni. The demographic of graduates has changed and will continue to change. Hawkins (2014) stated, "A come-one, come-all strategy alone may not work when engaging alumni whose experiences and identities revolve around race and sexual orientation" (p. 34). Diversity, equity, and inclusion (DEIA) is a topic in all industries today. DEI is important in a student body, and students need to see DEI as a priority at their college or university. PeopleAdmin (2022) shared, "Diversity on campus improves cultural awareness and

critical thinking. A diverse faculty body can offer a unique kind of support to students from historically underrepresented backgrounds" (para. 3). Inclusion matters to young alumni.

When looking at the current research on alumni engagement, there is a large focus on young alumni engagement and how to engage them. There is also a lot of research on philanthropic giving and how to increase alumni giving to an institution. This research is a blanket approach as it does not address the institution's demographics and specific alumni. As universities become more diverse and their alumni populations change, alumni associations must adapt their strategies to meet the needs and expectations of these new demographics.

Demographic Changes of Alumni

Much of the research on alumni engagement and diversity is regarding fundraising. Drezner and Huehls (2015) noted at the outset of their literature review on theories of giving that "most of the theories that existed to explain philanthropic motivations were created using research that almost exclusively looked at the giving of wealthy White men" (p. 1). Clotfelter's (2001) and Conley's (2000) research affirmed income was one of the most important predictors of alumni giving. Using this predictor, alumni who are part of racial minorities were at a disadvantage. In Clotfelter's study, a typical donor—and often, the most prominent donor—was White, male, in a top income class, involved in extracurricular activities as a student, and satisfied with their overall academic experience.

This research is not surprising, as access to higher education is relatively new. However, the lack of research and understanding of minority engagement and philanthropy is eye opening. With historical exclusions from campuses, inequalities in wealth accrual, and a fundraising profession that has yet to actively engage alumni outside of the traditional White donor, research

on giving by alumni from minoritized groups is lacking and is needed to advance alumni relations.

One racial demographic that has seen a significant increase in enrollment at higher education institutions is Hispanic students. Understanding the demographic changes at large is useful for alumni associations and finding ways to engage these demographics in meaningful ways. However, if an institution is considered Hispanic serving, an emphasis on understanding this demographic is also needed.

Hispanic-Serving Institutions

Student demographics are rapidly changing, and SU and PTU are no exception. According to Brownlee (2021), "Enrollment of Hispanic and Latino students in higher education is expected to exceed 4.4 million by 2025" (para. 2). Brownlee (2021) advised, as institutions seek and gain HSI status, university leaders must understand fully what it means to be Hispanic serving and not just Hispanic-dwelling institutions. Education is the catalyst for change and economic mobility in the United States.

PTU has assembled a task force and strategic plan to become an HSI by 2025. Having an HSI designation allows institutions to qualify for additional grants and funding. This, in turn, could support their educational programs and benefit Hispanic communities. To be an HSI, 25% of a campus's student population must identify as Hispanic (The White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity for Hispanics, 2022). PTU's website highlighted that 1 million Latinx young people will turn 18 this year and every year for the next 2 decades in the United States; these students are important to our nation's future, and they must be positioned to succeed and lead. Figure 4 illustrates the increase in demographics at PTU, especially among Hispanic-identifying students.

Figure 4

PTU 2021–2023 Demographics

Diversity

Student Diversity by Ethnicity

ETHNICITY	UNDERGRADUATE	GRADUATE
African American	5%	6%
American Indian & Alaska Native	<1%	<1%
Asian & Pacific Islander	33%	22%
Hispanic	21%	12%
White	26%	32%
Other Domestic or Unknown	4%	5%

Just like PTU, SU has a diverse student population. In 2020, SU earned the HSI designation. It also earned the prestigious Seal of Excelencia. SU's website shares, "As flagship public research institute SU has a unique and critical obligation to serve and prepare the next generation of leaders. As one country's most vibrant and diverse states, our Hispanic community is an important part of our culture, history, and future." Figure 5 illustrates the increase in demographics, especially in the Hispanic community at SU. With this continued increase in diversity among college students, alumni demographics will also change. Brownlee (2021) noted HSIs were not created to educate students of Hispanic or Latino origin exclusively. Instead, HSIs first began as a grassroots movement in the 1980s due to the shifts in demography and increased Hispanic enrollment in higher education.

Figure 5

SU 2021–2022 Demographics

Student Profile, Fall 2021

- Gender
    - Women: 55.3%
    - Men: 44.7%
- Ethnicity/Race
    - American Indian or Alaskan Native: 0.1%
    - Asian: 20.6%
    - Black: 5.2%
    - Hispanic: 24.2%
    - International: 9.1%
    - Multiracial (excl. Black or Hispanic): 2.7%
    - Native Hawaiian or other Pacific Islander: 0.1%
    - Unknown or Blank: 1.3%
    - White: 36.7%

Although access to higher education has shifted, inequities still impact society beyond campuses. A 2008 study found Hispanic students' high school and college dropout rate is nearly double that of other major racial groups (Rodriguez, 2008). Only 15% of Hispanic citizens over 25 earned a bachelor's degree by 2015 (Ryan & Bauman, 2016). The ripple effect of these students who dropped out of high school or college led to a barrier to attaining middle-class status and greater reliance on social programs such as child and health care (Rodriguez, 2008). Rodriguez (2008) contended, although the United States needed an educated working class, the trend for the quickest growing population was in the opposite direction.

Hispanic students are considered at risk based on lower persistence and graduation rates. Analyzing student and alumni engagement data at HSIs can help alumni association staff understand the cultural needs of these alumni. The research on Hispanic student involvement and retention will assist with creating alumni engagement strategies.

Understanding the Hispanic Student

As education has become more accessible for those outside the White majority in recent years, there has been increased diversity in higher education. The Hispanic population has seen the most significant increase in higher education attendance. The Hispanic population is also highly diverse, and how Hispanics identify within this group also varies. For example, they can identify as from Mexico, Latin America, Puerto Rico, etc. Ayala and Chalua (2016) shared understanding the role of racial classifications on identities or experiences is essential to Hispanic college attainment. They also highlighted ethnic self-identification as a significant factor influencing Latinos' postsecondary attainment. They argued differences observed across ethnic self-identifications result from the different structural issues, including socioeconomic statuses and differences in migration experiences that privilege, disadvantage, or support Latin American immigrants. According to Ayla and Chalupa, living in the Northwest decreases the odds of Hispanics having college attainment by 31% compared with living in the Southwest. Hispanics create strong communities in areas of California and Arizona. This community can then create strong support for education.

A study by Clayton et al. (2019) shed light on how Hispanics embrace their culture as first–generation students. Each participant had unique ways of expressing their Hispanic identity in the study. How students viewed their cultural identity influenced their college experiences.

Luz shared a unique experience in terms of her identity expression. She mentioned:

In high school, she used to feel ashamed of her cultural background. She was fearful that she or her mother would be discriminated against for being Latina. After all, Luz's mother did not speak fluent English when she was younger. Luz found herself speaking Spanish to her mom softly while in public. Additionally, she reported that there were few

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Latino-identified students who attended her high school. The students who were there did

not represent the same type of person that Luz identified herself to be. For Luz, these

students often fulfilled negative stereotypes about Latino students, "Some of them were

gang related. Some sold drugs. Some weren't going to college. . . . I just didn't connect to

them." This changed for Luz once she arrived at Southeast University. Instead of feeling

like an outsider, Luz is now among a group of peers who are more like her and have

similar educational perspectives. Overall, Juan and Luz exhibited strong Latino identity

expression. (Clayton et al., 2019, p. 142)

Students in Clayton et al.'s (2019) study reflected on how important it was to connect

with others of the same culture and experience cultural congruity in an academic setting; this

finding supports prior research on the importance of cultural identity in the university context.

Using this same approach, alumni associations can target alumni engagement in the same context

for Hispanic alumni.

Knight et al. (2004) interviewed students in high school and their families for

counterstories. Minoritized communities often use counterstories to tell stories that reflect their

experiences and knowledge. Knight et al. found retelling family involvement counterstories

significantly influenced their college-going processes. These counterstories reconceptualize

traditional perspectives of parent involvement in urban schools by addressing who, what, and

how college-going strategies are shared (Knight et al., 2004). The stories stressed inequitable

structures hindering access to college readiness resources. Knight et al. continued to say these

counterstories suggest the importance of analyzing and advocating for culturally relevant policies

and practices concerning family influences on college-going decisions early on. Using this same

concept, alumni associations can also use this knowledge. Creating events for Hispanic alumni

and inviting the community who might not be alumni could significantly influence attendance and a robust engagement pipeline. It also can create a college-going pipeline. Making events more of a family affair for Hispanic alumni could create more engaged alumni.

Cuada (2014) shared educating the alumni population about the university's many benefits and services is challenging for development and alumni relations staff. All too often, alumni overlook the many advantages of their alumni association membership and react negatively to the university's asks for financial support. However, Cauda's research showed they were not discouraged by the Hispanic population's lack of understanding of giving. Instead, they looked for opportunities to educate students and alumni to pay it forward to support the next generation of Hispanic students.

Understanding who Hispanic students are is important to the future of alumni connections. Using the ethnographic approach and the studies conducted by researchers of the Hispanic culture can help shape ways to best connect with these alumni. Ayala and Chalupa (2016) emphasized learning how Hispanics' different racialized, ethnic, and gendered experiences may be important factors influencing their outlooks on education and, ultimately, their attainment. Some ways to do this include focused and clear messages about how giving impacts the next generation of Hispanic learners.

Challenges of Hispanic Student Engagement

Although there has been an increase in overall Hispanic enrollment in higher education institutions, students from these backgrounds continue to face challenges once enrolled. Hispanic students who are the first in their families to attend college may face unique obstacles. Prior research has indicated Hispanic students are more likely to be first–generation college students and often experience adjustment difficulties at predominantly White institutions.

Students of color face many hurdles when compared to their White counterparts. According to Carey (2019), strong familial ties, supportive teachers, and early college exposure assist in Hispanic success in school. Carey shared the racial stereotypes Hispanic boys face regarding education, much of which is related to their academic capabilities could be. Carey cited a study from 1997 where Mexican American respondents shared feelings of "not being smart enough" (p. 386). They often mentioned, if they did go to college, they would struggle more than their White counterparts. However, Carey said peer networks for students of color are essential in achieving college goals.

Students of color often face many obstacles when attending college. Carey (2019) shared these obstacles are caused partly by individuals, situations, or other social circumstances external to the individual student. They extend beyond the individual learner into the macro-level influences and the local community and family networks that influence students' development. Carey's participants' families supported their college ambitions but offered little support for the college financial aid process. Carey used the term *familismo* to mean the family's needs supersede the student's desires. *Familismo* guides many Hispanic youths' decision making when deciding on their college dreams alongside familial responsibilities. In addition, some see going to college as part of their responsibility as a son, brother, cousin, etc. In Knight et al.'s (2004) research, many shared going to college was their responsibility, and then it was their responsibility to watch out and guide other family members who attend college after them. Hispanic parents who may encourage their children to live at or stay close to home during college to keep them within the family network create another obstacle. Family in the Hispanic culture plays a more significant role in HE attainment than other families. Carey (2019) wrote:

He was couched in his ambitions and familial responsibilities. He wanted to attend a highly selective college or university but knew securing a scholarship to such schools would be difficult. So, he resigned himself to attend any college—even a less selective one—if it offered him a generous scholarship and lessened his family's expected financial burden. (p. 22)

It is interesting to look at family involvement through this lens. Typically, family involvement is positive in White, middle-class families. Knight et al. (2004) shared research has shown families whose parents are involved in their children's schools tend to do better in school. Involved families attend more financially well-off schools and live in more affluent neighborhoods. These children are likelier to do better in school, have higher GPAs, and attend college. Education is essential to these families. Knight et al. suggested creating links between families and schools could increase college access for all students. They shared it is important to recognize how families conceptualize education for their children. Hispanic families do not ignore the importance of family and education; however, they often are balancing education with other family responsibilities. Education can take a backseat when it comes to family obligations. Understanding that Hispanic students are balancing other commitments can help not only K–12 schools but also higher education institutions. Alumni associations can use this understanding to find ways to engage Hispanic alumni.

Cortes (1995) encouraged the exploration of the traditions of giving within the Hispanic community, noting Hispanics give a smaller percentage of their household income than their White counterparts. In addition, the Hispanic community's practices and patterns of giving are much different. Cortes found Hispanic giving was more familial, and they were more likely to give to family or church. Using this knowledge, institutions can potentially create a sense of

giving in Hispanic alum if they feel the institution was a family to them. Or if they can see their "family" receiving the benefits of their monetary or nonmonetary giving.

According to Barnett (2022), in addition to creating engaged alumni, staff who look like the institution's alumni are also important. Lum (2014) discussed advancement or donation relations as a career are not well known in some parts of the world. Some cultures do not have experience or history with the term alma mater and understanding university traditions. Alma mater and alumni do not translate. Lum suggested, as student populations become more diverse, there is a need for more racially inclusive advancement staff.

Giving trends by individuals from minoritized groups are focused on families, friends, and churches (Jones, 2010). In a qualitative study of nine Hispanic participants at a predominantly White Jesuit institution in California, Cabrales (2013) found alumni more likely to give to institutional programs aimed at students from their culture. These alumni became compadres (friends) of the institution and *madrinas/padrinos* (sponsors) of specific students or programs they supported.

As alumni professionals begin to understand the literature on diverse demographics, associations then can shift their engagement efforts. Grant and Schiller (2022) wrote:

> [In an] inclusive culture, all colleagues and constituents see themselves as essential parts of the present and future of the organization. All are welcomed and encouraged to bring their full selves to the organization—their diverse backgrounds, experiences, talents, characters, and perspectives. An organization's core values inform how it goes about its work in fulfilling its mission. In addition, they shape the behaviors of those working for the organization. (p. 27)

DEI Initiatives Among Alumni Associations

As alumni associations work to find ways to engage all alumni and ensure their engagement efforts match the changing demographics, they can research what other institutions are doing to be successful in this endeavor. This will be crucial for continued success. Gasman and Bowman (2013) recommended developing material that profiles alumni who represent the diversity at the institution, which also aligns with their recommendation for the institution to make a formal commitment to diversity. Finally, Gasman and Bowman stated alumni of color may be looking for explanations for mistreatment in the past and genuine warmth from their alma mater. They also shared alumni of color want to be involved in decision making and giving. Alumni organizations can incorporate these changes to create a more meaningful outreach to alumni of all colors and backgrounds. Many institutions have done this. Numerous alumni association websites reflect DEI statements and commitments to change. In addition to statements, there are efforts to offer more diverse events, training, and connections for all alumni. One example of a DEI statement comes from Penn State's diversity, equity, and inclusions website homepage:

> The Penn State Alumni Association is committed to fostering a diverse and inclusive membership, one where all identities, experiences, and backgrounds come together to create a strong and welcoming alumni community representative of the Penn Staters it proudly serves. (Penn State Alumni Association, 2022, para. 2)

Research examining how networks contribute to social change suggested groups must define and pursue a common agenda and share information across network members. Campbell and Baxter (2019) conducted a case study providing insights into how alumni associations enact social change—an outcome rarely identified in scholarly research yet

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practically crucial for higher education goals. They highlight how alumni associations adopted a

national focus despite their diverse priorities when taking on social issues in local contexts.

Efforts to influence social change were sustained through strong relationships among group

members that allowed associations to persevere despite financial and time limitations. These

findings suggest the importance of drawing on the experiences of nationally oriented social

change organizations to inform the existing alumni associations and scholarship programs in

diverse contexts. Research like this is very uncommon among alumni associations. However,

research like this and mine will inform the future of alumni engagement strategies. Grant and

Schiller (2022) wrote:

> A diversity, equity, and inclusion statement allows an organization to express—clearly
>
> and publicly—its commitment to DEI, how that commitment connects to the mission and
>
> values of the organization, and how its commitment applies to its employees and
>
> volunteers and their work with the organization's stakeholders and constituents. Every
>
> organization needs an organizational diversity, equity, and inclusion statement that is
>
> embraced and internalized by employees and key stakeholders. (p. 32)

Drezner and Huehls (2015) shared the notion of satisfaction across alumni of different

races. An absence of diversity in giving in higher education can be seen. According to Garvey

and Drezner (2013), "Minority alumni have unique histories with their colleges and universities,

sometimes making it difficult for them to look past negative and marginalizing experiences to

create meaningful connections and mutually beneficial relationships with their alma maters" (p.

74). The failure to make a "return on their investment" of time and energy by a homogenous

fundraising profession and ranks of institutional leadership has also led to a failure to engage

these alumni, perhaps further isolating them from the pride, commitment, and devotion typically required to support their alma mater.

Summary

The research has helped provide an understanding of what makes an engaged alumnus and what young and diverse alumni seek to continue to want to connect with their alma mater. Some of the ways young alumni want to connect are through career development and early engagement. The literature overviews changes in demographics at HEIs, but not how alumni associations have addressed these changes. There also has been an overall commitment to DEI initiatives. Alumni associations can assess these items to create new impactful and long-term solutions for alumni engagement.

As university leadership attempts to understand the factors affecting alumni loyalty to their alma mater, the literature highlights the need to make policies and decisions to enhance students' undergraduate experience. Drezner and Pizmony-Levy (2021) stated universities should consider the long-term implications of standard practices affecting belonging, such as lack of diversity in the student body and faculty, large classes, adjuncts, the graduate cocurricular experience, and more. According to Drezner and Pizmony-Levy, these decisions might have a long-term impact on alumni engagement and their desire to give.

Caulkins et al. (2002) discovered the needs of donors are changing. Today's donors are moving away from "checkbook philanthropy," where a donation during a pledge drive covers the obligation of giving. Young donors favor a more hands-on giving style, focusing on solving issues and problems. Additionally, these young prospective donors tend to see their gift as an investment signaling a loose partnership with the institution and a desire for a strong working

relationship. These trends and changing student demographics will have significant implications for alumni associations and how they engage with alumni.

Although a college education was once only attainable by wealthy White males, colleges and universities are now more inclusive and have an increase in women and individuals of color. Although student demographics have changed, the demographics in the pool of alumni engagement have not and are still dominated primarily by wealthy, older White men. Addressing this gap and finding ways to engage all alumni is needed for alumni associations to match diverse student demographics. One way to do this is by fostering authentic relationships with alumni, making them more engaged and a desire to be part of their alumni community. Student retention and success are impacted significantly by feelings of belonging created by the university, and long-term engagement strategies can sustain relationships between the alumni and the university.

Barnett (2022) shared diversity is a well-documented issue in advancement. According to a 2015 CASE survey of advancement offices, most fundraisers are White, and women are underrepresented in advancement leadership. Barnett (2022) shared, in a 2020 College and University Professional Association for Human Resources survey, "13% of university fundraisers identified as non-white. Meanwhile, today's students, alumni, donors, and volunteers are becoming increasingly diverse" (para. 21). According to Grant and Schiller (2021), "Those who have not yet figured out how to embrace that opportunity are quickly being left behind, engaging fewer constituents and raising less money" (p. 15).

Reasons for adopting DEI in advancement and alumni engagement go beyond trying to reach more alumni and raise more money for the university. As Barnett (2022) wrote:

There's a perception that this work should be easy in advancement because so many

people are committed to diversity, but to do this work, you have to be committed to

making structural change because the status quo wasn't built with everyone in mind.

(para. 24)

The research has not focused on the importance of organizational change theory.

However, according to Barnett (2022), organizations' focus and efforts are important factors in

making any changes. Research on the importance of organizational change will create long-

lasting changes and new engagement opportunities. As Grant and Schiller (2021) wrote:

With a diverse team and an inclusive culture that celebrates and engages the power of the

team's diversity, advancement programs are well-positioned to approach donors and

other constituents more inclusively. Diversity and inclusion within the team, however, are

not enough. Successful teams apply inclusion in their engagement and fundraising work.

(p. 26)

Various university departments can work together to increase DEI efforts. One area

where advancement and diversity office teams can work together is outreach to diverse donors.

Barnett (2022) used an example of a leader in the development space, Maurice Gipson. Gipson

shared meeting plenty of Black alumni who graduated decades ago "who feel they graduated in

spite of the institution, not because of it. After graduation they went on to lead incredible lives,

but [they] don't feel connected at all to their alma mater" (Barnett, 2022, para. 38). Using

Homans's (1958) social exchange theory can help alumni professionals understand the lack of

engagement in various alumni groups, which might feel like alumni from Gipson's example. In

addition, diverse alumni typically identify as part of a community based on their demographics

or interests. How can alumni associations use this concept among specific groups or

demographics and connect with all alumni using social exchange theory? The research I conducted will help associations learn ways to use social exchange among all demographics and, in turn, create a more engaged alum. By understanding the changing demographics of alumni populations and by adapting engagement strategies, associations can help ensure they are meeting the needs and expectations of all alumni, regardless of their background and experience.

Overall, the literature emphasized the importance of alumni engagement and how the university's demographics continue to become more diverse. The focus of the current research conducted with alumni was on young alumni engagement efforts. There is also little research on how DEI knowledge can impact alumni engagement. Much of the current research has focused on financial giving. However, having engaged alumni is more than about how much they give financially to their alma mater. The concept of belonging is important not only for student retention but also for alumni engagement. When alumni feel a sense of belonging and connection to their alma mater and to their fellow alumni, they are more likely to be engaged and to stay engaged. Alumni associations can also use social exchange theory to develop new benefits and services tailored to the needs and preferences of different alumni demographics.

CHAPTER THREE: METHODS

This study aimed to understand how alumni associations in Research 1 (R1) universities engage increasingly diverse students to facilitate alumni involvement upon graduation. Using Homans's (1958) social exchange theory helped me explain levels of engagement among alumni at the institutions and why alumni choose to engage with their alma mater. I drew upon Lewin's (1947) organizational change theory to assess how alumni associations adapted their staff structure to meet the needs of the alumni. I asked the following research questions:

1. How do university alumni associations address the changing demographics of the student population?

   a. How do alumni associations engage with diverse demographics and use their chapters and special interest groups in doing so?

2. How do alumni associations narrate their experiences with diverse member engagement?

I used a qualitative comparative case study to gather data from two southwestern R1 university alumni associations. This chapter outlines the methods used for data collection and provides a description of the sample, analysis of measuring alumni engagement, and procedures.

Methodological Approach

Research on alumni engagement has been predominantly quantitative, using survey results to analyze trends and predictive behaviors. However, research has not explored on adapting alumni engagement efforts to meet the needs of alumni to engage them in meaningful ways, specifically in Hispanic-serving institutions (HSIs).

Qualitative researchers collect data in a natural setting sensitive to the people and places under study, and qualitative data analysis is both inductive and deductive and establishes patterns

or themes; the design helps gain a deeper understanding of what is being studied (Creswell, 2007). The comparative case study methodology explains comprehensively how alumni associations engage their changing demographics. According to Ortner (1984), comparative case studies are well suited to social research about practice and policy. Ortner (1984) shared, "By practice, it refers to social actors with diverse motives, intentions, and levels of influence work in tandem or in response to social forces to routinely produce the social and cultural worlds in which they live" (as cited in Bartlett & Vavrus, 2017, p. 1).

The comparative case study helps discover and aid in problem solving. Bartlett and Vavrus (2017) described the comparative case study as heuristic, which means to "discover." According to Bartlett and Vavrus (2017), "This discovery comes from three axes (horizontal, vertical, and transversal), which aid in potential direction for comparison" (p. 7). This model calls for a process approach to trace how and why the phenomena occur. An open-ended, inductive approach to discovering what these meanings and influences are and how they are involved in these events and activities is needed in this methodology. Lastly, Bartlett and Vavrus shared comparative case study re-envisions key concepts in case study research: culture, context, and comparison.

The goal of comparative case study research is to "develop a thorough understanding of the particular at each scale and to analyze how their understandings produce similar and different interpretations of the policy, problem, or phenomenon under study" (Bartlett & Vavrus, 2017, p. 41). Using this method helped me to understand how these associations engaged and addressed changing alumni demographics. The two universities are called by their pseudonyms, Palm Tree University (PTU) and Saguaro University (SU), to maintain their confidentiality.

Data Collection

I collected and analyzed various sources of data in this qualitative comparative case study of two southwestern R1 universities. First, the universities selected for this study were used for benchmarking at my home institution. They are also similar in current student demographics to my home institution and are either designated as HSIs or on track to be HSI. Lastly, their alumni size of over 500,000 matches my home institution. It was important for this comparative case study to ensure the universities I selected shared similar size, demographics, and benchmarking to my home institution to analyze the data so I could make suggestions to implement at my home institution. The data I analyzed and compared included: (a) institutional data highlighting the university's demographic data; and (b) qualitative interviews with Alumni Association staff at SU and PTU.

The alumni association staff at SU and PTU were interviewed and recorded via Zoom for participants' convenience. Throughout the interviews, I followed a set of open-ended questions (see Appendix B). As interviewees provided insight into the operations of their association, new questions emerged for a deeper understanding and discovery of practices. This process aligned with the comparative case study method and discovering how these associations engaged their alums. Only one interview with the staff identified in Table 1 was conducted; however, once coding began and additional questions arose, I reached out to the interviewees to gain further insight as needed. As much as possible, the individuals interviewed at SU and PTU occupied parallel positions.

Table 1

Staff Interviewed

Saguaro University (three staff members)	Palm Tree University (six staff members)
CEO of Alumni Association	Associate vice chancellor
Vice president of engagement	Founding director of diversity programs and initiatives
Vice president of communications	Associate director of diversity programs and initiatives
	Senior director of alumni marketing
	Senior director of alumni affairs
	Director of alumni marketing and communications

These staff members provided an inside look into their associations and how they engage with their alums. This insight highlighted the comparative case study's value and allowed me to see if there were similar processes at the institutions and their similar or different outcomes. It also highlighted distinct phenomena related to similar trends or pressures. Overall, "comparison allows us to better address how insights generated in one study transfer to other cases; in this way, comparison allows us to make stronger arguments for the significance of research" (Bartlett & Vavrus, 2017, p. 15).

Once initial interviews were conducted and recorded, interviews were uploaded to a qualitative data system, MAXQDA, to code data, add additional field notes, and keep all interviews together in one location. I used a 2-step approach to access these alumni associations at the designated R1 institutions. The first step included my network at my home institution. The CEO of my home institution's alumni association reached out to the alumni leadership at SU and PTU to introduce me to them. From there, I reached out to confirm their willingness to participate in the research. The sample email they were sent can be seen in Appendix A. Once the universities confirmed and agreed to the Zoom interviews, I followed up and met with them via Zoom. This brief meeting allowed me to explain my research further, answer any questions, and ensure I had an accurate list and contact information for the staff members I interviewed. I adjusted Table 1 to include any additional staff I interviewed. Upon IRB acceptance, interviews

were scheduled for early spring of 2023 via Zoom. Data gathered from SU and PTU included (a) quantitative data on alumni demographics and (b)recorded answers to the interview questions. The interview questions can be seen in Appendix B.

Once interviews were scheduled, they commenced via Zoom. Interview data were collected via Zoom recordings and stored on the Zoom cloud. Interviews were then uploaded to the software platform MAXQDA. This software was chosen as I could import handwritten notes and audio/video files and create transcripts based on the data. These transcripts assisted in my comparison of the two universities' strategies and processes. MAXQDA also helped me to manage the quantitative demographic information I received from the universities. Lastly, MAXQDA seamlessly quantified my qualitative data and enriched the analysis with evidence and plausibility. MAXQDA allows for coding of transcripts and grouping of codes from various interviews into one place. This allowed me to see clear themes of alumni engagement strategies at PTU and SU.

The validity of this study was its trustworthiness. There are numerous methods to ensure the trustworthiness of qualitative research. One is using multiple sources of data. For this study, interviews with numerous staff members of the universities were conducted, and data were coded and analyzed based on the theoretical frameworks of social exchange theory and organization development theory. Second, I actively built trust with my interviewees, beginning with my initial outreach and throughout the interview. Finally, I continued to build trust through member checking throughout the interview. This allowed me to repeat back what I was hearing in the interview to ensure understanding. In addition, according to Merriam and Tisdell (2016), another method to ensure the validity and reliability of qualitative data is providing rich descriptive data. Chapter 4 provides extensive summaries of the interviews to contextualize the study.

Analysis

I used inductive and deductive reasoning to make sense of the data. I used inductive reasoning while working back and forth between the themes and the database until I established a comprehensive set of themes. Using deductive thinking, I built themes that I checked constantly against the data. As Creswell (2007) wrote, "The inductive-deductive logic process means that the qualitative researcher uses complex reasoning skills throughout the research process" (p. 67).

I analyzed the qualitative data, working inductively from particulars to more general perspectives, whether these perspectives were called codes, categories, themes, or dimensions. I then worked deductively to gather evidence to support the themes and interpretations and to triangulate the data to ensure validity.

To analyze the interviews, I followed Moustakas's data analysis as outlined in Creswell (as cited in Creswell, 2007): (a) develop a list of significant statements, (b) group the significant statements into themes, (c) write a description of "what" participants experience with the phenomenon (textural), (d) write a description of "how" the experience happened (structural), and finally (e) describe the phenomenon by combining textural and structural descriptions.

In addition, I collected quantitative data of the alumni demographics at both R1 institutions. These data helped highlight and paint a picture of who the alumni were, where their alumni lived, and changes in the institutions' alumni demographics.

Once all data were collected and analyzed for trends, the final analysis was employed using the theoretical framework. Analysis of the data using the social exchange theory aided in a deeper understanding of alumni engagement at the two universities. Lastly, analyzing the two universities' approaches to outreach and alumni engagement strategies highlighted the

organizational change theory. These analyses could create suggestions for other alumni associations to construct to engage more diverse alumni.

Researcher Positionality

In qualitative research, the researcher's role is that of a data collector. There are advantages and disadvantages of researchers serving in this capacity. Merriam and Tisdell (2016) found the following advantages: (a) being responsive and flexible, (b) clarifying data, and (c) following up to verify accuracy. Given the researchers' intimate role, biases exist, and examining one's location and positionality is useful. As the researcher, I reflected on my position and interactions with participants to address these biases. I work at a large HSI R1 institution that uses the two R1 institutions I am researching as benchmarks. This position was made clear to participants in all outreach and communication. Also, I am a fundraising professional, and this study is of great interest to me as it identified the motivations for alumni engagement and how these institutions engage their alums. Results of this comparative case study will help alumni associations and fundraising professionals create new ways to engage a diverse demographic of alumni that matches the institution's demographics.

Summary

This chapter outlined the methodology I employed in the study. The comparative case study methodology addressed the research questions, providing rich, in-depth data for analysis. Prior research on alumni engagement strategies has focused primarily on quantitative survey data, and this study provided an understanding of new ways to engage with diverse alumni through interviews with alumni association staff. I outlined the research procedures, methods, and data analysis. The comparative case study focused on two R1 southwestern universities. Their engagement and outreach strategies will assist other institutions in engaging with a more

diverse demographic that mirrors their current student population. I also outlined the

trustworthiness of the data and researcher positionality. Chapter 4 provides a qualitative analysis

of the interviews and the quantitative demographic data of the two institutions researched.

CHAPTER FOUR: DATA ANALYSIS

Alumni associations across the United States have recently asked their peers how to engage more alumni as there has been a decrease in attendance, membership, and overall engagement among alumni. Many are trying to identify programs and outreach strategies to increase their alumni engagement. To address this overarching concern around engagement, I present cases from two Research 1 (R1) institutions that illustrate how they work to engage their increasingly diverse alumni demographics. Each university has been deliberate in its strategies to engage more alums, yet they have approached this goal differently. The cases provide a model for other universities to increase their engagement levels with their alumni. Administrators at both universities have attempted to understand their alumni and what they are requesting so they can engage with their alma mater.

The two universities I present in this case study are Palm Tree University (PTU) and Saguaro University (SU). At PTU, I interviewed the associate vice chancellor, the founding director of diversity initiatives, assistant director of diversity initiatives, senior director of alumni affairs, senior director of marketing, and director of marketing. At SU, I interviewed the chief executive officer of the alumni association, the vice president of communications, and the vice president of engagement. All staff names are pseudonyms.

As I present these cases, I draw on Homans's (1958) social exchange theory and Lewin's (1947) organizational theory. Two overarching themes were apparent at both universities. The first theme was around alumni identity (e.g., demographics, geography, career) and the association's engagement strategies with those facets of graduates' lives. Based on their alums' needs and their desire to find a sense of community based on affinity, the staff structure was significantly reorganized to meet these goals. A second theme involved intentional creation of

relationships rather than transactions. This relational shift was evident primarily based on the associations' funding models. Both universities have the same goal: to increase alumni engagement. PTU addresses this goal by growing its diversity networks and creating an archetype model. SU is expanding its community with a two-prong approach: engaging students and creating a pathway to engage alumni-owned businesses.

These cases represent how these two universities have recognized and responded to the changing demographics of their alumni. The primary response of PTU alumni leadership has been to create a new alumni archetype model and outreach to alumni based on whether they want to engage with the university by finding their niche. An alumni niche could be career, arts, health and wellness, or lifelong learning. This archetype model signals PTU is here for them through all stages of their life. In the case of SU, the focus is on creating alumni engagement tied to strong alumni pride in their alma mater. Similarities between the two universities include the importance of and emphasis on building community. Differences involve alumni membership models and outreach efforts, suggesting each university is at a different place in diversifying their alumni engagement. The rest of the chapter is divided into four parts. I will share Case 1, which focuses on PSU, and Case 2, which focuses on SU. A comparative case analysis of the two universities will round out the chapter with an overall summary of the data and literature.

Case 1: Palm Tree University

Introduction to PTU

PTU is a large, public, R1 university in a metropolitan city. Like many schools, PTU was founded as a teachers college and, after World War II, began a period of growth. PTU is both competitive in academics and athletics. Today, PTU takes pride in the diversity of their community and the access to education they provide. PTU's Fall 2022 data showed over 31,000

undergraduate and 14,000 graduate students. They are pursuing a Hispanic-serving institute (HSI) designation by 2025. Currently, 21% of their undergraduate population identifies as Hispanic. PTU takes pride in impacting society positively and bringing together a diverse student population.

PTU's alumni population is over 500,000, with 97% of its alumni living in the United States, and 3% living outside the United States. PTU defines alumni as anyone who has ever attended a class at PTU. This definition varies from other alumni associations' definitions; most alumni associations define alumni as anyone who has graduated from the institution. PTU also allows any alum free access to the alumni association events and benefits without a paid membership. This membership model differs from many other institutions, as many still have a paid alumni membership model. By moving away from a paid membership model, PTU has had to find new ways to identify the affinity and engagement of its alumni. However, by moving away from a paid model, they have moved from transactional to relational engagement efforts.

The PTU alumni association's mission is to enrich the lives of their alumni and offer ways to engage with PTU's future. This mission statement is on the homepage of their website—front and center. In talking with their staff in my interviews, they quoted this mission, which is something each staff member uses to drive their work. The mission reads, "Wherever you are in life or the world, your Alumni Association provides the bridge back to PTU."

PTU is highly volunteer driven and a nonprofit organization with a robust staff structure. The association provides scholarships for current students, career programming, and lifelong learning opportunities and connects alumni with networks worldwide. PTU has 150 networks led by volunteers who work to engage alumni outside the programming the association offers. These networks include regional networks, affinity networks, and diversity networks. The 12 diverse

networks include American Indian, Asian Pacific, Black Alumni, Mixed Alumni, Pilipino, Academic Advancement, Disability, LGBTQ, Latino, Muslim, Pacific Islander, and Undocumented. These diverse networks are specific to PTU's student and alumni demographics. They also are open to creating new diversity networks, and they recently added the disability network due to alumni requests.

PTU's robust staff structure has 50–60 paid employees who support various alumni engagement from career development, chapters and networks, marketing, events, and student programming. PTU's staff is diverse, and the demographics are similar to their alumni demographics. One of the staff members, Marisol, reflected on the importance of the diverse staff demographics:

> I really appreciate the range of diverse ethnic diversity I see in our department. I think it's essential. I think we have to elevate. How do we ensure that there are more opportunities for us to show up in our full self authentically because we're still working within a certain culture, institutional culture?

The age group of their alumni stands out as seen in Figure 6. Over 122,000 of their alum are in their 30s, followed by over 103,000 in their 40s. The third largest group of alumni, at over 81,000, are in their 20s. These statistics made me pause as a professional working in the university's foundation office. Looking at the age of alumni can be the first step in finding new engagement methods. To help with this, creating alumni events that invite all age groups will help with continuing alumni engagement throughout all life stages. Using some examples of how PTU has done this can help create new pathways for alumni engagement.

Figure 6

PTU Alumni Reported Age and Gender
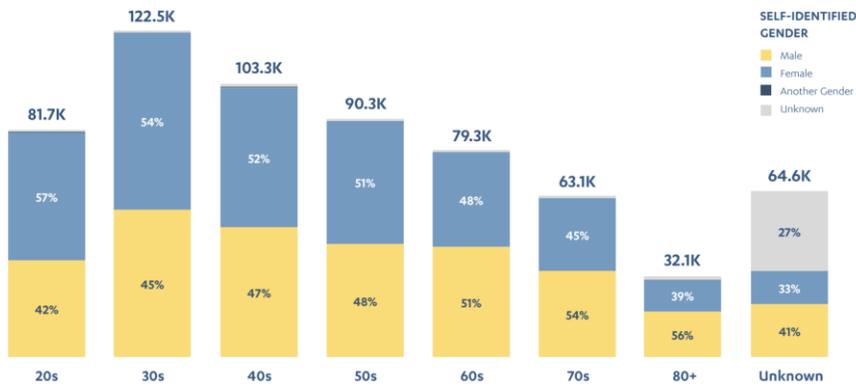
As a professional working with alumni, what also stood out to me with PTU's demographic data is that there were fewer White alumni as the age groups got younger (see Figure 7). This is not shocking, as access to education has increased diversity on campus. This also means the alumni database is more diverse. Being aware of this shift in demographics and how associations offer ways to engage can increase diverse engagement. Figure 7 includes PTU's alumni demographics, which highlights the increase in diverse alumni and the age group of their alumni.

Figure 7

PTU Alumni Demographics
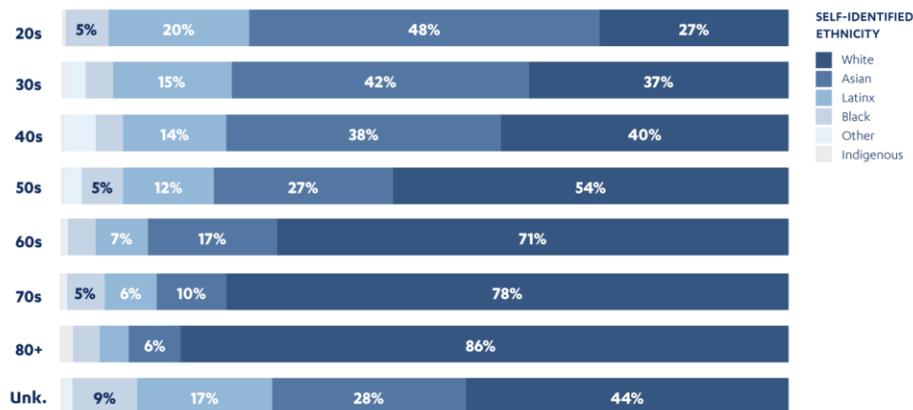
Overall, PTU's engagement and outreach to its alumni have been deliberate and embedded in everything they do. Their primary response has been to learn who their alumni are and attempt to engage with who they are. In the following sections, I present five related themes with examples. PTU has provided support for its diversity chapters with a unique staff structure. PTU has created a community among alumni, focusing on targeted events to increase engagement levels with its alumni and on deliberate marketing for increased alumni connection. Lastly, PTU is ever evolving to meet the needs of alumni with a new strategic plan by creating an alumni archetypes model.

Support of Diversity Chapters With a Unique Staff Structure

In 2012, PTU made an intentional step in addressing the changing demographics of its alumni by hiring an outside consultant to provide strategic changes to move forward, create more meaningful engagement with their alumni, and make staff structure changes the following year.

One of the significant changes included hiring a staff person to work directly with network groups. PTU staff separated their staff support structure intentionally into two different groups: one to support regional chapter groups and the other to support network groups. The new staff group was called diversity and inclusion, and they worked primarily to support the diversity networks and to create at-large opportunities to diversify engagement. PTU made a concerted effort to support and engage their diverse alum. This has allowed them to build intentional relationships and events to support their alumni network groups. Typical alumni outreach is based on zip code and graduation year. PTU's outreach has been more purposeful and has been based on how their alumni identify and what they hold an affinity for. Jared from PTU shared an example of a type of event they created for their diverse alumni. Jared shared they focused on

finding diverse lecture topics and partnered with ethnic studies faculty. PTU is working to offer various opportunities for alumni to choose how they want to engage with their alma mater.

In creating these intentional events, PTU staff has hosted some regular events, but they also have partnered with their diversity networks and have offered support to these groups to engage alumni. With the change in staff structure, building these relationships took time with the diversity network groups. Christina Tate, PTU's founding director of the diversity and inclusion alumni department, created what this new structure could look like. She would show up early to network meetings and stay late. She did this to start building relationships and trust with the groups. This reminds me of Wenger et al.'s (2002) community of practice, where they wrote, "A strong community of practice fosters interactions and relationships based on mutual respect and trust" (p. 28). Christina was building and putting herself in this community; if she had not, it would have been challenging to move these groups forward to what they are today. Christina shared many of these network groups have what she called "trauma" and do not think fondly of their time at the university. She focused on creating a healing space while connecting with their alma mater. She shared, "Alumni associations are to uphold traditions. But if we rewrite history, we can still uphold traditions, but in a new way to what the alumni are asking." Christina focused on creating a community for the network groups and researched her institution's history to help her do this. Christina's suggestion when creating new engagement strategies was:

> I don't think starting chapters is your first step. Many of the school's chapters are not the way chapters would like. If I put us on a level 1 to 10, chapters are like levels 6-7. You think about many things before that, which you may do as a one-off. Programming for these groups still happen, and you test pilot there. Ask yourself, can you do cultural programming? Start there.

This suggestion is related to how PTU wanted to diversify alumni engagement. They went

through a significant reorganization starting in 2012. Finding ways to engage alumni can be an

enormous undertaking, and many alumni associations might not know where to begin. As

someone who works with alumni engagement efforts, I often ask myself, "Where does an

association start if they want to make changes?" Christina suggested not starting with chapters

but with what the alumni association staff can do instead. Some of these suggestions included

staff hosting events focused on diversity like museum visits, lectures, scholarship support. Once

this is up and running, then associations can move to supporting and expanding their chapters.

After 5 years of building this model for diversity networks, Christina moved into a new

role. The new director is now supporting how the diversity networks will look as they continue

to grow and engage alumni. The new senior director of alumni affairs, Marisol Diaz, shared

where they are moving now and how diversity and inclusion are not just something her team

focuses on at PTU but also throughout the PTU alumni association:

> It is critical that we exist as a team, and we're a team. Diversity and inclusion are a team
>
> that collaborates with all the other teams like career alumni, career engagement, regional
>
> networks, marketing, family programming, and our student alumni scholars. We are
>
> actively connected and will work together to serve our 500,000-plus alums. But I
>
> appreciate that while it's an ongoing negotiation like where we began, we exist
>
> specifically, intentionally, explicitly dedicated to ensuring that these communities
>
> continue to feel like they have an avenue and that we are generating opportunities for all
>
> alumni of color. The fact that we continue to dedicate staff time and resources to this is
>
> essential. The fact that our leadership on board is essential, 10 years later. That's why I
>
> think having a team dedicated to this is essential because tacking that on to someone's

job description is really taxing and problematic. It's not just the fact that we have 12

networks. It's that we're battling issues that are deep and complex.

In my analysis, I found PTU had diversified its alumni engagement successfully because

of its intentional staff structure change. Typically, the same team in other alumni associations

supports regional and affinity chapters and networks, but these two groups are asking for two

different things. Using PTU as an example, I could see why separating regional and affinity

chapters and networks was crucial in connecting and diversifying alumni engagement

intentionally. PTU knew this work would take time. They hired the right people and were

patient. In this case study, separating the staff support for regional and affinity chapters and

networks, created more meaningful alumni communities and engagement efforts.

Creating Community Among Alumni

PTU has been deliberate in creating community among its alumni. One way they have

done this is by addressing any trauma alumni may have felt as a student. Christina shared:

> [The] one thing I feel like alumni do wrong right now is we're trying to build up the
>
> nostalgia of their undergrad or grad years. With most diverse alumni, good luck because
>
> most of those memories are not great, so it's a big pivot that we need to also be in the
>
> business of making new memories with our alumni. Perhaps some of that is healing.

Creating a space for healing is intentionally building a community among alumni.

Wenger et al. (2022) talked about building community as a living thing that is constantly

evolving: "As members build connections, they coalesce into a community. Once formed, the

community often grows in both membership and the depth of knowledge the members share" (p.

68). PTU has done this by first addressing the trauma and then by creating a healing space. They

then created new opportunities for engagement. With new memories come potential future opportunities to engage diverse alumni. Marisol shared:

> The one critical necessity of our program in my role is to cultivate opportunities, to repair some, or to create new relationships that are more humanizing, that are more meaningful, positive, and healing intentionally. Some of that without erasing the fact that racism still happens on a campus because it's happening in our world. It's happening in our country. If we keep high shying away from it, we're never going to get anywhere, and we are. We're in an incredible time of backlash, so I am more sensitive to that.

PTU found ways to create a healing space, and the staff did this by rebuilding their network connections. The number one way they did this was by building trust. Marisol, the current director of diversity and inclusion at the PTU alumni association, explained:

> How do we maximize opportunities for trust, building community, and building ongoing learning? And for some younger alumni who may not resonate with some of those experiences from a different generation or from their own personal journey. Those involved in a particular identity-based network may not share the same critique of the institution that some others in the same generation have, and just don't get involved.

Marisol's role aligns with Wenger et al.'s (2002) community of practice stage of sustaining. Communities grow and change throughout the years based on several factors, such as the community members or world experiences. Meeting with Marisol in a few years would be interesting to see how the diversity chapters have continued to mature and transform, like Wenger et al.'s community of practice model. Future studies could also examine these groups individually, as each group will not develop in the same way.

As a former alumni engagement director, I rarely saw alumni association staff use student development theory. PTU, however, has drawn on student development theory to inform their work. Christina, PTU's founding diversity director, shared two academic frameworks PTU used for developing its diverse community networks. These frameworks have aided in developing robust alumni engagement. Christina outlined this thinking:

There are two academic frameworks that are the foundation of this program. One is Hurtado's campus climate. If you look at the different types of programming, it overlays with the different dimensions of campus climate framework. In campus climate framework, there are things like behavioral diversity, compositional diversity, interactional diversity, organizational diversity, and histories of inclusion and exclusion. I made sure that our program hit all of those areas. There are different entry points that people can also come in. So that's one framework that that program is based on, which I use to help repair issues. When we got out of the trauma piece, which took about 5 years, then I started looking at Yosso's model of cultural wealth. So, wanting to have a more expansive definition of alumni giving and what alumni could give, I wanted to mark it in a different framework of gifts. That's where I left the program, and Yosso is the next framework.

Based on Christina's interview and how she learned to engage with diverse alumni intentionally, she recommended an alumni association (a) acknowledge any potential trauma, (b) create a healing space, (c) offer intentional programming, (d) intentionally support and build affinity networks and chapters, and (e) then navigate next steps for engagement strategies. Overall, this creates a space for community. These steps are how alumni associations can diversify boards and councils, trustees, mentors, and more to match student demographics—but

this takes time. PTU took 5 years to get to this next point. I will discuss their archetype strategic plan later, but PTU could not be at this level if they had not done this work first. The work PTU has done in the diversity of alumni engagement is why they are the leaders.

One way PTU has created a space for community among its alumni is through its events. Events are not a new strategy for engagement with alumni. All associations host events; however, most association events lean toward typical alumni engagement events like football watch parties, tailgates, golf tournaments, alumni hall of fame, and other ways to uphold traditions. These events are then repeated yearly without much variation. Where PTU differs is in moving away from a focus on traditional alumni events. Christina shared, "Because alumni associations are to uphold traditions, right? But if we rewrite history, we can still uphold traditions, but in a new way of what that looks like to what the alumni are asking."

Lewin's (1947) social exchange theory summarizes that people get involved based on what is in it for them. PTU's approach to engaging its diverse alumni is meeting them where they are. They addressed any trauma, provided a space of healing, and created robust engagement levels intentionally. Marisol shared, "I think that we are consistent in wanting to respond to and proactively foster conversations that are critical to building community, and I think part of that is recognizing people's lived realities."

Engagement Levels With Targeted Events

When people think about alumni engagement, events that uphold the university's traditions often come to mind. Often these are seen as fun events, but usually these fun events miss a critical piece for alumni engagement: moving alumni from attendee to the next level. For example, what is next if alumni are coming to your tailgates? Alumni associations could create something more meaningful using tried-and-true student engagement theories, although not all

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alumni will want to engage. This is okay, but if associations do not offer new ways to engage with the university, they will not diversify engagement.

PTU has focused on engaging alumni beyond just fun events. They have organized both fun and serious events for their alumni to engage in. Ava Long, associate vice chancellor of PTU, stated, "We look pretty deeply at alumni engagement. We look at, what do people choose to engage with? Where do they come back to? So, we follow those metrics really closely."

PTU also has been working on moving their alumni from readers of alumni communication to attendees at events to volunteers. Again, not all alumni will move through these modes of engagement; however, intentionally creating events and opportunities for them to choose their engagement can strengthen and help associations diversify engagement. Marisol from PTU shared what she feels is essential when planning intentional programming:

> That they have opportunities to engage in thoughtful reflective programming through a social justice lens that could just invite them to celebrate, appreciate the constant contributions of these communities, and learn more about issues affecting these communities. The goal is to participate and bring voice to get back to the institution.

> CASE (2022) standardized measuring alumni engagement across alumni associations. This measurement included philanthropic, volunteer, experiential, and communications. Like many alumni associations, PTU has measured engagement by attendance; however, PTU has also reconsidered its engagement measurement. This is evident in their archetype model, which I explain in the next section. Jared Smith, the diversity initiatives associate director, shared:

> Our goal is to track the engagement and not necessarily to push them in any direction specifically. It's up to them how they want to interact with us. However, we want to provide them with as many options as possible.

Jared shared, beyond the attendance number, "they measure how the alumni move throughout the different opportunities, rather than just solely gauging it on numbers." Jared said they intentionally measure how their alumni are moving to another step. They do this by offering different types of events at various levels. He shared level one events tend to be more fun cultural experiences. He shared the following examples of level one events:

> We've done things like the mob museum in Las Vegas or hosted an art gallery at the Hammer Museum. Or during the pandemic, we did a virtual magic show with an alum who was a magician at the Magic Castle. That's just an entryway into diversity.

Beyond these fun cultural experiences, they dive deeper into diversity events and host events like discussions with faculty or panel discussions about current topics. The more serious, more profound events get less engagement from their alumni, but they are actively hosting more than just fun events. They are intentionally creating spaces for alumni to choose how to get involved. This creates a pathway to diversify and engage new alumni who may not have been engaged. Marisol shared:

> It's going to be things like, yeah, let's go see this amazing art exhibit that will document how Black women making quilts in the South contains information to get enslaved people to freedom. Yeah, let's talk about that because you can get cookies and drinks all over the map on my campus. You don't need that for events from me. What you do need is understanding and exposure. So, we do a gradient. Some of it is just exposure. Let's go to the cool art exhibit, and then let's get some coffee after.

Overall, PTU has continued to reflect on why they are doing events and what new events could exist. They are not afraid to create new events. Abe Honest, director of alumni marketing

communications from PTU shared, just because something has happened for years does not mean you need to continue doing it. He said:

> Those aren't necessarily the best reasons to continue doing events and investing resources into it. But you know, as an alumni association, you can't necessarily stay static and keep doing the same thing. You just have to try different things and see what sticks.

As PTU moves into its archetype model, Abe shared measuring engagement is different. They want to know how alumni engage. The archetype model PTU has adopted is based on the last 10 years of evolution. They have dedicated their website to this, stating that learning in and out of the classroom does not stop when you graduate but continues in every stage of your life and that PTU and the alumni association are there for alumni. Abe shared one way PTU has implemented this is through the alumni newsletter. PTU has assessed alumni who read the alumni newsletter, clicked on something on the website, attended an event, volunteered, or more. By evaluating and looking at these numbers, PTU has moved to an archetype structure focused on moving alumni from a reader to someone who signs up and participates to someone who gives. This is an insightful measurement. PTU understands some alumni will only read the magazine, but to engage more alumni, tracking them and finding ways they could move through these engagement points could diversify an alumni association's alumni engagement portfolio.

Deliberate Marketing for Increased Alumni Connection

Given that their engagement strategies are deliberate, it is no surprise that PTU's marketing is also intentional. Throughout the interviews, I heard the importance of using open and accessible language in communication, which assists in engaging all alumni and not excluding them. This creates a pathway to engage more alumni. It is intentional. It is thoughtful.

As a former alumni engagement director, I have experienced firsthand how easy it is to engage with the same alumni, but engaging with the same alumni will not diversify and expand alumni engagement. PTU has addressed this. Ava Long shared:

> We have alumni all over the universe. So, to focus on this one small, active group. That's an important place to start. But let's open that door. I also say this to the networks because there's a certain type of alum drawn in to work with you as a volunteer and to be involved with you as a network. But there are many other folks that that's just not their jam.

PTU also has been deliberate in its engagement strategies through the alumni newsletter. Their focus has been to attract readers and then move them into action. This is easier said than done. They also understand some readers will remain readers, but their deliberate marketing efforts have focused on how to get their alumni excited and more engaged by tapping into their alumni pride. Abe shared:

> Based on their click-throughs, I can see what's sticking, what's not like. For example, I did a series on religious programs or religious groups on campus that have been around since they were alumni that continue to this day. This did not perform well. Then I had one on alumni-owned businesses based on different sectors like restaurants, wellness, retail, etc., which got great feedback. I had another one on career advice from a recruiter, and again, great feedback. But sometimes it depends on the topic.

PTU understands its alumni demographics and has used this understanding for intentional marketing efforts to increase engagement. Ava Long shared:

> The vast majority of our alumni don't identify by graduation year, and there's not that kind of a governance model even for undergraduates. So, we've created spaces for people

to come together based on their engagement. Our student newspaper is a huge success story for us, as they don't have any advisors. So, the alumni network is creating these advisor pods for editorial staff that consists of Pulitzer Prize winners. If we create the space for our alumni to do those things, they will engage.

PTU has reacted to its alumni needs and now can predict alumni content. They have remodeled their website to allow easier access to offerings and connections for their alumni. This did not happen overnight. Their intentional work has been 10 years in the making. The staff is dedicated to this; each staff member has bought into this vision. Because of this, they all commit to diversifying their alumni engagement. This can be seen from their website, alumni newsletter, events, social media, and more. One of the examples I love is how they curated a menu for alumni to choose how they want to engage. The alumni association staff can then track who is clicking and curate opportunities to engage their alum. Abe shared:

Here's the menu, and go ahead and pick what you like. The ones that have huge cross appeal will rise to the top. But you know, some are big on history stuff, some on research stuff, and some on "What's this particular alum doing?" Some are big on sports. It runs the gambit. And so that's how we attract a diverse interest. We tap into our diverse alumni's interest using this, and in a way that is the architect model. Regardless of where you're from, we have something for you.

Abe shared measuring alumni who move from reading, clicking on an article or an event, and then attending that event is next for PTU. These data would be insightful in measuring engagement levels. He also shared this will help them move beyond sending emails to 500,000+ alumni all the time but rather engage with specific alumni based on what they are requesting. I also see this potential as who is reading and not engaging. Using the current data, Abe continued,

saying they have succeeded in "finding ways to engage folks based on their interest, and not necessarily based on what we want them to be interested in."

Evolving and Meeting the Needs of Alumni With a New Strategic Plan by Creating an Alumni Archetypes Model

Because of the work PTU started in 2012, they are now on the leading edge of what is next to diversify and engage more alums. They have continued to ask, "How are we serving our alumni throughout their lifespan?" With this question in mind, they have moved to the next iteration of alumni engagement and are building a model around that question. This is groundbreaking when it comes to alumni engagement. This archetype model is 100% intersectionality at its finest. PTU is looking at the whole alumni to find out how to engage them more meaningfully. In some ways, this is not new. It is reframing the work they are already doing. Ava Long shared:

> Okay, let's look at how we serve our alumni throughout their lifespan. So, we've built a model around that, and then also, as a part of it, we have archetypes in terms of how alumni get involved. That lifespan model, those archetypes are really key to our next step in terms of how we're serving alumni and really moving away from a focus on networks because, you know, we'll still support those communities. But staffing-wise, our focus has changed because we now have about 560,000 alumni worldwide and a very open model. But very few of those are really identified with the network.

As PTU shifts to this experiential model where alumni can choose their experiences, they are attempting to meet their alum better. Jacqueline shared:

> This is why our new life stage model will be so effective. We'll home in on what our alums need and give them just that. We will no longer be focusing on younger alums. But

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rather, what do all alums need? But we offer a ton of ongoing career programs like the alumni mentor program, which is a one-year long relationship for hands-on industry-based skills Interview to sharpen interviewing skills life after degree.

The archetype model for PTU is all about increasing engagement. Abe shared, "We want to understand what would move them, based on the ones who are moving, and therefore come up with programming that helps facilitate that on a larger scale." Like Homans's (1958) social exchange theory, PTU builds from these alumni exchanges to increase engagement. Homans explained social behavior and the forms of social organization produced by social interaction

> by showing how A's behavior reinforced B's behavior (in a two-party relation between actors A and B) and how B's behavior reinforced A's behavior in return. This was the explicit basis for continued social interaction explained at the "sub-institutional" level. (as cited in Cook & Rice, 2006, p. 53)

I see this is action in PTU's interviews. PTU's archetype model is Homans's social exchange theory in action.

Summary of PTU Case Study

As I interviewed the staff from PTU, I found how PTU engages with its alumni could be cutting edge and inspiring to other associations. They told me other associations regularly reach out to them to learn from them; however, it took time to get here. It took hiring a consultant, a dedicated leader, and a team willing to do the work. It also is a team that does not strive to repeat what has always been done; therefore, they are again thinking ahead and moving to the archetype model. They also understand they cannot engage with all alum. However, they are committed to finding new ways to engage their alumni. Abe from PTU said it best: "[We are] finding ways to engage folks based on their interest, and not necessarily based on what we want them to be

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interested in." As someone who works to find ways to engage alumni, I find Abe's perspective to be an excellent reminder to alumni association staff as they seek creative ways to engage alumni.

When reflecting on PTU and its efforts to reorganize to meet alumni needs, I cannot help but think about Lewin's (1947) organizational change theory. Lewin's model is insightful for those looking to refine their missions and programs and engage in successful organizational change. Change in any organization can be challenging, but PTU succeeded in this organizational change. Like Lewin, PTU focused on the human side of interactions. PTU showed other associations how change could lead to engaging alumni in a new way. Based on Lewin's model, "Unfreezing creates in managers and employees a felt need for change, increasing their motivation to change. In this early stage, organizational members are encouraged through some operative mechanism to abandon old behaviors and attitudes and become open to accepting new ones" (Medley & Obasi, 2008, p. 487). If PTU had not hired a consultant to assess and create suggestions, I wonder how they would engage alumni today. Would they be moving into a new archetype model? Based on my interviews, I think the answer is no; however, because they were willing to see the need for change and embrace this change, they are an association others can look to as leaders in diversifying alumni engagement.

When considering Homans's (1958) social exchange theory, I think of alumni as customers. Homans linked customer perceptions of service directly to customer loyalty responses. Using PTU's examples of the services they provide to their customers (alumni), it is evident they have created a sense of loyalty in their alumni. Social exchange theory principles have been used to examine various facets of relational exchange. Blau (1964) described social exchange as "voluntary actions of individuals that are motivated by the returns they are expected to bring from others" (p. 91). The archetype model PTU has implemented is the promise to their

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alumni of the return they get from the alumni association: Long after graduation, their alumni association is there for them.

Case 2: Saguaro University

Introduction to SU

SU is a large, public, R1 university in a metropolitan city. It began its history over 140 years ago, ranks in the top 40 universities in the world, and is one the most diverse campuses in the nation. In 2020, SU received the Seal of Excelencia as an HSI. Their undergraduate population for Fall 2022 is over 40,000 undergraduate and 11,000 graduate students. Approximately 25% of their students identify as Hispanic. Their goal is to be first-class in education.

Their alumni population is over 500,000 and growing. Unlike PTU's no-pay alumni membership model, an alum must purchase a membership to be part of SU's alumni association. This membership gets alumni access to events, network systems, financial savings, career support, and more. Alumni can still connect to SU without a membership; however, without a membership, they cannot access member-specific benefits offered to SU alumni.

SU shared the demographics of its 500,000 alumni. Ninety-eight percent of their alumni live in the United States, and the other 2% live internationally. In looking at all their alumni, 51% identify as male, and 49% identify as female. As with other universities, many of their alumni are between 30 to 50 years of age. In the interviews, I learned they are working to engage business owners who naturally fall in this age range. Understanding the age demographics can help other alumni association teams with similar demographics look at ways other associations are trying to diversify engagement to ensure engagement among all age levels.

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The racial demographics of SU can be seen in Table 2. Over 50% of their alumni identify as White. Currently, most of SU's alumni are between 30–50 years old. With the changing student demographics as seen in Figure 5, these alumni demographics will change as the years progress. The SU alumni association is aware of these changing demographics and have been working to address how to engage their alumni. Although PTU began engaging more diverse alum over 10 years ago, SU is at the beginning stages. The interviews I conducted with SU reflected their active approach to engaging more alumni with the mindset of their changing demographics.

Table 2

SU Alumni Demographics

Ethnicity	Count	% of total
African American	13,288	2.33%
American Indian	1,315	0.23%
Asian American	43,725	7.68%
Caucasian American	295,273	51.84%
Foreign	30,491	5.35%
Hispanic American	50,309	8.83%
Other	526	0.09%
Not Specified	134,701	23.65%

The SU alumni association's mission is to unite alums around the world that strengthen the university, promote alumni accomplishments, and celebrate traditions. They do this through a few different avenues, such as events and communication to connect and engage their alumni, advocate on the university's behalf, enrich the student experience on campus, foster a welcoming environment, and preserve the university's traditions. The SU alumni association is a separate 501(c)(3) and is not governed by the university. They are one of only a handful of universities with this model. They are financially independent of the university and must generate income. Because of this focus, many of their alumni engagement strategies have a financial component.

One of the main ways SU connects with its alumni is through its 150 volunteer-led chapters. These chapters include domestic chapters in the United States and internationally. In addition to their domestic and international chapters, they have 12 affinity networks (e.g., Black, Hispanic) correlating with current student involvement opportunities. Hosting social and networking events is one focus of the chapters and networks. They also fundraise for scholarships for current students. Their website describes these chapters and networks:

> Members of our affinity networks share interests, experiences, a common bond or background, and offer support to each other. These networks are built to engage alumni around activities and philanthropy related to affinity connections. Networks allow you to connect and build relationships with alumni worldwide, support students, and show your pride.

SU has used the CASE's (2022) four measurements—engagement, philanthropic, volunteer, experience, and communications—for the past couple of years to gauge their alumni's current engagement levels. This has helped them create new engagement strategies they might want to employ. With over 500,000 alumni, the measurements for their Fiscal Year 2021 are as follows: Nearly 50,000 alumni support their alma mater philanthropically; 16,000 alumni volunteered both locally and nationally; 100,000 alumni participated in experiences like tailgates, watch parties, lectures, and more; and nearly 160,000 alumni reading the emails the association sends.

SU's robust staff structure has 50–60 paid employees. The staff supports various alumni engagement from businesses, engagement, chapters and networks, marketing, events, and student programming. Their staff structure changed 5 years ago when a new CEO was hired for the association. The CEO came from the private sector, unlike the leaders of most other associations.

Most other associations are led by someone who has worked in higher education. Because of their background, SU's association is different than any other association and has a business revenue focus.

In my interviews, I learned SU is attempting to diversify its alumni engagement in two ways: student engagement and alumni-owned business engagement strategies. This two-prong approach is unique as it tackles two diverse groups. The student approach is a long game to teach students the importance of why they should be an engaged alum. The business approach also ties into Homans's (1951) social exchange of value proposition. If alumni-owned businesses see the value of what is in it for them, appreciation for their alma mater, along with their devotion, can grow. Homans (1951) wrote:

> It is true that we often come to like the persons with whom we interact, it is also true that we are prepared to interact with persons we already like. That is interactions, and this particular kind of sentiment are mutually dependent. (p. 111)

Overall, SU's engagement goal has been emphasizing alumni pride in their alma mater. In the following sections, I present five related themes with examples. SU has worked proactively to enhance its engagement strategies by addressing the shift in the student population and the growth of its diverse alumni population. SU has been committed to creating a strong definition of alumni affinity. SU's focus on revenue generation is key to understanding their engagement practices with alumni. SU has shifted to a business-minded engagement strategy to engage 30- to 50-year-old alums. Lastly, SU has built and relied on a robust geographic network to help diversify alumni engagement.

Shift of Student Population and Diverse Alumni Population

Admission to and attending college have become more accessible to students, and universities are seeing a shift in demographics. SU has seen a huge shift in their demographics, partly due to legislation in their state mandating a certain admission percentage for top high school graduates. Cindy Mars, vice president of communications from SU, shared what is unique to SU is that "what [they] had forever was a generational tradition of attending the University of Texas." The shift in SU's student population to more first–generation students has impacted the SU alumni association and how they create their alumni community. SU alumni association has worked proactively to find ways to engage all their alumni and build a pipeline for future engagement. Cindy Mars from SU shared this shift in access to SU,

> is good for humanity, that the opportunity to go to SU is a total meritocracy, and if you work hard and you're brilliant, you will get in. That opportunity is going to more diverse groups. It's not just the old Country Club set who can dependably get in.

The interviews with SU demonstrated how they are actively in Lewin's (1947) organizational change model. They shared they have two sets of alumni. One set of alumni is part of generations of family members who attended SU and who place a high value on SU traditions. They also have a newer set of alumni that are not part of their family's generation of attendees. Having strong SU pride is one goal the alumni association wants to maintain. Cindy shared they are trying to teach the newer alumni Puma pride through student programming:

> We have a student membership and events like Puma Welcome and the Puma Exit, where we're trying to teach people about traditions that the Puma Alumni Association holds dear. We are cultivating and showing them traditions.

With the shift in student demographics, some SU traditions have been called to question. For example, the origin and potential racist undertones of their alma mater song have recently been questioned by their current students and some alumni. The song, which is sung at sporting events, graduation, and other alumni gatherings, is well known among SU graduates. But, in late 2020, the song divided the community because many current students and faculty wanted to abolish the song and write a new alma mater song. SU addressed the notion that this song, as a deep-rooted campus tradition, could be racist. They formed a committee to research the racist undertones. This is a prime example of when opinions could differ between the current student population and alumni. SU's current students demanded social change, and many alumni and donors threatened to pull resources if the tradition changed. SU was living in the balance of changing demographics and social justice. Universities with a strong generational alumni base might face similar struggles.

Throughout the rest of this case study, I explore how SU has addressed the changing demographics and how they have engaged more alumni while maintaining traditions and meeting current student and alumni needs. Overall, SU has tried to connect with its alumni from whom they never hear. Like many alumni associations, they have tried new ways to connect with alumni who are not engaged. SU has addressed what their demographics once were and what they are now. Stephanie Turner, SU vice president of engagement, shared:

> We were a rich White man's association, and so we knew that was something we didn't want to be or, at least perceived, all of it. We are more. We have such a diverse alumni base. We are looking at those gaps in the engagement of those not attending our events. Who are the grads we never hear from that are never monetarily giving back or answering our survey?

Creating a Strong Definition of Alumni Affinity

SU values strong alumni pride. SU is a university where, when you talk to proud alumni, you understand their pride in their alma mater. They feel a strong sense of connection to their community and have a contagious energy. This energy was infectious when talking to their association staff. It was clear there was pride in their university, and they wanted their alumni to feel this. Their alumni website oozes with phrases like "for people who love SU," "show off your pride," and "keep the SU pride alive." When talking to the staff, it was evident they have struggled to determine ways to spread this excitement to their alumni. In this section, I rename their mascot to the Puma because they want to build this Puma Pride and lifelong Puma mentality in their alumni.

In the interviews, the staff voiced their proactiveness in creating this Puma Pride. They have been working on this because of more recent shifts in alumni demographics. Years ago, SU was a legacy school. People were born in the Puma onesie, and their grandparents went to SU. Alumni grew up going to games and tailgates and knew they too would be a Puma one day; however, this shifted as admission to SU was given to more students. There are more first–generation students, and they need to learn the SU traditions. Cindy stated, "The rah-rah stuff has to be cultivated and fostered. It's brand new for many of these students."

The shift in student demographics has affected the Alumni Association's lifetime paid membership model. Stephanie from SU shared:

> [This shift] was so different than how the alumni association worked before because we didn't have to talk to people about joining, their parents, or their grandparents to join. They knew what they were doing. You go to the university. You get your life membership, and you graduate.

According to Stephanie, SU is now focused on communication with current students in a different way. They are assuming students do not yet know why they want to be involved with SU's alumni association. SU is using this mindset to create engagement strategies with students early to assist in the transition from student to alumni.

Because of SU's strong sense of Puma Pride, it has been a process for them to shift how they build their pride in their current student population before graduation. Creating this community of affinity reminded me of Wenger et al.'s (2002) community of practice. Wenger et al. studied how new communities are created. In the case of SU, the alumni community already existed; however, with a new generation of alumni, SU has looked to find new members who see the value and passion in this community. Wenger et al. (2002) wrote, "Passion alone is not enough to make a community. A community is driven by the value members get from it, so people need to see how their passion will translate into something useful" (p. 71). SU's vice president of alumni engagement, Stephanie Turner, shared they are working on this new community:

> We had to change how we talked to students, assuming they know nothing about what it means to be an alumni. We had to shift their mindset that it wouldn't just be 4 years of great memories. We had to teach them that they're never leaving us. We will be memories for the rest of your life.

SU has focused on engaging its students to diversify their engagement pipeline. By teaching current students the importance of being an engaged alum, SU hopes to create a diversified alumni pipeline in the coming years. SU has focused on forming affinity connections before graduation and have utilized their student association to help engage and teach current students, which has helped promote the value of paid alumni memberships. Stephanie shared:

[This approach] has been really helpful, and we haven't seen a reduction in our

membership going down, which so many alumni associations have at graduation. So we

know we're not doing it totally wrong. We're probably not doing everything right yet, but

we're heading that way.

She continued to say, using the student lens, they have shifted to ensure students know who and

what the alumni association is. This has helped convince early alumni why they should be

involved after graduation.

SU's alumni association has committed to expanding its student connection, which they

hope will grow the Puma Pride. Although they do not yet have data to prove what is working,

Stephanie shared they have changed how they do their student engagement. This commitment to

diversifying student engagement is a desire to create a community for a lifelong Puma. When

discussing college students, I think about the theorists Astin (1993) and Tinto (1993). These two

theorists' work can also play into alumni connections and the importance of creating an alumni

community. Researchers have theoretically and empirically linked persistence and degree

attainment in higher education to students' abilities to connect with a peer group and develop

positive relationships with faculty (Astin, 1993). Such relationships indicate how students have

integrated themselves into a college community's academic and social aspects, which Tinto

asserted is critical to students' 1st–year persistence decisions. I see SU creating the lifelong

Puma mindset using these same theories.

In SU's student engagement strategies, there is a strong component of teaching SU

traditions. One of these engagement strategies includes attending an SU camp at the beginning of

the school year to learn SU traditions like the fight song. As I mentioned previously, traditions

for SU are important, and cultivating an engaged alumni population means ensuring traditions

are taught and upheld. For SU, this is a community they are working to create. When reflecting

on Wenger et al.'s (2002) community of practice, I see SU in the phase of coalescing. As

Wenger et al. (2002) wrote, "During this phase, it is crucial to have activities that allow members

to build relationships, trust, and an awareness of their common interests and goals" (p. 82). SU

knows they have a strong affinity among most of their alumni, but they also see they need to

expand this affinity to new alumni. Cindy shared:

> Tradition is also tricky because not many younger generations don't feel dearly about
>
> traditions and feel that those can be racist, and it's not. You can't just say we're the
>
> keepers of tradition, and that's the net positive. Different audiences read different things
>
> into that. One way SU is teaching traditions to its new students is by hosting a camp. A 3-
>
> day summer camp where you learn about SU and all the cheers, traditions, and what it's
>
> like at SU. You also get assigned an older student mentor.

SU is invested in traditions; they do this so they can create a strong Puma community. Cindy

continued, "We've got to focus on our students because we can't wait until they graduate."

By building this affinity, the association expands its connected alumni worldwide once a

student graduates. They are working to create a community that promotes connecting people.

Cindy shared an example: "So if someone's looking to hire or mentor someone, we want that to

be a Puma."

Revenue Generation

Another theme throughout every interview was the revenue generation the SU association

needs to produce. Although it was apparent that they are passionate about creating lifelong

Pumas, many ways they do this rely on revenue generation (e.g., alumni memberships). A paid

alumni membership model is not new. This is a financial model that supports the operational

costs of the association. SU is independent of the university and receives no additional funding for operating expenses. This model then creates a need to generate revenue streams.

SU had to get creative to increase membership sales, especially given the shift in legacy alumni to a more diverse first–generation student body. Cindy explained recent graduates get a 1-year complimentary membership their first year after graduation. Cindy continued, "It's like a gift from the Dean of their college. They'll automatically become members, and they start receiving the magazine and getting some correspondence from us." The thought is that first-year alumni see firsthand the benefits of the association and then pay their lifetime membership moving forward. Regardless of whether their alumni paid the membership, all alumni can still participate in events, but an alum cannot access all the benefits without a membership.

In addition to the four CASE (2022) measurement guidelines, SU has used membership sales as a benchmark. Events have been structured around this paid membership model. A main event is one in which alumni host a sendoff for recent graduates. The goal of the event is for family members to purchase a lifetime alumni membership for their graduate as a graduation gift. SU has worked to show students the value of what the alumni association can do for them. It goes back to the lifelong Puma attitude.

Another primary revenue source for SU is class ring sales. Rings are a huge tradition at SU. However, SU understands this can be controversial because ring sales often are expensive and considered a status symbol. This is another example of how SU has worked on mixing old traditions with new ones in building a community of alumni. Cindy shared how SU is working to bring new traditions to this long-standing tradition:

Some people think having to purchase a class ring, which is not cheap, is elitist and will only appeal to certain people. The reality is when you go to our ring celebration, which is

under the SU Tower, and the rings spend the night in the SU Tower, that's kind of a new tradition. The tower is lit orange. The crowd is full of first–generation students of all races and creeds; their families are so proud of them. It's like we created where there wasn't one before, a moment, in addition to graduation, where everyone could just celebrate this milestone.

SU's alumni association has focused on creating strong affinity pathways and addressing how to engage more of its alumni. Some challenges in increasing alumni engagement at SU could be related to its revenue–generation focus. Revenue-focused opportunities often limit the population that can access them. A student might want to purchase a class ring or be part of the paid alumni association, but their focus is elsewhere early after graduation. Based on the research and reflecting on SUs changing student demographic and the impending shift in their alumni demographic, SU may need to rethink its revenue–generated models related to access and traditional low-income students. About access to education and low-income students, Bastidas (2021) wrote:

> The two primary institutional barriers present in most higher education systems are tuition fees and entrance examinations. Tuition increases are very clearly associated with diminished attendance and completion rates. The university will be out of reach for those from poor households and do not have significant financial contributions. (para. 13)

When combining this knowledge with SU's increased diversity, it may be harder to convince SU's graduates to see the benefits of—and pay for—a paid alumni membership or class ring.

Business-Minded Engagement Strategies

SU's leadership came from the business world rather than higher education. In my interviews, I saw how this background supports SU's business structure. This has worked well

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for SU because they rely on revenue generation. The SU alumni association CEO took a nonprofit, the alumni association, and runs it like a business in many ways. The CEO also is an alum of the institution. He combines his personal passion for SU and his business mindset to create new pathways for Puma Pride and for revenue.

One new strategy SU has employed to engage alumni is its business network. Cindy stated, "Our major, major push for the past 2 years has been supporting Puma businesses, so creating a listing of all businesses owned and operated by Pumas by category." In addition to the business listings, SU also has held celebrations to celebrate the fastest growing businesses. Although this strategy engages more alumni, it also creates a revenue stream, because these businesses can pay a membership to receive benefits.

The association's CEO, Paul Blue shared, "We've launched a whole B 2 B strategy for our business. That, I think, will be phenomenal, that I don't know that somebody stuck in the classic alumni paradigm would have discovered or thought of." This is a unique strategy because it is not just a celebration of alumni-owned companies. They are moving the needle forward on engagement. They are diversifying alumni engagement, not just through celebration but through an intentional connection. Cindy summarized these intentional connections and the need for this new initiative.

> We also needed to engage mid-career people, and we identified that these younger
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> business owners, and entrepreneurs, are probably the best way to do that, and they need
>
> us. They want to connect to talent, talk to each other, and talk to people who are a little
>
> more established than them in their industry, so it's probably got more legs than any new
>
> initiative.

I used CEO Paul's example to understand how this business network can engage more alumni. He shared how SU has engaged with business-owner alumni, not just alumni from an age demographic or physical location. Instead, SU has focused on the alumni as a business owner and what this means to the alumni and SU. This is unique and has allowed SU to curate more personalized alumni engagement. Paul shared:

> So, I graduated. And now begins all of the efforts by the University and the Alumni Association to engage Paul, the citizen, the alum, CEO of a business. So, my value prop as a consumer would be donations, scholarships, football watch parties, or hanging out with alums. But as a CEO, I would be interested in connecting with other businesses like me, and I'd be interested in finding alumni who also face similar business challenges. I'd also be interested in better ways to recruit from the university. And then, I would be interested in how the alumni association harnesses the 570,000 alumni.

Connecting Paul as a CEO to his alma mater taps into an alumni's understanding of the value their alumni association has for them. As Homans suggested, people who see things as a value proposition and what the value is to them are more likely to participate in something (as cited in Kullberg, 1977). In this example, if SU business-owner alumni see the value in being part of the SU business network, they are likely to join. SU has created a community of connections with a value proposition for alumni. Paul Blue, CEO of SU's alumni association, summarized the need for this business network:

> Why wouldn't we support our alumni-run businesses with the assets and resources we have as an Alumni Association? Now there's a reason for that. The reason for that is, I don't know a more significant time in a person's life when you're in the wealth formation phase, the person who reaches out and somehow helps you along that journey that

ultimately results in your success down the road. I would think that would stand you in pretty good stead when it came time to ask for a gift, you know, in 20 years. It's about the long-term pipeline of building the mid-career alum. The mid-career alum is the most challenging alum to capture because they're growing a business. They're raising their kids. They got their mortgage. They are not coming to your scholarship dinner. They're living their life. And so the Puma business network allows me to bring the institution to them instead of waiting for them to come to us, and it will enable us to help them in a scalable, repeatable impactful way. That is kind of the right thing to do, I think, just morally and ethically. As it is, we should be helping our alums in this way, but also, I think there's a long-term play in terms of how engaged they will be with us 10 years from now when they've sold their company for $100 million, and then wondering what to do with that profit.

The Puma business model came to fruition during COVID-19 when Paul said there was a need to support businesses. He saw many companies failing and struggling. Paul said he could not let that happen to their alumni. Paul embodies the lifelong "Puma support each other" mentality. The SU alumni association has continued to grow this engagement strategy and are hiring a full-time staff person to support these businesses. It will be interesting to see what new alumni they will engage with this new model. Part of the new staff's role will be tied to revenue generation because increasing business membership is needed. On top of an alumni business being listed in an alumni catalogue, the membership will unlock other benefits. Paul shared, "So for $1,000 a year, you unlock benefits beyond the free listing. So, there's something for everybody. This is a premium kind of business, and you can upgrade and get more benefits."

The Puma business model supports SU from a philanthropic and engagement arm. It also ties into their strong affinity. The idea is to tap into a community where alums want to support each other. If an alum is on vacation, they could look up a restaurant owned by a fellow alum. This goes back to SU's power of community and connection.

Robust Network to Diversify Alumni Engagement

Most alumni associations have chapters that support specialized alumni groups. These groups could be based on geographic locations or affinity connections. With SU's alumni population of over 500,000, they have relied on the chapters to connect alumni worldwide. In 2011, SU re-examined how they had been supporting their chapters. This change happened for many reasons, one of which was the university sharing they did not see the work of the networks. This led SU to examine how they could narrate and show what their chapters were doing. Prior to 2011, SU had not kept data on the chapters and could only share anecdotally what they were doing. The chapters hosted community service events, raised money for scholarships for current students, and held many social events. In sharing what the story with campus partners and chapters was, Stephanie said, "Oh, our chapters are great if you're looking for a game watch party or a happy hour." Stephanie said they could not prove all the other things the chapters did and knew there was a gap in understanding about their engagement in the alumni community.

In 2011, Stephanie worked with her team to begin a shift in telling the story of what chapters do for the Puma community. Stephanie shared it took nearly 3 years to make this shift. This shift was focused on how they were training and supporting their volunteers because these chapters were led by volunteers. Stephanie stated:

So, in 2011 we went through a huge initiative to revamp our chapter structure, and in 2014, after a couple of years of training, it was fully in process. And so, it did take us a

few years to get it right to work with our volunteers to get it right and then to have a full

year of training before we put it in action.

Stephanie shared part of the volunteer training was to add more than watch parties or

happy hours to chapter engagement opportunities. SU's staff was committed to this shift.

Stephanie explained:

It's easy to get people to come to a happy hour. But if we want them to focus on

something like a serious-minded content event. We've got to be able to provide, for

example, the speakers for that, or help them with best practices and everything else.

As SU strengthened its volunteer model to support networks, it created a president and president-

elect support system. They also have each chapter go through a renewal process each year. This

allows the staff at SU to support the chapters and ensure there is never a complete turnover or

years without a touch base or training. This model provides SU a space to continue building their

large affinity network.

Before 2014, when this new chapter system was implemented fully, all chapters received

the same resources. With this new model, chapters get different resources depending on their

activity (e.g., how much money are they raising for scholarships, volunteer hours, number of

attendees at events). This has helped the SU alumni association tell the story of what the chapters

do, because they can measure and share these data with their campus partners. Stephanie

explained, with these data, she could say, "This is what happens to graduates when they leave the

university. They're still giving to their local communities. They're still involved in this way.

They're still giving back to the university they graduated from." This model correlates to SU's

strong connection to what it means to be a Puma. Stephanie shared:

By bringing [chapters] closer to us and giving them a structure, we can tell you we are the SU Pumas worldwide. We do this many community service events under our brand. We do this many continuing education events on our brand. We raise this many scholarships.

Like many SU initiatives, the chapters also have a revenue component. They do not need to raise money to exist as a chapter. However, one focus of the chapters is to raise scholarship money for current students. The chapters are a prime example of Homans's (1958) social exchange value proposition and narrating the importance of alumni engagement to alumni. Before 2011, Stephanie explained SU had no control over chapters' engagement and no real insight into how much of an impact they were making, from alumni participation to giving. With this shift, the alumni impact story can now be shared, which helps build the Puma community. Stephanie said:

How do I know that an alumni is attending chapter events? I can see that they have given to the university. But how much better is it that I can prove that an alumni has been to so many events in their region that we're keeping them engaged? So, there's a correlation there. This percentage of people have been involved in a chapter structure, and they're giving. And so we're able to prove those members.

This model of regional chapters works for SU because the alumni association is committed to creating a community, and the chapters are one way they do that. Many universities are looking constructively at their regional chapters, and some have even gotten rid of them. However, with SU's focus on community and building Puma affinity and pride worldwide, I do not see them moving away from this model.

Summary of SU

Overall, SU has a strong alumni community and is creating initiatives to enhance alumni affinity while attempting to diversify alumni engagement. As someone who works with alumni engagement, it is nice to see how other associations are addressing this in the here and now. How SU works to engage its alumni is unique to its community and the alumni culture they want to create. Cindy shared:

> People are living longer, so the alumni base will keep growing and changing. Being so much more diverse, it's a different thing, and I think the shift has happened quickly. We are an industry that has always traditionally done things. That's just how we are. We're traditional. That's what alumni do. So, we need to shift, and I think people like Paul, who comes from the business world, are the right leaders for that moment.

SU's success in rebuilding its chapters can be attributed to the time and effort it devoted to the unfreezing process, which is a concept in Lewin's (1947) organization change theory. By investing in the unfreezing process, SU set the stage for successful chapter rebuilding by ensuring all stakeholders were aligned and committed to the change effort. This helped establish new norms and supported the organization's goals.

SU cares about its alumni and engages them using Homans's (1958) social exchange theory, which creates a system where alumni recognize the value of being part of the alumni community. SU's model of generating revenue through alumni engagement and using social exchange theory to create a mutually beneficial relationship is a sound strategy that can help the organization thrive in the absence of additional funding from the university.

Comparative Case Study of PTU and SU

According to Marisol from PTU, diversifying alumni engagement is "iterative, not linear." She continued, "Go back to what we know about human development, student development, and critical consciousness. It's not iterative." Iterative, simply put, means to continue adjusting and improving with every cycle. Much of alumni engagement can be seen as trying new things, getting feedback, and modifying the event in the future to meet the needs of changing alumni demographics. What I appreciate about both universities is they have diversified outreach by specific alumni interests and needs. By doing this, they each have found unique ways to diversify their engagement pipeline, which will build more diverse alumni engagement and a pipeline for future alumni boards and councils, trustees, philanthropic support for the university, and more, and thus more representative of the diverse student population.

It is complicated to do a comparative case study with two very different universities, because both associations engage their alumni in ways that are unique to their institution. The mode in which each university engages with its alumni also is tied to its institutional history. Through my interviews, I found PTU was further along in diversifying its engagement strategies because they have been moving toward this model since 2012, which is over 10 years of intentional work to diversify alumni engagement.

The analysis of PTU and SU's alumni associations was based on two theoretical frameworks: Homans's (1958) social exchange theory and Lewin's (1947) organizational theory. By comparing these case studies, I identified similarities and difference in their approaches to alumni engagement. Moreover, I drew insights that other alumni associations can use to inform strategies to implement similar efforts.

Similarities Between PTU and SU

Looking at both cases, I saw three similarities between PTU and SU. These similarities include enhancing the staff structure, building the alumni community, and focusing on rebuilding the alumni chapters. I will share more about these similarities, how they connect to the theories, and how this is part of diversifying alumni engagement.

The staff size and supporting a large and diverse alumni population align with what is known about Lewin's (1947) organizational change theory. Lewin's organizational change is based on whether the organization sees value in change. PTU and SU have adjusted their staff structure to meet their alumni needs and saw the value of change. Lewin observed people naturally resist change, gravitate toward what is familiar, and seek out comfort zones. SU and PTU are committed to not staying in their comfort zones and to seeking ways to engage more alumni. Both universities have restructured and have added team members to meet their alumni's needs. With the staff structure, they have created unique ways to engage their alumni. SU has done this by creating a new business alumni network, and PTU has done this through their archetype model to engage more alumni.

Both PTU and SU shared their struggles with how to engage their alumni. They both responded to this struggle by focusing on building community with their alumni. Their focus on building a lifelong connection has set them apart from other associations in how they found unique ways to engage with their alumni. Combining what is known about Homans's (1958) social exchange theory and Wenger et al.'s (2002) community of practice, I think PTU and SU have designed their alumni engagement to bring out the community's character and energy. PTU and SU have taken Wenger et al.'s design principles for communities of designing for evolution. Both associations are creating an alumni community that is evolving to fit their students'

changing demographics. They have opened a dialogue by listening to alumni perspectives within their chapters and networks, collecting data, and gathering surveys. They have developed community spaces for their alumni to connect, whether through the business network (SU) or through affinity groups (PTU). PTU and SU have focused on creating value and ensuring alumni see the value of engaging and see that they are there for their alumni no matter their life stage.

Lastly, PTU and SU have spent nearly 10 years restructuring their chapters and networks to support alumni based on their affinity connections. These groups are designed to create a sense of community and foster engagement among alumni who share similar interests, backgrounds, or experiences. Moreover, the statement alludes to Homans's concept of stimulus proposition (as cited in Kullberg, 1997), which suggests people are more likely to act when present stimuli are similar to their previous rewards.

In the context of alumni associations, this means creating alumni groups or networks based on previous affiliations or shared interests can be an effective way to engage and motivate alumni to participate. By connecting alumni with groups with which they have a significant affinity (e.g., former student organization or cultural affinity), associations can tap into their members' sense of belonging and shared identity, which can create a positive stimulus and encourage alumni to become more involved in their association's activities and initiatives.

Differences Between PTU and SU

When looking at both cases, I saw three significant differences between SU and PTU. These differences do not mean one university engages with its alumni better than another. Utilizing CASE's (2022) alumni engagement metrics, associations can see what new engagement efforts assist with increasing engagement levels. Alumni association staff can learn from these differences because every alumni association is different, and their alumni community is unique

to them. The three main differences between SU and PTU include the alumni membership model, the background and focus of the associations' leadership, and how they approach diversifying alumni engagement.

Alumni membership models vary from university to university. When alumni associations first began, most associations had paid alumni membership models, where alumni paid dues to be part of the alumni association and access member-exclusive benefits. Today, there is a mix of paid membership models and nonpaid membership models. PTU has created a new model to engage its alumni, and they moved away from a paid membership model over 10 years ago. They are providing more access to the association, and this is a recent trend with many other associations as well. SU is a membership model alumni association, and many of its initiatives surround keeping traditions alive and finding revenue-generating sources. Both models provide different ways to engage with alumni; however, at the core is the importance of creating alumni community.

A benefit of a paid alumni membership model is knowing who the paying members are. Often this means contact records are updated, and getting in contact with alumni is easier. Jacqueline Tanner, senior director of alumni marketing from PTU, said the paid model allowed for more affinity: "It was because I was making a declaration of affinity." If an alumni paid for their membership, then it signaled to the association the alumni was more engaged or wanted to be more engaged as an alum. Moving away from a paid membership model poses different challenges in engaging with alumni. Getting alumni to buy into why they should be connected to the alumni association after graduation is potentially one of the first hurdles. Homans called this the value proposition (as cited in Kullberg, 1977). The more value the alumni sees in paying for the membership, and the more benefits they receive, they will more likely purchase it, but they

will not buy a membership if they do not see the value. It is up to SU to ensure alumni see the value in alumni membership.

The other difference between PTU and SU is leadership. PTU leadership has a background in higher education and, with that, understands the student development theory mindset. They use this in their engagement strategies. SU leadership comes from the private sector and uses business knowledge to guide alumni engagement strategies. This business mindset fits well with SU as they also need to ensure revenue generation. In reflecting on this, I like the idea of combining both backgrounds, because I think this would be helpful in moving the associations forward.

Using Lewin's (1947) organizational theory model of unfreezing, change, and refreeze, alumni associations could implement changes in engagement quickly like the changes at PTU and SU. This model allows organizations to uncover patterns or problems and provide a fresh new way of thinking. According to Lewin (1947), "The transition period between the unfreeze and change steps make change more palatable to new hires and seasoned employees—two groups whose shared acceptance and understanding is critical to the success of your proposed organizational change" (as cited in "What Makes Lewin's Change Theory Ideal for Businesses," n.d., para. 15). This is ideal when considering a higher education setting and how fast it can move. Alumni associations can make changes while doing daily work.

Lastly, PTU and SU have different approaches to engaging and diversifying alumni engagement. PTU has worked to diversify alumni engagement for the past 10 years and is now moving to a new stage that would not have been possible if it was not for the work they started over 10 years ago. Associations can use PTU's engagement examples to see what they have done to diversify engagement to get them to where they are now. SU is currently implementing

initiatives to diversify alumni engagement, and other alumni associations can follow along to learn what might work for them in their future efforts.

A few things come to mind when I reflect on the two avenues SU shared about diversifying its alumni engagement. Connecting with students is powerful; however, it could be limiting, because it may produce a stereotypical picture of alumni engagement. The typical image of an engaged alumni often is a "rah rah" alumni who attends their regional chapter watch parties for games or returns to the university for homecoming and perhaps gives financially annually; however, only a portion of alumni participates in things like this. The "rah rah" alumni do not represent all alumni but rather a small percentage of engaged alumni. SU shared they are aware these traditions could be seen as White-alumni-centric; however, an association's engagement model is built off revenue–generated initiatives can pose challenges in creating new pathways to diversify engagement. Secondly, SU connects with alumni-owned businesses. Creating a networking platform to support fellow Puma-owned businesses, create possible mentorship connections with alumni and students, and develop a pipeline of potential board members, is excellent; however, this also is a limited pool of alumni to engage.

In reflecting on these two models, I see them as options for engagement but a bit limiting in scope. These examples limit the type of alumni that could engage with the associations. SU is addressing this and looking for ways to engage with more alumni who do not fall in these areas of engagement. It will be interesting to see what additional engagement efforts SU implements as they work to engage alumni in the in-between.

PTU's approach to engaging alumni through its archetype model is unique to them. This model allows the association to move alumni from readers to involved alumni intentionally. Many alumni associations attempt to engage alumni by offering initiatives they think their

alumni want. PTU is using this archetype model to meet their alumni where they are at. I think of this as an Amazon business approach. PTU will be able to track alumni who click on particular articles and attend certain events, and then they can curate personalized outreach to those alumni. For example, alumni from the business school could read articles on career networking and attend art exhibits with their local affinity group. PTU will then work to create outreach based on what those alumni are engaging with. This is similar to how Amazon knows a shopper might want a new water bottle or shoes based on their searches. In my assessment, this creates an intentional connection that could lead to more engaged alumni.

Summary of Analysis

This project examined two alumni associations' adjustments to new demographics and was guided by Lewin's (1947) organizational change theory and Homans's (1958) social exchange theory. Chapter 4 showed specific examples of two R1 institutions addressing these demographic changes. PTU is an example of a university that made operational changes to engage more diverse alumni 10 years ago. SU is an example of a university living through exploring initiatives to engage more diverse alumni now.

Drawing from these conclusions, alumni associations can implement similar efforts by focusing on community building, offering exclusive benefits, leveraging social exchange theory, communicating effectively, and focusing on alumni needs and interests. Moreover, associations can adapt their strategies to their unique context and objectives, considering factors such as organization structure, revenue sources, and program offerings.

Building on insights gained from the comparative case study approach, Chapter 5 will provide best practices other alumni associations can implement to diversify their alumni engagement. The focus is on a holistic approach that considers each alumni group's specific

needs and interests. The four levels of CASE's (2022) alumni engagement—volunteering,

experiential, philanthropic, and communication—provide a useful framework for diversifying

alumni engagement. Associations can develop initiatives catering to each of these levels based

on their alumni's specific needs and interests.

CHAPTER FIVE: DISCUSSION

"The 'remember when' moments become 'remember why' moments of action. This is not about being sappy. This is simply part of the strategic component of our lives: we are, we learn, we take, we give." (Gallo, 2021, p. 183)

Introduction

Current alumni research has addressed traditional alumni engagement rooted in fundraising, tailgates, and alumni chapters. Alumni associations are one way universities keep traditions alive at an institution; however, alumni associations should adopt more contemporary engagement relevant to their graduate demographics to diversify alumni engagement. By adopting more contemporary engagement efforts, associations can expand their alumni engagement. By expanding engagement, associations will see new alumni participating and engaging with their alma mater. For this project, I asked the following questions:

1. How do university alumni associations address the changing demographics of the student population?

    a. How do alumni associations engage with diverse demographics and use their chapters and special interest groups in doing so?

2. How do alumni associations narrate their experiences with diverse member engagement?

I wanted to understand how peer institutions were addressing their changing demographics creatively and creating avenues for their alumni to engage. I have worked at my home institution for over 12 years. Most of that time was spent in student services. Student services experts spend time finding ways to retain and engage their students. I now work in alumni engagement and philanthropy, and I combine my background in student retention and

passion for higher education with finding ways to engage alumni. After all, alumni are alumni far longer than they are students. As the world changes and access to higher education increases, alumni associations ask what they can do to can engage more graduates. Today's alumni are not the same alumni of years before. They are asking for different things to engage in. It is crucial to pivot and make changes to alumni engagement. As the previous generation moves on, the newer generation understands why a university needs them to be part of its alumni association.

By interviewing staff in the alumni associations from two Research 1 (R1) institutions, I learned more about how these two institutions have engaged their alumni. This chapter summarizes the findings, tying into Lewin's (1947) organizational change and Homan's (1958) social exchange theory. In this research, I found the importance of intentionally building community, understanding why social exchange matters, and leadership's commitment to organizational change. In this chapter, I explore these findings and provide suggestions other alumni associations could implement to change their alumni engagement. In addition to providing recommendations to alumni associations, I explore future research suggestions. My research is the missing gap that can propel future studies and applications of new alumni engagement strategies.

Summary of Findings and Conclusions

The comparative case study (CCS) approach is an effective method for examining the strategies different alumni associations use to engage their alumni. By comparing the experiences of two institutions, associations can identify successful practices and adapt them to their own context.

This project examined alumni engagement and diverse demographics guided by Lewin's (1947) organizational change and Homans's (1958) social exchange theories. I found the main

similarities and differences using a CCS. The research similarities included the staff structure, building the alumni community, and focusing on rebuilding their alumni chapters. The three main differences included the alumni membership model, the background and focus of their leadership, and their approach to diversifying alumni engagement.

Lewin's (1947) organization change model emphasizes the importance of unfreezing, changing, and refreezing to make lasting changes in an organization. This model can be useful in helping alumni associations understand the need for change and how to create a supportive environment that fosters engagement. PTU has diversified its alumni engagement successfully because of its intentional staff structure change. Typically, the same team in other alumni associations supports regional and affinity chapters and networks, but these two constituents are asking for two different things regarding engagement. PTU is an example of why separating regional and affinity chapters and networks is crucial for intentionally connecting and diversifying alumni engagement. PTU committed to this work 10 years ago, and they hired the right people and were patient in making the changes. Marisol from PTU shared:

> I think having a team dedicated to this is essential because tacking that on to someone's job description is really taxing and problematic. It's not just the fact that we have twelve networks. It's that we're battling issues that are deep and complex.

Breaking up regional chapters and affinity networks in terms of staff structure and support can be a first intentional engagement strategy to diversify alumni engagement.

SU also has used the organizational change method when looking at their regional chapters. After a year of freezing and implementing changes, they built their current model of regional chapters on the importance of Pumas supporting Pumas. SU is committed to creating a community, and the chapters are one way they do that. Stephanie shared the importance of

building the community with the regional chapters is that alumni can see the university being

part of their life daily. She said, "I think that the geographic chapter still matters so much

because I'm much more likely to run into a Puma at the bar than a Puma involved in the same

way I was as a student." SU is building off students' shared experiences rather than a specific

affinity. One way to create community among alumni is by focusing on chapters or networks.

The hurdle with this approach is that chapters or networks often are run by alumni volunteers.

During SU's organizational change, they addressed volunteer support and created a model to

support them. This is not without its shortcomings, but it does allow the university to connect

with alumni not living near their alma mater. Training and investing in resources for alumni

volunteers are needed for these groups to thrive. Stephanie shared that when they put this

training together, they involved a chapter advisory council with individuals who had led those

groups previously. She shared this group helped to communicate the new structure and assisted

in the training. Like Wenger et al.'s (2002) community of practice, she relied on individuals who

led in this space successfully, not the staff who had never been a regional chapter president. One

key to success is building trust among volunteers, which was also evident at PTU when they

were restructuring and building their affinity groups.

Homans's (1958) social exchange theory, on the other hand, focuses on the importance of

relationships and social interactions. According to this theory, individuals engage in social

exchanges to maximize their benefits while minimizing their costs. In the context of alumni

associations, this means alumni are more likely to engage if they feel they are receiving benefits

greater than the effort they are putting in.

Both PTU and SU used this approach to personalize their alumni engagement to create

new pathways for engagement. PTU's archetype model is interconnected, as they look at the

alumni to find out how to engage them more meaningfully. They are reframing the work they are already doing and intentionally moving alumni from unengaged to engaged. Homans's (1958) notion of social interaction is that people participate in things if they see the benefit to themselves. PTU is creating a menu of benefits for alumni that could be duplicated at other associations.

In addition to PTU's work, SU has created a model to help their alumni understand the benefits of paying for alumni membership and what they could get out of this membership model. They also have expanded this effort to include their alumni business model. SU has created a model to teach alumni how to leverage their investment in the alumni association to build connections and deepen relationships. Paul shared that with their membership model comes a value proposition. Like in Homans's (1958) social exchange theory, SU must provide a reason for their alumni to want to purchase an alumni membership.

Alumni associations can use Lewin's (1947) organizational change model and Homans's (1958) social exchange theory to develop effective strategies for engaging their alumni. By creating a community, connecting with alumni, and building alumni pride, associations can increase engagement and diversify their alumni base. The CCS offers a valuable tool for identifying successful practices and adapting them to individual contexts.

When interviewing Doug Synder, the consultant PTU hired in 2012, he shared alumni relationship building is "not just about the dollars, it's about the relationship with the institution, and where that is meeting them in their lives today." For example, an alum may have graduated from the business school, may be a car collector, or may have an affinity for the school's basketball team. Doug shared, "We as alumni associations must understand that." Through these

insights, there is value in discovering who alumni are, because it can be critical to diversifying alumni engagement specific to a university.

Discussion

One key finding of this study was the importance of creating a community among alumni. By fostering a sense of belonging and shared identity, alumni are more likely to engage with the association and with each other. This can be achieved through social events, online platforms, and other activities that bring alumni together, as seen at PTU and SU.

Another important finding was the need to connect with alumni in meaningful ways, which can involve offering professional development opportunities, mentorship programs, and other benefits to help alumni achieve their personal and professional goals. By providing value to alumni, associations can build trust and loyalty, which can lead to increased engagement over time.

Finally, the study highlighted the importance of creating alumni pride. By celebrating the achievements of alumni and showcasing their successes, associations can inspire other alumni to engage and become more active in the community. This can be done through awards ceremonies, recognitions programs, and other initiatives that highlight alumni accomplishments.

PTU has addressed the goal of increasing alumni engagement by growing its diversity networks and creating an archetype model. SU has expanded its community with a two-prong approach by engaging students and creating a pathway to engage alumni-owned businesses.

Research on alumni engagement has been predominantly quantitative, using survey results to analyze trends and predictive behaviors. In addition, the current research on alumni engagement has focused on young alumni engagement and the link to their involvement as students. Studies have shown these former student leaders often yield a more engaged alumnus.

According to Freeland et al. (2015), "Creating a connection early upon graduation has provided a lifelong connection with the alumni for years to come" (p. 757). The current research on alumni engagement also has focused on what young alumni expect and want from their alma mater upon graduation to remain engaged. My research removed the age qualifier from alumni and focused on what institutions are doing to engage new and diverse alum. Overall, the link between prior research and my research is the importance of community.

Gallo (2021) explored how an alumni's relationship with their alma mater can be relevant at any time in their life. She talked about how alumni can connect to the university, much like how PTU implements this connection through the archetype model. Like Homans's (1958) social exchange theory, Gallo highlighted that universities see alumni as giving money or time. Gallo's book highlighted building a mutually beneficial and authentic relationship, calling this the "alumni way." I call this the social exchange and commitment alumni associations should follow to diversify alumni engagement. With this knowledge, I recommend removing the revenue focus some alumni associations still have and build authentic and mutually beneficial relationships between alumni and their alma mater. One suggestion is to combine alumni associations with university foundations to allow for more connected efforts but with a different focus.

In my interviews with PTU and SU, I learned associations that have shifted and responded to changing demographics have more engaged alumni. When I spoke to the consultant Doug, whom PTU hired to assist in their changes in 2012, he said the shift in engagement was needed. Those associations that do this work will thrive. He also noted those doing the work are not the majority.

Using my CCS research, and knowing others are not yet doing this work, it is clear these changes need to happen for alumni associations to move into the future. If associations do this

work, they can shift and increase alumni engagement. This is not just about young alumni engagement or getting more money from alumni. This is about understanding who alumni are and letting them know their alumni association is here for them in all facets of their lives.

Overall, the key to diversifying alumni engagement is to take a holistic approach that considers each alumni group's specific needs and interests. By understanding who alumni are and where they are in their lives, associations can develop targeted initiatives that are relevant and engaging. By supporting new alumni initiatives and leveraging the four levels of CASE's (2022) alumni engagement metrics, associations can build a strong and engaged alumni community. Next, I provide practical applications other associations can adapt to their own context.

Recommendations for Practical Application

Based on what I learned from the staff interviews, I recommend associations begin identifying ways to diversify their engagement by combining SU's and PTU's approaches. The first step to diversify engagement is for alumni association staff to follow Lewin's (1947) model of organizational change (see Figure 1). Using Lewin's model, the first step is to unfreeze and look critically at the structure of the association and what the alumni have asked for from their alma mater. In the unfreeze stage, an association can look critically at changes that must be implemented. Based on what I heard in my interviews, I suggest two organizational changes: (a) hire additional staff to support alumni needs and (b) divide out regional chapter and affinity network support. Christina, from PTU, hired a team with strong student affairs background. To move from the unfreeze to change stages, she found it was essential to hire people who "were all steeped in identity development and leadership development." She continued, "That was the number one skill that I was always looking for." With my background in student development, I

see the benefits of hiring staff with this background to help support affinity groups. Utilizing a longitudinal study approach, which I recommend below, a continued assessment of the potential benefits of these organizational changes can be measured.

Although not needed, hiring a consultant could support large changes in the organization. PTU hired a consultant to give nonbiased suggestions to help them in their reorganization. A consultant also can support association leadership who may need to negotiate with university leadership about why changes and resources are needed. Another expense to consider is using a company to assist in surveying alumni to help associations understand their alumni demographics, needs, and engagement levels. Overall, this feedback could help paint a picture of the institution's alumni at large. These two items could support the association in implementing the change stage of Lewin's (1947) organization model.

When interviewing the consultant PTU hired in 2012, he shared the thought process guiding the changes PTU has focused on for the last 10 years. SU, like PTU, was in a revenue mindset and had a paid membership model. However, unlike SU, they also received funding from the university. They were interdependent with the university but also generated revenue. This model is very similar to the model most current alumni associations use, which Doug shared was the fundamental issue. He suggested flipping the model. Before 2012, PTU had 15 people doing alumni engagement and 45 doing revenue generation. He suggested PTU keep a few people to help with revenue generation and membership programs. Instead, he focused on moving the other 45 to engage alumni. Doug referenced their mission of connecting people with the institution and driving the mission of the university forward. Doug reminded me that alumni associations are there to support the institution, not sustain themselves. With this reminder comes a mind shift in how associations can diversify alumni engagement.

Once an association moves from unfreeze to change, it can make intentional changes to benefit its alumni engagement. Based on STU's feedback, I predict the unfreeze stage and shifting to a new model will take about 1 year, but implementing the new model can take time. Jacqueline from PTU reflected on the changes she made in 1 year. She said making all the changes in a year was a mistake because it was a complete overhaul. Although an overhaul may be needed to diversify alumni engagement, depending on the team's needs, these changes could be done in more than 1 year. Jacqueline from PTU shared that she hung up the suggestions from the consultant and crossed off the list of each change she implemented.

The following recommendations are strategies that could be implemented once an association has reorganized its staff structure to support alumni engagement initiatives. I picture these suggestions as iterative, reflective, and morphing as associations try them out to meet alumni needs and wants. In my interviews, I heard the importance of feedback. While associations move to try new things, gathering alumni feedback can support associations in ensuring their initiatives align with the needs of their alumni. Another reminder I heard in my interviews with PTU was that making these changes is part of the long game. Associations might not see immediate results.

Taking PTU's and SU's examples, here are ways other associations can implement new ways to engage their alumni and start seeing diverse engagement. I suggest four initiatives associations can implement.

One suggestion is for associations to create menus of engagement from which alumni can choose. SU used a business network approach for this. It connected alumni-owned businesses and alumni looking to support fellow Pumas. PTU has moved to an archetype engagement model where it no longer focuses on where alumni live or age; instead, PTU created a menu to track

where alumni choose to engage. I think of this like Amazon. Amazon curates suggestions based on a shopper's shopping and browsing history. PTU's archetype model uses this same concept but offers curated experiences to connect alumni to PTU.

As associations create menus of engagement, the menus should include different levels of engagement from which alumni can choose. Jared from PTU shared their goal is to have fun events like a magic show; as he said, this is an entryway into diversity. Their next level is more educational events, where faculty host power hours allowing for deeper diversity conversation. The goal is to move their alumni through these levels of events, but overall to move them to higher levels of engagement.

When creating an association's menus for engagement, I think it is important to ask about the association's goals for engaging alumni. Alumni giving can be categorized as time, treasure, and talent; however, if an association's alumni are not engaged, they will not give back with their time or dollars. Some alumni associations are linked to their foundations, and some are not. Researching alumni associations that are linked with their foundations could assist with new alumni engagement strategies. As a former alumni engagement director and now someone who works in the foundation at my institution, I see the benefits of combing these two organizations. Alumni associations focused on engaging alumni can create a clear pathway for development staff at the foundation to engage with alumni. These pathways can support cultivating future potential donors. Caulkins et al. (2002) discovered the needs of donors are changing. Today's donors are moving away from "checkbook philanthropy," where a donation during a pledge drive covers the obligation of giving. Young donors favor a more hands-on giving style, focusing on solving issues and problems. Additionally, these young prospective donors tend to see their

gift as an investment that signals a loose partnership with the institution and a desire for a strong working relationship.

These trends and changing student demographics will affect alumni associations and their engagement with alumni significantly. Combining the efforts of an alumni association and foundation could create stronger partnerships with future donors. These newer donors follow Homans's (1958) social exchange. They will not give unless they are bought in and engaged. They also will not give unless they see the impact their gift has on the university.

A third suggestion for implementation is to engage students early to teach them that an alumni association is here for them throughout their lives. SU capitalizes on engaging students before they graduate so they understand what the alumni association is and the importance of engaging. SU uses its student association to help create affinity and pride with current students. Stephanie from SU shared they could not wait to engage alumni and had to start when they were students. SU has a large first–generation population. Stephanie shared, "We are now talking to students assuming they have no idea why they want to be involved with an alumni association." Using social exchange theory, they teach students before they graduate what is in it for them.

Lastly, associations can create intentional engagement with their diverse alumni. Christina recommended an alumni association cannot engage with its diverse alumni unless they (a) acknowledge any potential trauma, (b) create a healing space, (c) offer intentional programming, and (d) intentionally support and build affinity networks and chapters. She shared if an association can do that successfully, then they can move to the next engagement steps.

Overall, these steps create a space for community. According to Wenger et al. (2002), "The most successful communities of practice thrive where the goals and needs of an organization intersect with passions and aspirations of participants" (p. 32). Reflecting on the

interviews and what I learned about affinity and regional chapters, the archetype model, and engaging students, the commonality is creating a space for an alumni community to thrive. Alumni associations can transform and diversify alumni engagement by creating a community with efforts like those I saw from PTU and SU, which builds a pipeline of new alumni to continue getting involved.

These applications illustrate how alumni associations can begin diversifying boards and councils, trustees, mentors, and more to match the student demographic. After interviewing PTU and SU, I see the importance in associations intentionally outreaching and diversifying engagement for new alumni to get involved and increase engagement levels.

Recommendations for Future Related Research

In reflecting on my research and interview questions, I feel my work can set associations up for implementing changes in the staff structure to help support the implementation of new engagement initiatives. Much alumni engagement is a trial-and-error approach. I provided examples from two universities currently doing this work. This, in turn, can allow others to learn from them and implement their own engagement strategies. Future studies could include interviews with universities that have implemented these applications to assess their alumni engagement levels.

The following steps in research on this topic would be to expand on this study and dive deeper. The CCS provides a snapshot in time. I suggest a follow-up longitudinal study to follow the newer initiatives PTU and SU have implemented. As PTU and SU have launched these new initiatives recently, it is not yet clear how these efforts will impact the level of engagement they will see with their alumni. A follow-up longitudinal study would allow researchers to see the impact of these engagement strategies utilizing CASE's (2020) alumni engagement metrics.

Associations cannot fast forward to see if these new engagement strategies will diversify board membership or increase philanthropic support, but a longitudinal study could follow these strategies to see what these levels of diversified engagement might be in 10 years.

In addition, meeting with Marisol from PTU in a few years could showcase where the diversity chapters have continued to mature and transform. Like Wenger et al.'s (2002) community of practice model, future studies could examine these groups individually because each affinity group will not evolve similarly, but learning how they have built upon their community and connected with alumni could be insightful for other associations to learn from.

Another way to continue building off the knowledge I uncovered is to look at specific demographic engagement (e.g., Hispanic engagement). Initially, when I started my literature review, I dedicated a section to Hispanic-serving institutions (HSIs) and engaging students who identify as Hispanic. Since PTU will be an HSI in the coming years and SU is currently an HSI, I thought this would impact their various efforts to engage diverse demographics. I was surprised to find the data focused on alumni engagement at large, not just specific demographic segments. The next level of understanding alumni engagement could be investigating specific alumni demographic engagement.

We recognize from these case studies that belonging is a fluid construct over time. This fluidity needs further attention, perhaps from the future longitudinal study, especially when it comes to understanding specific alumni demographic engagement. Utilizing the theory of college belonging, the research of Lisa M. Nunn (2021) could assist in the longitudinal study of various alumni demographics. The theory of belonging can support the understanding we have when it relates to the importance of creating community among alumni.

Lastly, I discussed merging alumni associations with university foundations. This could help remove the revenue focus many associations have. Future research could detail how these relationships work together collaboratively. This research then ties into philanthropy and creating a community of giving. However, in my research and in my understanding of social exchange, a university cannot increase philanthropic giving if associations and foundations do not create a community where alumni see why they would want to give and the benefits of giving. There is a lot of research on motivations for alumni giving. I suggest using these theories and what is known about creating communities to look at diversity and philanthropic giving. This work is just beginning.

My research was needed as this is the first step in discovering how to diversify alumni engagement. Now research on how associations implement this can be forged. For example, Jay Dillon, from the University of California, Berkeley, owns a company that surveys alumni to provide a snapshot of alumni engagement and ties to philanthropic giving. Philanthropy is an engagement measure CASE (2022) has used as well. Using my research and connecting it to research, like Jay's, allows even more insight into diversifying alumni engagement.

Lastly, I suggest creating a universal term for the diverse groups with which alumni associations connect. The CASE (2022) has provided universal terms for alumni engagement, which has helped alumni associations universally code engagement levels. These groups have various names: affinity groups, cultural groups, network groups, identity-based groups, and more. Developing the same language used for these alumni groups could support future research and coding engagement for these specific groups.

Implications

I chose to do this research following a qualitative CCS. The CCS allowed me to examine two universities and learn how they engage their alumni. These two institutions were chosen because my home institution has used them for benchmarking.

The challenge of choosing to do a CCS at these two R1 institutions was that my research depended on the administration's viewpoints and on the alumni associations' leadership. The administration often is not involved in the day-to-day implementation of initiatives and may lack a critical eye on their work. Future CCS work could include interviews with staff who implement this work and observations of their engagement efforts.

Using a CCS allowed me to have an open-ended inductive approach to understanding why specific engagement strategies were implemented at two universities. According to Bartlett and Vavrus (2017), this type of research taps into understanding the phenomenon. In this case, the phenomenon was alumni engagement. My research allowed me to conduct thorough interviews with various staff members, but the challenge of not being in the same location prevented me from making observations and using those observations in my assessment. I relied solely on the feedback and reflection of the interviewees.

Overall, the CCS approach allowed me to understand how the alumni associations at PTU and SU engage increasingly diverse alumni demographics to facilitate new alumni involvement. By comparing how these two universities have engaged their alumni, I learned how these efforts will assist in diversifying the pipeline of involved alumni. I predict this engagement will continue to grow and mirror the institution's demographics.

Summary

Alumni engagement is lifelong.

I chose this research because I love finding solutions. I have a passion for creating innovative solutions to make an organization thrive. I see a need to change how alumni associations engage their alumni to propel and sustain them in the future. I also see a need for this today as I work in philanthropy. Funding for public universities is being cut on local and federal levels. As associations look for new ways to engage alumni, they also can support new financial opportunities for the university. Although not all alumni will give financially to their institution, engaging alumni and creating them as ambassadors and connectors can assist in moving the university to the future. Universities need their alumni, and because universities need them, alumni professionals need to commit to engaging them in new ways. These unique engagement strategies will help to ensure alumni know the university is there for them in all stages of life. It is Homans's (1958) social exchange of maximizing gratification in a living model. In the interview with Doug, he shared:

> [Roughly] 65% of the alumni population is from the last 20 years. The current alumni model is set to engage the first 50 years of alumni. The successful alumni associations have already shifted their program away from tailgates. That's not to say not to do tailgates. But instead ask, what does your alumni population want?

I saw this shift in alumni engagement in the interviews I conducted. PTU has gone deeper than tailgates and instead is offering a menu of options to track alumni engagement. SU has connected with new alumni through their alumni-owned business network. As associations build new initiatives for their alumni, D. Snyder, shared, "How can we treat and engage all our alumni with the first-class frequent flyer mindset? Alumni are alumni forever."

Creating pathways for long-term alumni engagement is a great goal for alumni associations. Short-term engagement strategies can be an effective way to start building these pathways. By creating meaningful and engaging experiences for alumni (e.g., networking events, volunteer opportunities, or professional development opportunities), associations can increase the likelihood that alumni will stay connected to their alma mater.

Additionally, it is important for associations to make it easy for alumni to stay connected. This can include creating a user-friendly website with information on upcoming events and volunteer opportunities, like PTU has done in the archetype model.

As alumni become more engaged with their alma mater, they may be more likely to take on leadership roles, such as serving on boards or becoming trustees. These opportunities can help create a more diverse alumni community that reflects demographics of the student population.

In summary, by intentionally creating short-term engagement strategies and collecting feedback from alumni, alumni associations can build pathways to long-term engagement. Based on what we know about the importance of creating alumni community, these efforts can potentially lead to a more engaged and diverse alumni community that continues to support and give back to their alma mater.

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Appendix A: Recruitment Materials

Email Introduction for Research Site Agreement: Sent Fall 2022

Note: This email was sent out by CEO of home institution Alumni Association during the Fall 2022 semester to introduce the researcher and gain preliminary site access.

Email script to be sent:

Introduction to Researcher: Elizabeth Rosenkrantz has over 12 years of higher education experience and is a 3rd-year doctoral student at Northern Arizona University.

Research: The study aims to understand how alumni associations in research one (R1) universities engage increasingly diverse student demographics in ways that facilitate early alumni involvement upon graduation. The research will also analyze the social exchange theory and how it explains their current level of engagement. The study will also explore organizational development theory of alumni associations and how they address the changing demographic alumni needs with their organizational structure. The study attempts to answer the following research questions:

1. How do university alumni associations address the changing demographics of the student population?
   a. How do alumni associations engage with diverse demographics and utilize chapters and special interest groups?
2. How do alumni associations narrate their experiences with diverse member engagement?

The research will be conducted via interviews for a qualitative comparative case study. The interviews will be conducted via Zoom in the spring semester with various staff members. These staff members will provide an inside look into their associations and how they engage with their alumni. This insight will highlight the value of comparison utilized in case study work and qualitative research. This will allow me to see similar processes at the institutions and the outcomes (similar or different). It will also highlight distinct phenomena related to similar trends or pressures. The interviews are expected to be approximately an hour in length. Only one interview will be needed, but if initial information is needed an additional interview may be requested.

Elizabeth has recently passed her comps and can share Chapters 1–3 and is available to set up a Zoom to share more about her research with you.

> LinkedIn: https://www.linkedin.com/in/elizabeth-rosenkrantz/
> Email: xxxxx@asufoundation.org

She looks forward to working with you! If you are interested in participating, please contact Elizabeth by September 30, 2022.

Email Introduction for Research Participants: Sent Spring 2023

Subject: Interview Request: Alumni Engagement Research

Hello [Potential Participant Name],

My name is Elizabeth Rosenkrantz, and I am a third-year doctoral student at Northern Arizona University. I am researching how your institution is engaging alums and diversifying alumni engagement.

I have spoken to your Alumni Association leadership, and they have agreed to have your institution participate in this research. I would like to invite you to participate in a voluntary 60–90-minute Zoom interview. Participation in this study is confidential and voluntary. Your supervisor will not know if you agreed to participate or not. If you do decide to participate, your participation will be anonymous, as well as the institution you belong to. All data will be encrypted, and no identifying information will be used. The data will also be stored in a data-encrypted drive.

This interview will be part of my research as a doctoral student at Northern Arizona University. I want to understand how large research institutions engage with their increasingly diverse alumni population. My purpose in undertaking this study is to understand how your institution is engaging with alumni, in what ways you are doing that, and the outcomes you have seen. I hope that other institutions can learn from you. I have also attached a handout explaining my research if you want to learn more.

My two main research questions are:

1. How do university alumni associations address the changing demographics of the student population?
    a. How do alumni associations engage with diverse demographics and utilize their chapters and special interest groups?
2. How do alumni associations narrate their experiences with diverse member engagement?

If you would like to be part of this study, please email me by Friday, January 8, 2022. At that time, I will work with your schedule to schedule your Zoom interview.

This project has been approved by Northern Arizona University Human Research Protection program. If you have any questions, please don't hesitate to contact me via email, text, or phone.

I look forward to hearing from you!

Elizabeth Rosenkrantz
xxxxx@nau.edu

Appendix B: Interview Questions

1. Tell me about yourself: What is your name, your position, and how long have you worked at your institution?
2. What's your role at your alumni association?
3. What are the overall goals of your alumni association?
4. What is your alumni association membership process? *(ER to explain in the write-up what alumni membership means)*
5. What is your current organizational structure? (get specifics: how many people work in the office, supporting what initiatives, what are the demographics of staff that work in the office, etc.)
   a. Throughout the years, have you seen an organizational change? If so, what are they, and why did they occur? If not, why?
   b. Ideally, what would your organizational structure look like to address the needs of your alumni?
6. What are the needs of your alumni? How do you know?
   a. Does your current structure fit the needs of your alumni? Any changes you would make?
7. Due to the pandemic, what changes did you make regarding your alumni engagement?
   a. Were these changes long-term?
   b. How did you assess the level of engagement with these changes?
   c. Can you provide an example of a program you wouldn't normally implement but have since the pandemic and the engagement outcome?
8. How do you currently gather alumni feedback?
   a. What are the processes and strategies to implement feedback?
   b. Do you have an example of a change you implemented because of feedback? What was the outcome?
9. In your own observations, how have alumni changed? In what ways does your institution address this?
10. Engagement, Diversity, and Young Alumni:
    a. How many engagement events do you typically host in a year?
    b. What are some of your signature events, and what makes them stand out among other alumni associations?
    c. How do you measure the engagement level of alumni at these events?
       i. Throughout the years, have you seen an increase or decrease in engagement among alumni? (if applicable, how have you addressed this?)
    d. How does your alumni association attempt to diversify alumni participation?
    e. How do you define diverse alum?
    f. How have you utilized what young alumni are asking for to create engagement opportunities based on the available research available?
       i. What do you think young alumni want to engage with your university?
       ii. How do you gather feedback from young alumni?
       iii. Have you seen any recent evolutions regarding what alumni want?
    g. What barriers do you face when diversifying participation?
    h. What are your goals in launching new initiatives to diversify alumni participation?

      i.   What examples of programs or outreach have you started or will be beginning?
           i.   How do you utilize your chapter and/or special interest groups? Can you provide an example? Are your chapters and/or special interest groups the only way you engage diverse populations?

11. Is your association part of your institution's more significant commitment to diversity? How so?
    a.   What is the institution's commitment to diversity?
    b.   How do you see your alumni association fitting into that?

12. What programs do you offer that is unique in connecting with young alumni (examples)? How do you define young alumni?
    a.   What do your college/department partnerships look like?

13. You are an HSI-designated university. How has this impacted your alumni engagement?
    a.   Have you offered new engagement opportunities?
    b.   Do you have plans to offer new engagement opportunities?
    c.   How will you measure the outcomes of these opportunities?
    d.   How do you narrate diverse engagement?

14. How have your alumni dealt with social issues in the world? Have they asked the association to address these social concerns and unrest?
    a.   How have you addressed those asks of alumni?

15. Is there anything else you want to share, or that I should know?