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THE SCHULER INITIATIVE:

# Young Alumni Engagement & Philanthropy

2021

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## FOREWORD

**Jason Patenaude** COO and Executive Director,  
*Schuler Education Foundation*

As I reflect on the completion of our young alumni engagement initiative, it's hard not to frame it through the extraordinary events of the past year. Certainly, the upheaval of a global pandemic, racial justice protests, and the presidential election were felt by the 7,000 young alumni we surveyed annually for the past three years.



But while it's easy to assume these events negatively impacted this generation, that's not exclusively the case. Much of the change we saw in our survey results reflects a group energized by the challenges of the moment: more committed to supporting current students, increasing their overall philanthropy, and furthering equity and inclusion on college campuses.

Our survey results show a double-digit increase in alumni donating more than \$1,000 annually, and the number of alumni who believed their financial donations made a difference to their alma mater more than doubled.



**This shift from giving out of gratitude to giving for impact is critical. Young alumni need to see how their philanthropy makes a difference.”**

We at the Schuler Education Foundation are particularly optimistic about the growing population of first-generation and alumni of color, constituents typically overlooked and underserved by their alma maters. Contrary to popular opinion, our research shows these first-gen and alumni of color are more willing to give, and give substantially, to higher education than their white, non-first-gen peers.

Perhaps the most important shift we saw in our survey data, however, were the reasons why young alumni give. At the beginning of the Initiative, most alumni reported giving out of a sense of gratitude for the help they received from their alma mater. By 2021, however, nearly 70 percent of respondents said they gave to support current students.

This shift from giving out of gratitude to giving for impact is critical. Young alumni need to see how their philanthropy makes a difference. This generation wants to give, but the opportunities to do so need to be relevant to them and authentic to the college's culture—alumni will not support a racial justice campaign at their alma mater, for example, if there is skepticism about the school's diversity.

As we complete the journey of this Initiative, we want to acknowledge the exceptional work of our five partner colleges: Bates, Carleton, Middlebury, Wellesley, and Williams; our marketing partners at Ruffalo Noel Levitz; and, of course, the 7,000 alumni who generously shared their thoughts with us.

We are grateful to all of you for your collaboration, and hope other institutions interested in engaging their young alumni will benefit from the work of this Initiative.

## EXECUTIVE SUMMARY – THE SCHULER INITIATIVE

Jack Schuler believes in the power of education to transform lives. He and his family have demonstrated a commitment to this conviction for more than twenty years through the work of the Schuler Scholar Program and the recently announced \$500 million Schuler Access Initiative.<sup>1</sup>

Over the last decade, more than two-thirds of colleges and universities have reported a decline in their alumni giving percentage.<sup>2</sup> Concerned by this trend—particularly among recent graduates—and its impact on the longer-term financial stability of higher education institutions, the Schuler Education Foundation launched the Schuler Young Alumni Engagement Initiative in 2018.

In partnership with five liberal arts colleges<sup>3</sup> and Ruffalo Noel Levitz, the Initiative was launched as a three-year project to better understand young alumni. Given that almost half of the college and university alumni population has graduated within the last twenty years, discovering ways to better engage with and inspire philanthropy from this generation is critical in restoring and improving alumni support.

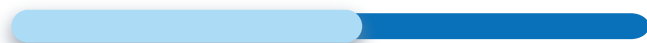
The Initiative measured donor acquisition and retention rates across the pilot institutions. Could the colleges both expand the count of young alumni making gifts to their alma mater and increase retention, establishing more consistent giving from this cohort?

The answer in short—yes. The colleges achieved a **54 percent growth** in the young alumni donor base and **74 percent donor retention**, reversing a four-year decline in renewal rates. Even with the pandemic and other events of 2020, four out of five institutions were able to improve first-time donor retention by up to 20 percentage points, with an average rate of 46 percent, more than double the national average for private institutions in 2020.<sup>4</sup>

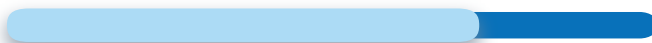


**54%**  
GROWTH

Colleges achieved a 54 percent growth in the young alumni donor base and 74 percent donor retention.



**74%**  
RETENTION



<sup>1</sup> The Schuler Scholar Program was founded in 2001 and has helped more than 1,500 high-potential high school students earn full scholarships and graduate from top liberal arts colleges across the country. Announced in April 2021, the Foundation will invest up to \$500 million in the Schuler Access Initiative to substantially expand access for both undocumented students and Pell-eligible students to attend highly selective liberal arts colleges.

<sup>2</sup> Voluntary Support of Education (VSE), CASE: <https://www.case.org/resources/voluntary-support-education-data-research-findings>

<sup>3</sup> Bates, Carleton, Middlebury, Wellesley, and Williams were chosen based on the strength of their existing advancement programs and for their potential to build a scalable pilot program that could serve as an example for others. Each college received grant funding to support communication and solicitation efforts, longitudinal market research, and investment in staff and technology.

<sup>4</sup> 2020 donorCentrics\* Annual Report on Higher Education Alumni Giving: [https://s21acms01blkbsa02.blob.core.windows.net/prod/docs/default-source/industry-insights/reports/2020-dc-he-report.pdf?sfvrsn=70acad3e\\_0](https://s21acms01blkbsa02.blob.core.windows.net/prod/docs/default-source/industry-insights/reports/2020-dc-he-report.pdf?sfvrsn=70acad3e_0)



## KEY FINDINGS

The colleges found success in applying what was learned after three years of gathering survey feedback, experimenting with different messages and targeted campaigns, adopting new technologies, expanding personalized outreach, and testing various strategies. We learned:

**Young alumni are philanthropic and many give at significant levels.** Nearly 9 out of 10 young alumni report making charitable contributions, with one-third donating \$1,000 or more.

**Authentic connections for students and alumni are key.** Young alumni who reported higher rates of student satisfaction and feel connected to their alma maters are 4x more likely to give.

**Campaigns that directly support today's students inspire giving.** Nearly 70 percent of young alumni report the desire to make a difference in the lives of current students is a top motivator.

**Lead with impact and invest in ongoing stewardship.** More than 95 percent of young alumni stated it was important to see evidence that an organization is making an impact.

**Events of 2020 accelerated activism.** Even through the economic downturn of 2020, more young alumni reported donating than in the previous year.



# Market Research

The Schuler Education Foundation sponsored surveys in 2018, 2019, and 2021, inviting graduates from the classes of 2002-2017 to share their perceptions of higher education, their volunteering and giving habits, and how they preferred to interact with their alma maters.

The 2018 survey focused on the five pilot institutions, with more than 7,000 alumni responding. In 2019, market research was expanded to see if the trends were isolated to liberal arts colleges or more representative of the broader young alumni population. With 40,000 alumni from 36 colleges and universities participating, we found resounding similarities across public, private, large, small, rural, and urban institutions. A report on these findings was published in 2020.<sup>5</sup>

To endcap the Initiative, a final survey was fielded in January 2021, with particular focus on the impact of the global pandemic and racial justice protests. Once again, roughly 7,000 alumni from the pilot colleges responded, for an average response rate of 18 percent. We acknowledge that events of 2020 no doubt influenced responses, and will likely influence thoughts and behaviors for years to come.

This paper summarizes key market research findings and references several of the efforts that were most effective.

## YOUNG ALUMNI ARE PHILANTHROPIC AND MANY GIVE AT SIGNIFICANT LEVELS

The Initiative has disrupted any narrative that suggests millennials aren't philanthropic. In fact, **nearly 9 out of 10 young alumni report donating to charitable organizations**, and nearly 40 percent report giving at least once a month.

In addition, we can rule out any notion that young alumni only make small “token” gifts. In the 2021 survey, **more than one-third reported donating \$1,000 or more** to any nonprofit organization in a calendar year. That's up 13 percent since 2019. Notably, giving is on the rise among first-generation and alumni of color—a trend that we expect will continue, as not even the economic downturn of 2020 slowed this momentum.

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<sup>5</sup> Ruffalo Noel Levitz & The Schuler Education Foundation (2020). 2020 National Young Alumni Survey.



More than 1/3 of recent alumni reported making gifts of \$1,000 or more.

Young alumni from the pilot colleges collectively gave more than \$12.5 million to their respective alma maters during the Initiative. With a deliberate focus on celebrating donor loyalty and consistency, Middlebury College branded its TrueBlue Sustainers society and found that tailored marketing and stewardship efforts were effective. Middlebury expanded its count of recurring donors and increased total annual giving per young alum, consistent with a 40 percent increase in average gift amount across the five colleges.

## FIRST-GENERATION AND ALUMNI OF COLOR REPORT HIGHER LEVELS OF INTEREST IN GIVING BACK TO THEIR ALMA MATERS

Our research also counters a misconception for some that first-generation and alumni of color are less philanthropic than their peers. Despite reporting lower levels of student satisfaction and current alumni connectedness, both **first-generation and alumni of color report higher levels of interest in giving back to their alma maters** when compared to their non-first-generation and non-alumni of color peers.





## AUTHENTIC CONNECTIONS FOR STUDENTS AND ALUMNI ARE KEY

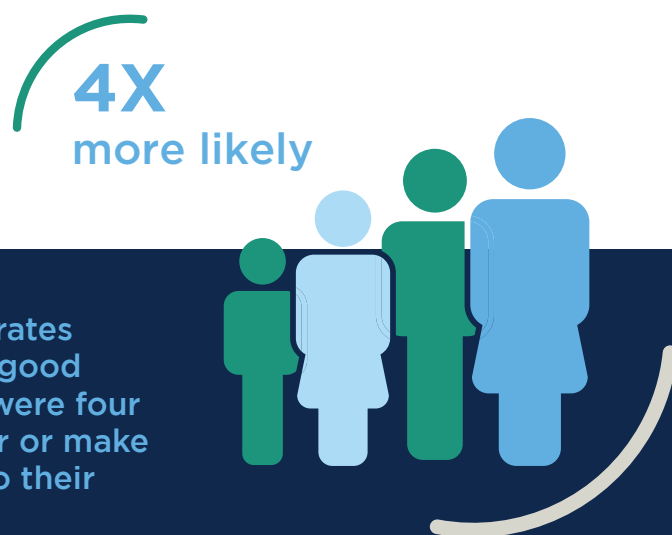
Alumni who reported higher rates of student satisfaction and a good sense of current connection were four times more likely to volunteer or make philanthropic contributions to their alma mater. The research confirms what we have anecdotally known: stronger giving rates require **stronger student experiences and post-graduation connection.**

Building life-long relationships starts with the student experience, which means all campus stakeholders must be invested in the mission of positive student engagement. The responsibility of improving alumni support cannot rest solely on the shoulders of annual giving, alumni relations, stewardship, or advancement teams. It involves a true campus-wide effort.

We learned from the market research that genuine connections were best facilitated through volunteer engagement, peer-to-peer outreach, and personalized communications. Recognizing this finding, the pilot colleges expanded impressive volunteer networks already in place, adding to the ranks of class agents, reunion committees, and social ambassadors.

Bates College added two young alumni leaders to its board of trustees and established a Schuler Task Force. Similarly, the new Young Alumni Council at Carleton College has served as a catalyst for change, with members offering valuable input on communication, events, and new initiatives. Williams College was intentional about collaboration across its Society of Alumni<sup>6</sup> and annual giving volunteers, and created a centralized digital resource—a one-stop online hub—for Alumni Fund volunteers.

The efforts of more than 1,200 volunteers paid off. In the second year of the longitudinal survey, alumni indicated they noticed and valued the peer-to-peer contact. This outreach, and college messaging that carried an informal, less “institutional” tone, helped facilitate more genuine connections.



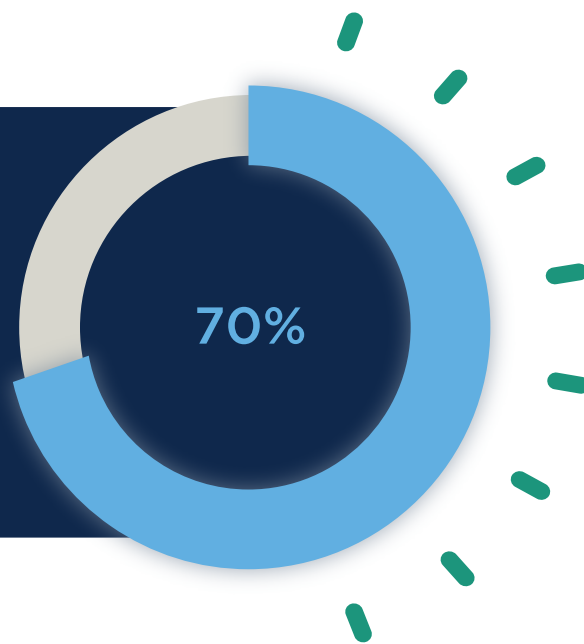
**Alumni who reported higher rates of student satisfaction and a good sense of current connection were four times more likely to volunteer or make philanthropic contributions to their alma mater.**

<sup>6</sup> Established in 1821, the Society of Alumni of Williams College is the oldest continuing college or university alumni organization in North America.

## CAMPAIGNS THAT DIRECTLY SUPPORT TODAY'S STUDENTS INSPIRE GIVING

We've seen a shift in what motivates young alumni to give to their alma maters. When asked in 2018, a majority reported giving out of a sense of gratitude. In response to the same question in 2021, nearly 70 percent reported giving out of a desire to make a difference in the lives of current students. Areas identified as most important: diversity, equity, and inclusion, mental health, financial aid advising, crisis or student emergency funds, and first-generation initiatives.

Nearly 70% of young alumni say they give to support current students.



The pilot colleges focused on giving opportunities tied to students and these areas of priority. Wellesley College, for example, launched a special day of giving campaign to celebrate and support its 418 enrolled first-generation students. The campaign raised more than \$100,000 with 152 percent achievement of the established donor goal and was acknowledged with a CASE Circle of Excellence Award.<sup>7</sup>

Purpose-driven campaigns proved effective not just at Wellesley but at each of the pilot institutions. Young alumni responded to specific asks for scholarships, laptops provided to students in need, cultural stoles for graduating seniors, required course textbooks, and student-led social justice projects. Matching dollars were often leveraged to generate momentum, and this ties to another finding from the research—nearly two-thirds of young alumni are motivated by challenge matches.



<sup>7</sup> CASE Circle of Excellence Awards, 2021. <https://www.case.org/awards/circle-excellence/2021/first-generation-students-become-next-generation-leaders>. Council for the Advancement and Support of Education.



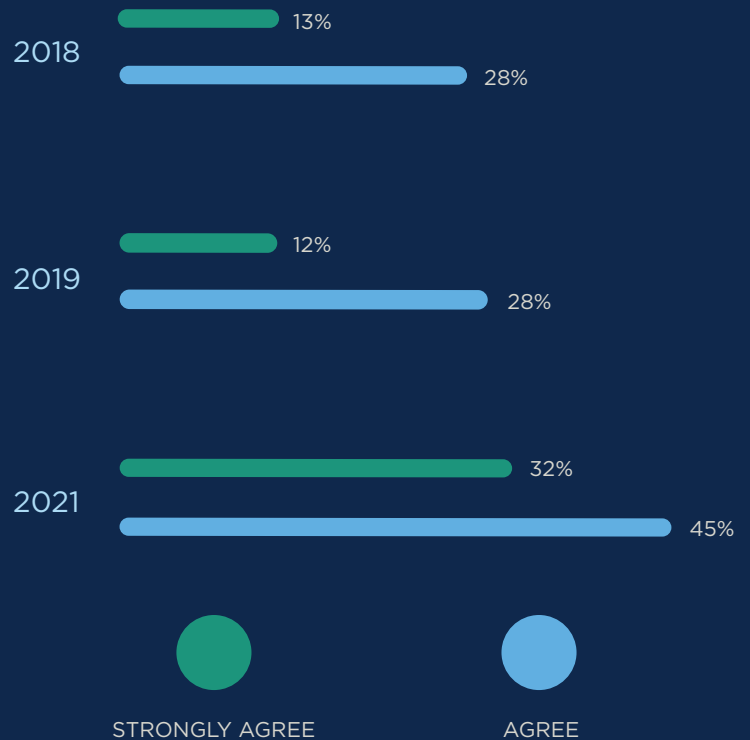
## LEAD WITH IMPACT AND INVEST IN ONGOING STEWARDSHIP

It's difficult to overstate the importance of impact. More than 95 percent of survey respondents indicated that evidence an organization is making an impact will drive decisions about where they give. As nonprofits cut through the noise and compete with other worthy charities, illustrating the impact of the organization and individual donors is key.

The pilot institutions conveyed impact by the numbers—infographics visualizing the specific count of students receiving scholarship support, zoom licenses and webcams for remote learning, paid internship or job shadow opportunities, and emergency fund grants. They also highlighted collective impact. For example, the power of coming together to contribute more modest gifts that when combined, unlock a six or seven-figure challenge match. Perhaps most importantly, the colleges inspired emotion through authentically sharing student stories.

The emphasis on impact worked. The count of young alumni who believed financial contributions to their alma mater made a difference **more than doubled** from the 2019 to 2021 surveys. The colleges were also thoughtful about multichannel stewardship. Acknowledging donors and showing gratitude through personalized videos, emails, text messages, phone conversations, printed postcards, and handwritten notes.

Young alumni who believed financial contributions to their alma mater made a difference more than doubled from the 2019 to 2021 surveys.



# Conclusion

## EVENTS OF 2020 ACCELERATED ACTIVISM & INSPIRE OPTIMISM AS WE LOOK AHEAD

When the Schuler Education Foundation, five pilot colleges, and Ruffalo Noel Levitz set out on this Initiative in 2018, no one could have predicted what we would encounter in 2020. The global pandemic, a reckoning around race and social justice issues, and other historic events created tremendous challenge and growth. This period also marks a moment of accelerated activism and philanthropy among young alumni.

Even with the economic downturn disproportionately affecting young professionals, the 2021 survey found that more young alumni reported donating than in the previous year. Leaning into immediate need causes, nearly 45 percent supported racial justice initiatives. This reinforces how important it is that colleges and universities meet young alumni where they're at—presenting giving opportunities that feel relevant, purpose-driven, and focused on student impact.

As we reflect on the Initiative and the Schuler family's driving belief that developing and preserving a tradition of philanthropy among young donors is critical, we are decidedly optimistic about the generosity of this generation and the potential that exists when institutions invest in effectively engaging young alumni.

The Schuler Education Foundation was honored to partner with RNL in publishing this research. We want to thank our partners at Bates, Carleton, Middlebury, Wellesley, and Williams, as well as the thousands of young alumni who shared their feedback during the three-year survey project.



## A SPECIAL THANKS TO THE PILOT INSTITUTIONS



**Bates**



Middlebury

**Williams  
College**



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### ABOUT THE SCHULER EDUCATION FOUNDATION

The Schuler Education Foundation seeks to further the success of individuals and communities by investing in high-achieving underrepresented students and top-tier liberal arts colleges. The Schuler Education Foundation currently supports the Schuler Scholar Program, the Schuler Initiative, and the Schuler Access Initiative.

[Visit \*\*SchulerEducationFoundation.org\*\*](https://www.schulereducationfoundation.org)



### ABOUT RNL

Ruffalo Noel Levitz (RNL) is a leading provider of higher education enrollment, student success, and fundraising solutions. For more than 40 years, colleges and nonprofit organizations have turned to RNL to enroll the students they want, help more students graduate and succeed, and build lifelong relationships with donors.

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## HOW TO CITE THIS REPORT

The Schuler Education Foundation & Ruffalo Noel Levitz (2021). 2021 Young Alumni Engagement & Philanthropy. Lake Forest, IL: Schuler Education Foundation. Retrieved from [schulereducationfoundation.org/schuler-initiative](https://www.schulereducationfoundation.org/schuler-initiative) and [RuffaloNL.com/Schuler](https://www.RuffaloNL.com/Schuler).

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