



HARVARD

Alumni Association

CLUBS & SHARED INTEREST GROUPS

Alumni Leadership Conference



Survey Savvy

Moderator: Ed Rocha AB '06, Harvard Latino Alumni Alliance

Panel Speakers:

Margaret Kane PhD '83, Harvard Club of Sacramento

Regina Ryan MPA '04, Harvard Alumni Entrepreneurs

Yuko Thomas AB '92, Harvard Club of the United Kingdom



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AGENDA

- Goals
- Survey Activity to Review Best Practices
- Panel Discussion and Q&A
- Concluding remarks

GOALS OF THIS SESSION

Goals:

- To learn when and why it could be beneficial for your organization to survey your membership
- To learn from peers on why they decided to send a survey and how they did it
- Understand general best practices when it comes to surveys

Survey Activity!

How to participating in the Poll Everywhere activity:

- Step 1: If needed, connect to Wifi
 - Select **Harvard University** network in your device's wifi network settings
 - Open a web browser and type in getonline.harvard.edu in a new tab or window
 - Select: I AM A GUEST > LOG IN WITH GUEST CREDENTIALS
 - username: ALC@gse.harvard.edu
 - password: alc2020!
- Step 2: Text SHAECALLAHAN550 to 22333
 - Or go to PollEv.com/shaecallahan550 on your laptop/phone
- Step 3: Participate in survey activity



Learn from your peers!

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THE WHY:

What was the goal of sending your organization's survey?

- Sacramento:
 - To understand:
 - Motivations for alumni engagement
 - Interest in various programs and volunteering
 - The viability of various communications vehicles
 - Preferred event logistics and times
 - Impact of costs upon attendance
 - Desire for collaboration with other groups
 - Other non-logical hurdles to building engagement
- HAE:
 - Understand our customers/attendees
 - Assess their wants and needs
 - Feedback on relevance/impact of program/initiative elements -> guides planning
 - Assess customer satisfaction
 - New ideas
 - Measure effectiveness
 - Feedback on why registrants did attend
 - Gauge interest/participation
 - Customer-centric marketing strategy -> top of mind awareness -> visibility
- United Kingdom:
 - To better understand the demographics of our membership, to better tailor our offering;
 - To understand why people choose not to join HCUK formally (pay dues);
 - To solicit volunteers for the club in events, interviewing etc.



PANEL DISCUSSION

THE HOW:

How did you do it?

What were the logistics around sending this survey?

- Sacramento: We do two types of surveys, using Survey Monkey.
 - A deep-dive to glean answers to the areas that I mentioned (every three years)
 - An annual pulse survey that asks respondents to express interest in specific programs and to rank those
 - We email the survey to our entire database
 - Tuesdays have the highest response rates and overall our response rates range from 10-15%
- HAE:
 - Survey Monkey – Past
 - Google Forms – Present
 - Event registration form - Present
 - Post events: Email survey to all registrants or attendees only
 - Market research: Email survey to database of proposed initiatives. Offer link to HAE LinkedIn group.
 - Sponsorship: Identified interest in sponsorship
 - Chapter Annual Reports (New)
 - Volunteer Feedback Form
- United Kingdom:
 - 2011 survey: SurveyMonkey and also hard copy version included in Harvard Magazine mailing, which we discontinued last year. Manual entry into SurveyMonkey for this small number of replies (captured mostly older members).
 - 2016 survey: SurveyMonkey

THE WHAT: What did you do with the results?

- Sacramento:
 - The surveys are used to:
 - Guide all decision-making (including the mix of events by type)
 - Build an event calendar
 - Understand our demographics, their motivations for attendance, and satisfaction with events and offerings
 - Identify volunteers, including College admission interviewers
 - Understand the diverse Harvard affiliations of our audience
- HAE:
 - Informs strategy
 - Informed mentoring initiative, established need/intent, customer demographics, pricing and volunteer hours -> HAE Connect
 - Qualifiable measure of relevance.
 - Strengthened our “Ask”
- United Kingdom:
 - Led strategy decisions around better integrating younger alumni
 - Helped inform our decision to cancel Harvard Magazine - this was actually very highly valued, so we held on to it as long as it was economically viable, but were forced to cancel it in the end
 - Reached out to pool of volunteers for interviewing and mentoring
 - Helped decision making around event types and timing (feedback: too business-oriented; more family events)



QUESTIONS?



THINGS TO KEEP IN MIND

What to do with the results:

- Don't forget the reason why you decided to send this survey!
- Follow up with your members
- Make adjustments or changes
- Implement new strategies
- Identify engaged volunteers

Helpful Reminders and Resources:

- Most frequently used sites for surveys
 - Survey Monkey, Google Forms, Typeform
- Alumni Magnet new "Forms Feature"
- Your fellow volunteers!
- Don't forget: Make sure your survey has a clear goal!

Thank you!



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Alumni Leadership Conference

Lunch

Gutman Conference Center

12:45 pm – 1:45 pm

Your table assignment is on the back of your nametag.

Please pick up your lunch from the Gutman Conference Center lobby before proceeding to your assigned table.

Room E-1: Tables 1 - 11

Room E-2: Tables 12 – 20

Room E-3: Tables 21 – 29

Room E-5: Tables 30-35