Alma Mater Matters

Designing Meaningful and Impactful Alumni Engagement
Within Independent School Communities

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About the Author

Carrie Grimes is an independent school leader with over twenty years of experience in higher education and independent school settings. A self-described curious and imaginative life-long learner, Carrie has loved school since her first day of kindergarten in Mrs. Carl's class-room.   She has spent her career working in educational administration, with a range of leadership experiences in early childhood education, enrollment management, arts education, school counseling, and development. Carrie began her career as an Associate Director of Admission for New York University's Tisch School of the Arts, and also spent ten years working in independent school settings in the San Francisco Bay Area. Carrie earned her Bachelor of Arts in English and Psychology from the University of Pennsylvania and her Master of Arts in Applied Psychology from New York University. She is also a proud wife and mother of three, who is deeply grateful to her family for their love, laughter, constancy, and support.

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Executive Summary

Independent schools' alumni engagement programming often lacks creative strategy and valid measures of engagement beyond dollars donated and attendance at alumni events (CASE, 2018). Despite the fact that independent school alumni are often well educated, successful, and uniquely strengthened by vast intergenerational social capital networks, the majority of independent schools struggle to inspire their alumni to give time, treasure and talent back to their alma mater (Gallup & NAIS, 2017). This phenomenon of detachment of alumni should cause concern for independent school development officers and administrative leaders, who confront challenges in enrollment and fundraising as they endeavor to secure long-term financial security (Hoerle, 2017; Hamilton-Kirk, 2018). Many independent schools operate on thin margins, and exercise high discount rates to maintain enrollment (CASE, 2018). As tuition-driven organizations, fundraising is a critical pillar of sustainability and long-term success for independent schools, and alumni represent the largest constituency for raising funds (NAIS, 2019).

This study focuses on exploring how independent schools can confront this challenge, and find ways to inspire more meaningful and impactful modalities of engagement for their alumni. SCP, the focal organization partnering in this study, is emblematic of hundreds of independent schools nationwide. A selective, large, pre-K-12 independent school in the United States, SCP possesses an alumni body of over 8000 who demonstrate very limited engagement. Like many independent school administrators, the team at SCP is actively seeking answers to questions like "How can we more effectively engage our alumni?" and "Why is our alumni participation not stronger?"

For the purposes of this study, I am defining alumni engagement as a group of behaviors in which alumni: dedicate their time to their alma mater, donate their talents to their alma mater, make a financial gift to their alma mater, and/or interact with fellow alumni in ways which enhance the alma mater's social capital networks of collaboration and/or community. My project investigates the following concepts at SCP, which are reflective of a conceptual framework undergirded by the pillars of social identity theory and communities of practice theory:

- Social identity as an array of dynamic forces that respond to shifts in group relations and contexts (Hogg et. al., 1995)

- The social systems of learning which help to shape and empower communities (Wenger, 1998)

- The influence of group membership, psychological intertwinement, and the

salience of identity on engagement behaviors (Hogg & Turner, 1985)

The extant literature on alumni engagement and independent school communities also informs my understanding of the conditions, context, and engagement behaviors of alumni organizations and their members.

This challenge faced by SCP and so many independent schools across the country inspires my central research questions:

1. How do personal and social identity shape forms of alumni engagement?

2. How do different forms of alumni engagement foster a sense of belonging?

3. What can schools do to provide more meaningful and impactful forms of alumni engagement?

To address my research questions, I used an exploratory mixed methods design, which relied primarily upon qualitative methods with purposive sampling. A site visit, interviews, and focus groups were the cornerstone of data collection. SCP also provided me with a robust array of materials ranging from internal performance data to print and digital media collateral which enhanced the research process through data and document analysis. After integrating all of these components and engaging in a rigorous analysis, the following relevant findings in this study were identified:

Finding 1

SCP alumni with more than one SCP layer of identity demonstrate more salience with the organization, which enhances their sense of belonging and actively motivates them towards engagement behaviors.

Finding 2

The deep and lasting relationships of SCP alumni with faculty and fellow alumni actively enhance their feelings of community, belonging and psychological intertwinement with SCP. This furthers their self-identification with SCP and inspires engagement.

Finding 3

Regardless of positive or negative past or present feelings about SCP, alumni unilaterally express strong feelings of pride about being an SCP alumnus/a.

Finding 4

SCP's core value of academic excellence is a powerful driver of SCP alumni pride.

Finding 5

Alumni-oriented communications integrating personal stories and nostalgia on school-related media fuel feelings of belongingness and community for SCP alumni, and can motivate alumni towards engagement behaviors.

Finding 6

Geography matters. SCP Alumni who are more physically distant from campus are less interested in engaging with SCP, and express a lack of incentive and connectedness.

Finding 7

SCP alumni seek engagement programming that extends beyond the scope of social events, including calls to action for mentorship opportunities, sharing knowledge and expertise, community service activities, and affinity group gatherings.

On the basis of my findings, I am making intervention recommendations that are aligned with the canon of literature, are reflective of the distinct SCP community, and also bear relevance for the independent school domain at large, as it collectively wrestles with alumni engagement strategy. Recommendations are concentrated around the five themes which emerged through the coding and analysis processes: alumni engagement, core values, community and culture, social identity/belongingness, meaningful shared practices, and narratives/storytelling.

Contextual Analysis

Focal Site Characteristics. SCP is a selective, large, pre-K-12 independent school in the United States, which was founded in the 1930's and possesses an alumni body of over 8000. Like many independent school administrations, the team at SCP is actively wrestling with the challenge of alumni engagement. This is evidenced by a 2017 internal SCP report (Appendix A) which characterized the alumni program as "in its infancy stage" and "underutilized in advancing the mission of the school," as well as SCP giving data (Appendix B) which consistently demonstrates 3.3% alumni participation in the annual fund, a rate 6% below the independent school national average (NAIS, 2019). SCP's phenomenon of lackluster alumni engagement sits in contrast to a backdrop of otherwise enviable excellence. Boasting full enrollment (with over 2000 students), exceptional college placement data (Appendix C), a robust $75 million endowment, and a legacy of highly accomplished alumni, SCP still actively struggles to effectively engage its alumni. Given their difficulties with alumni engagement, SCP was interested in partnering in order to explore how best to improve their alumni engagement. SCP was particularly keen to collaborate, as they prepare to embark upon the largest capital campaign in school history, and seek out avenues for optimization of community-building and fundraising.

Independent School Community Characteristics. The context and culture which distinguish independent schools from other educational communities are also

important considerations which help to inform our understanding of how alumni at institutions like SCP behave. The National Association of Independent Schools, which serves as the primary accreditation and governance guild for 1500 member schools across the United States, defines independent schools as non-profit educational settings which are each centered upon a unique mission (NAIS.org). Governed by an independent board of trustees, these schools source funding through tuition and charitable donations. NAIS further characterizes independent schools as "close-knit communities that provide students with individualized attention… challenging [them] to stretch their minds and go beyond academics" to become "responsible, independent, and community-oriented students" (NAIS.org). Varying in size, age, and religious affiliation, independent schools are perhaps best known for their strong sense of community, small class sizes, and dedication to ideals of collaboration, social responsibility, equity, and excellence (AIMSMDDC.org, CAISCA.org, AISNE.org, SAIS.org). A recent Gallup report of NAIS alumni survey data concluded that NAIS alumni have a higher probability of completing their college degree on time and are also less likely to transfer during college. The report asserts that "this consistent progression through college is linked with financial advantages — lower student debt and higher starting salaries – as well as higher career satisfaction and

well-being later in life" (Gallup & NAIS, 2017). The common cultural values of close-knit community, personal attention, and academic achievement may persist in the lives of independent school alumni after graduation, playing a role in how they interact with their alma mater, and what they expect from their alma mater as alumni.

Literature Review

Alumni Engagement. The available scholarly research on alumni engagement in education is almost exclusively based in institutions of higher education, revealing a gap in the formal investigation of independent schools. Alumni engagement in the post-secondary domain literature is consistently recognized as a multi-faceted user experience, which integrates a combination of internal and external variables (McDearmon and Shirley, 2009; Monks, 2003; Weerts and Ronca, 2007). This characterization is consistent with how independent school alumni relations professionals commonly describe alumni engagement as requiring complex "multi-pronged outreach that embraces high-tech, while maintaining high-touch efforts that have been used for decades" (Grace, 2019). Several themes emerge in the literature to shape our understanding of what lead alumni to engage with their alma mater. These include satisfaction with alma mater (past and present), personal finances/wealth, group/affinity trends,

communication strategies, and identity/engagement values.

Satisfaction with Alma Mater as a Predictor of Donor Behavior. The satisfaction alumni feel about their student experience is a strong predictor of alumni giving and engagement. Baade and Sundberg's research results (1996) found that alumni are more likely to engage with their alma mater if their experience has been positive. Monk's findings (2003) demonstrated that younger alumni who were satisfied with their student experience donated 2.6 times more than those who were less satisfied. Clotfelter's study (2003) echoed Monk's findings, but also unearthed the significance of the "mentor variable," which speaks to the importance that alumni attach to personal contacts with faculty. Alumni who recalled having a mentor as a student were twice as likely to indicate they were very satisfied with their college experience, and make a gift back to their alma mater. Weerts and Ronca (2009) found that larger gifts were correlated with alumni who perceived their alma mater as academically strong overall and wished to be affiliated with a strong academic organization. The findings of Tsao and Coll (2005) also affirmed the critical role of alumni satisfaction in giving and engagement.

Individual alumni financial circumstances also play a key role in giving (Weerts and Ronca, 2009). In the readings, this was diversely reflected in issues ranging from income, to career choices, to debt. Alumni who occupy certain high paying careers are much more likely to donate to their alma mater; namely, alumni who have JDs and MBAs give gifts which are 22% and 57% (respectively) larger than alumni without advanced degrees (Monks, 2003). Tsoa and Coll's (2005) findings also correlated alumni income levels with donor intentionality; alumni who had higher salaries were more likely to pledge to donate to their alma mater. Financial circumstances in which alumni were less likely to give included unemployment and over-commitment, when alumni feel an obligation to give to multiple alma maters and so their giving is "crowded out" (Smith and Price, 2017, Weerts and Ronca, 2009.) All in all, the literature clearly reveals that the correlation between alumni giving and household income is strong.

Group/Affinity Trends. Scholars identified several areas of concentration within alumni bodies where giving and engagement were more pronounced. Historically, women have been identified as being more philanthropic overall than men, (Thelin & Trollinger, 2014) and research has also proven that being an older alumnus/a is a predictor of the likelihood of donating both time as a volunteer and money to the institution (Weerts and Ronca, 2009). Older alumni have also been proven to be more generous at reunion moments than younger alumni (Clotfelter, 2003). Other groups where trends were revealed in the

literature are former financial aid students and students who are part of legacy families at a school. While the first group tends to give less, the second group tends to give more (Clotfelter, 2003). The dominant affinity group which emerged in the research are alumni who have an interest in athletics; institutions are consistently "rewarded by their alumni for sports programs that are extremely successful. Athletic success has an immediate impact on alumni generosity" (Baade and Sundberg, 1996).

Communication Strategies. Relevant literature around communications strategies which affect giving behavior with alumni elucidates the value of a number of techniques. These include a clear and compelling expression of institutional need for gifts, appeals targeted specifically toward alumni (as opposed to sweeping appeals to all constituents), and strategies crafted around ongoing, multi-platform communications and interactions between the school and the alumni body (Weerts & Ronca, 2009, Baade and Sundberg, 1996, Tsao & Coll, 2005). The most potent finding in the research was around communication concepts of expectation and need; when it was clearly communicated to alumni that they were expected to donate time and money, and that their support was essential to the institution, volunteers were 9.28 times more likely to give time, and past donors were 2.8 times more likely to give money (Weerts & Ronca , 2009). This finding interestingly illuminates that alumni not only increased their engagement behavior in response to these kinds of communication, but also that they did so in the same category of engagement (monetary/time). Conversely, if alumni perceive through school communications that their alma mater is thriving and does not need their support, alumni giving is diminished (Weerts and Ronca, 2009). A study by Tsao and Coll (2005) affirmed the value of ongoing, frequent and varied communication to alumni as well as offering varied opportunities for interaction between the alma mater and alumni. A variety of communications was strongly preferred by younger alumni, who "balked at the institution communicating only to ask for money, rather than to provide services or networking platforms at no charge to alumni" (McDearmon, 2010). The literature confirmed that more communication is best when it comes to motivating alumni engagement. If alumni were in regular communications with their alma mater and were consistently asked to get involved, overall volunteer and donor behaviors increased (Weerts & Ronca, 2009).

Identity/Engagement Values. This last theme which surfaced in the literature encompasses the feelings and actions which demonstrate camaraderie with one's alma mater and a sense of shared values with

the institution. A strong expression of one's identity integration with the alma mater is known as salience, and research suggested that an increase in salience towards being an alumnus(a) can increase engagement behaviors (McDearmon,2010). Weerts and Ronca's research revealed that "the most committed alumni have chosen to make the institution an important part of their life after graduation. Their personal initiative to stay connected indicates an emotional attachment to the university and is reflected in their giving and volunteerism" (Weerts & Ronca, 2009). Another major predictor of alumni giving in the literature was engagement in campus activities and programs. Attending alumni events, athletic programs, cultural gatherings, volunteering on a committee, and participating in the alumni association were all behaviors that were common amongst financially supportive alumni (McDearmon, 2013). Weerts and Ronca (2009) found that alumni who volunteer and give money are 1.5 times more likely than inactive alumni to have attended athletic events, cultural activities, or visited campus since graduation. The literature reviewed consistently maintains that engaging in school activities, sharing values with the alma mater, and identity salience as an alumnus/a of the organization all positively drive alumni giving and engagement.

Conclusion. A review of the literature related to alumni engagement suggests that there are known challenges to engaging alumni, and known strategies for targeting improvement in alumni engagement outcomes. The findings about the engagement behaviors of certain alumni groups are diverse, but a generalization of the research might be to say that older, local female alumni who are lawyers or doctors are most likely to donate. If they follow school athletics and are part of a legacy family, their odds of giving time, talent, or treasure to their alma mater further increase. The literature suggests that devising a school communications plan which optimizes the probability of alumni engagement involves targeted alumni campaigns and a steady flow of varied formats (online, print, etc.) paired with regular opportunities to participate in school-sponsored events. Finally, the results presented in these articles emphasize that engaging in school activities, sharing values with the alma mater, and identity salience as an alumnus/a of the organization all positively drive alumni giving and engagement.

However, current analyses overlook the unique alumni relations landscape of the independent school domain, which is considerably more intimate than the higher education alumni relations realm. Characterized by close-knit communities, joint emphases on personal attention and academic excellence, and a dedication to mission-driven culture and identity, independent schools' alumni represent a

distinctive cohort of alumni. Through the lens of my conceptual frameworks, communities of practice theory and social identity theory, my research seeks to explore how to best address the particular needs, challenges, and possibilities inherent to alumni engagement practices within independent school communities.

Conceptual Framework

Prior literature on alumni engagement and giving in particular highlights the importance of community and identity. Situating this study of alumni engagement in an independent school thus requires a deeper understanding of these ideas. SCP's focal challenge of insufficient alumni engagement can therefore be meaningfully investigated through the lenses of two conceptual frameworks: communities of practice theory and social identity theory.

Communities of Practice Theory. Wenger & Snyder (2000) define communities of practice as "fertile organizational forms" which typically exist within the context of a larger organization. Unlike a team, which is put together by a manager to achieve specific tasks, a community of practice is informally organized with a purpose of building upon or sharing knowledge in flexible and dynamic ways (Wenger, 1998). The concept of communities of practice can help shape our understanding of how alumni might more meaningfully interact with one another as

a form of alumni engagement. Typically conceived around "joint enterprises", communities of practice are voluntary and have a core group of actors who provide intellectual and social leadership, which serves to energize fellow participants (Wenger, 1998). Within the context of alumni communities, this characteristic of communities of practice is germane, as it suggests that factions of alumni might galvanize around particular activities which pique shared interests, passions, or skills.

Knowledge, experience, and information is shared in unstructured and inventive ways within a community of practice, and the community emerges around ideas and work that matter to people (Lave, 1996). Lave describes communities of practice as having "permeable boundaries" characterized by a fluidity of roles, and fostering learning through mentorship and an increase in one's participation over time. Newcomers may enter a community of practice, and find mentorship through relations with more experienced old-timers, while both cohorts are simultaneously cultivating identities as members of a sustained community (Lave, 1991). Wenger represents this process of navigating from the edges to the core of a community of practice with a model of stages of development (Figure 1, Wenger, 1998), which illustrates the different levels of interaction among the members and different kinds of activities associated with

each level. These characteristic of communities of practice align well with the structure of alumni associations, which are inherently vast and disperse, but readily invite the formation of affinity-based collectives due to a shared sense of identity as alumni. Furthermore, alumni associations are in a constant cycle of membership replenishment. The annual addition of newcomers to the alumni body, along with the increasing longevity of old-timers, provides a generative context in which potential communities of practice might emerge.

Social Identity Theory. Tajfel & Turner (1979) suggest that the groups to which people belong are an essential source of pride and self-esteem. Social groups offer individuals a framework for social identity: a way of belonging within the social world (Tajfel & Turner, 1979). Within the context of alumni relations, these concepts are particularly relevant, as alumni organizations automatically conglomerate all of the individuals who attended a particular institution into a shared social group, and these groups often coalesce around shared symbols, traditions, and feelings of pride. Ashford & Mael (1989) described this process of social identification as a perception of belongingness to "some human aggregate." The literature on group identification indicates that one does not need to put forth effort toward the goals of an organization in order to identify with it; rather, an individual "need only perceive him or herself as psychologically intertwined with the fate of the group" (Foote, 1951). This raises questions about how the sense of "intertwinement" alumni feel with their alma mater may motivate them towards engagement behaviors, and how those who make no overt gestures of alumni engagement may still meaningfully socially identify as a member of their alumni community,
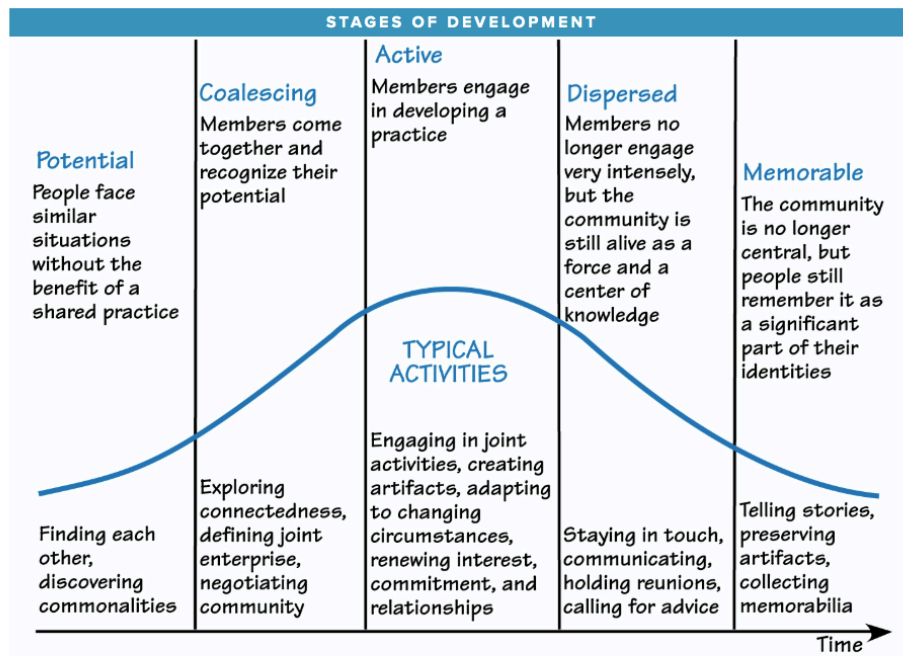
Communities of practice move through various stages of development characterized by different levels of interaction among the members and different kinds of activities.

Figure 1, (Wenger, 1998)

with a capacity for future engagement. Foote advanced this argument by finding that when individuals socially identified with a particular group, they also personally experienced both the successes and failures of that group at large. This raises questions about the ways in which schools can more authentically connect with alumni during moments of institutional accomplishment and setback, to promote stronger social identification.

Tajfel and Turner (1985) also theorized that a social category into which one falls (e.g., alma mater affiliation), and with which one feels a sense of belonging, contributes to the definition of who one is—an element of a person's overall self-concept. People have a collection of these distinct social category memberships which vary in relative importance to one's self- concept (Hogg, et. al., 1995). People evaluate themselves based upon their group memberships, and are motivated to adopt behaviors which enable them to remain tied to groups they and others perceive as favorable. These findings are important because:

Alumni of independent schools likely have multiple social category memberships—where does one's independent school alma mater rank in that mix? A lower ranking (relative to one's college alma mater, for example) would result in fewer behaviors (such as alumni engagement behaviors) that are motivated by a desire to remain tied to the group.

This also has relevance because it begs the question, what additional categories of social identity might reinforce or upgrade the importance of one's status as an independent school alumnus/a? Factors such as having a child who attends or is applying to their alma mater, serving on one of the school's boards or committees, and being married to a fellow alumnus/a of the institution are all factors which might impact the influence that element of one's social identity has on an individual's overall self-concept.

Social identity theory literature also identifies two elements which are likely to positively increase one's tendency to identify with a particular group. Both have direct relevance to alumni relations communities. The first is the distinctiveness of the group's values and practices in relation to comparable groups (Oakes & Turner, 1986). Is the character, history, mission, and culture of one's independent school alma mater unique in comparison to other

secondary schools? Are these characteristics of distinctiveness effectively communicated to alumni through media and publications, and at events? If so, the trait of distinctiveness serves as a means of promoting more alumni to identify with their alma mater, and potentially engage in behaviors which will nourish their ties to the group. The second factor which has been shown to increase social identification with the group is the prestige of the group (Ashforth & Mael, 1989). Social identification affects self-esteem, and the desire to be associated with a winner is powerful. The perceived prestige of an independent school may be associated with a variety of factors including college placements, endowment size, enrollment success, attractiveness of the physical campus, and the performance of athletic teams. Alumni relations professionals at schools must consider ways in which to proactively communicate prestige points to their communities, in order to enhance feelings of affiliation.

Through the application of these theories to independent school alumni engagement behaviors, this study investigates how feelings of belonging, identity, and community membership shape independent school alumni engagement. This includes consideration of the ways in which the characteristically "permeable peripheries" (Wenger, 1998) of alumni communities can foster shared enterprises which nurture opportunities for valuable modalities

of alumni engagement as well as a consideration of the theoretical aspects of social identity theory and communities of practice theory which synthesize with the distinct gestalt of independent school communities. These include the concept of social identity as a dynamic construct that responds to shifts in group relations and contexts (Hogg et. al., 1995), the social systems of learning which help to shape and empower communities (Wenger, 1998), and the influence of group membership and salience of identity on engagement behaviors (Hogg & Turner, 1985).

Problem of Practice and Key Research Questions

SCP struggles to inspire their alumni to give time, talent, and/or treasure to their alma mater.

Why does it matter if SCP alumni, or any independent school alumni for that matter, engage with their alma mater? It's simple. Many independent schools operate on thin margins, and exercise high discount rates to maintain enrollment (CASE, 2018). As tuition-driven organizations, fundraising has become a critical pillar of sustainability and long-term success for independent schools, and alumni represent the largest constituency for raising funds (NAIS, 2019). *In order to promote long-term financial sustainability and security, independent schools such as SCP must effectively engage this large and valuable*

group of stakeholders. This challenge faced by SCP, and independent schools across the country, inspires my central research questions:

1. How do personal and social identity shape forms of alumni engagement?

2. How do different forms of alumni engagement foster a sense of belonging?

3. What can schools do to provide more meaningful and impactful forms of alumni engagement?

For the purposes of this study, alumni engagement is defined as a group of behaviors in which alumni: dedicate their time to their alma mater, donate their talents to their alma mater, make a financial gift to their alma mater, and/or interact with fellow alumni in ways which enhance the alma mater's social capital networks of collaboration and/or community. Project findings will provide a foundation to offer SCP evidence-based feedback on the problem of practice, and guide the formation of key recommendations which will better inform SCP's future strategy on alumni engagement. Additionally, this research will contribute to the practice of leadership and learning within independent schools, specifically in the field of alumni relations for independent schools--thus far an unexplored area within the research.

Design and Methodology

This project design is an exploratory mixed methods design, which relied primarily upon qualitative methods with purposive sampling. A site visit, standardized, open-ended interviews (both in person and via FaceTime) and two in-person focus groups were the cornerstone of data collection. SCP also provided me with a robust array of materials ranging from internal performance data, to print, social, and digital media collateral, which enhanced the research process through data and document review catalogued in a document analysis table (Appendices A, B, C, E, J).

Interviews and Focus Groups

Interviews were conducted with eight employees (five male, three female) at SCP who work in the development office, as well as some who are administrative leaders in other areas of the school that share common ground with the domain of SCP's alumni relations. Employees were also selected based upon their availability on a specific date, and therefore this was a sample of convenience, which has its limitations. Four employees represented SCP's executive leadership team, and four employees represented middle management. Titles of employee interviewees included Vice President of Advancement, Director of Advancement, Alumni Development Officer, Vice President of Marketing, Director of Alumni Relations,

Director of College Counseling, Head of Upper School, and Director of Parent Relations and Volunteer Programs. One employee was Black, and the remainder were White. Employees interviewed had a range of tenures at SCP from 1-36 years, and two employees were alumni. In addition, two employees were current parents, and two employees were parents of alumni.

Eleven SCP alumni (five male, six female) were also interviewed. Five of these alumni lived in proximity to SCP's campus, and six lived in other states. One alumnus was Black, one was Asian, and the remainder were White. Two of these alumni were also current parents at SCP. Two in-person alumni focus groups were also conducted, the first with six participants (two male, four female) and the second with five participants (four male, one female), following the same interview protocol. All alumni participants in the first focus group were also current parents; one participant in the second focus group was a current parent. Alumni were designated to focus groups based upon their proximity to campus, and availability to come to campus to

Employee Participants

Male	5	Black	1	Leadership	4	Current Parents	2
Female	3	Asian	0	Middle Management	4	Parents of Alumni	2
Total	8	White	7	Tenure	1-36 years	Alumni	2

Alumni Participants

Male	5	Black	1	Proximate to Campus	5	Current Parents	2
Female	6	Asian	1	Out-of-State	6	Parents of Alumni	0
Total	11	White	9	Ages	27-60		

Alumni Focus Group 1

Male	2	Engaged*	3	Proximate to Campus	6	Current Parents	6
Female	4	No-engagemer	3	Out-of-State	0	Parents of Alumni	0
Total	6			Ages	27-60		

Alumni Focus Group 2

Male	4	Engaged*	3	Proximate to Campus	5	Current Parents	1
Female	1	No-engagemer	3	Out-of-State	0	Parents of Alumni	0
Total	5			Ages	27-60		

* Engagement defined as having volunteered and/or given a gift in the last 5 years.

Figure 2

participate on a designated date at designated times, making these participants also a sample of convenience, which presents limitations.

Alumni participants represented an array of ages (27-60) and tracked levels of alumni donor and volunteer behaviors. Participants were composed of 50% individuals who have volunteered and/or given a gift in the last 5 years, and 50% who have not. Criteria for alumni inclusion in the study included being a graduate of SCP; individuals who attended SCP but did not graduate were excluded from the study. SCP's internal database, which includes current information about prospective participants' physical and email addresses and alumni status/participation served as the resource for determining eligibility. Selection of participants was equitable in that no one gender or ethnic group was targeted in the selection process. The study recruited an equal number of male and female participants. In addition, the composition of participants included an average of 1 administrator for every 2.6 alumni. The selection of the sample is the most significant limitation of the study. A purposive convenience sample such as this substantially limits the internal validity of the study, as the alumni who were selected and interviewed are not fully representative of the greater population of 8000+ SCP alumni. In addition, those who agreed to participate in the study may possess traits that are not representative of the general SCP alumni constituency, such as a desire to positively represent and display deference to SCP.

On my behalf, an administrator from SCP emailed prospective participants who fit these characteristics, (using an email template I provided) inviting them to participate in the study. Those who responded were then contacted via email by me, in order to coordinate their participation in the research. In-person interviews and the focus groups took place on SCP's campus, in a private conference room that the school reserved for this purpose. Those who lived in other states were asked to engage in an interview via telephone or FaceTime. Interview and focus group participants did not receive renumeration for their participation, and I informed all participants that their identities and the identity of the school would be kept anonymous in the written report of the study. Subjects were also advised that interviews and focus groups would be recorded for the purpose of future analyses.

Interviews lasted for thirty to forty minutes and included 34 questions. Focus groups lasted one hour, included the same questions, and were also recorded. Interview protocols were built around the aforementioned theoretical frameworks, in an effort to tease out the ways in which concepts of identity, belongingness, and community played a role in the experiences of alumni and perceptions of

employees about the alumni experience. General categories for questions were: social identity/belongingness (40%); communities of practice (30%); and general alumni engagement (30%). Questions for alumni and employees were the same, but worded appropriately for each audience. Sample questions included (Appendix D):

- How would you describe overall alumni engagement at SCP?

- Tell me about a time when you have witnessed the SCP alumni community come together in order to solve a problem, accomplish a goal, or share valuable knowledge?

- What do you believe would inspire alumni the most to give to a financial gift of any size to SCP?

- Tell me about a time when SCP publicly failed at something. How did you feel that moment reflected upon you, as an alumnus/a?

- How did you feel that those moment reflected upon SCP at large?

- Tell me about ways in which your team promotes a sense of belonging within the SCP alumni community.

Analytic Memos

Analytic memos (Appendix F) were written amidst the processes of conducting interviews and focus groups, in an effort to engage in reflective practice about the organizational context and the stakeholder experience. Reflecting upon my conversations with SCP administrators and alumni in these memos promoted learning and introspection, and inspired critical thinking and questioning about the purpose of the research and the conceptual frameworks guiding my investigation. Analytic memos were later referenced on multiple occasions, supporting the construction of my codebook and concept-clustered matrices which were instrumental in my analysis of stakeholder interviews. These memos also nurtured iterative processes of revisiting interview protocols, identifying emergent themes and patterns amongst interviewee responses, and promoting an overall focus on developing a deeper understanding of the unique context of SCP.

Listening Tour

Once all of the interviews and focus groups were complete, I transcribed them using a password protected educational software. In conjunction with these transcriptions and any notes I took during the actual meetings, I listened to each interview twice through, and then began curating a list of key themes and patterns which were emergent. The transcription software I utilized also provided a list of summary keywords--words that emerged with higher frequency—which aided in my identification of recurrent concepts which connected to my study's conceptual frameworks (Appendix G).

Matrices & Codebook

After listening to the interviews and focus groups twice, and reviewing my list of key themes, patterns, and recurrent words, I created a template for my codebook and a concept-clustered matrix, which I then applied to each interview and focus group, as I listened to the recordings again. The matrices served as a powerful coding tool, providing a place for me to gather quotes from interviewees which further illuminated the ways in which my conversations with stakeholders connected back to my conceptual frameworks and my key problem of practice. They also allowed me to see where there were gaps and inconsistencies within the data. I built my matrix template and codebook around the following core concepts**: alumni engagement, core values, community, and culture, social identity/belongingness, meaningful shared practices, and stories/narratives**. In each individual matrix, I worked to distill themes from my conversations with stakeholders that were illustrative of my three central research questions: How do personal and social identity shape forms of alumni engagement? ; How do different forms of alumni engagement foster a sense of belonging? ; and What can independent schools do to provide more meaningful and impactful forms of alumni engagement? For instance, the theme of the power of mentoring between alumni and students was clearly portrayed in one school administrator's interview. Sharing a story about meaningful interactions between students and alumni, she said, "One of our teachers took a group of journalism students to New York City to meet alumni who are working in the field of journalism--and it was phenomenal for the students--they all had to write a story about the people that they met. And then the alumni loved it." Once a matrix was created for each interviewee and focus group, all the matrices were examined collectively, in order to best understand the most prevalent themes, highlighted in my codebook (Appendix H). These themes, and the most representative quotes, were coalesced into two master matrices—one for alumni and one for employees-- (Appendix I) reflecting key elements of my conceptual frameworks of social identity theory and communities of practice theory.

Document/Media Analysis

In order to draw upon additional sources of evidence in my investigation of the phenomenon of disengagement of SCP alumni, I read, analyzed, and interpreted various social, digital and print SCP media, along with pre-existing SCP data about giving and alumni engagement tools and behaviors. This involved cataloging both content and thematic traits of documents and websites into a document analysis table, and served to better ground my qualitative methods in the context of SCP as pertains to the problem of practice being investigated (Appendix J). In addition to

providing contextual richness, the documents, media, and websites were particularly useful in my post-interview reflective practice. In that regard, I used data culled from these sources to help inform my interview data, and vice versa. My review of documents, media, and websites prompted new lines of inquiry, and was instrumental in refining concepts and themes which I had unearthed through the interview and codebook/matrix-creation processes.

Findings

Overview of Findings

Findings in this study surfaced around the following core concepts: alumni engagement; core values, community, and culture; social identity and belongingness, meaningful shared practices; and stories/narratives.

Limited Forms of Alumni Engagement

Alumni engagement in this study is defined as a group of behaviors in which alumni: dedicate their time to their alma mater, donate their talents to their alma mater, make a financial gift to their alma mater, and/or interact with fellow alumni in ways which enhance the alma mater's networks of collaboration and/or community. Analysis of the collected data reveals some inconsistencies amongst stakeholder attitudes about alumni engagement

across these four categories. A 2017 internal SCP report (Appendix A) characterized the alumni program as "in its infancy stage" and "underutilized in advancing the mission of the school." One current administrative leader in the development office described SCP's alumni engagement as "very limited," while another said "we have no alumni engagement program." In reflecting generally upon alumni engagement, alumni used words like "spotty", "skewed toward local alums", lacking in "rhyme or reason", "on a scale of one to ten, it's maybe like a one or a two", and "outreach from the school is pretty low…it's usually for you to donate." There was clear consensus amongst stakeholders in both the employee and alumni cohorts that the primary modality of alumni engagement at SCP is currently event participation. In 2018-19, the Alumni Director managed ten distinct events in six major cities, with a total of 1410 alumni registrants recorded, reflecting 17% of the alumni constituency (Appendix E). Alumni made statements such as, "The primary mode of engagement for alumni is alumni events…I think engagement is so-so." When asked about alumni engagement, multiple employees focused their comments primarily on event attendance: "Our New York City reunion in terms of turnout, I mean, we have turned people away. Wow…we had a substantial waiting list for that." Another remarked on feelings of positive momentum related to alumni events: "I think that

gathering people at the alumni receptions in the cities and working toward getting even more people back on campus for homecoming and reunion weekends--I imagine it's paid off. I don't have the data to back that up. But it just feels like, you know, it's growing."

While the school's busy annual calendar of regional alumni social events in cities with higher SCP alumni concentrations was lauded by some stakeholders for recent growth in attendance, other stakeholders were skeptical of the lasting value that these social events truly provided the attendees, the institution, and the alumni body at large. The key employees involved in designing and executing alumni relations engagement programming and strategy expressed dissimilar opinions about the value of alumni events. For some, high attendance was illustrative of value. For others, an inherent lack of deeper meaning and purpose associated with events diminished their value. One school leader wondered, "We just had fifty alumni come to a happy hour. You know, I still don't know if any good came out of that. I really don't." Another said, "There are a lot of people whose success is determined by how many people you get to events. It's not, did they have a good time? Did they feel more connected, did they make some connection that will help them in the future? Did they walk away with anything?"

Alumni also displayed mixed feelings about events. While some expressed disinterest--"In all honesty, if I asked my alumni friends if they wanted to go to an event, they'd say no,"-- others noted logistical obstacles: "There are some regional events that happen, but they are often on a week night--getting there is not super easy." Other alumni described events as "a great way to network, and, you know, see where life has taken other people". School messaging around alumni engagement prioritized event attendance, listing it as the number one way to "get involved" as an alumnus/a of SCP. The primary calls to action on SCP's alumni website included, "Join fellow alumni and faculty at reunions and receptions" and "Stay engaged in the life of the school by attending events on campus." The tradition of including beloved faculty into alumni events was roundly praised, and seen as a very motivating and deeply meaningful aspect of these gatherings: "Most people come to alumni events to see what teachers are coming. They want to see their old teachers." While some alumni professed appreciation for the opportunity to professionally network at alumni events, others admitted that if given the opportunity, they and their SCP friends would prefer to just spend time together on their own and use platforms such as LinkedIn to facilitate networking.

Alumni engagement programming which solicits alumni gifts of talent to SCP appeared to be limited in scope and lacking in formal programming and structure. Activities such as a former program run through the school's civic institute, occasional alumni guest speakers, and a recent journalism field trip collaboration between SCP faculty and alumni were all mentioned as examples of alumni sharing talents with the SCP student body. This limited menu of alumni talent engagement accurately reflected some stakeholders' expressions that broader concepts of alumni engagement are "untapped" and instead remain localized around social events. Alumni expressed marked enthusiasm about giving talent or expertise back to SCP, but seemed unclear on how to pursue that avenue of alumni engagement.

At 3.3% alumni participation in the annual fund, a rate 6 % below the independent school national average (NAIS, 2019), SCP's record of financial gifts from alumni demonstrates low donor engagement for the last several years. However, recent data did reveal steady growth over the last few years in overall dollars given to SCP from alumni, indicating the acquisition of some major individual alumni gifts. Some employee stakeholders were mystified by chronic low alumni donor participation, while others pointed

directly to SCP's longstanding impersonal solicitation techniques, which lacked the foundation of a broader alumni engagement program: "So we have no alumni engagement program, but we're continually soliciting alumni over and over--that doesn't work so well. And not a targeted solicitation--a general annual fund appeal that says, 'Dear Alumni'." Some alumni echoed this critique with cynicism about the school "always asking for money" and having limited alumni outreach that is "usually for you to donate." Gifts from alumni also appear to be mitigated by the alumni perception that SCP is "flush with money" and the fact that alumni sought to "put money into causes that are more relevant to me at this point in my life." Alumni also offered feedback related to the potential power of SCP's storytelling for more targeted gift solicitation; stories about former faculty, scholarship successes, and specific areas of institutional

Alumni Average Facebook Engagements over 300 Posts	
School-Sponsored Alumni Facebook Page Engagements*	
Event-related Posts	14
Nostalgia/Former Faculty Related Posts	114
Overall average	32
Alumni-Managed Alumni Facebook Page Engagements*	
Event-related Posts	8
Nostalgia/Former Faculty Related Posts	289
Overall average	66

* Engagement defined as a like, comment, or share.

Figure 3

need were narratives alumni said could inspire them to make a financial gift to SCP.

Interaction with fellow alumni in ways which enhance SCP's networks of collaboration and/or community were impressive in certain domains, such as social media. SCP boasts two alumni Facebook pages (one school-managed, one alumni-managed), which have engagement of 21% and 25%, respectively. The school site, with an average of five posts per week, was a celebration of alumni. Births, weddings, businesses, alumni visits, and upcoming events were all met with reactions from stakeholders. This platform for engagement positively facilitates virtual dialogue between alumni and SCP as well as amongst alumni; the page also hosts seven alumni affinity groups, ranging from arts, to athletics, to class years.

On the school-managed site, the most recent 300 posts demonstrated an average of 114 engagements for nostalgic posts associated with former faculty versus an average of 14 engagements for posts associated with school-sponsored alumni events. The alumni-managed Facebook page is a private group, managed by alumni, for alumni. Despite having more followers than the school-sponsored page, posts are much less frequent but offer an authentic platform for alumni voices including promotion of businesses, photos of alumni get-togethers, nostalgic memory-sharing, dissemination of obituaries, and requests for fundraising support for the

personal initiatives of alumni. On the alumni-managed Facebook page, the last 300 posts demonstrated an average of 289 engagements for nostalgic posts associated with former faculty, and an average of 8 engagements for posts associated with school-sponsored alumni events. Overall engagement in the last 300 posts for each site indicated an average of 32 engagements per post on the school-sponsored site, and 66 engagements per post on the alumni-managed site. Notably, across the four domains of alumni engagement, themes of belonging were most apparently expressed in this last category of interaction with fellow alumni in ways which enhance SCP's networks on social media. Words like "You know you went to SCP if", "our SCP community", "special relationships", "connection", "memories", and "SCP lifer" were illustrative of this.

Powerful Core Values, Community & Culture

Regardless of age, location, or number of layers of identity, academic excellence was consistently expressed as the leading core value of the SCP alumni who participated in this study. Scaffolded upon academic excellence were the neighboring constructs of success, intelligence, and work ethic. When asked about the core values of SCP, one graduate summed up the remarks of many: "Work ethic—you have to be smart and work hard to go to SCP", while another said "Academic excellence first and foremost--the school prides itself on being the

best of the best." Employee stakeholders as a group gravitated more toward core values of citizenship, character, and empathy, sharing reflections such as "having strong character and being good citizens" and "to have empathy towards others' perspectives". The value of academic excellence was also powerfully resonant throughout documents and media collateral, with repeated use of words like "excellence", "most challenging high schools list", and "challenging academic experience" (Appendix C). Alumni also expressed feelings of pride and positive affiliation in relation to SCP's core value of academic excellence; there was an explicit prestige associated with having graduated from an institution that prized academic excellence. Every alumnus/a who participated in this study expressed pride for their affiliation with SCP. For some alumni it was "intense pride" and "tremendous pride"; even alumni stakeholders who lived far from campus and/or had anger about some of their experiences with SCP still claimed to "feel very proud" to be an alumnus/a of SCP.

Interwoven throughout the data, in both employee and alumni stakeholder responses, there was also a deep and abiding appreciation for the value of the SCP community. If academic excellence emerged as the overarching intellectual value, community emerged from all of the data as the value at the heart of all of SCP. Whether

sustained through longtime alumni friendships, nostalgic reminiscence about revered faculty, or multigenerational commitment to SCP, a love of the community (either in its gestalt or via a subset thereof) was unambiguous. This even rang true for stakeholders who had become overtly disenchanted with SCP in other ways. Grudges about past administrative lapses, foolhardy leadership stints, and clumsy solicitations were all overshadowed by a love of the SCP community.

Nestled within the construct of SCP community were more specific expressed socio-cultural assets. Many alumni described how enduring relationships and a close-knit family feeling engendered by membership within the SCP community continue to nourish them in their interpersonal lives, long after graduation. Several alumni described SCP relationships with alumni friends and former teachers as "lifelong" and "family." Feeling "cared for", "close with," and "at home" were all qualities associated with SCP alumni reflections, and special relationships built at SCP by alumni. For some alumni, the feelings derived from these lasting SCP relationships helps cultivate an enduring affection for the institution at large. One alumnus vividly described the way in which his nearly 40-year close relationship with one of his SCP teachers casts "a glow from her that is reflected back on the school." Another described how the richness of her SCP relationships remains

unparalleled 27 years after graduating; "There is a connection that I've never replicated anywhere else."

Social Identity & Belongingness: Layers, Lifers and Geography

Alumni who possessed additional layers of identity at SCP (parent, coach, employee) along with alumni who attended SCP for 13 years ("lifers") demonstrated the most powerful identification with SCP. The more roles alumni had in association with the school, and/or the longer they attended, the greater the sense of "intertwinement" with the organization (Foote, 1951). One alumnus reflected upon having more than one identity, and also being a lifer at SCP: "when you tabulate all of those vantage points, it makes for a rich understanding of the school…all the identities are intertwined…I feel like they're all rolled up into one." Employees echoed this observation about alumni who possessed additional SCP identities behaving in ways that were illustrative of a deep connection. One remarked that "We have so many alumni who come back and have their kids here…the number of legacy families is huge," while another commented on the fact that SCP legacy family events were popular opportunities for alumni "to come together and…celebrat[e] identity." Status was also associated with possessing multiple SCP identities and being an SCP lifer. Those who were employees/alumni, lifers, and/or part of a legacy family were classified as "special" and "a big deal" in

interviews, focus groups, and school media. The value proposition of recreating the SCP experience for the children of alumni was also notably high. Several alumni mentioned their aspirations to send their children to SCP, while others shared stories about electively relocating far distances back to the region due to their desire to enroll their children at their alma mater. Employees also referenced "so many cases of [alumni] who move back here to have their kids to go to school where they went." Feelings of identity were powerful for SCP lifers. One shared, "Your identity is with those people that you spent all those hours with…every single day, for years…that's part of who you are."

For alumni who did not live in proximity to campus, the ranking of their SCP identity into their overall concept of self was typically much less significant. Geographic distance fostered feelings of detachment, and self-identification as an "outsider" or being "on the edges" of the alumni community. Some of these stakeholders looked to the alumni office, and/or to SCP social media and professional digital networking outlets to help bridge their sense of disengagement. When reunions and long-distance correspondences with SCP didn't meet their expectations, alumni mentioned feeling "disconnected" and "distant" from the organization, and "stop[ing] paying attention." One non-local alumna observed that "the people who are

local get a lot more engagement from SCP" while another said, "The fact that I went to SCP doesn't really inform my identity today, in my everyday life...I don't live there." Some non-local alumni also alluded to a lack of relevance of one's high school alma mater, particularly if you didn't live near the organization; "Once you graduate from college I don't know that where you went to high school is looked at when you're applying for jobs— especially if you're not living near SCP". Employees, conversely, did not express any concerns or observations about effectively engaging geographically distant alumni. Rather, several commented on the ways in which the school has positively nourished connections with alumni in other cities through regional events.

A Desire for Outlets of Meaningful Shared Practice

Despite very limited school-sponsored opportunities, alumni expressed willingness, curiosity, and occasional eagerness to engage in meaningful shared community practices, whether through service projects, mentoring, professional collaboration, athletics, or the arts. Communities of practice were emergent amongst regional alumni who shared business affinities; one group arranged their own regular professional networking meetings with the explicit purpose of "continu[ing] to develop in our professional careers, and helping each other grow in all aspects of our lives." Sharing knowledge

and expertise was something alumni wished to have more opportunities to capitalize on, given the perceived strength and value of the SCP alumni community at large. SCP's LinkedIn group was a digital space where some alumni claimed to seek out these resources, but the more meaningful collaborations happened through alumnus/a-to-alumnus/a professional referrals and relations. Alumni referenced the implicit worth of an SCP professional referral. One stated, "You're more trusting to do business with an SCP alum," while another added, "We share a history that cannot be rivaled by someone who is not from that background."

Opportunities to engage in community service activities, or shared social impact efforts were also welcomed by alumni. For some, coming together to engage in these kinds of meaningful practices with an altruistic mission or goal was more attractive than traditional social events: "I would choose to give back at a service-type of event over participating in a social event." The desire to engage in these sorts of activities was not tied to one's geographic proximity to campus. Alumni expressed a willingness to co-opt fellow alumni in their region to galvanize around meaningful endeavors. "If SCP was doing something worthwhile, like helping people register to vote, or marching to bring awareness to a social cause I believe in, I'd be inclined to get that going where I live too."

Mentoring was the most favored outlet for shared meaningful practice amongst SCP alumni. There was an overt enthusiasm about serving as a mentor to a younger alumnus/a, and/or adopting the role of mentee with a more seasoned member of the alumni community. Wonderings about the current lack of formalized mentoring programming at SCP were evident; "I think [mentoring] is something that, you know, is really lacking in SCP alumni engagement." Despite the enthusiasm of alumni for mentoring forms of engagement, employees were reticent to take on the concept due to challenges related to human resources and interdepartmental collaboration. Concerns about the quality control of mentor onboarding, the bifurcation of mentoring solicitation efforts and fundraising efforts, and a lack of clarity regarding whether an alumni mentoring program should be managed by a development officer or a student affairs employee were all significant stumbling blocks expressed by SCP staff. Some past efforts to more strategically and formally engage alumni in mentoring programming through the school's civic center were now dormant due to personnel changes, but the occasional alumni guest speaker and alumni panel-style activities were unilaterally praised for their direct positive impact on students. "If I'm a student, and I'm being mentored by alumni, that's something for me to look up to. I can see myself in her." The capacity for alumni gifts of time and talent through mentoring

to bring a focus on something other than fundraising was also commended. "I've also seen alumni be asked to share their expertise with students and that working really well, because they feel like they're giving without having to sacrifice money."

Connection through Storytelling

Storytelling about alumni has only recently become a more intentional aspect of SCP's efforts to connect with their alumni. With the advent of relatively new formats for storytelling, such as social media, SCP's communications team has avidly sought out ways to enhance and celebrate the alumni narrative. Stories about individual alumni--their professions, crafts, talents, and "a-day-in-the-life"—find a broad audience on SCP's social media channels, and in the alumni magazine. Stories are repeated across formats, and highlight a range of SCP alumni; one employee shared, "Not a week goes by where there's not an alumni story going on. And it could be repeated. You know, I'll see it on Facebook. I'll see it on Instagram. I'll see it wherever. And that's so terrific." Employees seemed invigorated by the fresh voices that recent alumni profiles have brought forth into the alumni narrative, and the benefits of storytelling were perceived as manifold, "sharing the story is a celebration in itself...because a lot of times when we reach out to that [alumnus/a], they are honored and happy to share their story." This format for sharing alumni stories between SCP and the alumni body stands in

contrast to some expressed alumni perceptions of direct-mail-oriented interactions with their alma mater, focused on events and gift solicitation, not storytelling. One alumnus shared "I can't remember many points of contact from SCP. Once in a while I get a pamphlet in the mail with a request for a donation...and maybe notification of regional events in my area. But that's all I can think of." Interestingly, the alumni relations personnel at SCP seem to have less of a hand in shaping alumni stories; rather, it is the employees in the communications department who appear to drive the generation, writing, and publishing of alumni stories, with alumni employees remaining focused on donor solicitation and events.

Nostalgia played a key role in the SCP narrative for its alumni. Described by some as "huge" and others as "iconic," the folkloric chronicles of SCP traditions, former teachers, and student hijinks were all an essential part of the gestalt of the shared SCP alumni experience. Warm and humorous memories of time spent with teachers and friends during one's time as a student, in combination with the celebration of distinctive SCP community rituals, comprised much of the narrative on the alumni-sponsored Facebook page. Resonance of certain particulars of SCP nostalgia emerged across a variety of school media, as well as during interviews. Alumni articulated an appreciation for the genuineness of SCP narratives which highlighted nostalgia, indicating its power in the overall alumni discourse. "Some traditions aren't there anymore. But I think you know, there's that overwhelming sense of nostalgia that's very powerful within the alumni group. And it's fun to have that shared sense of memory." Alumni also commented on the effect of more personal stories in motivating them to act, whether as a donor or a volunteer: "Hearing personal stories of people who have been helped by gifts to SCP who are less fortunate--then I might feel more compelled to donate or volunteer."

Key Findings

Finding 1

SCP alumni with more than one SCP layer of identity demonstrate more salience with the organization, which enhances their sense of belonging and actively motivates them towards engagement behaviors.

Correlated Key Research Question: How do personal and social identity shape alumni engagement at SCP?

Alumni who possessed additional layers of identity at SCP (parent, coach, employee) along with alumni who attended SCP for 13 years ("lifers") demonstrated the most powerful identification with SCP. The more roles alumni had in association with

the school, and/or the longer they attended, the greater the salience they had with the organization. In this context salience is defined as a strong expression of one's identity integration with the alma mater. Status was also associated with possessing multiple SCP identities and being an SCP lifer. Those who had multiple identities were classified as "special" in interviews, focus groups, and school media, and personally expressed powerful feelings of belonging.

alumni friends and former teachers as "lifelong" and "family." Feeling cared for, "close" with, and "at home" were all qualities associated with SCP alumni reflections, and special relationships built at SCP by alumni. For some alumni, the feelings derived from these lasting SCP relationships helps cultivate an enduring affection for the institution at large, and inspires ongoing engagement behaviors.

Finding 2

The deep and lasting relationships of SCP alumni with faculty and fellow alumni actively enhance their feelings of community, belonging and psychological intertwinement with SCP. This furthers their self-identification with SCP and inspires engagement.

Correlated Key Research Question: How do personal and social identity shape alumni engagement at SCP?

Finding 3

Regardless of positive or negative past or present feelings about SCP, alumni unilaterally express strong feelings of pride about being an SCP alumnus/a.

Correlated Key Research Question: How do personal and social identity shape alumni engagement at SCP?

Nestled within the construct of SCP community were more specific expressed socio-cultural assets. Many alumni described how enduring relationships and a close-knit family feeling engendered by membership within the SCP community continue to nourish them in their interpersonal lives, long after graduation. Several alumni described SCP relationships with

Every alumnus/a who participated in this study expressed distinct pride for their alma mater. For some alumni it was "intense pride" and "tremendous pride"; even alumni stakeholders who lived far from campus and/or had anger about some of their experiences with SCP still claimed to "feel very proud" to be an alumnus/a of SCP. As indicated by the literature, feelings of pride and perceptions of prestige increase one's social identification with a group. Positive social identification nourishes self-esteem, and motivates one's

desire to be affiliated with a successful organization.

Finding 4

SCP's core value of academic excellence is a powerful driver of SCP alumni pride.

Correlated Key Research Question: How do personal and social identity shape alumni engagement at SCP?

Regardless of age, location, or number of layers of identity, academic excellence was consistently expressed as the leading core value of the SCP alumni who participated in this study. Scaffolded upon academic excellence were the neighboring constructs of success, intelligence, and work ethic. Alumni also expressed feelings of positive affiliation in relation to SCP's core value of academic excellence; there was an explicit prestige associated with having graduated from an institution that prized academic excellence. The literature illustrates that social identification with a winner positively impacts self-esteem and motivates behaviors which enhance affiliation (Ashforth & Mael, 1989).

Finding 5

Alumni-oriented communications integrating personal stories and nostalgia on school-related media fuel feelings of belongingness and community for SCP alumni, and can motivate alumni towards engagement behaviors.

Correlated Key Research Question: How do different forms of alumni engagement shape a sense of belonging?

Nostalgia and personal stories play a key role in the SCP narrative for its alumni. The folkloric chronicles of SCP traditions, former teachers, and student hijinks were all an essential part of the gestalt of the expressed SCP alumni experience. Resonance of certain particulars of SCP nostalgia emerged across a variety of school media, as well as during interviews, integrating words indicative of belongingness. Alumni also articulated an appreciation for the genuineness of SCP narratives which highlighted personal alumni stories in the overall discourse of SCP. Alumni commented on the effect of more personal stories in motivating them to act, whether as a donor or a volunteer.

Finding 6

Geography matters. SCP Alumni who are more physically distant from campus are less interested in engaging with SCP, and express a lack of incentive and connectedness.

Correlated Key Research Question: How do personal and social identity shape alumni engagement at SCP?

For alumni who do not live in proximity to campus, the ranking of their SCP identity into their overall concept of self was typically much less significant than alumni living in proximity to campus. Geographic distance fostered feelings of detachment; as one out of state alumna said "I don't really feel a connection to the school anymore." Other self-descriptors used by out of state alumni included being an "outsider" or being "on the edges" of the alumni community.

Finding 7

SCP alumni seek engagement programming that extends beyond the scope of social events, including calls to action for mentorship opportunities, sharing knowledge and expertise, community service activities, and affinity group gatherings.

Correlated Key Research Question: What can SCP do to provide more meaningful and impactful forms of alumni engagement?

Despite very limited school-sponsored opportunities, alumni expressed willingness, curiosity, and occasional eagerness to engage in meaningful shared community practices, whether through service projects, mentoring, professional collaboration, athletics, or the arts. Mentoring was the most favored outlet for shared meaningful practice amongst SCP alumni. The desire to engage in these sorts of activities was not tied to one's geographic proximity to campus; alumni expressed a willingness to co-opt fellow alumni in their region to galvanize around meaningful endeavors.

Conclusion of Findings

The alumni organization of SCP is relatively large, somewhat engaged, and steeped in institutional pride. SCP alumni identify most saliently with their alma mater through cherished relationships they began while there, the lived experience of multiple layers of SCP identity, and shared core values of academic excellence, close-knit community, and hard work. The perceived prestige of SCP also nourishes alumni identification with the organization; the desire to be affiliated with a winning organization is powerful (Ashford & Mael, 1989). SCP alumni coalesce around school traditions, memories, and nostalgic lore, which contribute to their identification with their alma mater and the associated feelings of belongingness, pride, and affection. For some, the self-concept of being an SCP alumnus/a ranks highly. These individuals typically live near campus and possess more than one SCP identity. "Lifers" and members of SCP legacy families are also likely to have higher ranking SCP self-concepts. Alumni who live further from campus and possess the singular identity of alumnus/a, demonstrate a lower ranking self-concept

as an SCP alumnus/a, and are more likely to feel disconnected from the institution as a result.

SCP's alumni relations team is driven by events and fundraising. Alumni social events hosted by SCP in major alumni-centric cities, along with local events like Alumni Reunion Weekend provide large-scale opportunities for the alumni to gather for camaraderie, food/drink, and conversation. Other than participation as a donor, events are the primary avenue for alumni to engage formally with their alma mater. A robust SCP social media presence complements these structured in-person opportunities for social engagement with alumni news, stories, and solicitations. The communication team's recent efforts to enrich the alumni narrative with more personal stories highlighting a range of alumni has provided new pathways for SCP alumni to explore connectedness, renew interest, and tell their own stories as part of the SCP community. Outside of fundraising, social events and social media, the alumni community of SCP has not been afforded consistent, ongoing programmatic opportunities to recognize their collective potential. Despite this lack of opportunity, alumni are willing to more constructively engage with the SCP network. A receptivity to participate in endeavors involving mentoring, community service, and affinity group programming in sports and the arts is evident amongst alumni. The interest

amongst SCP alumni to have deeper and more meaningful channels for alumni engagement is present.

Recommended Interventions & Associated Evidence

The goal of these recommendations is to enable SCP to foster more meaningful and impactful forms of alumni engagement, which help shape a sense of belonging for the members of the SCP alumni community. I am defining alumni engagement as a group of behaviors in which alumni: dedicate their time to their alma mater, donate their talents to their alma mater, make a financial gift to their alma mater, and/or interact with fellow alumni in ways which enhance the alma mater's networks of collaboration and/or community. On the basis of my findings, I am making intervention recommendations that are aligned with the previously discussed literature, are reflective of the distinct SCP community, and also bear relevance for the independent school domain at large, as it collectively wrestles with alumni engagement strategy. Recommendations are concentrated around the five themes which emerged through the coding and analysis processes: alumni engagement; core values, community and culture; social identity and belongingness; meaningful shared practices; and narratives/storytelling.

Alumni Engagement

- Limit large-scale social events to three or four major cities per year, where alumni are most concentrated, plus Homecoming & Reunion Weekend, in order to avail human resources to other engagement efforts. Continue having longtime beloved faculty attend.

- Ensure all gift appeals to alumni are targeted in nature. Consider a concentrated schedule for the annual fund alumni appeal during one 6-8 week timeframe per year, using mixed media platforms such as videos, text to give, traditional mail, and social media. Suggested focal themes for alumni annual fund appeal include those most commonly emphasized by alumni in this study: pride/prestige and community/people. If possible, integrate the concept of pride, as well as beloved SCP faculty/coaches/mentors into alumni annual fund appeal.

- Test-run an alumni affinity group fundraising appeal to a targeted alumni sub-community such as a longtime successful athletics program, the broadcasting/TV program, or an arts program (such as the dance program). As part of the appeal, clearly identify the expectation for alumni to "give back", as well as the specific need and purpose of the funds being raised. Partner strategically with internal stakeholders of target group to effectively discern needs, goals, and desired outcomes of such an appeal.

- Launch educational programming with the current SCP senior class to steward, educate, and habituate future alumni giving. Designate a senior class leadership team of 6-8 students to partner with advancement staff to support the execution of their inaugural class gift. In the fall, host a series of senior class breakfasts before school, with remarks from the Alumni Director and Annual Fund Director about the power of becoming a part of the SCP alumni family, and a pitch for class gifts in the form of a "Dollar of Dedication" in honor of a coach/mentor/teacher who has influenced them, with goal of 100% class participation ($1-5 per student). Capitalize on successful completion of project through various school media platforms.

- Use exemplar of recent successful student-alumni journalism trip to New York City as a model for 1-2 additional trips in popular sectors of interest such as finance, technology, and marketing. Create a best practice model to design future trips, and identify key alumni hosts and target cities. Celebrate the stories of these alumni-student professional partnership experiences throughout various school media platforms.

These recommendations align well with the previously discussed prior research about alumni engagement and independent schools. We know that contemporary alumni engagement practices cannot be primarily driven by events; they must be agile, multi-pronged, and complex in order to bear fruit (Grace, 2019; Weerts & Ronca, 2009). Pre-existing research also shows that targeted appeals to affinity cohorts have been successful (Baade & Sundberg, 1996) and that a clear expectation of giving in order to meet essential institutional needs results in gifts of time and money (Tsao & Coll, 2002; Weerts and Ronca, 2009). Inclusion of beloved mentors or former teachers in engagement activities is a known to motivate alumni to give back time and money to their alma mater (Clotfelder, 2003). The need to educate and steward the next generation of alumni is clearly illuminated by trends within young alumni giving behavior and attitudes (McDearmon, 2010).

Core Values, Community & Culture

- In partnership with the community at large, cultivate a newly created prestige-oriented affinity group such as an "SCP 40 Under 40" which identifies and celebrates younger alumni who powerfully reflect the school's mission in their current profession/craft, volunteer work and/or personal pursuits. Promote an online community-wide nominations process and strategically engage an alumni advisory panel to make the selections. Host an on-campus reception for honorees (perhaps in coordination with Alumni Reunion Weekend), and strategically announce/celebrate the honorees and their accomplishments through media. The processes of learning about nominees will provide rich data for the alumni relations and communications teams' continued work.

- Increase utilization of hashtags with the words "pride" and/or "proud" on digital collateral and in social media targeted towards alumni. Develop additional alumni merchandise integrating the words pride and proud.

- Build a centralized digital alumni community by adopting an alumni networking platform partner, such as Graduway, to custom design one primary digital alumni networking tool that can serve as a domain for SCP alumni to independently network, seek out fellow alumni in their geographic region or industry, share news/stories, job/internship hunt, and facilitate mentoring partnerships. With support of Graduway (or preferred partner), strategically launch platform to optimize alumni onboarding/utilization.

These recommendations are supported by the literature, which illustrates that feelings of pride and perceptions of prestige increase one's social identification with a group. Positive social identification nourishes self-esteem, and motivates one's

desire to be affiliated with a successful organization (Ashford & Mael, 1989). Tactics like strategically leveraging the illustrious success stories of alumni, and emphasizing the collective feelings of pride within the alumni community have been shown to have a high level of effectiveness in prior studies, contributing to individuals' desire to claim membership within groups they and others perceive as favorable (Hogg, et. al., 1995). The recommended digital networking alumni community is illustrative of a communities of practice model; research supports that this inventive type of organizational design as flexible, dynamic, and conducive to fostering learning through mentorship (Lave, 1996). Alumni participants in this digital version of the SCP community would have the ability to permeate in and out of various stages of development, depending upon their needs, skills, and the available interactions and activities (Wenger, 1998).

Social Identity/Belongingness

- Engender feelings of social identification and belongingness with SCP alumni by offering a more diverse menu of programming that includes strategic engagement of mixed age affinity groups. For example, invite all theater arts alumni or football alumni to return to campus for an alumni dinner/reception, followed by a performance of an SCP upper school musical or playoff game. Invite current and former faculty, coaches, and alumni parent volunteers

who engaged in these affinity groups to these events as well. Additionally, host bi-annual luncheons on campus for retired faculty and staff, reminding them that they are still valued members of the SCP family. Share photo collateral from these affinity gatherings with the SCP community, and invite their former colleagues and current students of the recently retired to stop by these gatherings.

- Capitalize on the innately powerful SCP affinity groups of "lifers" (alumni who attended SCP for 13 years), local alumni, and legacy families with strategic programming and outreach. Dedication to an annual legacy family event, with a legacy keynote speaker and multiple generations of SCP families in attendance is recommended to further stoke the pride and social identification this group has with SCP. "Legacy Limelight" and/ or "Lifer Limelight" featurette stories on these affinity groups are also a recommended addition to the communications stream. Consider design of an SCP Lifer Society for individuals who belong to that group, cultivating a powerful pipeline of proud alumni association volunteers, donors, and leaders.

These recommendations are firmly rooted in research about the power of affinity groups as positive catalysts for feelings of belongingness within organizations; the desire to gather around shared symbols

and traditions within a specific social group is a powerful motivator to engage with the organization at large (Clotfelter, 2003; Baade & Sundberg, 1996). Legacy families are proven to be demonstrably more generous with their alma maters, primarily due to their identity salience with the institution (Clotfelter, 2003). In prior research, individuals with multiple layers of institutional identity are seen as "intertwined with the fate of the group" (Foote, 1951) and therefore more motivated towards engagement.

Meaningful Shared Practices

Respond to the expressed desire for alumni to engage in mentoring by partnering more strategically with the SCP Institute for Civic Involvement.

- Together with the Institute, design an alumni speaker series for the upcoming school year which targets alumni who fit the curricular and programmatic needs of the Institute. Invite 4-6 key alumni to engage in the project in year 1, and plan on-campus experiences for them which integrate time with students in large and small formats (i.e.: an assembly format and as a guest lecturer in a relevant class) as well as the opportunity for them to liaise with former faculty. Celebrate new program partnership in all media formats.

- Also partner with the Civic Institute in their mission to "recognize the importance of specialized formal training,

interspersed with internship, for the profession of public service" to creatively design additional mentoring interfaces between alumni and students (www.scp.edu). Ideally, this would be a collaboration with responsibility shared between the alumni office personnel and civic institute personnel, that adds value to the prospect of SCP students seeking summer internships in a field of interest after their junior and senior years, and/or young alumni sourcing internships within the alumni network during their college years. A year-one pilot goal of 8-10 alumni-student or young alumni-older alumni internship matches is suggested, with close oversight/intentional mentor recruitment by SCP personnel.

- Experiment with a small-scale activity led by regional alumni for participation in a service project in collaboration with a local community-based organization. Examples include a group of alumni cooking dinner together at a homeless shelter, making care packages for troops stationed abroad (perhaps in connection with an alumnus/a who is currently serving), or gathering together for a local beach cleanup. A project could launch within the legacy family community, welcoming adults and children, and perhaps co-opting a legacy parent to help lead the initiative. Share news about the project on various media platforms to discern broader interest. If feedback is positive, explore

longer-term style engagements such as a Habitat for Humanity partnership.

- Reach out to a hand-picked group of stakeholders including older regional alumni, retired regional faculty, and alumni parents to discern potential interest in galvanizing around volunteering to organize/oversee the school's archives program. Work with internal stakeholders in possession of the current school archival materials to assess the possibility for this as a long-term platform for affinity engagement, as the school navigates more closely towards its centennial.

In order to best facilitate activities of meaningful shared practice within the alumni community, SCP must be intentional in embracing the proven attributes of independent schools as close-knit communities which nurture students into becoming responsible, successful citizens of the world (NAIS.org). It's imperative that schools like SCP fashion their own micro-cosmic intellectual and creative marketplaces where alumni and students, and young alumni and older alumni can more meaningfully interact. I'm proposing interventions in this section that do not find a home in the literature, because they are mostly unexplored within the realms of independent schools and alumni engagement. While the independent school domain is under-researched, we know that it is it characterized by strong community, ideals of responsibility, collaboration

and excellence, and providing students with individualized attention (AIMS-MDDC.org, CAISCA.org, AINSNE.org, SAIS.org). A synthesis of these attributes with the communities of practice body of literature's assertion that voluntary actors provide intellectual and social leadership, serving to energize and mentor fellow participants around ideas and work that matter to people (Wenger, 1998; Lave, 1996) offers a highly optimistic portrait of possibilities for the above recommendations.

Narratives/Storytelling

- Create an alumni podcast to enrich the alumni narrative. Work in collaboration with the SCP production studio and the communications to team to record and edit the podcast for monthly distribution. Create a diverse list of prospective alumni guests, and secure individuals to be interviewed on the podcast in a short format (15-20 minutes) with set questions that invite alumni to share stories about their days at SCP, their path since graduation, and nostalgic memories of former teachers and campus culture. When possible, align guests with relevant events such as milestone reunions, sports seasons, and/or an opportunity for them to promote a meaningful personal accomplishment or activity. Pursue a similar activity/collaboration with the students of the on-campus TV station, where alumni are invited on to "guest host" or be interviewed.

- Reframe the narrative on the alumni portion of the SCP website to shift from focusing heavily on events, to more prominently and creatively sharing stories of alumni. Build the alumni messaging around concepts of SCP community, nostalgia, pride, and stories of alumni by placing the social media feeds as side banners on the alumni webpage, and including links to all alumni-related social media platforms. As new programming for affinity groups, alumni mentoring, community service, 40 Under 40, the podcast, etc. takes shape, prominently share these assets on the alumni website in a dynamic way.

- As part and parcel of the integration of these new alumni program and engagement opportunities on the alumni website and in other forms of media, have explicit calls to action for alumni--exclusive of a click to donate money. Examples might be "Click here to Nominate a 40 Under 40 alumnus/a," "Sign up here for Service Opportunities," and "Register Today to Join our Alumni Networking Platform."

- Launch an SCP alumni-centric Instagram handle. While the current school-wide SCP Instagram has occasional alumni postings, there should be enough alumni-centric news, folklore, and overall content to attract alumni ages 18-35. Both the school and alumni handles could share content when appropriate. The alumni Facebook handle could also share postings with the alumni Instagram handle.

These interventions are undergirded by numerous studies which purport that more volume and more varied communications are best when it comes to motivating alumni engagement (McDearmon, 2010); younger alumni in particular are proven to be highly receptive to a variety of communications, and repelled by only receiving impersonal intermittent snail mail solicitations (Tsao & Coll, 2005). The prior research also illustrates that easy access to digital alumni networking platforms is valued by alumni (McDearmon, 2010) and that repeated and varied calls to action result in an overall increase in volunteer and donor behaviors (Weerts & Ronca, 2009). In addition, a reframe of the SCP alumni narrative away from highlighting large-scale social events and instead toward focusing on stories about alumni which celebrate the distinctive value proposition of being a part of the SCP community amplify the likelihood of alumni positively identifying with SCP (Oakes & Turner, 1986). Alumni who are persuaded to see their alma mater as valuable and unique in comparison to other schools are more likely to identify with their alma mater, and in turn, potentially engage in behaviors that will nourish their ties to the organization (Oakes & Turner, 1986).

Planning for Interactions of Interventions on Organization

In order to position itself for success in undertaking the recommended interventions/changes in practice, SCP is encouraged to harness the following resources and competencies:

- Coalesce a team of key internal employee stakeholders to overlay recommended interventions with the 2019-2024 SCP Strategic Plan. Investigate overlapping motifs more deeply, particularly those aligned with the themes which emerged through the coding and analysis processes of this project: alumni engagement, core values, community and culture, social identity/ belongingness, meaningful shared practices, and narratives/storytelling. Prioritize activation of interventions in accordance with findings of this exercise.

- Ensure there is active and ongoing collaboration and communication between the alumni relations personnel and the communications personnel to foster departmental synergy, goals alignment, and mapping of timelines, responsibilities, and messaging. Due to physical separation of departments/offices, integrate an intra-office project management software platform such as Basecamp to communicate, create calendars/schedules, and share documents and files.

- Much of the work in these recommendations is not aligned with the ebb and flow of a transactional, traditional gift officer role. It is recommended that the SCP Vice President of Advancement consider onboarding an SCP alumnus/a employee who is not a gift officer, but rather a "friendraiser" whose goals and responsibilities include:

- Working in close collaboration with the communications team on sourcing, writing, and designing key creative collateral for the alumni program

- In concert with the communications team, crafting social media flow for all alumni relations digital platforms (LinkedIn, Graduway, Instagram, Facebook)

- Being a frontline creative and programmatic partner with key internal stakeholders (Director of Civic Institute, Director of College Counseling, Upper/Middle/Lower School Heads) to unearth and optimize potential alumni-student learning opportunities and collaborations

- Managing and executing programmatic initiatives such as the senior class breakfasts, the podcast, 40 Under 40, affinity group gatherings, and alumni community service

- Ensure there is active and ongoing collaboration and communication between the gift officers and alumni relations personnel. Specifically, fostering close strategic partnerships between the Alumni Director, Director of Advancement, and Director of the SCP Fund (and the suggested new hire, if applicable) is essential to successfully realizing the possibilities of the interventions. This includes teamwork around game plans for alumni appeals and clear mutual understandings about goals and desired outcomes of alumni programming.

Conclusion

As previously stated, the alumni organization of SCP is relatively large, somewhat engaged, and steeped in institutional pride. SCP alumni identify most saliently with their alma mater through cherished relationships they began while there, the lived experience of multiple layers of SCP identity, and shared core values of academic excellence, close-knit community, and hard work. Despite the fact that the potential of the SCP alumni community has not yet been actualized, many of the ingredients for its success are present. Alumni are deeply proud of their alma mater; multiple alumni affinity groups fundamentally enhance the community at large; alumni clearly manifest their motivation to diversify their engagement beyond traditional events and fundraising. By putting forth the effort necessary to foster more meaningful and impactful forms of engagement for its alumni, SCP will derive expected and unforeseen benefits for years to come.

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Guiding Principles

The purpose of a well-developed Alumni Program is to further the mission of the school, including to promote a spirit of camaraderie among the alumni; to encourage the ongoing support of the school through volunteering and annual giving, and to deepen alumni interest in and loyalty to the school.

Alumni programs succeed when alumni of all ages are engaged as volunteers

The Engage Alumni website (www.engagealumni.com) posts Jamie Hunte discussion on building alumni affinity through great customer service: "In an age of increasing levels of consumer expectations, alumni groups need to attend to alumni expectations:

> *What are the consequences of poor customer service? An unreturned phone call, a confusing website, or a poor experience at an event will decrease affinity, and others will hear about it. Studies show that after a poor customer service experience, 26% of consumers will post a negative comment via their social networks. Alumni with degrees from other institutions or with children enrolled at other schools may choose to support the alma mater that has given them the best alumni experience. And while not all alumni have the option to take their business to a competitor, there are plenty of opportunities for alumni to invest their time and resources elsewhere.* (December 18, 2013)

Observations

1. ▓▓▓▓▓ alumni program is in its infancy stage. It includes an Alumni Association Board referred to as an Alumni Council comprised of 21 members, most of whom are local and some of whom are also parents at the school. There are no officers. The Council meets 3 times a year to help organize annual events on behalf of the alumni association including Homecoming and Reunion Weekend. Class leaders for the reunion years are recruited by the Director of Alumni Relations who supports them in their efforts to encourage attendance at the Reunions.

Constituency	FY2010	FY2011	% yr-yr variance	FY2012	% yr-yr variance	FY2013	% yr-yr variance	FY2014	% yr-yr variance	FY2015	% yr-yr variance
Trustees											
Total $ raised	$ 22,100	$ 41,750	89%	$ 65,100	56%	$ 72,700	12%	$ 97,016	33%	$ 149,052	54%
# of Donors	11	15	36%	14	-7%	16	14%	13	-19%	17	31%
# Solicited	24	24	0%	24	0%	22	-8%	24	9%	24	0%
Participation rate	46%	63%	36%	58%	-7%	73%	25%	54%	-26%	71%	31%
Average Gift Size	$ 2,009	$ 2,783	39%	$ 4,650	67%	$ 4,544	-2%	$ 7,463	64%	$ 8,768	17%
Alumni											
Total $ raised	$ 71,019	$ 72,211	2%	$ 60,920	-16%	$ 72,240	19%	$ 103,868	44%	$ 121,766	17%
# of Donors	264	260	-2%	203	-22%	211	4%	223	6%	225	1%
# Solicited	5225	5479	5%	5678	4%	5935	5%	6160	4%	6329	3%
Participation rate	5%	5%	-6%	4%	-25%	4%	-1%	4%	2%	4%	-2%
Average Gift Size	$ 269	$ 278	3%	$ 300	8%	$ 342	14%	$ 466	36%	$ 541	16%
Current Parents											
Total $ raised	$ 807,132	$ 790,237	-2%	$ 853,816	8%	$ 857,130	0%	$ 1,072,630	25%	$ 1,119,196	4%
# of Donors	536	583	9%	668	15%	782	17%	807	3%	1059	31%
# Solicited			#DIV/0!	1723	#DIV/0!	1748	1%	1741	0%	1766	1%
Participation rate	#DIV/0!	#DIV/0!	#DIV/0!	39%	#DIV/0!	45%	15%	46%	4%	60%	29%
Average Gift Size	$ 1,506	$ 1,355	-10%	$ 1,278	-6%	$ 1,096	-14%	$ 1,329	21%	$ 1,057	-20%
Past Parents											
Total $ raised	$ 54,199	$ 32,700	-40%	$ 42,760	31%	$ 34,801	-19%	$ 32,909	-5%	$ 14,659	-55%
# of Donors	559	540	-3%	482	-11%	469	-3%	338	-28%	323	-4%
# Solicited			#DIV/0!		#DIV/0!		#DIV/0!	662	#DIV/0!	647	-2%
Participation rate	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	51%	#DIV/0!	50%	-2%
Average Gift Size	$ 97	$ 61	-38%	$ 89	46%	$ 74	-16%	$ 97	31%	$ 45	-53%
Grandparents											
Total $ raised	$ 75,885	$ 70,737	-7%	$ 61,766	-13%	$ 64,561	5%	$ 119,595	85%	$ 148,533	24%
# of Donors	137	175	28%	158	-10%	176	11%	138	-22%	151	9%
# Solicited			#DIV/0!	1766	#DIV/0!	1680	-5%	1360	-19%	1320	-3%
Participation rate	#DIV/0!	#DIV/0!		9%		10%		10%		11%	
Average Gift Size	$ 554	$ 404	-27%	$ 391	-3%	$ 367	-6%	$ 867	136%	$ 984	14%
Faculty/Staff											
Total $ raised	$ 10,296	$ 11,606	13%	$ 10,659	-8%	$ 10,642	0%	$ 14,449	36%	$ 22,535	56%
# of Donors	151	144	-5%	241	67%	288	20%	313	9%	362	16%
# Solicited			#DIV/0!		#DIV/0!	351	#DIV/0!	413	18%	417	1%
Participation rate	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	82%	#DIV/0!	76%	-8%	87%	15%
Average Gift Size	$ 68	$ 81	18%	$ 44	-45%	$ 37	-16%	$ 46	25%	$ 62	35%
Friends/Others											
Total $ raised	$ 360,438	$ 310,410	-14%	$ 298,322	-4%	$ 415,446	39%	$ 504,783	22%	$ 465,850	-8%
# of Donors	649	461	-29%	396	-14%	382	-4%	279	-27%	210	-25%
Average Gift Size	$ 555	$ 673	21%	$ 753	12%	$ 1,088	44%	$ 1,809	66%	$ 2,218	23%
TOTAL											
Total $	$ 1,401,069	$ 1,329,651	-5%	$ 1,393,343	5%	$ 1,527,520	10%	$ 1,945,250	27%	$ 2,041,591	5%
Total # of Donors	2307	2178	-6%	2162	-1%	2324	7%	2111	-9%	2347	5%
Average Gift	$ 607.31	$ 610.49		$ 644.47		$ 657.28		$ 921.48		$ 869.87	11%

NOTES:
All gifts in this report are reported on a cash basis.
All gifts in this report are reported based on priority order of constituency which reflects both longevity of association and strength of the affinity.
Each gift is counted in only one constituency.
The report is based on the Pine Crest Fund - Annual Unrestricted gifts only.

SCHOOL MISSION STATEMENT

To offer a challenging academic experience complemented by excellence in the arts and athletics; to develop the character, independence, and leadership of each student; and to provide a collaborative learning community that prepares students to meet the global challenges of our future.

CLASS OF 2018 TESTING

SAT	MEAN
Evidence Based Reading and Writing	690
Math	700

ACT	MEAN
Composite Score	31.6

SAT SUBJECT TEST	MEAN SCORE	STUDENTS
Biology-Molecular	673	27
Chemistry	726	44
English Literature	639	81
Math Level II	723	101
Spanish with Listening	771	14
US History	675	75
World History	663	13

ADVANCED PLACEMENT
- 31 AP Courses Offered
- 2,000 AP Exams taken in May 2018
- 84% of the AP Exams taken in May 2018 scored 3 or higher
- 804 Students in Upper School taking AP classes in 2018-19 School Year

AP SCHOLAR AWARDS
- 120 AP Scholars
- 73 AP Scholars with Honor
- 235 AP Scholars with Distinction
- 90 AP National Scholars

2018 AP TEST HIGHLIGHTS
- 62 students earned an average score of 4.8 on the Microeconomics exam
- 184 students earned 3 or higher on the AP Calculus AB and BC exams
- 82 students earned 3 or higher on the AP Ch...

SCHOOL COMMUNITY

Ranked #3 Private School

Most Challenging High Schools list

Founded in 1934

Independent, all-faith, co-educational pre-kindergarten through grade twelve day school

2,635 students

96% overall retention rate

841 students in Upper School

214 students in the Class of 2018

Students of color represent 30% of the Upper School

22% of Upper School students receive Financial and Inclusion Aid

FIVE-YEAR MATRICULATION 2014-2018
(Five or more students attended)

Babson College	13
Barnard College	6
Boston College	8
Boston University	36
Bowdoin College	5
Case Western Reserve University	6
Columbia University	17
Cornell University	33
Dartmouth College	5
Duke University	25
Emory University	23
Florida State University	31
George Washington University	14
Georgetown University	12
Georgia Institute of Technology	7
Harvard University	15
Indiana University at Bloomington	7
Johns Hopkins University	11
Massachusetts Institute of Technology	7
New York University	38
Northeastern University	7
Northwestern University	24
Pennsylvania State University	6
Princeton University	13
Purdue University	5
Rice University	5
Stanford University	9
Syracuse University	12
Tufts University	13
Tulane University	14
University of California, Berkeley	8
University of California, Los Angeles	10
University of Central Florida	8
University of Chicago	23
University of Colorado at Boulder	6
University of Florida	92
University of Miami	37
University of Michigan	42
University of North Carolina at Chapel Hill	6
University of North Florida	10
University of Pennsylvania	20
University of Southern California	18
University of Texas, Austin	5
University of Virginia	10
University of Wisconsin, Madison	16
Vanderbilt University	30
Wake Forest University	13
Washington University in St. Louis	32
Williams College	5
Yale University	10

GRADUATION CREDITS	
English	4
Mathematics	4
Science	3
Social Science	3
World Language	3
Humanities and Fine Arts	1.5
Electives	5.5

- 24 credits required for graduation in grades 9-12
- 32 Advanced Placement
- 44 Honors courses
- 11 Post-AP seminars taught at levels beyond AP curriculum and noted on transcript
- 2 semester academic calendar
- 9 period school day with 45-minute periods

For full curriculum guide, please visit:

GRADING AND RANK
Pine Crest School does not rank students. The transcript provides a weighted cumulative core grade point average and is calculated as follows:

GRADE	GRADE RANGE
A+	97-100
A	93-96
A-	90-92
B+	87-89
B	83-86
B-	80-82
C+	77-79
C	73-76
C-	70-72
D+	67-69
D	63-66
D-	60-62
F	50-59

AP and Post AP Course Weight - - 1.0
Honors Course Weight - - 0.5

SPECIAL CURRICULAR FEATURES

Lab provides students with a dedicated space to generate ideas, think critically, collaborate, explore, investigate, and engage as problem solvers in a technology rich environment. Students compete in academic competitions that enrich student learning and reinforce lessons taught in the classroom.

Science Research Program:
Eight students selected by committee enter the program at the end of ninth grade and continue through twelfth. They design experiments, write research papers, present findings, and submit work to regional and national symposia and research venues.

Disciplinary Reporting Policy:
All probations, suspensions, or expulsions are reported to any requesting college by both the student and the college counselor.

We believe in educating generations of students to be emotionally intelligent, intellectually inspired, and prepared to

Carrie M. Grimes, M.A.
Doctoral Candidate at Vanderbilt University
Empathy Interview Template for Capstone Research: School Administrator Interview

Alumni Engagement Research: School Administrator Interview Framework

Primary Goal: To gain a deeper understanding of school administrators' beliefs, perceptions, activities and goals regarding SCP's alumni programming, applying lenses of social identity/community of practice theories.

Goals for Alumni Empathy Interviews: & Focus Groups
- Seek to understand, not confirm
- Ask once, clearly—avoid yes/no questions
- Ask questions that elicit stories and feelings
- Welcome dialogue within the group
- Remember to probe: "Tell me more…" "What was that like for you?" "Why?"

Questions:

- How would you describe overall alumni engagement at SCP?
- What do you believe are the common core values and guiding principles of SCP?
- Which of these values do you believe also are reflected the alumni body?
- Tell me about a time that SCP 's efforts to engage alumni were a success.
- Tell me about a time that SCP 's efforts to engage alumni failed.
- How did you feel that those moment reflected upon SCP at large?
- Tell me about ways in which your team promotes a sense of belonging within the SCP alumni community.
- Tell me about your primary mechanisms for sharing the SCP alumni narrative within the alumni body as well as the community at large.
- Tell me what makes the community of alumni here distinct.
- Tell me a story about when you witnessed alumni connecting in a special way to each other, and/or to the SCP community.
  - Why do you think they felt a sense of connection?
    - What did they do in that moment?
    - How did your team celebrate/leverage/recognize that moment of connectivity?

- Share a story about a time when SCP has organized/executed meaningful shared activities (**excluding purely social events**) for SCP alumni.
  - How was information/knowledge shared in this moment?

- Tell me ways in which cohorts of the alumni community coalesce/galvanize to engage in activities outside of socializing. What do these activities look like?

- Tell me about a time when you have witnessed the SCP alumni community come together in order to solve a problem, accomplish a goal, or share valuable knowledge?
    - How did that feel for the community?
    - How did this kind of engagement compare to purely social engagement?
    - What residue were you able to pull from these collective moments to build your brand?

- What percentage of the alumni community would you say exists at the core/heart and what percentage at its edges/boundaries?
- What do you think differentiates these groups?
- How does nostalgia play a role in the SCP alumni narrative?
- How does mentoring play a role in the SCP alumni narrative?

- What percentage of alumni give to the annual fund?
    - What types of things do you belivee motivate alumni to make a gift to SCP?
    - What are your primary strategies with alumni in your annual fund campaign?

- What do you believe would inspire alumni the most to give to a financial gift of any size to SCP?

- How would you describe the alumni community's relationship with SCP's current school community of faculty/staff, parents, trustees, and administrators?

- Who at SCP notices alumni engagement?

-

- What do they think the SCP alumni bring to the community?

-

- What is the alumni community's involvement in setting direction for the community?

Conduct Interviews (30 minutes):
My notes:

Post-Interview Reflections
What did I **hear**? What am I learning about the **root causes** that contribute to the problem?
Are there **questions I wish I would have asked or not asked**? Are there **questions that
were particularly fruitful**? Did I **probe** effectively?

Carrie M. Grimes, M.A.
Doctoral Candidate at Vanderbilt University
Empathy Interview Template for Capstone Research: Alumnus/a Interview

Alumni Engagement Research: Alumnus/a Interview Framework

Primary Goal: To gain a deeper understanding of alumnus/a's beliefs, perceptions, activities and goals regarding SCP's alumni programming, applying lenses of social identity/community of practice theories.

Goals for Alumni Empathy Interviews: & Focus Groups
- Seek to understand, not confirm
- Ask once, clearly—avoid yes/no questions
- Ask questions that elicit stories and feelings
- Welcome dialogue within the group
- Remember to probe: "Tell me more…" "What was that like for you?" "Why?"

Questions:

- How would you describe overall alumni engagement at SCP?
- What do you believe are the common core values and guiding principles of SCP?
- Which of these values do you personally share/identify with an an alum?
- Tell me about a time when SCP 's publicly succeeded at something.
- How did you feel that moment reflected upon you, as an alum?
- Tell me about a time that publicly failed at something.
- How did you feel that reflected upon you, as an alum?
- Do you have other (non-alumni) identities at SCP (parent, employee, coach, etc.)?
- How do you feel these additional identities shape your identity as an alum?
- How would you characterize your sense of belonging within the SCP community?
- If you could describe your alma mater in one or two words, what would they be?
- Tell me what makes the community of alumni here distinct.
- How do you feel that being an alumnus of this school informs your overall identity?
- On average, how many times per year do you openly classify yourself as an alumnus of SCP?
- Tell me a story about when you felt connected in a special way to your identity as an alumnus/a of your alma mater.
    - Why do you think you felt a sense of connection?
        - What did you do in that moment?
        - What did others do? (your classmates, your family, your school community)

- Share a story about a time when you have engaged in meaningful shared activities (**excluding purely social events**) with other SCP alumni.
    - How was information/knowledge shared in this moment?
    - Would you describe your involvement in these types of non-social activities as peripheral, supporting, or actively leading?

    -

- Tell me about a time when you have witnessed/participated in the SCP alumni community come together in order to solve a problem, accomplish a goal, or share valuable knowledge?
    - How did that feel?
    - If you could choose that or a social event, what would be your preference, and why?

- Do you see yourself more at the center of the alumni community, or at its edges/boundaries?
- Have you ever given to your alma mater's annual fund?
    - If so, how did it feel to give a gift?
    - What types of things motivate you to make a gift to any organization?
    - What do you wish would happen when you give a gift?
    - When you do not give a gift, why is that?

- What would inspire you most to give a financial gift of any size to SCP?

- How would you describe the alumni community's relationship with SCP's current school community of faculty/staff, parents, trustees, and administrators?

- Who at SCP notices your engagement as an alumnus/a?

-

- What do they think alumni bring to the community?

-

- What is the alumni community's involvement in setting direction for the SCP community?

Conduct Interviews (30 minutes):
My notes:

<u>Post-Interview Reflections</u>

What did I **hear**? What am I learning about the **root causes** that contribute to the problem? Are there **questions I wish I would have asked or not asked**? Are there **questions that were particularly fruitful**? Did I **probe** effectively?

Carrie M. Grimes, M.A.
Doctoral Candidate at Vanderbilt University
Empathy Interview Template for Capstone Research: Alumnus/a Interview & Focus Group

Alumni Engagement Research: Empathy Interview and Focus Group Framework

Primary Goal: To gain a deeper understanding of a user's experience as an alumnus/a of this independent school, through lenses of social identity/community of practice theories.

Goals for Alumni Empathy Interviews: & Focus Groups
- Seek to understand, not confirm
- Ask once, clearly—avoid yes/no questions
- Ask questions that elicit stories and feelings
- Welcome dialogue within the group
- Remember to probe: "Tell me more…" "What was that like for you?" "Why?"

Questions:

- How would you describe overall alumni engagement at SCP?
- What do you believe are the common core values and guiding principles of SCP?
- Which of these values do you personally share/identify with as an alum?
- Tell me about a time that SCP publicly failed at something.
- How did you feel that moment reflected upon you, as an alum?
- Tell me about a time that SCP publicly succeeded at something.
- How did you feel that moment reflected upon you, as an alum?
- Do you have other (non-alumni) identities at SCP (parent, employee, coach, etc.)?
- How do you feel these additional identities shape your identity as an alum?
- How would you characterize your sense of belonging within the SCP community?
- If you could describe how you feel about your alma mater in one or two words, would it/they be?
- Tell me what makes the community of alumni here distinct.
- How do you feel that being an alumnus of this school informs your overall identity?
- On average, how many times per year do you openly classify yourself as an alumnus of this institution?
- Tell me a story about when you felt connected in a special way to your identity as an alumnus/a of your alma mater.
  - Why do you think you felt a sense of connection?
    - What did you do in that moment?

■ What did others do? (your classmates, your family, your school community)

- Share a story about a time when you have engaged in meaningful shared activities (excluding purely social events) with other SCP alumni.
  - How was information/knowledge shared in this moment?
  - Would you describe your involvement in these types of (non-social) activities as peripheral, supporting, or actively leading?

- Tell me about a time when you have witnessed/participated in the SCP alumni community in order to solve a problem, accomplish a goal, or share valuable knowledge?
  - How did that feel?
  - If you could choose that or a social event, what would be your preference and why?

- Do you see yourself more at the center of the alumni community, or at its edges/boundaries?

- Have you ever given to your alma mater's annual fund?
  - If so, how did it feel to give a gift?
  - What types of things motivate you to make a gift to any organization?
  - What do you wish would happen when you give a gift?
  - When you do not give a gift, why is that?

- What would inspire you most to give to a financial gift of any size to SCP?

- How would you describe the alumni community's relationship with SCP's current school community of faculty/staff, parents, trustees, and administrators?

-

- Who at SCP notices your engagement?

-

- What do they think you bring to the community?

-

- What is your involvement in setting direction for the community?

Conduct Interviews (30 minutes):
My notes:

<u>Post-Interview Reflections</u>
What did I **hear**? What am I learning about the **root causes** that contribute to the problem? Are there **questions I wish I would have asked or not asked**? Are there **questions that were particularly fruitful**? Did I **probe** effectively?

Carrie M. Grimes, M.A.
Doctoral Candidate at Vanderbilt University
Data Collection Rubric for Capstone Research

Data/Media Collateral Collection	Collected?
Annual Report 2016-17	X
Annual Report 2017-18	X
Median Annual Giving Gift by Alumni/ae (last 10 years)	X
Alumni Print Media/Mailings 2015-2019	X
Alumni Volunteer Data	N/A
Alumni Events Data/Attendance	X
Alumni Board/Leadership Mission, membership, programming	X
Alumni Social media handles/feeds	X
Alumni Networking Platforms (In House, Evertrue, Graduway, etc.)	N/A
Alumni Programming Calendar 2015-2019	X
Median Annual Giving % Participation by Alumni/ae (last 10 years)	X
Alumni/School Magazine (2015-2019)	X

Analytic Memo 1

I'm interested in understanding why alumni of independent schools are often disengaged from their alma maters. I'm defining alumni engagement as a group of behaviors in which alumni dedicate their time, give of their talents, and/or make financial gifts to their alma mater. I'm also incorporating another element to this definition: the interactions alumni have with fellow alumni which enhance the alma mater's networks of communication, collaboration, and/or camaraderie. The topic of alumni engagement has been of greater relevance in the last decade, as the landscape of alumni relations has begun to shift in the wake of social media and other forms of technology which empower alumni to collectively reconnect and reminisce without the institutional resources (i.e. a printed alumni directory) of their alma mater. It bears further relevance as many independent schools across the country struggle to make ends meet. Schools cannot rely on tuition dollars and the financial gifts of current parents alone to survive and thrive; alumni are an underleveraged resource which all independent schools would benefit from better galvanizing. Independent school administrators remained puzzled by the fact that their mostly successful, often affluent alumni, many of whom shared seminal life experiences and established enduring friendships at their institutions, withhold gifts of time, talent, and treasure from their alma maters.

Through my graduate school network, I've been fortunate to secure a research site (SCP) which is an exemplar of this phenomenon. Despite possessing a large and prosperous alumni

community, their annual giving from alumni is less than half the national average, and their over-

all alumni engagement is languid. Other characteristics of this institution are quite impressive: a

large endowment, full enrollment, expansive state-of-the-art facilities, and outstanding college

admissions data all tell a story of an otherwise healthy, vibrant, engaged community. Therefore,

it seems like an ideal setting in which to explore this common problem of practice.

So far in my first day here, I've conducted three interviews. Two were with school ad-

ministrators, and one was with an alumna. The administrators I interviewed were both employees

within the school's advancement office, which is comprised of a team of nine employees who

focus on gift solicitation, event management, and alumni relations. All three interviews have al-

ready highlighted some similar themes related to a lack of alumni engagement. The department's

director, who just completed her second year at SCP, had strong opinions about the ways in

which the approach and style of certain advancement employees affected alumni engagement

outcomes. She also responded to some interview questions by wondering out loud about how she

might affect alumni engagement outcomes through her personnel management choices. My in-

terview with her was long relative to the protocol I had designed, with a significant amount of

"wandering" in which she talked about power structures at SCP, the circumstances prior to her

onboarding, and her impressions of independent school culture vis a vis the high education land-

scape, in which she had worked for the last 25 years before coming to SCP. She suggested, for

the most part, that while SCP was making some progress in how it engaged alumni, it still had a

long way to go—and she was unsure how they would go about doing a better job of it. She de-

scribed alumni engagement as "very, very limited," and stated that "until last year, and

particularly this year, we did not know what our alumni were doing. We didn't have their business titles, we had them living at mom and dad's house. So we really did not have an alumni relations program." She alluded to aggressive initiatives around collecting updated alumni data, which would enable them to more effectively reach alumni.

My other two interviews were with longtime stakeholders—one was an employee and the other an alumna employee who had attended the school for 12 years and recently relocated back to the area. Both were able to shed more of an historical light on the challenges around SCP's alumni engagement, and how that connected back to the school's leadership as well as infrastructural challenges within "the old" development office (before the current Director was put in place). One of the interviewees expressed disgust at the longstanding practice of the institution repeatedly soliciting alumni, while simultaneously having a void of meaningful alumni relations programming. "So we have no alumni engagement program, but yet we're continually soliciting them over and over…that doesn't work so well. And not a targeted solicitation—a general annual fund appeal, like, 'Dear alumni'." The other interviewee echoed this sense of disappointment about SCP's inability to engage with alumni. "Prior to my return to the area, I can't really remember lots of points of contact, maybe once in a while, I would get some kind of pamphlet or something with a request for the, you know, to donate to the SCP fund." Interestingly, despite these expressions of dissatisfaction, when asked about their feelings about being a member of the SCP community, both expressed authentic and potent feelings of pride. I'm interested to note if this disconnect (of disappointment and pride) emerges in other interviews.

I'm eager to sit down later today and tomorrow with more alumni, to garner a sense of their user experience with the program. I'm wondering if those delivering the program might

have an inaccurate portrait of how the alumni actually feel about it? I'm also wondering how the

alumni interviews I conduct today and tomorrow will compare with my interviews with alumni

who are not local to campus. I suspect there will be a distinct difference.

Analytic Memo 2

The last two weeks of interviews have played an important role in enhancing my understanding of alumni disengagement within independent school communities. While I was on campus at SCP earlier this summer, I had the opportunity to learn the perspectives of alumni and administrators who were in close proximity to campus. Despite their varied ages, some of these individuals had multiple layers of identity in addition to that of alumnus/a, such as employee, coach, parent, and/or alumni parent. At the time I wondered if the combination of these interviewees' multiple identities and their proximity to SCP would result in their engagement being naturally higher with SCP. (While reflecting upon this, I reached out to my internal point person, to reaffirm that my additional interviewees were definitely not in proximity to campus.) Understandably (and as the current literature demonstrates) my on-campus interviews demonstrated that alumni who are geographically closer to their alma mater are more likely to engage with it. Also, as the research shows, those with more powerful salience of identity (as I witnessed in my interviewees who were alumni, parents, and employees) are more likely to be engaged. In these ways, the pre-existing literature about alumni relations was reflected in my conversations from my on-campus visit last month. It's been interesting to speak recently with *non-local alumni* and see how much that impacts their feelings of belongingness and pride, as well as their engagement behaviors toward SCP.

My interviews with non-local alumni have all been conducted over FaceTime or the telephone (whichever the alumnus/a preferred) and have proved to be as rich in content as my in-person interviews. Certain themes were very clear in these conversations—most notably the

SCP core value of "academic excellence," the feeling of "pride" alumni felt with regards to their affiliation with SCP, and the fact that neither of these concepts seemed to motivate them to give a financial gift back to SCP. Rather, as one alumna noted, "I have no kids there--I don't have any horse in that race anymore… So you know, I give money to things that are closer and nearer to me." Another noted, "I'd probably allocate those funds to other causes that I'm more passionate aboutbecause we're not there. And like, I know, my kids aren't going to go there…I just see my-self putting my money more into causes that are more relevant to me at this point in my life." Some alumni I spoke with were able to identify specific feelings of closeness, despite their geo-graphic distance, cultivated through nostalgic relationships with their former teachers, or ongoing relationships with their SCP friends. Unlike locals, who focused on engaging via their currently enrolled children or a valued local alumni professional network, non-local alumni more often referenced friends and mentors associated with SCP. One talked fondly of SCP faculty, including a teacher with whom he has maintained a close connection for over 30 years, "I have a lot of very fond memories of my teachers. She's obviously one that's I've remained very close with, and that's all because of the school--so that there's a glow on this from her, that is reflected on the school." When alumni described the impact that SCP relationships they personally cherish have on their overall alumni connection with SCP, the results varied. For some, those cherished relationships fortified their identification with the institution. For others, there was little to no im-pact. One interviewee said "I don't really feel a connection to the school anymore. But I do still have a strong connection to some of my close friends from the school."

Now that I've been able to interview non-local alumni with singular institutional identi-ties, I'm looking forward to going back and listening to the interviews I did on campus. I'm

wondering how the similarities and differences between these interviewees' points of view might help me better understand the overall problem of practice. I also can understand how the context of the current organization plays a significant part in the ways in which local alumni might re-connect to their alma mater. That is to say, if I spend time on campus as an alumna/us around the people, buildings, and programs that shape it today, aren't I more likely to look for reflections of myself within that place? Whether it be through thinking about my own memories from my time on campus, running into former teachers or schoolmates who work there, or catching part of a sporting event for a team on which I used to play?

The literature review suggested that affinity groups were another motivator for alumni to engage—my interviews have involved mentions of athletic and arts affinity groups with which alumni still felt a strong connection and sense of identity. I'm hoping my documents/ media re-search can shed some light on the most prevalent affinity groups at SCP—maybe enliving these alumni sub-communities would be an avenue for meaningful, highly nostalgic alumni interac-tions? Another echo from the literature review has been around legacy. Both local and non-local interviewees referenced the high relevance of having one's own children attend (or not) SCP. I'm thinking that a greater programmatic emphasis on SCP legacy families would be a low-stakes easy win for the advancement team as they seek to grow alumni engagement.

CODES	CATEGO-RIES	THEMES
Event(s) Reunion Attendance/turnout Money Social Engagement Outreach Gift	• Do events matter? • Room to grow • Why give? • Mixed feelings • Attendance vs. meaning	**ALUMNI ENGAGEMENT**
Academic Excellence Character Intelligence Work Ethic Citizenship Prestige Success	• Academic excellence & hard work • Nationally known and respected • Guiding moral compass: character, education, leadership • Alumni values reflect SCP values	**CORE VALUES**
Family Community Teacher/coach Home Caring/love Pride/Proud	• Relationships • Affection for institution • Close knit family feel • Pride •	**COMMUNITY AND CULTURE**
Legacy Lifer Identity Friends Self Live near Connecting/connection Feeling	• Intertwinement of identities • Alumni identity value proposition • Differing perspectives on belongingness • Pride and Prestige • Outsiders vs. Insiders	**SOCIAL IDENTITY/BELONG-INGNESS**

	• Geographic influence	
Support Learn Collaborate Expertise Mentor/mentoring Knowledge Network Advice Service	• Good work • Sharing knowledge • Mentoring opportunities and challenges • The alumni beehive • Something besides happy hour • Sharing knowledge through mentorship	**MEANINGFUL SHARED PRACTICE**
Social media Mail Sharing Story Memories/memory Personal Nostalgia Genuine	• Communication hit & misses • Alumni stories embedded within larger community context • Nostalgia/folklore • Power of personal stories • Resonance within alumni network	**NARRATIVES/STORYTELLING**

Concept	Theme	Key Quotes	Theme	Key Quotes	Theme	Key Quotes	Documents/Media
Alumni Engagement • Event participation • Gifts • Outreach to alumni	Do events matter?	"There are some regional events that happen, but they are often on a week night…getting there is not super easy so my engagement has been through Facebook groups and at reunions." "In all honesty if I asked my alumni friends if they wanted to go an alumni event they'd say no." "At events I attended there was a kinship that we all went to SCP but it was	Room to grow	"Definitely engagement is skewed toward local alums…I'm so removed from it geographically." "Engagement is spotty. I probably engage more with the school than they engage with me. But it's getting better." "They're always asking for money. It doesn't seem like there is any rhyme or reason as to why they do what they do."	Why give?	"I'd allocate my funds to causes I'm more passionate about. SCP is a fabulous institution, but I see putting my money into causes that are more relevant to me at this point in my life." "If you care about a place and it means something to you, then you have to give something back to it, to show that you care." "I might give to SCP if my gift were going to a scholarship for a student who couldn't afford	• AlumniConnect collateral • Donor Report • Alumni Website • Internal events data reports

		also a great way to network and, you know, see where life has taken other people." "Most people come to alumni events to see what teachers are coming. They want to see their old teachers." "The primary mode of engagement for alumni is alumni events...I think engagement is so-so."		"On a scale of one to 10 engagement is maybe like a one or two...It's improving, but there is definitely more room for improvement." "The outreach from the school is pretty low...it's usually for you to donate. But engagement within groups of alumni is pretty high."		SCP, or if it was to create a health center on campus for students." "When a place like SCP seems just flush with money I'm not compelled to give." "When I gave a gift to SCP it let me recognize where I came from. That felt good, even though places like the Bahamas may need my money more." "I just gave some money because the development office did a thing about talking about a favorite teacher so I donated money in	

						honor of XXX. So that was motivating for me to honor a faculty member."	
Core Values • Distinctiveness of community • Perceived Prestige • Alumni identification with PCS values	Success & smarts	"Kids that come out of SCP are very, very smart and very, very motivated. They're impressive." "Going to a prep school in this geographic area was a really distinct and interesting experience. It was a different kind of world from other prep school experiences." "People that went to SCP have a desire to	Academic excellence &hard work	"Academics excellence first and foremost…the school prides itself on being the best of the best, also integrity, preparation, and a focus on community." "Academic excellence…that's the only thing that comes to mind." "Community, education, academic excellence, leadership, and	Alumni values reflect SCP core values	"I identify with trust and honor…the moral values are the ones I identify most with…not so much the academic prowess." "I identify with the sense of community." "We have a lot of prestigious alumni. I think that's important, because people relate to that level of excellence—it's kind of a status thing."	• School magazine alumni profiles • Website • Founder's autobiography • Magazine • School profile • Strategic Plan

		be successful, productive adults. There is a unique drive." "Work ethic—you have to be smart and work hard to go to SCP. There is a deep educational foundation that people who went to other schools don't have." "To go to SCP and succeed at SCP you need to be smart…among my peers in college I was very prepared."		strong ethics and values." "A commitment to character, excellence, hard work and community. There is a consistent shared devotion to making SCP the best place that it can be." "Academic excellence, to build future leaders, to foster social skills." "Character, leadership…and preparing kids for the real world."		"Character is the most important thing I connect with…it's more important to me than academic excellence." "Adaptability and the ability to present well in the world are things I identify with strongly." "All of them—I connect with all of SCP's core values."	

				"There is an expectation of high achievement."			
Independent School Community and Culture • Close knit "family" • Enduring relationships • Affection for institution	Enduring relationships	"In my experience I think there was a very strong bond with a lot of teachers…my sister is still in touch with her first grade teacher." "When there is news about retired teachers dying, it's amazing to see the outpouring on social media…my brother recently basically wrote a Facebook eulogy about his former teacher who died."	Affection and pride for institution	"They way that SCP has invested in the facilities is just huge…it's grown so much…and that gives me some pride about my alma mater. I feel affection for the school since it's where I spent my formative years." "I feel tremendous pride. I think very highly of the school. I want my children to go there and to graduate from	Close knit "Family" feel	"SCP was a unique school experience. It was a small tight knit group and there was a lot of mutual respect for different types of people. I look for that now that I am raising kids." "I have a lot of very fond memories of my teachers. There's one that's I've remained very close with. It's all because of the school…there's a glow from her that is reflected back on the school…at this	• Social media pages/groups (Facebook) • Magazine • Quarterly AlumniConnect e-newsletter

		"The people that I feel closest to are my friends from SCP. We don't talk a lot, but there is a connection that I've never replicated anywhere else." "I'm very proud of my SCP friends…we're still very close. I have this core group of friends who are my lifelong friends."		there and enjoy many of the experiences I had there." "When I'm here I do feel like I came home. I mean, after you think about how many years you know, you spend on campus, I started in kindergarten, and you know, how many years I'll be here as a parent now. Yeah, it's a really special place." "I have intense pride, I love the school, I am very thankful and have gratitude for the		point she is family…we built a family relationship." "There are people at SCP who have been part of my life for 40 years. There are still a couple of my teachers there. I feel great affinity toward them. I have so many fond memories of people from SCP caring for me way beyond the classroom." "There is a closeness and sense of family at SCP that I think is really special."	

				experience I had." "I'm very proud that I went to SCP. It was a good school. You're with a very elite group."			
Social Identity/Belongingness • Layers of Identity • "Intertwinement" & salience • Alumni share identity markers of competence, ability, work ethic • PCS Self-concept ranking • Pride of identityAffinity groups	Multiple Identities cherished	"When you tabulate all of those vantage points it makes for a rich understanding of the school and appreciation. The identities are all intertwined…I feel like they're all rolled up into one." "Your identity is with those people that you spent all those hours with, you	Pride & prestige	"Once you graduate from college, I don't know that where you went to high school is looked at when you're applying for jobs…especially if you're not living near SCP." "The fact that I went to SCP doesn't really inform my identity today, in my everyday	Outsiders vs. insiders	"Our 20th reunion was kind of impersonal…I felt disconnected from SCP at that point—there was a lack of personal touch. It was very generic. I felt distant from the school." "I don't really feel a connection to the school anymore." "I'm an outsider. I'm not involved. I	• Magazine • Social media handles • Website

		know, every single day, for years, Here and outside of here. That's part of who you are." "Having multiple identities at SCP gives me a glimpse into the life of the school from all these other different perspectives. And I think that…contributes to my sense of the school, like I have a much deeper and fuller understanding SCP." "Being a lifer at SCP is a big deal…it is strictly defined as someone who		life…I don't live there." "When I tell people I went to SCP and they say what a good school it is, I'm proud of that and I like that-- it makes me feel good about myself." "SCP is known as one of the top schools in the country. To know that I went to a school that is top tier is a badge of honor." "A lot of the person I am today came from my time at SCP."		don't want to go to anything. I'm not giving them a penny." "My sense of belonging is very strong…I'm on the LinkedIn group and I login to the alumni page and see what everybody is up to." "It's powerful…I feel close to my friends. It would be upsetting to me not to maintain relationships with people there." "I felt at home at SCP. With all the awkwardness of teendom, I felt at home there. It still feels like coming home, even	

		started in kindergarten and graduated."		"I feel very proud to be associated with the school. We are high ranking nationally, and that feels good."		though I hardly know anyone there." "I'm definitely at the edges of the alumni community…on the outskirts."	
Meaningful Shared Practice • Sharing of knowledge/passions • Doing "good work" • Mentorship • Voluntary galvanization • Newcomers & Oldtimers	Something besides happy hour…	"If SCP was doing something worthwhile, like helping people register to vote, or marching to bring awareness to a social cause I believe in, I'd be inclined to get that going where I live too." "One alum put together an annual flag football day…it's probably 50 people	The alumni beehive	"We put together a networking group. We're basically getting together once every two months as we continue to develop in our professional careers, and helping each other grow in all aspects of our lives." "I'd say that 1/3 of my clients at work	Sharing knowledge and mentorship	"SCP makes an effort to have successful alumni come back and speak to the students…and the alumni love this." "I think we should do more mentoring. I think that's one of the really great benefits you can have within an alumni network…even someone like myself could probably use a	• LinkedIn alumni group page

		who get to-gether to play. We are former SCP athletes. The school's not involved." "I remember a teacher ran for office. Alumni came out and re-ally campaigned for that guy!" "If somebody from SCP was in my area and do-ing charitable work that I be-lieved in, I'd probably get in-volved." "Maybe if I lived closer I would do choose to give back at a service-type of		are SCP alumni. SCP alumni send and share professional re-ferrals through the alumni net-work. You're more trusting to do business with an SCP alum." "Some of my clients now are alums and friends of al-ums. We're helping each other out. It's very rewarding. It feels good. We share a his-tory that cannot be ri-valed by someone who is not from that background."		mentor, quite frankly." "If somebody is in the legal field, and they need advice, I'd love to help that person out. You know, just give them any-thing that I've learned…and kind of steer them in the right direc-tion, I mean, helping out SCP alumni is defi-nitely something that I would want to do." "Mentoring is crit-ical. I think it's something that, you know, is re-ally lacking in SCP alumni engage-ment. And I think that that particu-lar relationship	

		event over par-ticipating in a social event."		"There's an alum that has a construc-tion company, and I'm in real estate, and we're thinking of working to-gether. Another alum helped my dad with something on estate planning. So yeah, from the network, the profes-sional SCP network, yes, I've taken ad-vantage of that."		between mentor and mentee, re-ally develops a very close, strong bond, and when you're trying to build a sense of community, and that's certainly one way to do it."	
Narratives/Storytell-ing • Communica-tions • Stories • Nostalgia • Folklore	Commu-nication collapse	"Somewhere along the line communication from SCP dropped off and I stopped paying attention…I feel like the people	Per-sonal stories	"Hearing per-sonal stories of people who have been helped by gifts to SCP who are less fortunate-- then I might	Nostal-gia/folklor e	"I had such close relationships with some of my teach-ers. I still remember words that some of my elementary school teachers	• Website • AlumniConnect e-newsletter • Facebook page • Instagram han-dle • Linked In page

		who are local get a lot more engagement from SCP."

"I can't remember many points of contact from SCP. Once in a while I got a pamphlet in the mail with a request for a donation…and maybe notification of regional events in my area. But that's all I can think of." | | feel more compelled to donate or volunteer."

"I've seen one or two teachers who passed away and there were literally hundreds of comments, stories and memories about these people shared on social media. It was incredible to see the community come together like that."

"A story about an actual event, or a personal story--that would maybe inspire me to | | said to me 35 years ago. I treasure those memories."

"Every time I have to write something, I always think about my ninth grade English teacher."

"Nostalgia plays a big role at SCP. Huge. There's a Facebook page where alumni post all kinds of things about nostalgic memories like chicken fried steak and gravy, or Mr. Turner measuring our skirts, or Mrs. Dee taking attendance."

"Our school founder is an | • School founder's autobiography |

				give a gift to SCP."		iconic figure. I still have a photo of her handing me my kindergarten diploma." "We have an or-ganization called the Founder's Council, and this group has given the same awards, at the same as-sembly, in the same way for 50 years. It's a hugely nostalgic tradition."	

Key Themes: alumni engagement, core values, community/culture, social identity/belongingness, meaningful shared practices, and stories/narratives

Document/Media Selected	Data/Content Presented	Concept Illuminated	Evidence
Recent annual reports/ "President's Report of Giving"	Digital content provided for last 4 years	Alumni Engagement (Donor)	Donor lists by constituency; donor categories; alumni gift lists relative to other constituents; number of donors (alumni vs. other constituents); lack of donor engagement in the form of gifts evident (3-4%); "Alumni Loyalty Society" and "Alumni Giving by Decade" noted
Annual giving data	Spreadsheet; year-over-year	Alumni Engagement (Donor)	Number of alumni donors shows slight increase in last 4 years; amount of total gifts shows steady increase since 2015-16; possible trend of strategic cultivation of high net worth donors and upgrade in SCP data integrity; also hiring of 2 alumni gift officers in 2017
Alumni magazine	Digital and print content (photographs, captions, brief articles)	Social identity/belongingness, alumni engagement, core values, community/culture	Legacy breakfast, alumni council, homecoming/reunion, "pride", Honorary Alumni program; "so many students and parents knew the campus as a community that felt small and warm—like a home.", "SCP planted the seed for a life of inquiry"-alumnus, alumni affinity groups (theater, television production, distance running); "rigor"
Alumni postcards	Digital copies	Alumni engagement (Social), belongingness	"Your SCP family", group photos

Document/Media Selected	Data/Content Presented	Concept Illuminated	Evidence
Internal advancement staff survey	Digital spreadsheet	Alumni engagement (Donor), narratives, core values	"How good is your office at promoting consistent message about the importance of philanthropy with alumni?", "competitive advantage" (what distinguishes SCP), school's historical narrative as pertains to supporting fundraising efforts
Alumni events attendance data	List provided, only reflects 2018-19 event cycle	Alumni engagement, community	1410 alumni attended events across 9 distinct locations in 2018-19
Alumni board documents	Digital list of members "Alumni Connect Cabinet" published in annual report—no other documents available		Reps in New York, San Francisco, Boston, D.C., Miami and Chicago; reunion year leaders noted for 5 reunion classes
Facebook handle	Own page for Alumni (separate from school's page) Digital feed, "About", "Groups" , "Videos"	Alumni engagement, community/culture, social identity/belongingness, stories/narrative, core values	1967 followers/9049 alumni = 22% engagement rate; "The mission of the SCP Alumni Association is to support SCP in its commitment to excellence by re-engaging SCP alumni worldwide.", class notes, advertising of upcoming events, alumni profiles, "Flashback Friday" nostalgia posts, High engagement on faculty posts "If you could ask Mr. XXXXXXXX any question, what would you ask him?", Nostalgia videos "Chickenfried steak" & "Favorite memories from SCP teachers", affinity groups celebrated (dance), core values "intelligent, creative, amazing, bound to be successful"
Instagram handle	Digital feed—one page for alumni and school	Community/culture, belongingness, narrative/stories	"#alumnitakeovertuesday" (alumni "hijack" the feed with personal stories/memories), "We are Family"

Document/Media Se-lected	Data/Content Presented	Concept Illuminated	Evidence
LinkedIn page	Private digital group	Alumni engagement	952 members, "A social and professional alumni group for all who have attended or graduated from SCP. With over 8000 alumni, this nearly 80 year old private college prepara-tory school has educated many and the nation's--most successful business leaders."
Archives	Book written by the school founder in 1978	Narrative/stories, core val-ues	Section dedicated to "old grads" and "alums" (alumni)-- addendum of "letters from the grad-uates", "the high caliber and achievement of our students and the success of our alumni are SCP's only excuse for being", "self-discipline"
Alumni section of SCP website	Alumni Section of SCP website	Alumni engagement, mean-ingful shared practice	"Ways to Get Involved: There are many ways for you to benefit from our community, but you can also make a difference for students and fac-ulty." List: Attend events, submit class notes, visit campus, share your time (volunteer at alumni events, be a guest speaker at the school's civic forum, volunteer in the parents' association or helping solicit for the annual fund),give a gift to the annual fund
SCP Strategic Plan	2019-2024 plan	Core values, alumni engage-ment, meaningful shared practice	Values: "excellence," "challenging academics," "community," "inclusion," "compassion," "coura-geous leadership", Financial sustainability through "advance-ment efforts" and "facilitating opportunities for collaboration among students, faculty, alumni and parents, including through mentorship and programming"