
Maximization of Alumni Engagement within Student Philanthropic Organizations

Using Indiana University Dance Marathon as a Case

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BSPA Nonprofit Management

Indiana University

SPEA Undergraduate Honors Thesis

Spring 2015

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ACKNOWLEDGEMENTS

First and foremost, the guidance and support provided by my faculty mentor, Beth Gazley, was integral to the development and completion of this thesis. Professor Gazley's expertise and insight was critical in turning a topic for which I have strong passion into a practical research thesis.

The research methodology utilized in this thesis relied on the willing participation of Indiana University Dance Marathon alumni. Their interview responses provided critical insight into the existing strengths and weaknesses as well as future opportunities for IUDM's alumni engagement strategy. Specifically, the following eighteen alumni committed their time to be interviewed for this project (Each alum's highest level of IUDM student leadership is noted):

- Eliza McNulty, Executive Council member (1997)
- Erica Goldenberg, Executive Council member (2007)
- Katherine Rinker, Executive Council member (2012)
- Jorie DePalma, Executive Council member (2000)
- Katie Glesing, Executive Council member (2008 & 2009)
- Andrew McDonald, Executive Council member (1995)
- Moly Giles, Executive Council member (2006 & 2007)
- Alley Murphy, Executive Council member (2012)
- Ronnie Meyers, Subcommittee chair (2012)
- Zoe Engel, Committee member (2012)
- Parth Patel, Subcommittee chair (2012)
- Jason Barnaby, Executive Council member (1991-1992 & 1992-1993)
- Andy Waibel, Executive Council member (1993)
- Deanna Murphy, Executive Council member (1998)
- Sara Franz, Executive Council member (2008 & 2009)
- Ryan Meyers, Subcommittee chair (2013 & 2014)
- Shannon Barron, Executive Council Member (1998 & 1999)
- Christopher Holland, Executive Council member (2009)

Additional individuals who contributed their own expertise in this area include:

- Elyse Meardon, Dance Marathon Director, Children's Miracle Network Hospitals
- Brit Davis, Dance Marathon Director, Children's Miracle Network Hospitals
- Jeff Reyes, President, THON Dance Marathon Alumni Interest Group
- Samantha Lane, Dance Marathon Coordinator, Riley Children's Foundation
- IUDM 2014 & 2015 Executive Council Members
- The Board of Aeons, Indiana University student research board for the President's office

EXECUTIVE SUMMARY

Student-run philanthropic organizations suffer from high turnover rates as students quickly progress through membership and leadership roles before graduating from their undergraduate institutions. While this situation poses unique challenges of viability and sustainability for student organizations, it also provides these programs with a rapidly growing base of alumni supporters. Organizations that can effectively tap into this resource could realize major benefits, both monetarily and beyond. This thesis uses the specific case of Indiana University Dance Marathon to determine how to best design a student philanthropic organization to maximize its alumni engagement.

Indiana University Dance Marathon

Founded in 1991, Indiana University Dance Marathon (IUDM) has raised over \$20 million, including \$3.2 million in 2014 alone, for Riley Hospital for Children in Indianapolis, IN. While IUDM has realized its rapid growth in student membership and the students' solicitation efforts, its current alumni engagement strategy has resulted in a depleted and underutilized alumni resource. With over 700 students projected to graduate and become IUDM alumni in the next two years, now is the time for IUDM student and alumni leaders to revitalize the organization's alumni engagement strategy.

IUDM is not alone in its mission; Children's Miracle Network (CMN) has facilitated the development of a nationwide Dance Marathon network that includes over 255 university and collegiate dance marathon organizations. As the second largest dance marathon and largest within the CMN network, IUDM's commitment to developing a best practice alumni engagement program will set an example and could foster improved dance marathon alumni engagement nationwide.

Literature Review

Higher education alumni relations and development literature reveals how scholars and practitioners approach cultivating engaged alumni and donor bases. Trends in higher education have emphasized collaborative efforts between alumni associations and student affairs departments that begin alumni formation during students' matriculations, encourage alumni-student interactions that introduce students to the behaviors of engaged alumni, and help alumni develop meaningful relationships with their alma mater. Furthermore, successful fundraising and development depends upon the process of building relationships between organizations and potential and existing donors. Despite the extensive research and practitioner knowledge in these two separate areas, the literature lacks specificity in how these concepts interact within a student philanthropic organization environment.

Methodology, Findings & Recommendations

To further explore these concepts within IUDM, the grounded theory research method allows the researcher to form new theories from a body of qualitative data. Semi-structured interviews with

IUDM alumni and peer dance marathon representatives provided insight into how IUDM can better engage with its alumni base. The coding process reveals patterns and trends within alumni responses about their current and desired engagement with IUDM through communities and relationships, awareness of the organization and opportunities, and continuation of their personal experiences and connections.

Synthesis of the existing literature, conceptual and practical findings, and the author's own experience with the organization leads to the development of concrete recommendations for a revitalized alumni engagement strategy. This strategy should begin by creating a culture of lifelong commitment among student members and leaders, transition them effectively to alumni status, and foster a mutually beneficial relationship post graduation. The recommendations can be summarized into four main action steps:

1. Determine a structure that facilitates both student and alumni leadership and engagement
2. Build an alumni network through consistent record keeping and active outreach
3. Identify the alumni population's situations, desires and assets that can inform development of communication strategy and engagement opportunities
4. Cultivate lifelong commitment by treating students as "alumni-in-training" and giving alumni meaningful opportunities to connect back to their student experience

Implementation of the recommendations in a timely manner with full support of student and alumni leaders could lead to a broader and more highly engaged alumni resource. Further spread of these recommendations to CMN's Dance Marathon network with consideration for each organization's unique culture and operations could mean more effective utilization of alumni bases nationwide.

INDIANA UNIVERSITY DANCE MARATHON

Mission & Structure

Indiana University Dance Marathon (IUDM) is a yearlong student-run fundraising and awareness effort that culminates in an annual 36-hour dance marathon event and raised \$3.2 million in 2014 alone. According to the organization's constitution, the mission is

“To create a Dance Marathon, a dynamic organization of friends in the community, that will provide hope for the children of Riley Hospital by generating funds which have built the Ryan White Infectious Disease Center and continue to support the Hospital's efforts to treat all of its patients, regardless of financial concerns.”

IUDM accomplishes this mission by engaging Indiana University students throughout the year in a variety of different capacities as either members or dancers. Currently, the organization is led by a 22-student executive council: a president and four vice presidents compose the Board of Managers and each vice president guides a ‘focus’ (a grouping of similar committees) composed of 4-5 directors and their committees. Every director works with several chairpersons to lead one of 17 committees, each with 60-80 committee members, totaling over 1000 members in 2014 (See organizational chart in Appendix A). Committee members work year-round to keep IUDM functioning and solicit gifts towards their personal goals.

Throughout the year, especially in the fall semester, students can join IUDM by registering to participate in the culminating event as a dancer. Prior to the event, dancers raise money in order to reach the minimum \$500 goal to be eligible to dance in the main event. Eligible dancers participate with student organization groups or independently and stand for 18 or 36 hours straight during the event while learning a 10-minute line dance, participating in games and challenges, listening to stories from Riley families, and joining in a variety of other activities. Over 2500 students participated as dancers in 2014.

History & Growth

Students at Indiana University founded IUDM in 1991 in memory of friend and national hero Ryan White who died the previous year. After contracting HIV at age 13 from a contaminated blood product he received for his hemophilia, Ryan faced not only his illness, but also a national battle for his rights in a time when HIV/AIDS was a misunderstood disease. The founding students were inspired by Penn State University's THON, a 46-hour dance marathon which began in 1973 to raise money for Penn State Hershey Children's Hospital.

IUDM originated as a small fundraiser for Riley Hospital for Children in Indianapolis, where Ryan White was treated. Since 1991, IUDM has raised over \$20 million, which has fulfilled three endowments funding operations and research at the Ryan White Center for Infectious Disease at Riley Hospital. IUDM has grown from a small student-run event raising \$10,000 in its first year, to the second largest student-run philanthropy in the nation. It is one of the largest student organizations on campus, with over 3,500 students, almost 10 percent of the undergraduate student body, participating in some capacity.

National Context

Several years after IUDM was founded, Children's Miracle Network (CMN), a nonprofit that raises funds and awareness for 170 children's hospitals across the U.S. and Canada, brought the Dance Marathon concept to four other universities. Today, there are over 255 university and collegiate dance marathons raising money for their local CMN hospital (E. Meardon, personal communication, April 8, 2015). CMN has invested its own resources in dance marathon cultivation and advancement, including creating a national Dance Marathon brand and hosting the Dance Marathon Leadership Conference each summer so student leaders can collaborate and learn dance marathon best practices from each other.

The Dance Marathon movement is continuing to grow, with over 75 new programs starting each year. Dance Marathon programs are growing rapidly, constantly innovating and developing new strategies to improve their operations and strategic visions. With the existence of this expanding nationwide Dance Marathon network, maximizing dance marathon is not confined to Indiana University, but crucial to children's health fundraising efforts across the country.

Current State of IUDM Alumni Engagement Efforts

With the national growth of student dance marathon organizations and their growing potential, alumni engagement has naturally become an important focus area. The ability of both IUDM and the Dance Marathon network to more effectively engage with their alumni could have national implications. IUDM has responded with recent efforts to revitalize its alumni engagement strategy, as current activities have not produced the desired impact on the organization.

IUDM's current alumni engagement efforts exist as a partnership between student leaders and the Alumni Board. The Membership focus, led by the Vice President of Membership consists of four committees that follow an IUDM participant's life cycle from a high school student to an alum: Marathon Relations, Recruitment, Dancer Relations, and Alumni Relations. The Director of Alumni Relations and the Alumni Relations committee engage with alumni through a monthly email newsletter, fundraising campaign email blasts, and events on campus.

The Alumni Board, composed of eight alumni who were past executive council members, exists to "develop and enhance the involvement of IU Dance Marathon Alumni and future Alumni in supporting mission and goals" ("Alumni Board", n.d.). The board's goals include involvement, fundraising, relationships management, and training. Historically the Alumni Board has focused mainly on being a resource for the current Executive Council and has recently started expanding its role as a connection to the IUDM alumni base.

The Alumni Board's outreach efforts include planning two annual alumni social events in Indianapolis and Chicago, beginning implementation of an Alumni Ambassador program, and managing the IUDM Alumni social media accounts. For further information about the role of the Alumni Board, refer to the position descriptions in Appendix B.

IUDM currently maintains a database of 1,325 alumni, but it is incomplete. It consists mainly of past executive council members and committee members who graduated in May 2014. Many of

the existing records lack complete or updated information. Historical committee member contact information is limited. In recent years, the Alumni Relations Committee has taken steps to grow the database by routinely adding all recent graduates and encouraging alumni to submit their contact information through an electronic reconnect form on the IUDM website.

Despite efforts to engage with alumni, IUDM has consistently struggled to maintain an active alumni base beyond a group of core supporters. Around 380 alumni currently receive the alumni newsletter, and on average, 38 percent open the email each month. While invitations to IUDM events are sent to all alumni with updated email contact information, in 2013 just 100 alumni attended either the summer Golf Outing or Annual Gala and 60 attended the Dance Marathon. It is evident that IUDM is not effectively cultivating a wide and engaged alumni base.

IUDM's current alumni engagement efforts have presented a problem. The organization has seen drop-offs in engagement immediately after students graduate and throughout the lifetime of alumni who remain engaged at first. Furthermore, inconsistent record keeping has left future years with an incomplete database of alumni that can be tapped for engagement potential. Together these problems have led to an underutilized alumni resource.

As discussed earlier, IUDM is growing rapidly and so is its available alumni resource. Over 730 IUDM committee members and executive council members are predicted to graduate between May 2015 and May 2016. These alumni could provide major monetary and volunteer benefits to the organization if IUDM can develop a strategy to cultivate their lifelong commitment.

To understand how this weak level of alumni engagement can be strengthened, a review of the literature follows.

LITERATURE REVIEW

Little research has been conducted on student or philanthropic organizations' alumni engagement efforts. Instead a review of the literature found a body of academic scholar and practitioner literature on the separate topics of higher education alumni engagement and fundraising development concepts. The next few sections will review the extensive research on these individual subjects. To facilitate reader comprehension, a glossary of common terms follows.

Table 1. Terms used in the Alumni Engagement Literature

| | |
|-----------------------------------|--|
| Alumni | Traditionally refers to all individuals who have graduated from a higher education institution. Depending on the institution, individuals who were students for a minimum time span but never graduated from the institution may be considered alumni. |
| Student Affairs | A higher education department, division or role charged with the responsibility to support student growth and development (Rissmeyer, 2010). |
| Alumni Relations | A higher education department, division or role charged with the responsibility to cultivate and maintain relationships with alumni to maximize alumni's potential as a resource to the institution (Rissmeyer, 2010). |
| Alumni Association | The formal entity that organizes alumni relations activities and provides membership opportunities for an institution's alumni (Singer, 2002). |
| Student Alumni Association | An undergraduate student organization aimed at providing students with opportunities to be involved in institutional advancement activities related to alumni affairs and aimed at socializing them into future alumni. Works in partnership with the institution's alumni association. May be separate from or replace a student foundation (Nayman, 1993). |
| Student Foundation | An undergraduate student organization often associated with the institution's foundation that provides students with leadership opportunities in higher education advancement and allows them to interact with their peers on these topics. May be separate from or replace a student alumni association (Nayman, 1993). |
| University Affinity Group | A collection of people, traditionally alumni, who are connected in a community based on shared interests in university affairs. Communities can be formed about shared membership in student organizations, career interests, cultural similarities, etc (Rissmeyer, 2010). |

Higher Education Alumni Relations

Importance of Alumni

In times of diminishing funding and institutional resources, universities are putting greater emphasis on utilizing alumni as an advancement opportunity. Alumni were at one time students, and therefore have a deep and strong connection to their alma mater, its success and future

sustainability (Singer, 2002). Yet, higher education institutions have historically struggled to garner a large alumni engagement network, as fewer than 20 American universities received financial contributions from more than half of their living alumni in 2008. (McClintock, 2009). Institutions that can successfully re-engage existing alumni and ensure higher engagement levels among future alumni will benefit from increased philanthropic funding and support of institutional goals. Alumni “represent a window to the past, embody evolution of the department over time, and provide inspiration for the vision of the future” (Gaskins 2006, p. 141).

Determinants of Alumni Engagement

Determining the factors that lead to high post-graduation engagement is the first step in successful alumni programming. Across the reviewed literature, authors overwhelmingly agreed that a major factor in alumni generosity is a positive and successful undergraduate experience (See e.g. Monks, Rissmeyer). Conley states that alumni who continue to have a strong connection to the institution may be more likely remain the most engaged (1999). Student relationships with faculty and administration are a foundation for loyalty to the institution (Rissmeyer, 2010).

Alumni generosity, similar to other development areas, tends to follow the Pareto principle, and therefore successful programs focus resources on the top percentile of potentially engaged alumni. The Pareto principle, sometimes referred to as the “80-20 Rule”, applied in fundraising means that the majority (perhaps 80 percent) of donations will come from a minority (20 percent) of individual donors. Taking this a step further in alumni development theory, the Pareto principle means that perhaps 20 percent of students will eventually have 80 percent of the overall alumni impact on the university. Targeting those with the best undergraduate experience rather than spreading resources across the entire body of alumni has proven to be a promising strategy (Monks, 2003).

Alumni who show existing engagement through event attendance, financial giving, and maintenance of accurate personal records have higher potential for sustained and increased involvement. Additionally, research shows that alumni who give consistently the years immediately following graduation have a higher lifetime giving rate. Eighty percent of major \$1 million or greater level donors showed consistent giving in their first five years as alumni (McClintock, 2009).

Creating the Best Experience

Since alumni engagement begins with a positive undergraduate experience, the literature agrees that successful alumni programs begin with the student. A basic concept in alumni relations is to “treat students like alumni and alumni like students” (Cellone, 2012, p.22). As stakeholders of the institution, students and alumni share in the social identity of the university, which tends to create a familial culture. This association leads to a stronger connection and therefore concern for others sharing the same identity, which lends to higher levels of pro-social and philanthropic activity towards the institution that helped create that identity (Hurvitz, 2010). In other words, alumni can identify with current students and therefore feel more inclined to contribute to their alma mater because it impacts these students’ success and well-being. Student affairs

departments play an important role in creating a strong sense of pride and a positive experience that can translate to post-graduate identity (Rissmeyer, 2010).

Extensive literature emphasizes the important role for student affairs in advancing alumni engagement strategies through collaboration with alumni relations departments (See e.g. Nayman, Rissmeyer, Singer). Treating students as “alumni-in-training” by communicating early and often to them the alumni body’s important role in the institution prepares them for a lifelong commitment (Pumerantz, 2005; Rissmeyer, 2010). Successful universities instill in their students a philanthropic conscience through involvement in institutional advancement activities to educate them on the necessity of alumni involvement in reaching philanthropic goals (Nayman, 1993). Students who are introduced to the alumni association soon after arriving and reminded of it often may better understand its mission and their future opportunities for involvement (Gaier, 2001; Jackson, 1994).

Student Affairs & Alumni Relations Collaboration

Successfully socializing students into the roles expected of engaged alumni begins by identifying the similarities between student affairs departments and alumni relations departments to detect areas for mutually beneficial initiatives. Student affairs departments focus on student life, rights and activities, while alumni relations functions are often associated with the fundraising and development arm of the institution. Programs aimed at creating a better student experience should simultaneously instill the importance of alumni involvement and those aimed at cultivating alumni relationships should also reconnect alumni to their alma mater in a meaningful way (Rissmeyer, 2010). The process requires a combination of consistent messaging that aligns with the organizational culture and maximization of alumni-student interaction opportunities (Hurvitz, 2010).

Creating a culture of lifelong commitment involves intentionally spreading this message to students through direct and passive mediums. For many institutions, sharing the message of lifelong commitment begins at new student orientation, is continued through peer-to-peer education by student alumni associations and student foundations, and culminates in major events and campaigns like homecoming and senior class gift challenges.

Students are often unaware that the institution and therefore their student experience are dependent upon philanthropic contributions. Consequently, they are unaware of the role alumni should play in advancing the institution. Institutions should clearly articulate the importance of the alumni base and the institutional need for their engagement. In a study of Ivy-plus institutions (i.e., the seven “Ivies” and similar elite institutions such as Dartmouth, Williams, etc.), Hurvitz found that alumni affairs professionals widely agreed that students, particularly student leaders, should be educated about the institutional operating budget to better understand the distribution and impact of their gifts (2010).

Cultivating alumni-student interaction allows alumni to develop a stronger connection to the institution by reintroducing memories and sentiments of their student experience. Simultaneously, students who see alumni engaging with the university learn what behaviors to model post-graduation (Singer, 2002). Alumni-student interactions occur formally and informally on-campus, across the country and virtually. Notably, alumni can serve as career

mentors and networking connections, students and alumni can host each other on campus or in their city of residence, respectively, and events can allow them to interact socially and meaningfully (See e.g. Cellone, Hurvitz, Singer). Connecting students and alumni with aligned interests or shared participation in a university affinity group furthers the development of significant and mutually beneficial relationship building (Rissmeyer, 2010).

Transitioning Students to Alumni

Bridging the transition from student to alum is an important aspect of the alumni cultivation process. With proper cultivation, by senior year students should already be aware that alumni are crucial to the university and that students will assume this same role post-graduation. During senior year students are focused on their career and post-graduation success and may be aware they will have limited discretionary funding for several years. Senior year programming that focuses on how the institution can benefit alumni in areas like networking and career preparedness and how students can be engaged outside of financial commitment will begin developing the mutually beneficial relationship necessary for successful alumni relations (Jackson, 1994). Alumni who give time or other non-financial contributions may have a higher propensity for future financial giving to the institution (Singer, 2002).

Senior celebrations and senior gift challenges recognize students for the contributions to the university thus far and begin a pattern of consistent engagement. Programming during senior year allows for alumni officers to begin building relationships with young alumni and early subscription to alumni communications like newsletters introduces students to the experience they will have post-graduation (Rissmeyer, 2010).

Purpose of Alumni Associations

Higher education institutions have widely adopted the alumni association model as the main conduit for organizing alumni affairs activity. The alumni association mission is “twofold: (a) to develop programs and activities intended to support the continued affiliation of alumni, and (b) to devise and manage alumni efforts in support of institutional goals” (Newman, 2009, p.26). McClintock adds that alumni associations need to go beyond being event planners and acknowledge their role in educating alumni about institutional direction and goals and the role for alumni in these endeavors (2009).

Alumni relations require officers to be more than fundraisers; they must develop personal relationships with all alumni. Alumni associations are considered loyalty membership programs with the purpose of maintaining lifelong members by developing strong relationships and ties to the organization. While fundraising is a reason to build these relationships, alumni programs focus on creating loyalty so that the development department will have a committed alumni group to target (Rich, 2006).

High quality reciprocal relationships provide continual value to alumni and result in higher long-term engagement levels. Alumni value continued career and networking support, access to student and alumni talent, and opportunities to reconnect with their student experience. Likewise, alumni want to see how their financial, time and talent contributions have impacted the

university and served institutional goals (Coolman, 2011). Incorporating these messages into effective stewardship and recognition reaffirms alumni's personal role in the institution.

Organization and Activities of Alumni Associations

The foundation of any successful alumni relations program is an accurate alumni record database. Gaskins explores an alumni network formation for a university's recreational sports department and emphasizes the constant attention alumni record-keeping requires and the steps to expanding it through existing alumni connections acting as ambassadors to their classmates (2006). Along with current contact information and job title, alumni records should include student affairs data such as affinity group affiliation to better provide specialized messaging and programming based on identified interests (Rissmeyer, 2010).

Alumni associations develop programming around fostering the reciprocal relationship with their alumni and communicating value-driven messages. Alumni-specific newsletters communicate consistent and relevant information to a broad base of stakeholders, keeping them informed regardless of their proximity to campus or ability to engage in other ways. On-campus functions surrounding major events like homecoming and reunions provide alumni a reason to return to campus and re-connect with their student experiences. Networking and social events around the country allow alumni to maintain and build relationships with peers, students and alumni officers (Gaskins, 2006).

While alumni associations provide many programs for all alumni, they also offer specific benefits for alumni who self-select as due-paying alumni association members. Alumni associations benefit from identifying this group of highly engaged alumni because research has shown that members are three times more likely to give and at higher levels than non-member alumni. Factors that help predict which alumni will become members include current giving, accurate records, a positive perception of the alumni association, and connections to other association members (Newman, 2009).

Fundraising & Development

While the higher education literature provides insight into academic and practitioner best practices in alumni engagement, more direction is needed to understand the role fundraising and development plays in alumni relations and student philanthropic organizations. Reviewing literature on fundraising and development reveals basic concepts for the general fundraiser. These theories and best practices help inform development and alumni relations professionals on how to initiate, develop and maintain relationships with potential donors and alumni.

The I's of Development

Across the literature, many agree that the basic fundraising steps can be represented by actions beginning with the letter I. While practitioners seem to utilize anywhere from four to seven different I-steps, there were four common steps to define a successful fundraising activity: identify, inform, involve, and invest donors (See e.g. Ciconte, Jordan, Patouillet). Some fundraising experts also write about the value of "interesting" and "inspiring" donors to give. To expand on this principle, generally, practitioners have made it clear that organizations must first

“identify” potential donors, then “inform” them about the organization and “involve” them in its efforts so that they choose to “invest” financially. The following sections will look more in depth at strategies and principles that guide fundraising professionals through these steps.

Identifying Prospective Donors

A key element of successful development strategies is correctly identifying the individuals, or prospects, who will be likely to donate to the organization. A core concept in identifying prospects is the L-A-I Principle, which stands for “linkage, ability and interest” (Rosso, 2003). Linkage is the individual’s human connection to the organization through an organization representative or existing tie to the organization. Ability is the individual’s financial capacity to make a donation, and interest is the individual’s personal commitment or connection to the mission the organization serves.

Individuals who exhibit reasonable qualifications in all three categories will have the highest propensity to become future donors (Rosso, 2003). Development professionals discover linkage, ability and interest through prospect research and can rank prospects based on their qualifications in these three categories.

Informing and Involving through Donor Cultivation

Fundraising literature discusses the development process, often by focusing on relationship building between the organization and donors. Donor cultivation is the process by which professionals develop a personal relationship to further interest in and loyalty to the organization. Cultivated donors may be more likely to appreciate the organization’s work and feel that the organization is grateful for their role in its mission. Building trust with donors can take many forms, but often involves stewardship techniques to thank, recognize and further the personal relationship between a donor and the organization. Klein noted “cultivation only works when there is a genuine desire to know the donor better” (1999, p.3). Depending on available resources, donor cultivation will occur on a different timeline for every organization, beginning either before or after a gift is made and hopefully extending throughout the donor’s lifetime.

Involving as Volunteers

An organization’s volunteers are an important resource not only because the time and talent they give, but because this connection may lead to financial support as well. Of individuals who volunteer for nonprofits, 90 percent also contributed financially to charitable causes. Volunteering households also donate 55 percent more than households without volunteers (Purvis, n.d.). Patouillet confirmed that research done by the organization Independent Sector as well as his consulting firm has found a “positive correlation between volunteerism/involvement and giving” (2012, para. 6).

Securing the Investment

A phrase found throughout development literature is that “people give to people”; this is often considered a foundational principle of successful fundraising (See e.g. Burnett, Livers). While prospects may show linkage, ability and interest in an organization, they may not give until directly asked to by the organization (Livers, 1999). In a telephone survey conducted by

American Red Cross in 2012, 59 percent of respondents said they would sponsor a friend participating in a charity event and 50 percent would donate if asked by a friend or close relationship (“Public Still Plans,” 2012). Soliciting a donation, often referred to as “the ask”, should be personalized to the organization, the individual or donor type, and the desired gift value.

Literature Synthesis & Gap Analysis

This literature review displays research and practitioner best practices for higher education alumni relations programs and general fundraising and development efforts. It suggests that universities, at-large, are discovering how to cultivate students into future alumni by providing a positive undergraduate experience. Alumni relations professionals continue to build strong relationships with alumni so that development professionals can turn alumni’s inherent linkage and interest into investment. Alumni relations and development activities are fundamentally connected as the alumni association’s efforts contribute directly to the process of cultivating future alumni donors.

However, despite successful independent strategies in these two areas, the literature only briefly explores what alumni relations looks like when a university subgroup has a separate but similar interest in cultivating its respective students into engaged alumni. Furthermore, how can these concepts apply when a student within a philanthropic student organization is simultaneously a member, a volunteer, a fundraiser, and a donor?

METHODOLOGY

Goals of Research

This thesis will contextualize the concepts explored in the literature within a specific case, Indiana University Dance Marathon. The goal is to determine how IUDM can be designed to best cultivate mutually beneficial lifelong relationships. Given the gap in existing literature to synthesize and apply these concepts to the specific context of student philanthropic organizations, a grounded theory approach was taken to understand first how IUDM stakeholders perceive the need and the potential solutions for alumni engagement.

IUDM alumni interviews, the primary information source, were used to determine trends in alumni motivations, desires and behaviors. Additional information came from interviews the author conducted with Indiana University administrators, alumni relations professionals, and faculty while working on a separate alumni focused research project. This qualitative research also sought to understand whether the higher education alumni relations and development practices discovered through the literature review (discussed in the previous section) are applicable to a student philanthropic organization.

Grounded Theory Method Background

Grounded theory is a systematic research methodology that examines a collection of data in order to develop theories from the apparent data patterns. Barney G. Glaser, among others, first invented this method in the late 1960s as a way to develop theory to explain “the social life, roles and expected behavior of people” and it has since grown as a popular research method for many disciplines including nonprofit management (McNabb, 2002, p.302). Grounded theory allows researchers to develop new theories in areas where little research exists rather than being restricted to testing existing theories.

The grounded theory method was selected because it allowed exploration of alumni behavior within a specific context the existing literature has not explored. Because of inconsistent record keeping and high turnover rate, there was little existing data on IUDM alumni behavior. Instead, grounded theory lends itself well to exploring this question through analysis of qualitative data in the form of alumni interviews. Furthermore, as this research thesis is limited in time and scope, the grounded theory method provides a strong foundation for further research by providing material for survey development and additional data collection.

Nonetheless, grounded theory has its drawbacks. It requires an extensive process of data collection, analysis, and theory development. Grounded theory methodology is not straightforward and several different approaches exist, so the researcher must decide which approach to follow. Furthermore, there is the potential for the researcher’s own biases to enter throughout the analysis and theory formation stages. The researcher must acknowledge her background and experiences that may influence the way she perceives and interprets the data (Hussein, 2014)

Despite the possible disadvantages, grounded theory prevailed as the most appropriate methodology for this particular research exploration.

Interview Methodology

Data collection consisted of conducting eighteen telephone interviews with IUDM alumni and several with representatives from peer dance marathon organizations including Penn State's THON and Children's Miracle Network. The goal was to better understand how and why alumni have or have not remained engaged with IUDM since their graduation. For ease of analysis, interviews were audio recorded and then transcribed electronically.

Interviews were semi-structured, meaning questions and topics were used to guide the conversation but the interviewees responded freely and trajectories from the guide were followed conversationally. Semi-structured interviewing allowed for open-ended questioning and conversation-style interviewing (Cohen, 2006). Interviewees felt comfortable responding and leading the conversation in different directions, but the sample questions below helped keep responses within the relevant subject area:

1. What about your IUDM experience encourages you to stay engaged?
2. How and why have you stayed engaged with IUDM?
3. What value can alumni bring to IUDM?
4. What value can IUDM bring to alumni?

The sample population chosen was small and concentrated mainly on engaged to highly-engaged alumni in order to focus first on the behaviors of and social influences on this desirable group. Most individuals were past executive council members although several subcommittee chairs and committee members were interviewed to compare their perspectives.

While focusing the sample poses limitations including omitting the perspectives of disengaged alumni, literature on grounded theory suggests that the main goal is to reach theoretical saturation where few new codes begin to appear with additional data collection (Holton, 2010). Data saturation can be reached with a small sample size when the sample is relatively homogeneous and the research scope is limited ("Grounded Theory Tutorial Transcripts," n.d.). Further research can expand these questions to a broader IUDM alumni population to search for possible differences in perspectives of disengaged and engaged individuals.

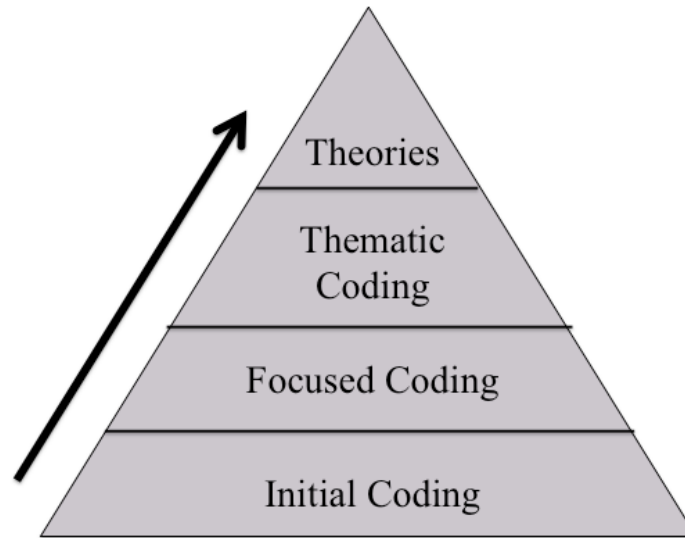
Grounded Theory Coding Process Overview

The grounded theory methodology involves following through a series of coding steps to analyze the data. Coding is "the process of applying some conceptually meaningful set of identifiers to the concepts, categories and characteristics" within the data (McNabb, 2002, p.311). Throughout the literature, the coding stages take on a variety of names, but the figure below shows the general process followed: initial coding, focused coding, thematic coding, theory development. Furthermore, there are two grounded theory schools of thought, Glaserian and Straussian, which can be seen in Appendix C. This thesis focused on the Glaserian method.

Throughout the initial and focused coding stages the researcher follows an open coding method to freely assign codes as they appear from analysis of the qualitative data (McNabb, 2002). In

the first step, interview transcripts are reviewed line-by-line with codes given to segments of text based on interviewee words, academic terms, or as created by the researcher (Khandkar, n.d.). Focused coding then seeks to determine categories, or groups of related codes, based on the commonalities between the initial codes.

Figure 1: The Analytic Stages of Grounded Theory



In the later stages, thematic coding requires letting patterns and themes emerge across the categories by further coding and relationship discovery. Literature also refers to these steps as theoretical or selective coding because it is where the researcher begins to determine a final structure for the data as the process moves from specific instances to generalizations (McNabb, 2002). In this stage the researcher may determine a core category, which incorporates the central phenomena present within the data and relates to all other thematic structures (Böhm 2004, pp. 274; Birks, 2011).

In culmination, the researcher should record theoretical memos throughout the process to summarize the researchers conclusions and explanations about the phenomena within the data (Birks, 2011). The memos provide a platform for generating theories that fit the topic's scope, are useful in the specific situation, and are "complex enough to account for [...] most of the variation in the area studied" (McNabb, 2002, p.314).

FINDINGS

This section presents the findings of the coding process, including the development of several central themes, which offer insights into successful alumni engagement within IUDM. These findings and theories will be further developed and supplemented with conclusions and applications drawn from the literature review in a Recommendations section, which follows.

Initial Coding

The open coding began with a line-by-line review of the interview transcripts, and assignment of initial codes, mainly based on interviewee wording and terms that define human behavior, to individual data points within the responses. The initial coding process revealed over 100 separate codes, which began to describe both the similarities and differences between alumni's desires and behaviors related to philanthropic engagement. The excerpt below from a former executive council and former alumni board member exemplifies typical codes placed directly within the text:

*First few years I just missed it so much, luckily I still knew college students and council members, I mean well. **[engage for community]** Luckily I still know you guys, but I don't know anybody [else]. **[easier to connect when know people participating]** [...] And I think that I when I became president of Alumni Board we did better job as Alumni Board of getting close to each other too and that sort of filled that gap a little. **[desire to fill gap leaving DM creates]** I don't know how I feel about my role yet, [...] I just want to find the right way to stay involved. **[find the niche]***

Focused Coding

While reviewing the initial codes, categories began to appear to further group the data. Table 1 shows a sample of several focused codes that encompass a variety of the initial codes. Throughout the process frequently reoccurring initial codes were identified (see items in bold font). A full depiction of the focused and initial codes can be found in Appendix D.

Table 1: Sample of Initial and Focused Coding of Interview

| FOCUSED CODES | Alumni Desires | Opportunities for Improvement |
|----------------------|--|---|
| INITIAL CODES | Desire to know Riley impact Desire to reconnect with people Desire to network Desire to share own experience Need to fit schedule Desire to reconnect to/support a subgroup Need for professionalism Desire to fill gap leaving DM creates Desire to share skills Desire to meet new people with similar experience Desire for alumni group identity | Find the niche Respond well to peer connection Looking for reason to come back Need to better understand alumni demographics Updated records key Remind alumni of experience Need to improve stewardship Create community feeling for all |

Thirteen focused codes were then identified, which began to tell a story about alumni behavior and perceptions:

1. **Alumni Board & Alumni Relations Roles** – Perceptions, firsthand accounts, and opinions of the Alumni Board’s role within IUDM.
2. **Alumni Desires** – The feelings, actions, and opportunities that alumni desire to experience in their relationships with IUDM post-graduation.
3. **Opportunities for Improvement** – Alumni identified areas where IUDM can make improvements that would enhance its engagement strategy.
4. **Benefits of Alumni** – Ways through which alumni self-identified that they could bring value to IUDM in their current stages of life.
5. **Reasons For or Against Engagement** – Motivations behind alumni past, current and future engagement with IUDM, as well as indications of the reasons why engagement has been limited.
6. **Alumni Giving** – Accounts of and motivations behind alumni financial giving and capacity to donate monetarily.
7. **Communication Related** – Perceptions and commentary on IUDM’s historical and current communications with alumni, and indications of ways to improve how IUDM communicates effectively to this population.
8. **General Barriers** – Difficulties IUDM currently faces in fully cultivating its alumni resource and in progressing forward into a revitalized strategy.
9. **Event Related** – Responses specific to attendance and engagement at IUDM sponsored events throughout the year as well as Dance Marathon weekend.
10. **Location Related** – Indications of how geographical location determines alumni engagement and unique opportunities.
11. **Existing Communities & Relationships** – Descriptions of existing communities and relationships that define the IUDM student and alumni experiences.
12. **Preparation for Future** – The role IUDM plays in preparing students for their future careers and post-graduation lives.

13. Connections & Inspirations – The aspects of IUDM that inspire alumni and develop their view of the current state of IUDM.

Thematic Coding & Conceptual Idea Development

For the purpose of this thesis, the thematic coding and theory development stages were combined into a process resulting in the development of conceptual ideas that expand upon the existing theories within the higher education and development literature. Rather than developing entirely new theories, a grounded theory approach addressed the existing question of whether and how the literature review findings could be contextualized within a student philanthropic organization. The general finding is that many existing principles and best practices could be adapted to IUDM if the existing organizational culture was seriously considered and utilized in designing an alumni engagement strategy.

The following three conceptual ideas seek to define the existing IUDM culture, its role in alumni engagement, and the ways it aligns with and expands upon existing literature. They explore how building communities and relationships are integral to the IUDM experience and how alumni awareness and personalization can further develop these key connections to the organization.

Community and Relationships

As stated in the Methodology section, the researcher may identify a core category that encompasses the central phenomena the data analysis revealed. Throughout this research, it became apparent that the community and relationships formed within and because of IUDM define the student and alumni experiences and are the single-most important factor in reconnecting alumni to the organization.

As noted, the literature focuses on the relationship between the institution and its students and alumni as key to creating a positive undergraduate experience that translates to a high-quality, lifelong, cultivatable resource. Gaier (2001, p. 16) states the “level of alumni involvement is linked to the basic, fundamental perception, opinion, relationships of each alumnae with their alma mater”, which is developed during the students’ matriculation and maintained post graduation. The literature goes slightly further to discuss the important role of relationships between students and faculty and administration in building lifelong commitment, but the grounded theory findings give more depth, exploring the relationships developed between students and their peers because of their mutual participation in IUDM.

When talking about their most memorable IUDM experiences or what has been the most important factor in keeping them engaged thus far, alumni overwhelmingly referred to the friendships they built within IUDM and the opportunities staying engaged gave them to continue to reconnect with these people. For example, an alumna and Alumni Board member stated her belief that “the catalyst of why [she] wanted to stay involved were the relationships [she] built. If [she] hadn’t become friends with the people [she] met in the organization [she] would not be as involved”. Leaving IUDM, an organization that, for many, their undergraduate time and experiences revolved around, creates a gap that alumni attempt to fill by re-engaging with the organization or another organization, especially in the first two years post-graduation.

Alumni engagement after these first two years depends on a combination of an individual's personal motivation to continue contributing to the organization and the strength of their sustained relationships with peers or students still participating in IUDM. An alum from the 1995 executive council, has had varied engagement levels as an alum, but his most engaged periods have resulted from other alumni from the 1995 executive council choosing to attend IUDM events. His council's relationships have remained remarkably strong, as eight of their fourteen members still gather annually in the fall. Every few years this gathering will take place within IUDM's 36-hour Dance Marathon weekend.

Communities within IUDM currently exist based on specific executive council and committee affiliations, with relationships created on an executive council being the strongest and most sustainable. The Alumni Board has created an additional opportunity for alumni to form an executive council-like relationship post-graduation. As committees have grown in size, responsibility and importance, the relationships formed on them have become much stronger than they were in IUDM's early years. Unfortunately though, IUDM's alumni efforts have historically focused on engaging past executive council members, creating an exclusive culture that prevents subcommittee chairs and committee members from being aware of or feeling comfortable joining in the alumni identity. From the perspective of a former subcommittee chair "it is tough to break into the ranks of the alumni association [...], it's almost like a clique".

Alumni exclusiveness currently exists as a major barrier to creating an alumni group identity and expanding the alumni network. While focusing on executive council members worked in past as they were the most engaged graduates, the efforts can now be expanded to a wider population, especially the top 20 percent of students, in acknowledgement of alumni's desires to be involved and in alignment with the Pareto Principle discussed in the literature (Monks, 2003).

Alumni, overall, desire to have a platform for rekindling and maintaining existing communities as well as developing additional relationships with current IUDM students and alumni. Literature suggests that students and alumni create a social identity with their university and therefore develop a familial relationship where they feel concerned for the well-being and success of others sharing the identity and desire to continue in this identity (Hurvitz, 2010). Because of this concern, IUDM alumni indicated a desire to network professionally and socially with IUDM-affiliated students and alumni as a way to contribute to the organization and the success of those within it, while simultaneously reinforcing their social identity and gaining personal value.

Alumni Awareness

As a conceptual idea, stakeholder awareness of the organization and its alumni has the strongest support from the existing literature. In this context, awareness refers to both students' and graduates' knowledge of the role and importance of alumni in the organization's success, the organization's current state and needs, and the opportunities for alumni engagement.

The literature review discusses how practitioners have consistently emphasized the importance of beginning intentional alumni cultivation during the students' undergraduate experiences. Currently this intentionality and recognition of students as "alumni-in-training" is largely lacking from IUDM's alumni strategy. By virtue of their increased role in the organization, the

executive council members graduate with a two-part understanding of the alumni role: the Alumni Board as a resource for the executive council and IUDM event attendance in the first few years post-graduation. On the contrary, all non-executive council alumni interviewed felt they had little to no knowledge as students of an alumni group's existence, and therefore did not know they could remain actively engaged beyond financial giving after graduation.

In discussions about what alumni want from their relationship with IUDM and effective communication, alumni revealed a desire for regular messaging that provides updates on the organization's current status and growth, insight into the impact their gifts have at Riley Hospital and clearly articulated opportunities for alumni involvement. Alumni are intrigued by IUDM's rapid growth, but because of that can feel out-of-date with IUDM's current operations, structure, and impact. This leads to them feeling disconnected from the organization and, in some cases, has resulted in alumni misunderstanding and disapproving of decisions made by current IUDM leadership. Furthermore, a common theme in alumni responses was a desire for increased engagement but a lack of familiarity with any opportunities to do so because they were not being articulated clearly or at all through current communication mediums.

A member of the 1992 Executive Council explained that it is not that alumni care about the organization less than when they were students, but they cannot give to it in the same way since there are many factors competing for their attention. The regular communications help remind alumni of their positive IUDM experience and maintain their passion for the organization despite these factors. Higher education alumni associations frequently employ newsletters for regular communication to alumni. These align with the second "I", keeping a donor informed about an organization, emphasized in development literature for its role in the cultivation process.

Engagement Personalization

Alumni engagement can be enhanced when the strategy allows for personalization within alumni's current situations as well as to the specific affinities they developed as students. To attract and retain a broad engaged alumni base, the strategy should account for alumni's varied life-stages, geographical locations and desired commitment levels. Alumni noted geographic location and proximity to Bloomington or an alumni hub such as Indianapolis or Chicago as a major contributing factor to their engagement level.

As alumni described their engagement level from graduation into the present, it became apparent that life changes such as marriage, children, relocation, and career had significant impacts on their ability to remain actively involved, most notably through drop-offs in event attendance. Young alumni have more time but less discretionary funds; while more mature alumni have higher financial and skill-based giving capacity with more restraints on their availability.

Higher education alumni associations have acknowledged these trends by emphasizing time-based engagement for recent graduates, knowing that it will lead to increased long-term giving when the alumni have more financial flexibility. Alumni associations account for additional variety in alumni situations by developing regional location-based alumni chapters and events as well as volunteer opportunities for a variety of skillsets (Gaskins 2006).

An alum further emphasizes this point in reminding IUDM of the WIIFM (“What’s In It For Me”) principle in the sales profession, which explains how individuals first consider the personal value an opportunity holds. In the context of IUDM, he would be more willing to engage in ways where he could positively contribute because of his unique skillset. Another alum goes on to say that alumni “would make the time [to be involved], [they] just need to find the niche of how to do that”.

As discussed in the community and relationships conceptual idea, alumni form a strong connection to the subgroup that defined their IUDM student experience. Rissmeyer agrees, exploring how young alumni connect better to affinity groups than their graduation class year affiliation (2010). Alumni associations have capitalized on this by forming university affinity groups allowing alumni and students with shared affiliations to interact and providing alumni with a personalized connection back to the institution. Building a comprehensive alumni record database that includes these subgroup affiliations allows alumni associations to create personalized relationships revolving around these important factors (Gaskins 2006).

Throughout the interviews, IUDM alumni indicated that increased opportunities to connect with and support their subgroup affiliation would encourage higher participation levels. Currently alumni seem more inclined to support their subgroup’s fundraising goals, often choosing to make their donation to a student member of their past committee or a dancer representing a student organization with which they were involved. They also indicated a desire to receive more current information about these subgroups and continue to support them in non-financial ways as well.

Practical Findings

In addition to developing the conceptual ideas that enhance the existing scholarly literature, the grounded theory method provided practical findings about IUDM’s current operations and future opportunities for improvement. The practical findings are organized into the previously identified focused categories.

1. Alumni Board & Alumni Relations Roles

While the Alumni Relations Committee and Alumni Board have worked collaboratively for many years to engage with alumni and enhance IUDM’s overall mission, their distinct roles have begun to overlap due to the organization’s rapid growth. The Alumni Relations Committees currently has over 70 student members, but very few day-to-day tasks, so it is constantly searching for additional projects to provide all its members an opportunity to contribute. As discussed previously, the Alumni Board has recently focused on better fulfilling its role as a connection to the alumni base through increased programming and outreach.

The blurring of role lines combined with annual turnover of the Director of Alumni Relations has led to difficulties in communications between the two entities about a clear, cohesive strategy for alumni engagement. Individuals on both the student and alumni sides have voiced a need for a clearer delineation of responsibilities moving forward to accommodate IUDM’s growth and increased need for alumni resources. In interviews, alumni voiced a variety of opinions on the distribution of roles and communication strategy between the two entities. There did appear to

be a slight trend toward student ownership of current IUDM operations and fundraising information dissemination and alumni ownership of activities that are beyond the scope of the marathon or involve alumni-only news.

In examining peer dance marathons, a variety of different models exist. The most established and thus-far successful model is Penn State THON's Dance Marathon Alumni Interest Group (DMAIG). While there are many differences between IUDM's and THON's operations, which prevent it from being a direct peer, IUDM can still learn from DMAIG's successful alumni engagement efforts. DMAIG exists as a formal interest group (Penn State's terminology for university affinity group) within Penn State's alumni association and views its main mission as continuing to support the students' cause acting as a partner to, rather than a part of THON's student initiatives. Jeff Reyes, current DMAIG president emphasized how DMAIG maintains and develops the alumni network that can be used as an ongoing asset to THON's mission by providing alumni with opportunities to contribute their time, talent and money. He believes the first step in establishing an alumni network is developing a strong connection to the university's Alumni Association. DMAIG maintains communication, which varies year-to-year, with THON's Donor and Alumni Relations Director, who manages these efforts from the student side.

2. Alumni Desires

When asked about what value IUDM could provide to its alumni, interviewees generally stated a simple desire to remain a part of an organization and family that has been an important part of their life. In exchange for their involvement and contributions, alumni expect a minimum level of stewardship and professionalism from the students maintaining the relationship. An alumna reminded, "[t]here is a fundraising saying that you should thank a person seven times before you ask again. I think this is something [IUDM] needs to remember". As a part of the stewardship process, alumni would like to know more concrete details about how their donations have impacted Riley Hospital.

Beyond this base level of stewardship, more meaningful mutually beneficial relationships can be cultivated with alumni by providing them opportunities to fulfill emotional, professional, and social needs. An alumna believes alumni want to stay connected to each other, "want to feel needed," and "are looking for opportunities to volunteer [...]" but struggle to find the places to do it." She summarized that the ways IUDM could help fill these desires were career and social networking, mentoring, and charitable volunteering.

3. Opportunities for Improvement

While the entirety of this thesis revolves around areas where IUDM can improve, this focused code categorizes the opportunities that alumni explicitly stated. Operationally, if IUDM were to build and maintain a more comprehensive database and understand its alumni demographics and the ways they desire to be involved it would be able to "pull [alumni] in to engage in IUDM in a way that makes sense for them" said one alumna. Another alum echoed this sentiment, believing an alumni survey would help find "common ground" between alumni, students and IUDM.

Alumni felt that offering more ownership and responsibility could be a catalyst for engagement. Suggestions for doing so included alumni-organized regional events, alumni fundraising, and

alumni positions as ambassadors to their peers. It is important to note that some alumni did feel that they had exhausted their connections as a student, making it difficult to raise money as alumni, while others felt that they had a new network they could solicit for gifts.

A miscellaneous but important finding to consider is that several alumni indicated a desire to include their children in their IUDM engagement. As alumni progress through life stages, it is important that these changes can be accommodated. Alumni want to bring their children to IUDM events, purchase IUDM apparel for their children, and potentially be involved in high school dance marathons when their children reach that age.

4. Benefits of Alumni

Part of creating a mutually beneficial relationship is realizing the value that alumni can bring to the organization. While financial contributions are important and will be discussed later, the literature reminds that building a foundation through non-financial engagement can lead to higher giving levels in the future (Singer, 2002). Because of their professional experiences, alumni overwhelmingly felt they could act as career and skill-based mentors for students and other alumni. Specifically, “leadership training or discovery that alumni can provide [could help in] developing people in IUDM into young professionals” said an alumna. Alumni can also apply their skill-sets to furthering IUDM’s success in competencies such as marketing, technology development, and more.

Alumni’s social and professional networks could connect IUDM with a broader base of alumni willing to become re-engaged. With twenty-five years of alumni, many are now in a career position where they can facilitate hiring and financial sponsorship decisions. Alumni expressed desires to use their networks to connect students and alumni with internships or career opportunities. Many of the ways alumni feel they could provide value to IUDM align with their indications of the way IUDM could provide value to alumni.

5. Reasons For or Against Engagement

Certain factors contribute to alumni’s likelihood and willingness to engage with IUDM. These include an increase in their available time, the engagement level of their peers, and their proximity to IU’s campus, a topic that will be discussed later. Alumni felt that they wanted to remain engaged because of the relationships they build, the impact the organization had on their life, a strong connection to the mission, and as a way to give back for the experiences the organization provided them.

Anecdotally, alumni who recently re-engaged with IUDM through an invitation to participate in determining the organization’s next funding designation responded to this opportunity because it was a more mature role. A founding alum is excited about this opportunity because “its amazing to see something that we started come to fruition and so [he] relish[es] the idea of being able to be involved at the next stage of where it evolves.”

6. Alumni Giving

As discussed earlier, generally alumni’s capacity to give grows as they progress through their lives and careers. An alum noted that “the minimum bar for an IUDM alum is that they continue

donating,” but many stop donating once they graduate or several years post-graduation. Currently, IUDM is lacking a strategy to solicit alumni giving at higher levels based on capacity. Instead alumni are often only donating when asked specifically by a student participant they know or in response to a general solicitation email, without being asked to consider the level at which they could appropriately contribute to the organization.

Alumni suggested that creating competition or urgency would encourage increased amounts and participation in giving. Additionally, giving alumni a group goal, whether monetary or tangible, to work towards would bring them together to form this group identity and would drive increased engagement.

7. Communication Related

For alumni who are currently receiving the monthly newsletter and other IUDM communications, there was a wide range of opinions on its effectiveness and content. On the positive side, alumni enjoyed the regular communication and updates about the organization as a way to easily reconnect on their own time. Additionally they felt that it was appropriate for communication to become more frequent in the months leading up to the main Dance Marathon event.

For others, the newsletter provided redundant information that they already knew as alumni, such as general information about the cause. There were also conflicting opinions on whether email was the best form of communication. Several alumni noted that they often automatically delete or lose email communications in their inbox. Others were not receiving any communications and were not aware of how to confirm if IUDM has their correct contact information or how to submit updated information.

In suggesting ways to improve communication, alumni emphasized delivery through mediums convenient to their lifestyles. They mentioned that continuation of the newsletter and social media accounts would be desired and added that existing communication channels such as committee Facebook groups or GroupMe messaging groups could be further utilized after graduation. These pose limitations though because these methods have only been used with recent graduating classes and do not extend to older alumni.

8. General Barriers

Most barriers have been identified within the conceptual ideas and throughout the practical findings. Major barriers will be discussed further in the Recommendations section.

9. Event Related

Alumni attendance at IUDM events varies and often aligns with other engagement determining factors, such as location. Most former executive council members attend the dance marathon weekend the first two years after graduation and may or may not attend other events such as the Annual Gala. Attendance decreases as alumni become more removed from the organization and the students who attend the events. Those that maintain their attendance tend to have additional connections to these students or increased engagement through the Alumni Board. Non-executive council members rarely continue to attend events after they graduate, even if they attended them as students.

Alumni are often discouraged from attending events such as the Annual Gala because they do not feel that they will know other alumni there. They would be more likely to go if they knew other alumni would be in attendance or if there was an alumni-specific component to the event.

10. Location Related

Geographical distance is a major barrier to alumni engagement within IUDM's current strategy. Alumni outside of Indiana or Chicago tend to be more disconnected from the organization than those who are close in proximity. Alumni indicated that more effort from IUDM to allow for regional engagement could help keep alumni connected to the organization from afar. This aligns with other suggestions from alumni for regional events hosted for or by IUDM alumni. Regional communities could help alumni transition to living in a new city, allowing them to network with and learn from their peers in that geographical location. Purdue University Dance Marathon's alumni association has taken advantage of this opportunity facilitating 'alumni welcoming committees' in popular post-graduate cities so that established alumni can help welcome new graduates to the city.

11. Existing Communities & Relationships

Please refer to the Communities & Relationships conceptual idea for discussion of these findings.

12. Preparation for Future

When asked how IUDM prepared them for post-graduate life, alumni felt that the leadership and professional skills they learned throughout their student experience had positive impacts on their ability to perform in their career. An alumna stated that the "experience [was] so incredible because it was student-run, we were the ones in charge and put more energy into that than [our] school work." Despite this she "did not necessarily realize what they had learned about themselves and the skills [developed] until later".

13. Connections & Inspirations

Alumni continue to be inspired by the student-run nature of the organization because they have "yet to find another organization that is 100 percent volunteer with college students that work so hard" for one goal. Alumni, especially those on the early executive councils, are fascinated by IUDM's rapid growth and enjoy seeing the ways their legacy has developed. There is an ever-present desire to "maintain the authenticity" of the organization's traditions and to reconnect to the organization through these and their memories. "There is certainly something to be said about people wanting to be taken back to their college days, their glory days," said an alum and what IUDM can do to remind alumni of these experiences could go far in helping build meaningful relationships. This becomes increasingly important the more time passes between the present and alum's student experience.

RECOMMENDATIONS

A synthesis of findings from this literature review, the results of the interviews, and the author's personal expertise as an IUDM leader, result in several actionable recommendations for the revitalization of IUDM's alumni engagement strategy. Successful implementation of these recommendations will rely on support from and active participation of IUDM's current Executive Council and Alumni Board.

General Barriers to Success

Before beginning, it is important to acknowledge the key organizational barriers to creating a successful alumni engagement strategy.

Ambiguity in Alumni Relations and Alumni Board Responsibilities

Currently, the unclear delineation of roles between the Alumni Relations committee and the Alumni Board (discussed previously in Findings) has contributed to many existing inefficiencies and will continue to do so as the organization grows. Both parties have expressed that without clearly defined roles there have been difficulties in effective communication and implementation of alumni engagement programming. This issue is addressed in the first recommendation, as it must be addressed in order to give both parties clear ownership of responsibilities in the future strategy.

Turnover in Student and Alumni Leadership

High turnover rates in student leadership create challenges in the development and implementation of long-term strategies as student leaders generally serve only one term on the executive council. While there is some executive council continuity each year with the few students who return for a second term, it is not guaranteed that this will include the Director of Alumni Relations. The Alumni Board sees less frequent turnover with staggered 2-year terms, but there are still limitations to continuity there as well.

Existing Culture of Exclusivity

The exclusive culture that has perpetuated the idea that only executive council members are welcome as IUDM alumni will be a barrier to re-engaging past subcommittee chairs and committee members and towards progressing to an inclusive culture. Culture shifts require active buy-in from all stakeholders and a multi-year commitment to cultivating the new environment.

Implementation Process

In order to capture the full potential of future and existing alumni, these recommendations should be implemented in a timely manner. Nonetheless, each recommendation involves several tactics that must build upon each other over time, so implementation will require a multi-year roll out plan. The recommendations are divided into two stages in order to ensure a proper foundation is

built before full deployment: *Strategy Development* and *Strategy Implementation*. The thoughtful implementation of this strategy over time is absolutely crucial to success as IUDM has historically struggled with multi-year implementation (a common theme for student organizations) and often defaults to attempting to implement an entire strategy within one year.

A. Strategy Development

- 1) Determine formal roles and responsibilities of the Alumni Relations Committee and Alumni Board in alignment with IUDM's growth and strategic vision for alumni engagement
- 2) Continue research through a survey aimed at gaining a better understanding of alumni demographics, desires and valuable skills

B. Strategy Implementation

- 1) Initiate a culture shift that creates an alumni group identity inclusive of all past IUDM participants
- 2) Establish a strong foundation through a comprehensive alumni record database and clear process for continued and consistent record-keeping
- 3) Build and maintain an expanded alumni base by establishing a network through existing personal and subgroup connections
- 4) Utilize the student experience as a key factor in cultivating engaged alumni and effectively transition members from student to alumni status
- 5) Develop a communication strategy that combines relevant and regular updates, clearly articulated opportunities for involvement, and proper stewardship techniques in a manner that is easily digestible and well-received by alumni
- 6) Design alumni engagement opportunities that fit a range of lifestyles, geographical locations and commitment levels and that foster a mutually beneficial relationship between IUDM, the students, and the alumni

Continual Improvement & Measurement of Success

In its planning stages, IUDM should establish a process for measurement of strategy success. By identifying key metrics such as percent of alumni that give annually or percent of active alumni, IUDM can better understand how its strategy is performing over time. Alumni Relations and the Alumni Board should determine engagement goals and continually improve the strategy from metric-based as well as qualitative feedback from students and alumni. IUDM should reevaluate the strategy in three to five years to account for organizational changes and growth.

Recommendation Spread

While the research, findings and recommendations this thesis presents have been contextualized within the specific instance of IUDM, they can provide value to other dance marathon organizations across the country. At their base level, the recommendations provide an actionable foundation for a strong alumni engagement strategy that each dance marathon organization can adapt to fit their unique culture, structure and operations. Dance marathon student and alumni leaders should consider how the conceptual ideas: community and relationship, alumni awareness, and engagement personalization are applicable to their organization and use these findings to inform their strategy development.

Dance marathons currently exist at a variety of organizational levels and development, but each can follow these basic steps in starting, building or maintaining effective alumni engagement:

1. Determine a structure that facilitates both student and alumni leadership and engagement
2. Build an alumni network through consistent record keeping and active outreach
3. Identify the alumni population's situations, desires and assets that can inform development of communication strategy and engagement opportunities
4. Cultivate lifelong commitment by treating students as alumni-in-training and giving alumni meaningful opportunities to connect back to their student experience

Spread of these recommendations can be accomplished through involvement of dance marathon coordinators at Riley Children's Foundation and Children's Miracle Network, to bring the best practices to student leaders within Indiana-based and nationwide dance marathons, respectively.

CONCLUSION

Initially, this thesis set forth to determine how to best design a student philanthropic organization, specifically Indiana University Dance Marathon, to maximize alumni engagement. With many competing factors and pressure to grow at a rapid pace, dance marathons are looking for ways to build a strong, consistent donor base. While generally most individual donors give in support of a student participant, meaning the donor base is constantly turning over as students progress through the organization and graduate, tapping into the organization's alumni resource provides an opportunity to develop long-term supporter relationships.

For years, higher education institutions have acknowledged the value alumni provide as financial contributors, professional developers, and brand ambassadors, and are continually improving their alumni engagement strategies to better utilize the alumni base's inherent linkage and interest in their alma mater. The grounded theory research approach taken in this thesis inquired and confirmed that many best practices discovered in the higher education alumni relations and development academic and practitioner literature could be applied to IUDM and other student-run philanthropies. Similar to how universities must design their alumni cultivation strategies around their institutional cultures, application of these principles to IUDM must be founded on a thorough understanding of the organization's own unique culture.

Analysis of interviews revealed that alumni perceive IUDM to have a strong familial nature, where community and relationships define student and alumni engagement, experiences and memories. As students leave IUDM and become alumni, they seek to maintain these communities and their passion for the organization even though life changes and geographical distance present challenges. If IUDM is to create a culture of lifelong commitment, it needs to apply the higher education best practices to introduce students to the importance of the alumni base early and then continue to foster its unique familial culture throughout their transition to and life as alumni. With a better understanding of the organization's alumni demographics, IUDM can develop a comprehensive alumni cultivation strategy that incorporates alumni desires and value add with higher education best practices in structure, programming, and communication.

As IUDM continues to improve its alumni engagement, spread of these best practices can provide on-going benefit to dance marathons across the country. The Dance Marathon network and depth will continue to grow as new organizations are founded and existing organizations produce highly engaged alumni. Maximization of these alumni as not only a financial resource, but as volunteers, student developers and brand ambassadors will provide continuing growth opportunities for student-run philanthropic organizations in the future.

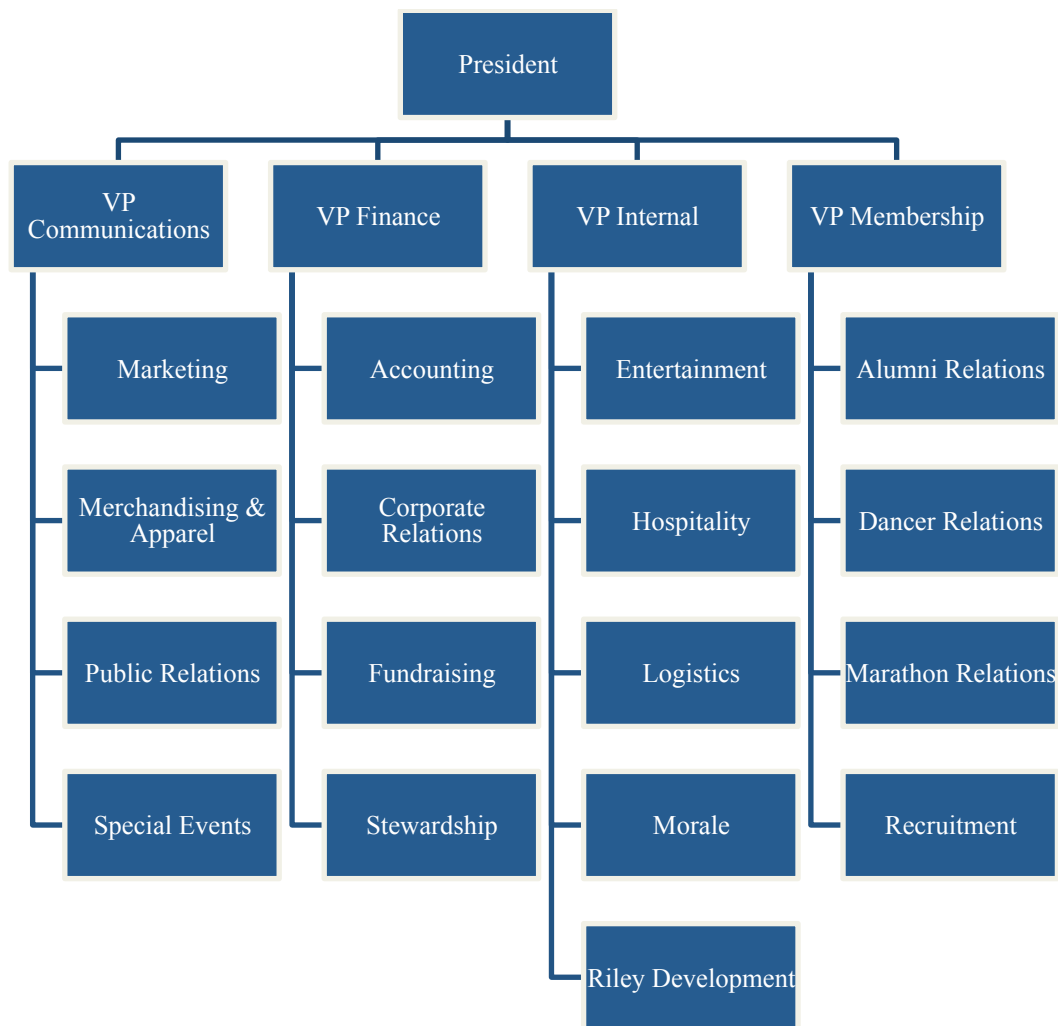
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Appendix A

Figure 2: IUDM Organizational Chart



Appendix B

IUDM Alumni Board Position Descriptions

Source: http://www.iudm.org/?page_id=78

President

- Work with Foundation staff to plan and implement successful giving campaigns and fundraising events
- Work with Foundation staff and hospital leadership to ensure that an engaging, compelling, and appropriate story is being told regarding how dollars are being spent
- Plan, chair and lead all Alumni Board meetings with support from Foundation staff and the Executive Council
- Participate in planning meetings and conference calls
- Inspire interest and enthusiasm about Indiana University Dance Marathon amongst council members, alumni, and general donors
- Assume final responsibility for Alumni Board activities such as marketing, e-communications, retreats, etc.
- Participate actively and enthusiastically in the promotion of Indiana University Dance Marathon—include speaking at various events, meeting with key prospects or Riley leadership, etc.
- Be visible and make frequent public appearances in Bloomington—during meetings, retreats, events, etc.
- Generate ideas to share with Foundation staff and IUDM Exec Council; cultivate new donors; and encourage previous donors to increase their contribution and commitment to IUDM
- Mentor and Work with BOM on IUDM Exec and provide support as needed and requested

Vice President

- “Life after IUDM” program – idea to bring it to life with External
- Twice a year meet as a “lead team” with Riley, Exec, and Pres/VP to talk through long term plans
- Mentor and Work with external and events Exec Focus Groups and provide support as needed and requested
- Identify and Cultivate “Prime Prospects” to donate to IUDM (working with President and Exec Council)
- Create a Program for Alumni Giving

Treasurer

- Mentor and Work with finance IUDM Exec Focus Groups and provide support as needed and requested

- Evaluate what are we missing from year to year with turnover
- Manage Financial Risks and Opportunities
- Work with President to help shape 5-10 year vision of our organizations goals, strategies, and measures

Secretary & Historian

- Ensure Alumni Feel involved (Social, Emotional, Mentor, Updates on IUDM, Professional connections...)
- Take and share out the meeting notes for Alumni Board Meetings
- Help preserve & document IUDM's history by soliciting and collecting stories and facts from alumni about past marathons
- Mentor and Work with internal IUDM Exec Focus Groups and provide support as needed and requested

External VPs (2)

- Compile and distribute monthly newsletters to keep alumni involved and updated
- Develop and connect with IUDM Exec Alumni through e-mail and local fundraising events
- “Life after IUDM” program – idea to bring it to life with Vice President•
- Plan Alumni Events for week of Marathon
- Mentor external and events Focus Group and provide support as needed and requested, especially Alumni relations and positions requesting help from alumni

Internal VPs (2)

- Plan and Lead IUDM Exec Winter Retreat
- Plan and Lead IUDM Exec Fall Retreat
- Create a transition checklist with Exec to help during turn-over to create more efficiency and prevent loss of information
- Provide a special recognition gift during the alumni brunch during the DM weekend in order to encourage more upgraded gifts during Dance Marathon
- Mentor and work with internal IUDM Exec Focus Groups and provide support as needed and requested

Appendix C

Figure 3: Grounded Theory Methods

| ‘GLASERIAN’ | ‘STRAUSSIAN’ |
|--|---|
| Beginning with general wonderment (an empty mind) | Having a general idea of where to begin |
| Emerging theory, with neutral questions | Forcing the theory, with structured questions |
| Development of a conceptual theory | Conceptual description (description of situations) |
| Theoretical sensitivity (the ability to perceive variables and relationships) comes from immersion in the data | Theoretical sensitivity comes from methods and Tools |
| The theory is grounded in the data | The theory is interpreted by an observer |
| The credibility of the theory, or verification, is derived from its grounding in the data | The credibility of the theory comes from the rigour of the method |
| A basic social process should be identified | Basic social processes need not be identified |
| The researcher is passive, exhibiting disciplined restraint | The researcher is active |
| Data reveals the theory | Data is structured to reveal the theory |

Source: <http://ijds.org/Volume6/IJDSv6p095-114Jones322.pdf>

Appendix D

Table 2: Initial and Focused Coding of Interviews

| FOCUSED CODES | 1. Alumni Board & Alumni Relations Roles | 2. Alumni Desires | 3. Opportunities for Improvement |
|----------------------|--|--|---|
| INITIAL CODES | Alumni board as resource Alumni board as connection to alumni Alumni board as voice for alumni Alumni board owns what goes beyond marathon Laid back alumni board culture Students asking for Riley donations Students communicating IUDM info Alumni Board asking for IUF-DM endowment Alumni Board communicating alumni info | Desire to know Riley impact Desire to reconnect with people Desire to network Desire to share own experience Need to fit schedule Desire to reconnect to/support a subgroup Desire to meet people with similar experience Desire to help people who influenced to get involved Need for professionalism Desire to fill gap leaving DM creates Desire to share skills Desire to meet new people with similar experience Desire for alumni group identity Desire to hire IUDM students and alumni Desire to feel needed/wanted Desire to volunteer Alumni recognition | Find the niche Respond well to peer connection Looking for reason to come back Need to better understand alumni demographics Updated records key Need to improve stewardship Create community feeling for all High school marathon involvement Desire to fundraise Give alumni ownership Need resources to make fundraising easier |

| FOCUSED CODES | 4. Benefits of Alumni | 5. Reasons For or Against Engagement | 6. Alumni Giving |
|----------------------|---|---|---|
| INITIAL CODES | Career mentoring DM mentoring Help students with leadership development Alumni can broaden network with existing connections to other alumni Alumni connections for corporate partners | Change in life stage Engage when peers do Engage because has time Engage because it had such an impact on life Engage to give back for experience Strong connection to cause Engaged only monetarily (because of location) Engagement by class Funding discussion (as reengagement) Funding discussion as more mature | Capacity to give Engagement through giving Give towards goal Give because class connection Give to support organization (operations) Gives only when asked Feels privileged to give back Minimum bar should be donating Create competition Create urgency for alumni |
| FOCUSED CODES | 7. Communication Related | 8. General Barriers | 9. Event Related |
| INITIAL CODES | Specialized messaging Desire for awareness/updates Approval of more communication closer to marathon Email communication easy to miss Communication is redundant Not receiving communications Facebook groups in existence (leveraging existing channels of communication) Regular communication for updates Desire to receive communication in convenient way Social media Newsletter Desire for actionable communication Desire for awareness of other alumni | Alumni not visible to students Disconnect between marathon and graduation Alumni exclusiveness Unaware of opportunities Feeling removed/disconnected Difficulties in alumni board/IUDM leadership communication Issue of turnover Do not know all other alumni Many factors competing for alumni attention Alumni divert to another cause if not engaged in IUDM Exhausted personal fundraising connections as student Alumni not fundraising themselves | Immediate post-grad marathon attendance Selective event attendance Frequent event attendance Stop attendance because removed Alumni participation at marathon Give events a purpose |

| | | | |
|----------------------|---|--|---|
| | efforts | Alumni Board lacking resources No way to confirm contact information Alumni efforts may take persistence | |
| FOCUSED CODES | 10. Location Related | 11. Existing Communities & Relationships | 12. Preparation for Future |
| INITIAL CODES | Location-close Location-far Programming to help alumni transition to new city Desire for experiences aligned with environment of location Alumni regional event planning | Alumni Board relationship Executive Council relationship Easier to connect when know people participating DM friendships remain strong | Learned skills (through DM) DM leading to nonprofit career |
| FOCUSED CODES | 13. Connections & Inspirations | | |
| INITIAL CODES | Changing/growing DM Connections through tradition/legacy/memories Inspired by student-run Connection stronger to DM than other causes because community View of current DM Need to strengthen connections for older alumni Remind alumni of experience | | |