



EAB

Engagement Scores and Metrics

Carnegie Mellon, George Washington, Emory, Vanderbilt, Caltech

Advancement Advisory Services

Disengagement – a Reversible Trend?



Engagement is Down Across the Board

Public Confidence Better, But Still Low

58%

Lack a great deal of confidence in higher education system for 2025 (2024 it was 64%)

Disconnection Grows

+25%

Increase in alumni who feel disconnected from 1950s to today

Donors Decline

-10.5%

Decline in alumni giving between 2021 and 2024



Voters Want Less Talk and More Action on Higher Ed Value

*Voters still see the value of a college education and its connection to a secure financial future but recognize that **changes are needed to maintain that positive ROI for future generations.***

- Ben Cecil, Third Way



Source: "2024 National Alumni Survey," RNL, 2024; "CASE Insights on Voluntary Support of Education," CASE, 2024; B Cecil, "Voters Want Less Talk, More Action on Higher Ed Value," Third Way, March 18, 2024; M Brennan, "Public Trust in Higher Ed Rises From Low," Gallup, July 15, 2025; EAB interviews and analysis.

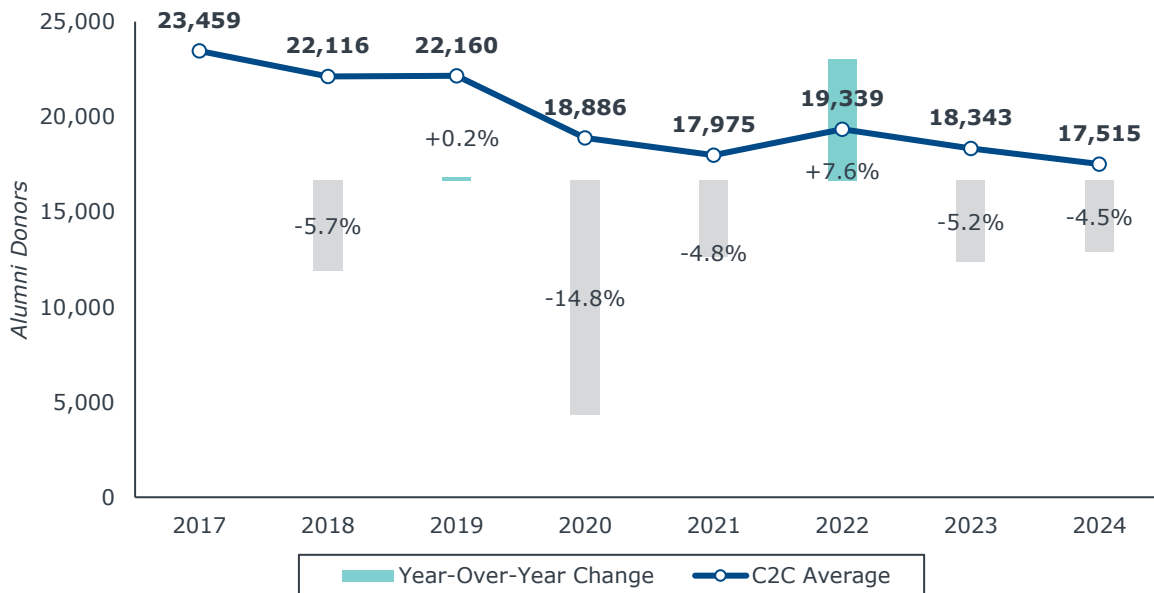
C2C Cohort Not Immune to Engagement Woes



Alumni Donor Count Down Over 25% Since 2017

Average Number of Alumni Donors

FY2017-FY2024





What Gets Measured, Gets Done

CASE Provides a Helpful Baseline, But Often Falls Short

CASE's Four Alumni Engagement Categories

- 1 Philanthropic:** All forms of financial and in-kind support of the institution
- 2 Volunteer:** Formally defined volunteer roles that are endorsed and valued by the institution
- 3 Experiential:** Meaningful experiences that inspire alumni and are valued by the institution
- 4 Communication:** Interactive, meaningful, and informative communication with alumni

C2C Institutions Question How to Use CASE Metrics to Make Decisions

“We’ve had lots of discussions about what exactly these metrics tell us. **It’s just a count.** We need to find a way to connect the dots.”

“CASE’s data is **interesting but not used** a lot in terms of benchmarking.”

“We’ve noticed CASE metrics lacking in that they are **binary in nature** across the four modes, so it lacks depth of level of engagement.”



C2C Engagement Score Examples

Carnegie Mellon, George Washington, Emory, Vanderbilt,
Caltech



Carnegie Mellon University

Data-Driven Engagement Ratings using Salesforce

Carnegie Mellon Engagement Ratings System

- Provides summary measures of the CMU engagement of all individual constituents *(not just alumni)* in real-time *(updated nightly)*
- Grounded in the recommendations of the CASE Alumni Engagement Metrics Task Force (2019)
- Categories (“modes”) of engagement are communication, experiential, philanthropic, and volunteer
- In general, engagement is measured for the last two years *(rolling: current quarter and last 7 quarters)*

Carnegie Mellon Engagement Ratings System

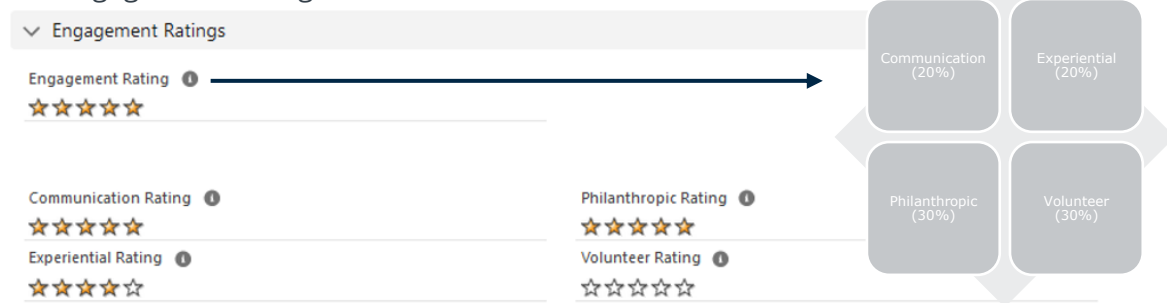
- Broad-based Working Group developed specific scoring recommendations for each of the four engagement modes
- Built in **Salesforce** using engagement rating tool developed by Affinaquest (*with many customizations by CMU Salesforce programmer*)
- Launched in January 2023 (*work-in-progress: continue to iterate and enhance*)
- Well received and utilized by staff across advancement (has also helped build broader awareness of the importance of data entry and hygiene)

Use case examples:

- Prospect assignment prioritization
- Potential volunteer identification (e.g., reunion ambassadors)
- Annual giving direct mail (non-donors) and upgrade audiences
- Event invitation prioritization and tiering

Carnegie Mellon Engagement Ratings System

- Star ratings (0-5) for the overall Engagement Rating, as well as for the four engagement modes
- For each of those ratings, individuals with any level of engagement are divided into quintiles (*relative scoring*), represented by stars
- Modest weighting is applied to the mode scores when calculating the overall Engagement Rating



Annual Engagement Ratings "Snapshot"

Contacts > Engagement Ratings			
3 items • Sorted by End Date • Updated 2 minutes ago			
☐	Engagement Rating Na... ↑	CMU Engagement Rating	End Date ↓
1	☐ ER-01029379	5	6/30/2025
2	☐ ER-00615327	5	6/30/2024
3	☐ ER-00275414	5	6/30/2023

Engagement Rating Name
ER-01029379

End Date
6/30/2025

Contact

Primary Degree Level

Contact Status

Primary School

Active

Contact Type

Preferred Year

Parent

Secondary Contact Types

Staff

Advancement Type

Preferred Region

Current/LYBUNT Donors

PA - Pittsburgh

Donor Type

Current Giver

Prospect Manager

CMU Engagement Ratings

CMU Engagement Rating
5

CMU Communication Rating
5

CMU Philanthropic Rating
4

CMU Experiential Rating
5

CMU Volunteer Rating
0

Easy Access to Engagement Details

Contact Details Relationships **Engagement** Giving More ▾

Recent Communication Snapshots (5) [Filter] [Copy]

5 Items • Sorted by Start Date • Filtered by Start Date • Updated a minute ago

	Start Date ▾	End Date ▾	Emails Rec... ▾	Open Rate ▾	Click Rate
1	7/1/2023	9/30/2023	9	88.9%	0.0%
2	4/1/2023	6/30/2023	13	92.3%	7.7%
3	1/1/2023	3/31/2023	19	100.0%	5.3%
4	10/1/2022	12/31/2022	16	100.0%	12.5%
5	7/1/2022	9/30/2022	34	100.0%	5.9%

View All

Registrations for Upcoming Events (0) [New]

Event Attendance (8+) [Filter] [Copy]

8+ Items • Sorted by Event Start Date and Time • Filtered by No Show • Updated a minute ago

☐	Guest Number ▾	Event Start Date and Time ▾	Event
1	1877531	10/28/2022 6:30 PM	2022 CMU Alumni Awards
2	1766241	12/9/2020 7:00 PM	Insiders Town Hall with President Farnam Jahanian
3	1746309	5/20/2020 1:30 PM	Dean's Advisory and Collane Alumni Boards Town Hall (U

Memberships (8+) [Filter] [Copy]

8+ Items • Sorted by Start Date • Updated 2 minutes ago

☐	Membersh... ▾	Affiliated Orga... ▾	Start Date ▾	Stop Date ▾	Membership ... ▾
1	1676661	Andrew Carnegie So...	7/1/2022	6/30/2023	ACS_H \$50,000-\$9...
2	1676688	Order of the May	7/1/2022	6/30/2023	

- The “Engagement” tab on the Contact screen provides individual data that relates to their engagement with CMU
- Quarterly communication snapshots; registrations for upcoming events; event attendance; memberships; and volunteer positions



George Washington University

Refining a 100-Point Alumni Engagement Score

Alumni Engagement Score at GW



Purpose

- Provides a **baseline to measure alumni engagement** over time
- Key performance indicator for Alumni Relations & Division goals
- **Aligned with CASE** Alumni Engagement Metrics



How It Works

- Each alumnus earns an alumni engagement **score (0–100)** based on participation across key areas
- Refreshed **quarterly**
- Scores appear in alumni records, reports, and dashboards



FY26 Goal

- 36,100 actively engaged alumni (+~2% from FY25)
- Definition (FY26 update): Alumni with engagement in philanthropy, volunteer, or experiential modes
- **Removed “communication”** mode to better reflect direct engagement

Alumni Engagement Score at GW



Philanthropy (20 points)	• Loyal Giving (5 points) • LRS Level Giving (5 points) • Current FY donor or LYBUNT (2.5 points) • Years Increasing over last 5 years (2.5 points) • Leadership Giving (2.5 points) • Planned Giving (2.5 points)
Volunteer (30 points)	• Current Member of a Board/Council (10 points) • Other Current Volunteer Activity on record (5, 7.5, or 10 points) • Past Volunteer Activity on record (2.5 or 5 points) • Past Member of a School Board/Council (5 points)
Experiential (30 points)	• Event Attendance (2.5, 5, 7.5, or 10 points) • Basketball Season Ticket holder (5 points) • Lifelong Learning/Career Services (2.5, 5, or 7.5 points) • Received award from GW (2.5 points) • Visit Contact Reports (5 points)
Communication (20 points)	• Social Media Advocacy (2.5 or 5 points) • Email Clickthrough (2.5 points) • Form/Survey Completion (2.5 points) • Event Registration, did not attend (2.5 or 5 points) • Contact Reports with type of "phone, email, or correspondence" where the purpose is not volunteer engagement, qualify, or contact attempt (2.5 or 5 points)



Emory University

Leveraging Dashboards for Real-Time Engagement
Tracking

Emory's Engagement Dashboards



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Engagement FY

2022

2023

2024

2025

Contactable reflects the number of contactable alums captured at the beginning of the selected fiscal year.
Living reflects the number of alums captured at the beginning of the selected year with a status of not deceased.
Alums are counted in each school they attended.
RATE: Calculated by dividing the number of engaged alumni by the the number of contactable alumni.

School	Contactable	Living	Communication	Communication Rate	Experiential	Experiential Rate	Volunteer	Volunteer Rate	Philanthropic	Philanthropic Rate	Total Engaged	Engagement Rate
Candler School of Theology	8105	8454	2467	30.44%	882	10.88%	185	2.28%	665	8.20%	2916	35.98%
Emory College of Arts and Sciences	60633	63328	18970	31.29%	7352	12.13%	2146	3.54%	4558	7.52%	21628	35.67%
Emory University School of Law	14278	14617	4185	29.31%	1690	11.84%	435	3.05%	1079	7.56%	5082	35.59%
Emory University School of Medicine	19578	20153	3930	20.07%	1221	6.24%	242	1.24%	1310	6.69%	4841	24.73%
Goizueta Business School	24431	25551	9022	36.93%	4284	17.54%	1255	5.14%	2052	8.40%	10579	43.30%
James T. Laney School of Graduate Studies	15665	16829	4510	28.79%	1262	8.06%	373	2.38%	1054	6.73%	5072	32.38%
Nell Hodgson Woodruff School of Nursing	10445	10793	3117	29.84%	957	9.16%	272	2.60%	602	5.76%	3438	32.92%
Oxford College of Emory University	17050	17938	5891	34.55%	2410	14.13%	728	4.27%	1225	7.18%	6548	38.40%
Rollins School of Public Health	13320	13502	5301	39.80%	1865	14.00%	612	4.59%	623	4.68%	5658	42.48%
School of Allied Health	7538	7800	1352	17.94%	251	3.33%	52	0.69%	223	2.96%	1472	19.53%
School of Dentistry	2086	2262	272	13.04%	99	4.75%	15	0.72%	101	4.84%	364	17.45%
University Total	168950	176374	48644	28.79%	18093	10.71%	4964	2.94%	11036	6.53%	56027	33.16%

School	Any of the Four Modes	All Four Modes	Engaged Non-Donor	Communication ONLY	Experiential ONLY	Volunteer ONLY	Philanthropic ONLY	Engagement Goal	Percent to Goal
Candler School of Theology	2916	82	2251	1591	184	18	188	3000	97.20%
Emory College of Arts and Sciences	21628	676	17070	11288	1046	145	1116	21900	98.76%
Emory University School of Law	5082	134	4003	2693	417	54	279	5100	99.65%
Emory University School of Medicine	4841	103	3531	2700	285	26	474	4600	105.24%
Goizueta Business School	10579	353	8527	4927	782	99	455	10400	101.72%
James T. Laney School of Graduate Studies	5072	115	4018	3002	167	25	312	4700	107.91%
Nell Hodgson Woodruff School of Nursing	3438	73	2836	2086	118	28	144	3200	107.44%
Oxford College of Emory University	6548	224	5323	3386	296	44	220	6500	100.74%
Rollins School of Public Health	5658	110	5035	3260	150	74	94	5200	108.81%
School of Allied Health	1472	21	1249	1052	29	3	83	1400	105.14%
School of Dentistry	364	8	263	194	35	2	43	400	91.00%
University Total	55000	1111	48644	30311	3031	107	3050	55000	100.00%

Emory's Engagement Dashboards



CFY Constituent Engagement

September 1, 2024 - August 31, 2025

Contact Type

All

Secondary Contact Types

All

Alumni/Student School

All

Contact Type	Contactable*	Living*	Any of the Four Modes	All Four Modes	Engaged Non-Donor	Communication	Communication ONLY	Experiential	Experiential ONLY	Volunteer	Volunteer ONLY	Philanthropic	Philanthropic ONLY	Engagement Rate
Alumnus/a	173540	180289	56027	5783	35973	48645	17815	18094	1060	4965	102	11037	1227	32.28%
Alumnus/a Spouse	36248	37246	5823	255	1121	2115	520	1320	162	200	17	4126	2430	16.06%
Board of Trustee Member	26	78	21	13	4	17	2	17	1	10	1	12	2	80.77%
Employee Spouse	1131	1147	451	43	38	141	16	113	6	27	2	375	195	39.88%
Faculty	10425	10542	4401	386	3272	4209	2333	753	24	364	38	648	36	42.22%
Friend	202862	212021	16378	1062	5833	9494	3378	4085	604	1026	50	7428	3592	8.07%
Healthcare Friend	116529	120755	7699	472	2427	2966	202	2767	506	1859	36	4213	3310	6.61%
Honorary Alumnus/a	35	69	8	3	4	5	2	5	2	4	1	6	2	22.86%
Parent	135186	139767	16555	472	11418	14548	7346	3926	292	466	43	3524	754	12.25%
Staff	94405	94888	25099	955	21414	24413	18984	1942	73	963	13	2427	338	26.59%
Student (Current)	15261	15721	9503	744	7861	8953	3109	4690	198	937	7	1055	27	62.27%
Student (Former)	6496	7793	78	3	69	64	33	31	8	7	2	8	3	1.20%
Student (Prospective)	12	1345	12	1	12	9	2	10	3	2	2	2	2	100.00%
Total	792156	821661	142055	10180	89434	115567	53730	37741	2927	10818	302	34849	11906	17.93%

* Contactable and Living counts are "live". They show contacts' status as of today.

Emory's Engagement Dashboards



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Alumni counts include non-grads and certificate only alumni

Alums are counted in **each** school they attended. Alums with both Undergraduate and Graduate degrees will be counted in **both** Undergraduate Engagement table and in Graduate Engagement table.
All numbers are "live" and are updated daily

Undergraduate Engagement CFY

School	Contactable	Communication	Communication Rate	Experiential	Experiential Rate	Volunteer	Volunteer Rate	Philanthropic	Philanthropic Rate	Overall Engaged	Engagement Rate
Emory College of Arts and Sciences	68091	18850	27.68%	7300	10.72%	2135	3.14%	4540	6.67%	21472	31.53%
Goizueta Business School	13476	4440	32.95%	2128	15.79%	600	4.45%	934	6.93%	5106	37.89%
Nell Hodgson Woodruff School of Nursing	6730	1682	24.99%	569	8.45%	168	2.50%	349	5.19%	1886	28.02%
Oxford College of Emory University	19149	5890	30.76%	2410	12.59%	728	3.80%	1223	6.39%	6545	34.18%
School of Allied Health	2069	266	12.86%	48	2.32%	8	0.39%	46	2.22%	288	13.92%
University Total	85726	25569	29.83%	10173	11.87%	2907	3.39%	5975	6.97%	29174	34.03%

Graduate Engagement CFY

School	Contactable	Communication	Communication Rate	Experiential	Experiential Rate	Volunteer	Volunteer Rate	Philanthropic	Philanthropic Rate	Overall Engaged	Engagement Rate
Candler School of Theology	8624	2443	28.33%	871	10.10%	181	2.10%	654	7.58%	2884	33.44%
Emory University School of Law	15761	4163	26.41%	1675	10.63%	429	2.72%	1068	6.78%	5056	32.08%
Emory University School of Medicine	20197	3927	19.44%	1220	6.04%	242	1.20%	1309	6.48%	4837	23.95%
Goizueta Business School	14974	4736	31.63%	2238	14.95%	684	4.57%	1150	7.68%	5656	37.77%
James T. Laney School of Graduate Studies	16848	4150	24.63%	1169	6.94%	341	2.02%	993	5.89%	4684	27.80%
Nell Hodgson Woodruff School of Nursing	7100	1829	25.76%	507	7.14%	135	1.90%	329	4.63%	2004	28.23%
Rollins School of Public Health	14580	5157	35.37%	1825	12.52%	594	4.07%	592	4.06%	5506	37.76%
School of Allied Health	5982	943	15.76%	166	2.77%	32	0.53%	148	2.47%	1037	17.34%
University Total	92390	25867	28.00%	9142	9.90%	2459	2.66%	5926	6.41%	30049	32.52%

Emory's Engagement Dashboards

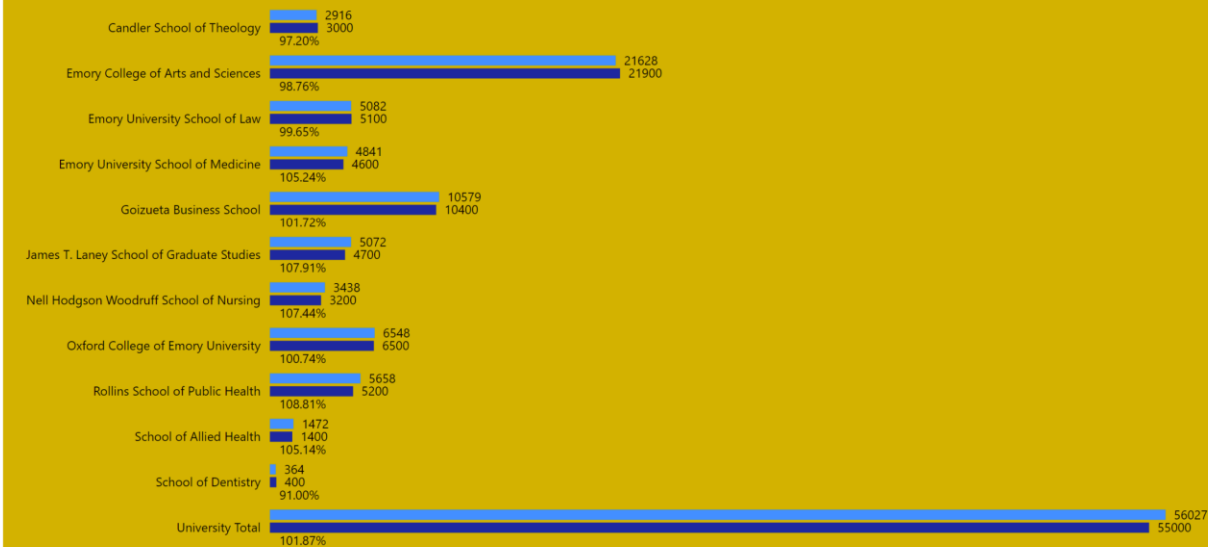


CFY SCHOOL PROGRESS TO GOAL

September 1, 2024 - August 31, 2025

Engagement Goal Tracking By School

Overall Engaged Engagement Goal Percent to Goal



Emory's Engagement Dashboards



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CFY Committee Participation

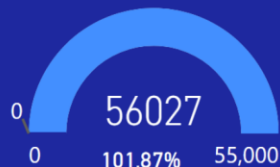
September 1, 2024 - August 31, 2025

Leadership Board Only	Committee	Role	Comment
All	All	All	All
Committee	Committee Members	Philanthropic Engagement	Philanthropic Rate
☐ BUS Business School Alumni Board	22	22	100.00%
☐ BUS EWG Exec Women of Goizueta	11	10	90.91%
☐ BUS GBS Dean's Advisory Council	37	29	78.38%
☐ BUS HC24 Kickoff Host Committee	1		
☐ CC Carter Center Board of Trustees	3		
☐ COL Committee for Robert T. Jones Jr. Scholarship	14	10	71.43%
☐ COL Emory College Alumni Board	23	23	100.00%
☐ COL Emory College Dean's Advisory Council	18	18	100.00%
☐ DEN Dental Alumni Executive Committee	7	6	85.71%
☐ EAA Alumnae & Women of Emory-New York	4	2	50.00%
☐ EAA Alumnae Network	6	6	100.00%
☐ EAA APIDA Network	8	8	100.00%
☐ EAA ATL Alumnae & Women of Emory Book Club	2	2	100.00%
☐ EAA ATL Emory Woman's Club	93	46	49.46%
☐ EAA Atlanta Young Alumni Network	9	3	33.33%
☐ EAA Austin TX Network	3	3	100.00%
☐ EAA Austria Network	2		
☐ EAA Baltimore MD Network	6	1	16.67%
☐ EAA Birmingham AL Network	5	2	40.00%
☐ EAA Boston MA Network	4		
☐ EAA Brazil Network	1		
☐ EAA Broward FL Network	7	6	85.71%
☐ EAA Canada Network	3	1	33.33%
☐ EAA Caucus of Emory Black Alumni	6	6	100.00%
☐ EAA Caucus of Emory Black Alumni-DC	3		
☐ EAA Caucus of Emory Black Alumni-New York	4		
☐ EAA Central New Jersey Network Leadership	5	4	80.00%
Total	2095	1236	59.00%

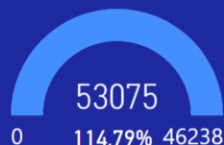
Emory's Engagement Dashboards



Total Alumni Engagement



Alumni Engagement (excl. Phil)



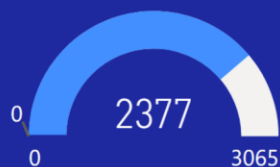
Alumni Donors

11,036

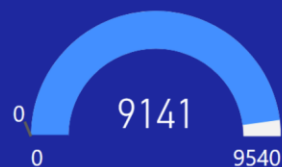
Alumni Leadership Donors

842

Returning Volunteer



Returning Experiential





Vanderbilt University

Custom Model Integrated with Campaign Strategy

Vanderbilt's Framework for Measuring Engagement

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Grounded in CASE Standards

Used CASE engagement definitions to guide consistent measurement criteria.

Custom “Give-Go-Help-Share” Model

Created a tailored framework reflecting Vanderbilt's unique engagement goals.

Two Lenses for Measurement

Tracks engagement at both the individual and overall alumni levels.

Campaign Integration

Focused on engaging 100K alumni using clear, behavior-based criteria during the campaign.

Data Visualization and Tools

Uses Tableau dashboards for campaign and individual portfolio engagement tracking.

Vanderbilt's Engagement Dashboard



Show Account Filters		Show Alumni Filters				Show Reunion Filters				Show Parent Filters				Reset Filters			
Account Name		Date												Accounts with No Action Items in the Last 9 Months			
		Q3		FY 2025		Q4				FY 2026		Q3					
		February	March	April	May	June	July	August	September	October	November	December	January	February			
Activity Reports		Events				Gifts				Milestones				Opportunities		RFAs	

Caltech Alumni Engagement Score Project

November 18, 2025



Caltech Alumni Engagement Score Overview

Experiential

- Signature events
- Regional events
- Virtual events
- Campus partner/Division events



Volunteer

- Boards/Committees
- Regional leadership
- Reunions
- Mentorship
- Speaker/Lecturer



Communication

- Email click-through
- Survey response
- Class notes
- Virtual networks



Philanthropy

- New gift
- Pledge or pledge payment
- Planned gift



Caltech Alumni Engagement Score Team and Process

Alumni Engagement Score Project Team

13 Staff Members

Alumni Relations

- AVP
- Alumni Communications
- Alumni Engagement

Data & Business Intelligence

- AVP
- Advancement Analytics
- Advancement Information Services
- Reporting & Business Analysis
- Strategic Initiatives

Process – Idea to Score

- Met numerous times to understand goals and data
- Defined each bucket and what Caltech values
- Determined accessible data now, data we have but not in the database, what data we want to measure
- Voted on data that allowed us to create a score now
- Created 5 versions of each model
- Selected the strongest statistic models
- Created a dashboard in Tableau

Data Points Considered

Philanthropic: 32
Volunteer: 47
Experiential: 50
Communication: 51
Total: 180

Alumni Engagement Score



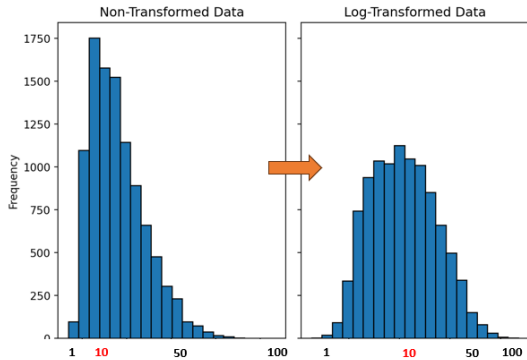
OVERALL	Not Engaged Yet	Least Engaged	Somewhat Engaged	Engaged	Highly Engaged
5 Levels	0	1-30	31-63	64-80	81-100

Data

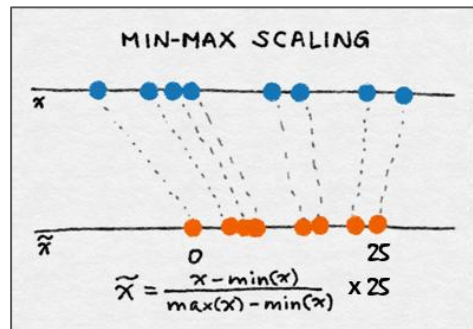


Methodology

Transformation

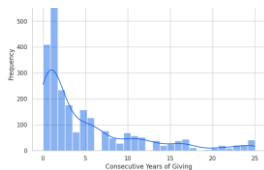


Scaling

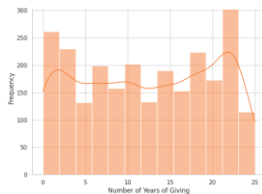


Philanthropic: Components

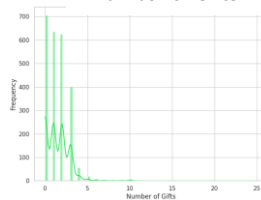
Consecutive Years of Giving



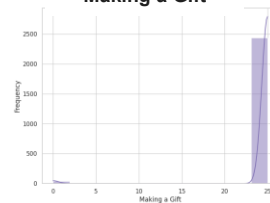
Years of Giving



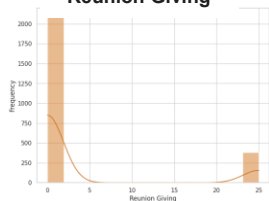
Number of Gifts



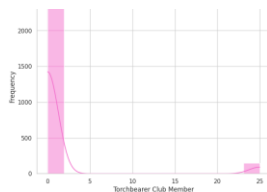
Making a Gift



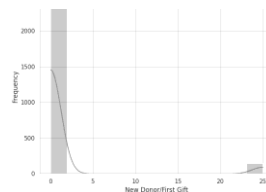
Reunion Giving



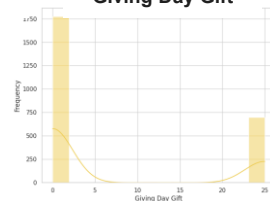
Torchbearer Club Member



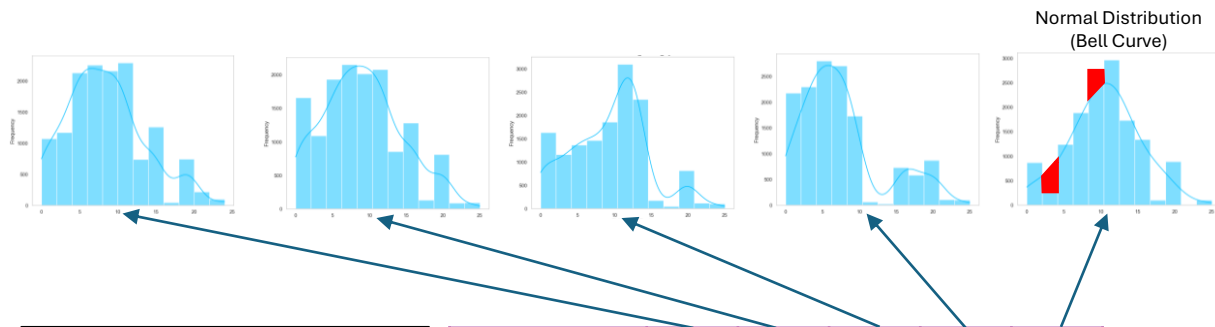
New Donor / First Gift



Giving Day Gift



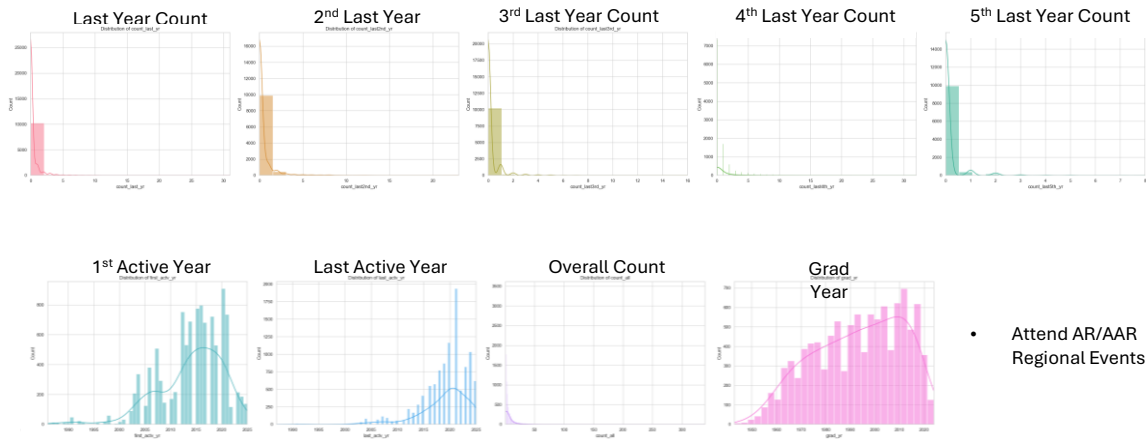
Philanthropic: Strategies



Long-time	Consecutive Years of Giving
Long-time	Number of Years of Giving
Long-time	Number of Gifts
Balance	Consecutive Years of Giving/Year
Balance	Number of Years of Giving/Year
Balance	Number of Gifts/Year
Last FY-overall	Making a Gift
New	New Donor/First Gift
Special	Reunion Giving
Special	Torchbearer Club Member
Special	Giving Day Gift

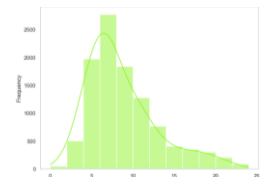
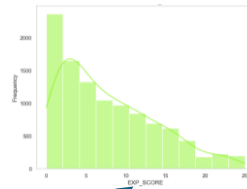
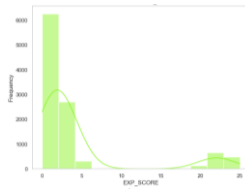
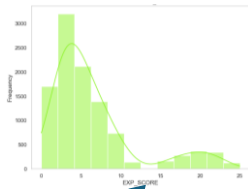
Metrics	Strategy1	Strategy2	Strategy3	Strategy4	Strategy5
Long-time	0.20	0.17	0.17	0.17	0.16
Balance	0.20	0.32	0.17	0.17	0.28
Last FY-overall	0.20	0.17	0.32	0.17	0.17
New	0.20	0.17	0.17	0.17	0.22
Special	0.20	0.17	0.17	0.32	0.17

Exponential: Components



- Attend AR/AAR Regional Events

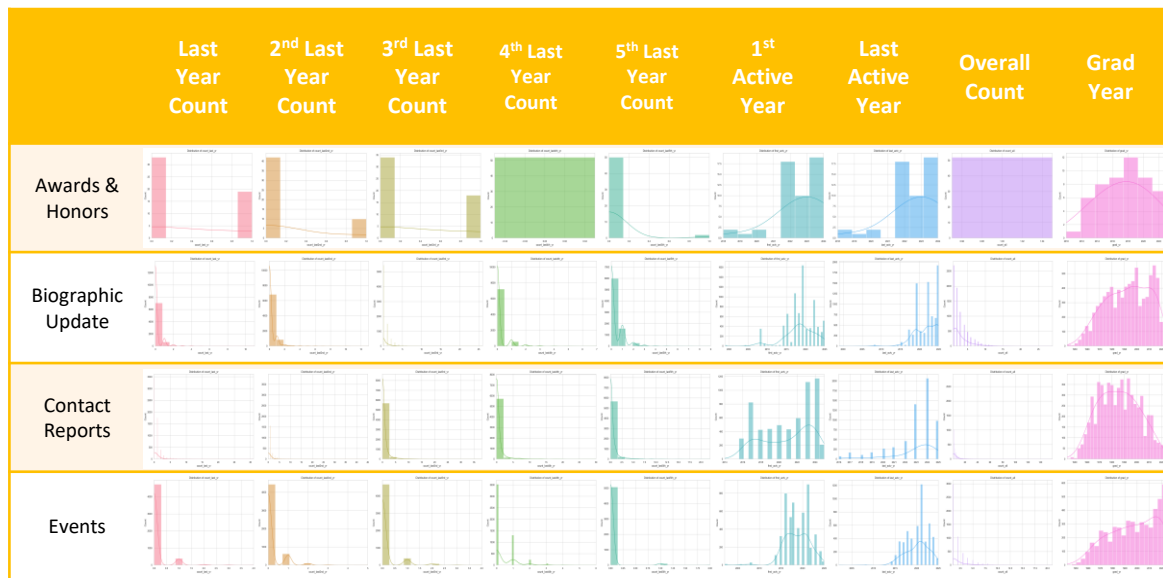
Experiential: Strategies



Metrics	Strategy1	Strategy2	Strategy3	Strategy4	Strategy5
Engagement in Last Year	0.20	0.60	0.10	0.10	0.01
Re-engagement Potential	0.20	0.10	0.10	0.30	0.30
Annual Engagement Since Graduated	0.20	0.10	0.60	0.10	0.01
Annual Engagement During Active Years	0.20	0.10	0.10	0.40	0.67
Engagement Trend in Recent 5 Years	0.20	0.10	0.10	0.10	0.01



Communication: Components



Communication: Strategies



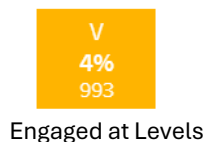
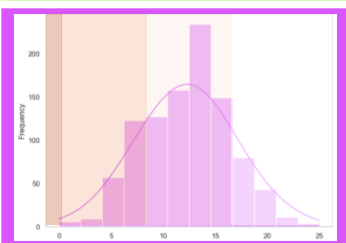
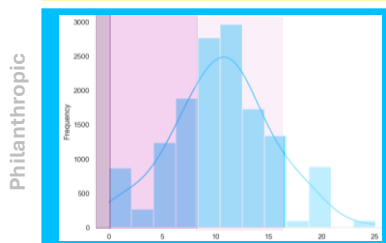
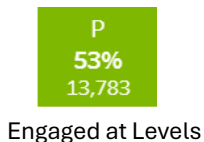
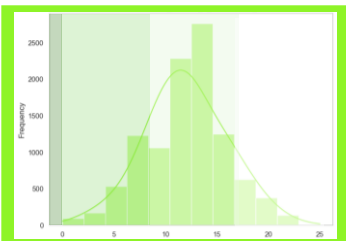
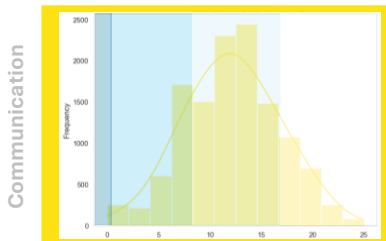
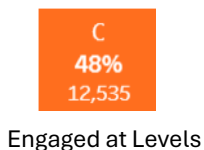
Volunteer: Components



Volunteer: Strategies

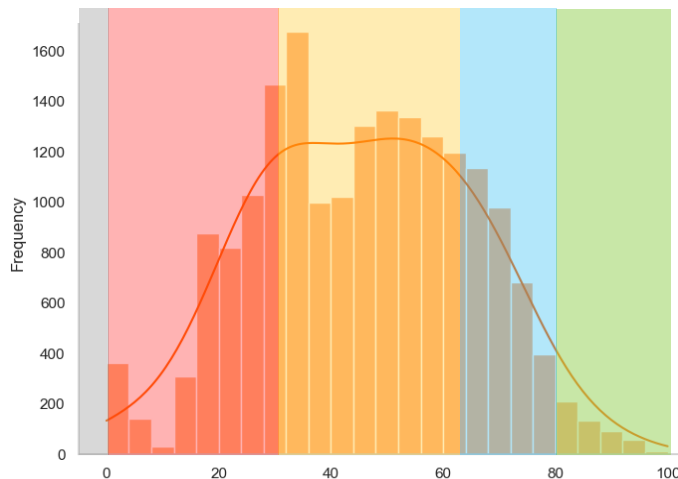


Engagement Models



Total **26,018 Living Alumni**

Overall: Score and Level



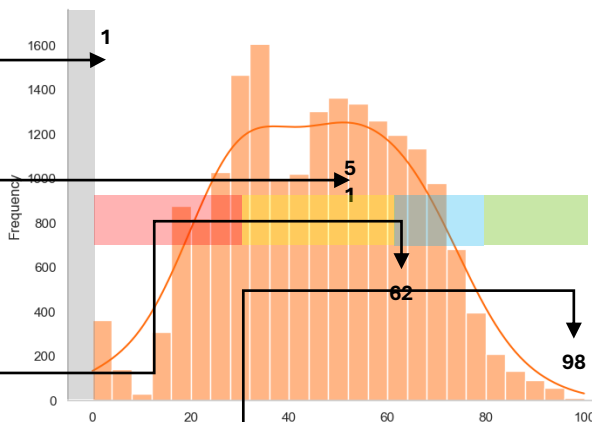
71%

18,501
Alumni were Engaged
at different levels.



- Not Engaged Yet
- Least Engaged
- Somewhat Engaged
- Engaged
- Highly Engaged

Rec Type #17202 (MS'05APH/PHD'08CHE)
 Alumni (2008 Engineering and Applied Science), Former Faculty/Staff, [More...](#)
Degree MS 2005 Engineering and Applied Science (Major: Applied Physics), PHD 2008 Chemistry and Chemical Engineering (Major: Chemical Engineering)
 Married: #19576 (MS'06CHE/PHD'09CHE)
Birth Date 07/04/1981 **Age** 43
Last Event Attended AA120223 Tesla Factory Tour



Rec Type #105603 (BS'20CS, Venerable)
 Alumni (2020 Engineering and Applied Science), Undergraduate
Degree BS 2020 Engineering and Applied Science (Major: Computer Science)
Birth Date 07/20/1999 **Age** 25
Last Event Attended CAA FY22: Alumni Reunion Weekend



Rec Type #14442 (PHD'13BI)
 Alumni (2013 Biology and Biological Engineering), Graduate (2013 Biology and Biological Engineering)
Degree PHD 2013 Biology and Biological Engineering (Major: Biology)
 Married: #24159
Birth Date 04/04/1977 **Age** 48
Last Event Attended CPG: A Conversation with Zoom Founder and CEO Eric S. Yuan

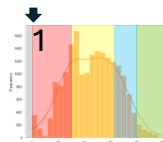


Rec Type #7038 (CAA Board, BS'02ENG, Lloyd)
 Alumni (2002 Engineering and Applied Science), Undergraduate
Degree BS 2002 Engineering and Applied Science (Major: Engineering & Applied Science) [More...](#)
 Married: #106944 (CAA Board Sp)
Birth Date 07/02/1980 **Age** 44
Last Event Attended CAA 2023: Caltech in Seattle



Example #1

#17202 (MS'05APH/PHD'08CHE)
 Rec Type Alumni (2008 Engineering and Applied Science), Former Faculty/Staff, More...
 Degree MS 2005 Engineering and Applied Science (Major: Applied Physics), PhD 2008 Chemistry and Chemical Engineering (Major: Chemical Engineering)
 Married: #19576 (MS'06CHE/PHD'09CHE)
 Birth Date: 07/04/1981 Age 33
 Last Event Attended AA120223 Tesla Factory Tour



Communication	Score
Awards and Honors	0
Biographic Update	0
Contact Report	0
Events	0

Philanthropic	Score
Long-time	0
Balance	0
Last FY-overall	0
New	0
Special	0

Recorded Giving Years: N/A
 Consecutive Years: 0
 Total Years: 0
 Number of Gifts: 0



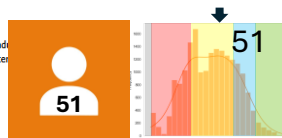
Experiential	Score
Engagement in Last Year	0
Re-engagement Potential	5
Annual Engagement Since Graduated	7
Annual Engagement During Active Yrs	4
Engagement Trend in Recent 5 Years	0

Latest activity: 1 event in 2012
 Total: 2 events 2006-2012

Volunteer	Score
Committee Participation	0
Events	0
Evaluations	0
Notes	0

Example #2

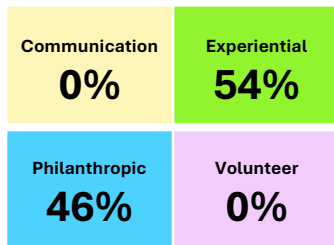
Rec Type #105603 (BS'20CS, Venerable)
Degree Alumni (2020 Engineering and Applied Science), Undergrad
 BS 2020 Engineering and Applied Science (Major: Computer Science)
Birth Date 07/20/1999 **Age** 25
Last Event Attended CAA FY22: Alumni Reunion Weekend



Communication	Score
Awards and Honors	0
Biographic Update	0
Contact Report	0
Events	0

Philanthropic	Score
Long-time	11
Balance	18
Last FY-overall	0
New	0
Special	18

Recorded Giving Years: 2020-2021
 Consecutive Years: 2
 Total Years: 2
 Number of Gifts: 2



Experiential	Score
Engagement in Last Year	0
Re-engagement Potential	16
Annual Engagement Since Graduated	12
Annual Engagement During Active Yrs	11
Engagement Trend in Recent 5 Years	0

Latest activity: 1 event in 2022
 Total: 1 event in 2022

Volunteer	Score
Committee Participation	0
Events	0
Evaluations	0
Notes	0

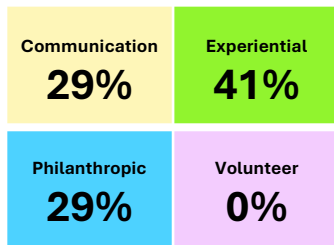
Example #3



Communication	Score
Awards and Honors	1
Biographic Update	0
Contact Report	10
Events	0

Philanthropic	Score
Long-time	21
Balance	23
Last FY-overall	0
New	0
Special	0

Recorded Giving Years: 2020-2024
 Consecutive Years: 3
 Total Years: 5
 Number of Gifts: 4



Experiential	Score
Engagement in Last Year	0
Re-engagement Potential	14
Annual Engagement Since Graduated	23
Annual Engagement During Active Yrs	15
Engagement Trend in Recent 5 Years	0

Latest activity: 1 event in 2021
 Total: 9 events 2016-2021

Volunteer	Score
Committee Participation	0
Events	0
Evaluations	0
Notes	0

Example #4

[Redacted] #7038 (CAA Board, BS'02ENG, Lloyd)
Rec Type Alumni (2002 Engineering and Applied Science), Undergraduate (2002 Engineering and Applied Science)
Degree BS 2002 Engineering and Applied Science (Major: Engineering & Applied Science) [More...](#)
Married: [Redacted] 106944 (CAA Board Sp)
Birth Date 07/02/1980 **Age** 44
Last Event Attended CAA 2025: Caltech in Seattle

[Profile Picture: 98]
 [Bar Chart: 98]

Communication	Score
Awards and Honors	0
Biographic Update	23
Contact Report	24
Events	14

Philanthropic	Score
Long-time	22
Balance	23
Last FY-overall	25
New	0
Special	0

Recorded Giving Years: 2017-2024
 Consecutive Years: 7
 Total Years: 8
 Number of Gifts: 17



Experiential	Score
Engagement in Last Year	25
Re-engagement Potential	25
Annual Engagement Since Graduated	24
Annual Engagement During Active Yrs	20
Engagement Trend in Recent 5 Years	24

Latest activity: 7 events in 2024
 Total: 69 events 2007-2024

Volunteer	Score
Committee Participation	18
Events	24
Evaluations	0
Notes	0

Caltech Alumni Engagement Score

- Measure overall engagement level of alumni base – updated quarterly
- Can segment data to identify cohorts of alumni that may be under/over engaged
- Use to set team goals on engagement level of alumni attending events, opening emails, & participating in volunteer opportunities
- Caltech can use score to understand engagement of individual, cohorts, or larger segments of alumni

Caltech Alumni Engagement Score 2.0

- Add click-through information into communication
- Identify touch points/initiatives that move engagement and the staff/resources investment
- Identify alumni who are falling or rising quickly in their score for targeted outreach



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Questions for Discussion

- Are there **insights, questions, or challenges** around engagement metrics or benchmarking that we haven't already discussed today?
- What **specific decisions do you want to make** using engagement data?
- Looking at your current engagement systems and measures, what **data or capabilities do you feel are still missing** to fully support those decisions?
- Given the variety of systems and approaches across institutions, what could we do collectively to move toward more **consistent benchmarking and shared learning**?



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