# The Alumni Engagement Metrics Project Brief

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**What is it?**
The goal of the project is to track and measure the engagement of Georgetown's alumni community (and other constituents). This multi-year project unfolded over distinct phases.

1. **Definitions:** We first had to convene everyone in the office to create a shared definition of engagement, choose which engagements to track, and decide how to classify them.
2. **Build:** From there we needed to then build the data infrastructure (in Salesforce) that would support these metrics.
3. **Data Integrity:** Then we needed to figure out how to collect and submit data properly and ensure that the dashboard was maintained with quality data throughout the year.
4. **Data Insights:** After that, we needed to figure out how to leverage the data to inform decision making and enhance work.

**What was my role?**
I was the **lead project manager**. I joined during the middle of the project and needed to figure out the moving pieces, the players involved and wrap my head around the system and its shortcomings. My boss provided me with much needed support and guidance in the first year, but by the end of the year I was fully in charge of setting priorities and making sure the project moved forward.

I worked as a **convener** with team members who worked directly with alumni in each of the different engagement types (Join, Go, Give, Help). My job was to get to know their work on the ground, and figure out how they translated their work into data that could then be fed into Salesforce. Over the first year, I held many conversations with team members and held focus groups to better understand their workflows and the roadblocks they faced.

I also worked as a **data analyst**, collaborating with our DATA colleagues, who built the data infrastructure and processed the data that was submitted from teams. I spent many hours learning the ins and outs of Salesforce and FreshService, learning how an alumni was measured in our system from their first email click to their first event to their first donation and beyond. I learned about the decisions we made in how we built our data infrastructure, its strengths and shortcomings, and had to constantly learn how to make the data structure fit our purposes and be easily understood and streamlined for our alumni-facing team members.

After learning and conversing and understanding, it was time to make the rubber meet the road. **I spearheaded our quality control and data integrity measures**. I essentially needed to bridge the gap between what we wanted to track in the system and what team members were doing on the ground. This involved creating an automated reminder system, a customized reporting system, clear deadlines and data templates. I leveraged the goodwill I had built and communicated clearly and directly with team members so that they understood what was asked of them (clear and timely data submissions) and the reason that it was needed (to enable our metrics dashboard).

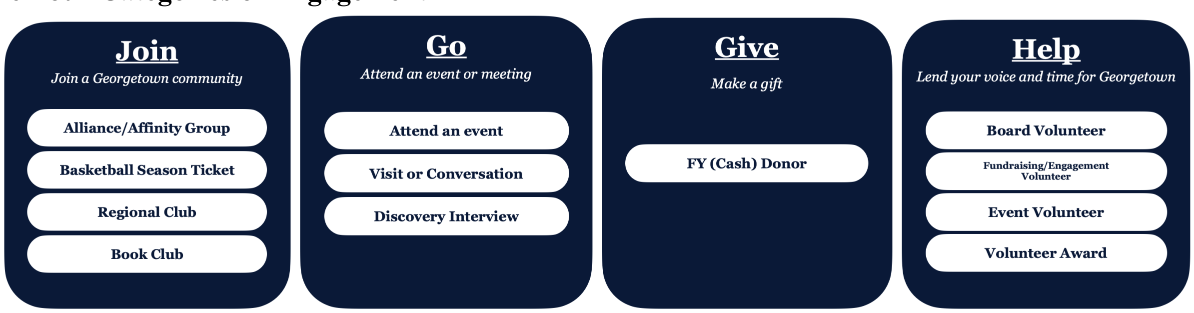
As the data became more clear and accurate, **I had the job of presenting the data** to teammates, unveiling the fruits of our labor. Thanks to the work of my DATA colleagues, we began a quarterly review process as well as an annual report. We researched existing models (CASE) and identified the insights we wanted to show in our annual report.

**Sustainability Plan & Next Steps**

With the data team, I helped establish automated quality control and data integrity reports that will allow the office to maintain the high level of data integrity that I helped establish.

For the next phase of the project, I helped lay out a roadmap of how the project could grow. The general data is useful for leadership and to gauge our office-wide year-to-year performance, but the next challenge is to make the data useful and informative to the specific teams involved. Many of our sub teams in Alumni Engagement work with a very specific sub-group of alumni (by class year, region, interest group, etc.) and want to know how the metrics pertain to *their specific population of alumni*. However, the data is not set up to meet this need, so we will need to undergo a new phase of figuring out how to make this data applicable to specific teams. This will involve new rounds of facilitating conversations with DATA colleagues and alumni engagement team members to explore what is desired by teams and what is possible from the data infrastructure perspective. As of this writing (June 2026), this is where the project stands.

**The Four Categories of Engagement**



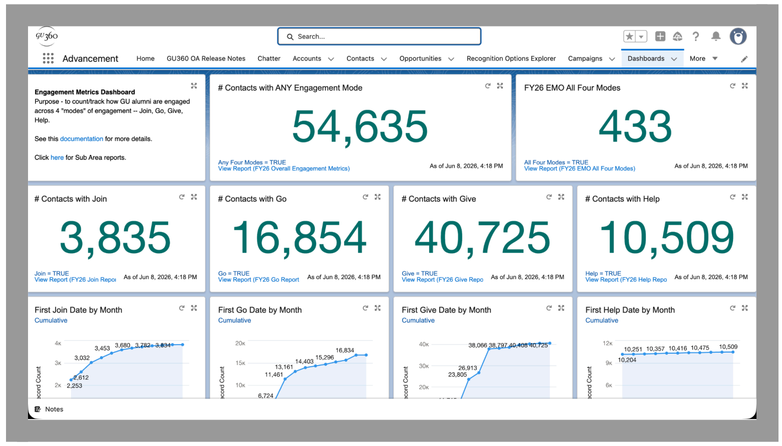

**Who was involved?**

- AEM Core Group: Office of the AVP, DATA, Records, and key data specialists from Alumni Relations and Annual Giving.
    - AVP: Project managers, executive decision makers, and primary audience. Also leads quality control and data integrity.
    - DATA: Lead developers and data specialists.
    - Records: Lead in data processing.
    - AE Team Members: Advisory and Consulting role.
- AEM Task Force: A group of OA staff who represent the full band of alumni engagement's work and the data collected.
- AE Team Members: Responsible for leading their engagement works in all four categories (Join, Go, Give, Help), collecting data to measure their populations' engagement, and submitting their data.

**What were the deliverables?**

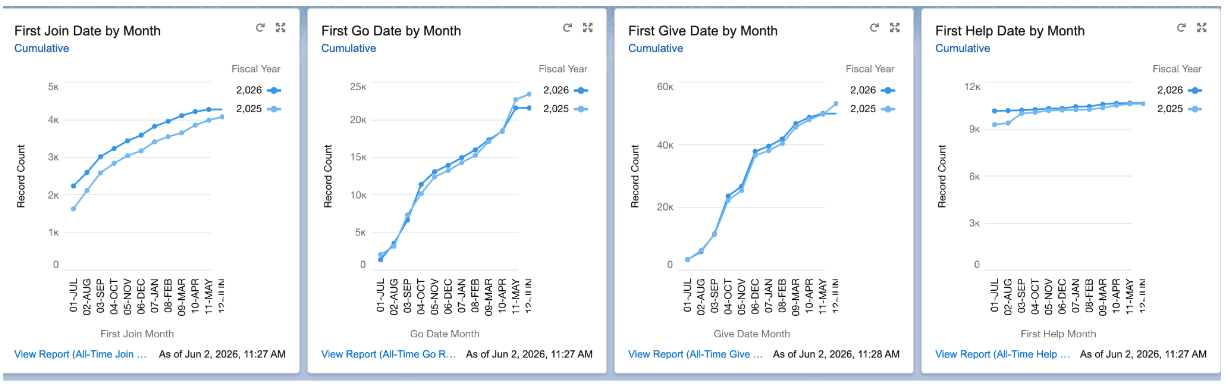
*FY '25 & FY '26 Dashboard*

These dashboards pull together data from a variety of sources, showing our engagement along four categories: Join, Go, Give, and Help




*Multi-Year Dashboard showing YoY comparisons*

These graphs enable the office to see YoY trends and identify fluctuations in our numbers from month-to-month




*Quarterly and Annual Review*

Conducting quarterly and annual reviews enables leadership to identify fluctuations in performance and can flag any engagement dips or spikes each year. This can also enable goal setting for subsequent years.