

2008 PRIDE OF CASE V
Marquette University CIRCLES Program
Category 3 Excellence in Alumni Relations, Best Collaborative Program

Contact Information:

Stacy Mitz, Sr. Director, Alumni Relations
 Marquette University, PO Box 1881, Milwaukee, WI 53201-1881
 (414) 288-7439 stacy.mitz@marquette.edu

General Description:

As part of an effort to better engage alumni, parents and friends of the university, we developed a new initiative based on the concept of workplace affinity – CIRCLES. Because an individual’s identity is often defined by what he or she chooses to do for a living, this program has been highly successful. It fosters opportunities to bring alumni, colleagues and friends together based on their professional interests. By bringing together people within the same business community and providing networking opportunities, this program generates additional goodwill toward Marquette.

We named this affinity initiative “CIRCLES,” with the message that the “best business partners travel in the same CIRCLES.” We defined CIRCLES as an innovative business networking program that connects Marquette alumni and friends doing business in or providing services to specific industries.

We launched the CIRCLES concept in Chicago because this region presents a constituency with immense, yet largely untapped, strategic importance for the university. We sent a mailing to all alumni and friends with primary business addresses in the Chicago area. Recipients had the opportunity to have their contact information included in a directory that can easily be consulted by other alumni and friends in search of new associates or business partners. The directories are distributed at CIRCLES events. In Chicago, participants identified themselves as belonging to one of the following four groups: (1) real estate and construction; (2) financial services; (3) manufacturing and distribution; and (4) advertising, marketing and public relations.

A keynote speaker presents at the beginning of the program during which he or she shares his or her experiences or expertise. Having a high profile speaker draws people who might not otherwise be inclined to attend a university event. Since there are attendees across industries, we attempt to secure speakers that have a broad appeal. Some of the keynote speakers at CIRCLES events have included: David Bernauer, Chairman and CEO of Walgreen Co.; Brad Anderson, CEO of Best Buy, Inc.; and Kevin Brown, President and CEO, Lettuce Entertain You, Inc.

In order to promote the CIRCLES program, we created a host committee. The host committee is composed of Marquette alumni, parents and friends with high-level titles at their respective companies who allow us to list their names, titles and companies on the invitations and other marketing materials. Building the host committee has been very well-received by the development staff because it gives them something unique and beneficial to offer potential donors. As it is an honor to be part of the host committee, these members have become very involved in CIRCLES. In addition to attending the events, they invite their colleagues to attend, which enhances the networking opportunities for everyone. Host committees have engaged alumni, parents and friends with potential to give to the university who otherwise would not be involved.

As attendance at the initial CIRCLES events in Chicago was consistently higher than expected (approximately 300 per event), we began to take the CIRCLES concept and apply it to additional regions with high concentrations of Marquette alumni.

Over the past year, we have launched CIRCLES events in New York, Minneapolis, Atlanta, the Fox Valley (Green Bay and Appleton, Wisconsin), Madison, Milwaukee, and offered additional CIRCLES programs in Chicago. A benefit of the CIRCLES concept is our ability to tailor the events to each marketplace. For instance, although we market CIRCLES to specific industries, as those listed above for Chicago, we can tailor the networking opportunities based on the prevalent professions and markets within each region.

CIRCLES has transformed the way we work in Alumni Relations, and has impacted many in University Advancement and across campus. All Marquette deans are involved with CIRCLES and attend the events; professors attend with their

students and incorporate the information from the keynote speakers and networking opportunities into their curriculum; Career Services has found many new internship programs for students; the development staff has made connections that resulted in major gifts for the university; Advancement's Prospect Analysis and Research team has discovered hundreds of potential major gift donors through CIRCLES; Corporate Foundations and Relations has begun new relationships with companies; the Athletic department has utilized CIRCLES as a platform to inspire our alumni and to fundraise; and our engagement numbers have increased due to this programming.

Goals and Objectives:

Our goals for the CIRCLES program are:

- To create opportunities for stewardship and cultivation at the highest levels;
- To provide our alumni, parents and friends with valuable experiences through the Marquette CIRCLES programs;
- To obtain sponsorship funding for the CIRCLES programs so that the events can sustain themselves without assistance from the operational budget;
- To enhance the connection to Marquette among our alumni, parents and friends, and consequently to heighten support for the university;
- To collaborate across Marquette's campus and throughout Advancement to ensure that CIRCLES helps each department reach and/or exceed its goals.

How CIRCLES Fits into Overall Institutional and/or Advancement Goals:

On the brink of a campaign designed to increase the university's endowment, CIRCLES serves as a pipeline to identify and further engage major gift donors. Because CIRCLES provides valuable networking opportunities for Marquette's alumni, parents and friends, we enhance their connection to each other and to the university. CIRCLES also cultivates alumni through membership on the Host Committee and involvement with the events. As seen below in the documented results, the CIRCLES program is effectively helping Advancement reach its goals.

The CIRCLES initiative has also bridged gaps within Advancement and between Advancement and academia. Through our CIRCLES programs, Alumni Relations and the development staff work hand-in-hand with involvement from many other departments. In terms of academia, faculty members bring their students to the CIRCLES events to learn from the speakers and to benefit from potential internship opportunities; at many events, deans, professors and academic leadership have a platform to share their vision with alumni.

Audience:

According to results from a recent Gallup survey, the least engaged group of alumni are those who graduated 11-30 years ago. This group can be more challenging to engage because they are likely to be immersed in their careers and family obligations, and lack the time to connect with the university socially. With CIRCLES events, however, we find this group to be the *most* engaged. As mid- to high-level professionals, they can benefit greatly from networking opportunities. A measure of success has been the number of CIRCLES attendees who graduated from Marquette in the 1980s, who represent 30 percent of our attendees. Previously, this had been our least engaged alumni group.

In general, we target professionals working in wealth-creating industries who utilize networking opportunities to enhance their careers. Through this target audience, we engage alumni who have otherwise not been involved with the university. This provides us with the opportunity to connect with alumni who have potential to give to the university, both through their expertise (helping with academia) and through their contacts (internships for students and new connections for Marquette).

Throughout the past year, we offered nine CIRCLES events, which were attended by nearly 2,500 participants (Marquette has approximately 100,000 living alumni in our constituency). CIRCLES events have been very well-attended programs with a high caliber of alumni, parents and friends and noteworthy results. In fact, approximately 35 percent of the attendees have titles at the C-suite, vice president and partner level.

Total Number of Professional and Support Staff Involved in the Program:

- Alumni Relations – 4
- Development – 4
- Corporate Foundations and Relations – 2
- Prospect Analysis and Research – 2
- Vice President’s Office – 2 (the Board of Trustees has been heavily involved in CIRCLES; therefore, the Vice President’s Office has played a role)
- Deans – All deans across campus
- President’s Office – 2 (both the President and Provost have been involved with CIRCLES)
- Faculty (academic) – 8
- Career Services – 1
- Office of Marketing and Communication – 1
- Support Staff – 2
- Host Committee Members – 200+ across the United States (CIRCLES is primarily a staff-driven program; we rely on our Host Committee members to help promote the events and financially support the program through sponsorship)

Program Budget:

We have utilized sponsorship dollars in order to offset the operational budget and to sustain the CIRCLES programming at the highest quality. As we offer many benefits to the companies for promotion, we have raised over \$110,000 in sponsorship support for this program in the past year. For more than half of the CIRCLES sponsors, this was either their first or largest gift to the university.

Events range in price depending on the structure. The budget for the fiscal year is as follows:

Invitations/Printing	\$ 19,000.00
Directories	\$ 2,700.00
Event Materials	\$ 2,900.00
Catering	\$ 36,000.00
Gifts for speaker(s)	\$ 1,200.00
Staff Travel	\$ 2,000.00
AV Needs	\$ 2,000.00
Total	\$ 65,800.00

Special Circumstances or Challenges:

Although industry-based networking is the main draw for the CIRCLES program, it is also very important to secure keynote speakers with a broad hook (recognizable companies, high-level titles, household names). In addition, for most events, the keynote speaker must be able to address different industries simultaneously (i.e. financial services and advertising). We have leaned on our Host Committee members and Trustees to help connect us with some of our keynote presenters, and we have budgeted the time necessary to secure the speakers and find dates that fit into their busy schedules.

Another challenge we have faced is ensuring that we market the CIRCLES events to the correct industries within each region. We have worked with the Prospect Analysis and Research department to fully understand the markets with the highest concentration of alumni, parents and friends.

Documented Results, Measurements of Effectiveness:

We have been able to foster many new relationships with our alumni through CIRCLES programming, increase the number of internships available for students, enhance the experiences for our students and professors, and raise significant dollars for the university.

Through our collaborative efforts with the Prospect Analysis and Research team (within Advancement), we have discovered over 200 potential major gift donors. These events have become opportunities to identify and qualify new high-potential prospects.

Since CIRCLES officially launched less than two years ago, the development office has connected with many alumni, parents and friends who became engaged with Marquette through the CIRCLES programming. Since that point, the following gifts have come to the university:

- More than \$250,000 (aggregate amount) for the Bell Real Estate Program from several alumni and friends who became connected to the university through CIRCLES;
- Morningstar's premium trading software for the Applied Investment Management program, with upgrades every academic year (and access to other newly developed software);
- \$100,000+ pledge for Marquette's new soccer stadium from a Marquette parent who became engaged through CIRCLES;
- \$150,000 donation at the conclusion of a deal which began between investors who connected through CIRCLES;
- \$100,000 pledge for financial aid and the ACRE program from a law firm whose employees became engaged through CIRCLES (via an alumnus);
- And other significant gifts and connections tied directly to the CIRCLES program.

We have consistently asked for feedback from the participants, sponsors and host committee members to help us determine what industries are relevant, find potential keynote speakers and solicit suggestions regarding needed structural enhancements and changes. Based on their input, we have offered a variety of CIRCLES programs. In fact, based on the helpful information from our alumni, in the fall of 2007 we offered a roundtable event with discussions moderated by industry leaders (a sample invitation is included as an example). This event sold out one month after the invitation was distributed. Following the advice of another participant, we have offered three networking breakfasts for C-Suite level professionals in Minneapolis/St. Paul, with over half of the invitees attending the event.

Through surveys, we have also learned that many of the attendees utilize business budgets to cover their expenses to attend these Alumni Relations events.

The following are testimonials regarding this program:

CIRCLES has been an exceptional networking opportunity for me. If you're an alum doing business in Chicago, you have to become part of CIRCLES.

- *Matthew Maddock, Eng '84, President, Maddock Industries*

I have made some very productive connections with wonderful people through Marquette CIRCLES. It has been a great investment of my time and energies.

- *Joseph Wiesemann, Arts '82, President, US Gas*

CIRCLES events bring together deans, alumni, and the corporate and professional communities in ways that I have found invaluable. The CIRCLES concept works well because it accomplishes so many advancement goals simultaneously and seamlessly. The choice of a target city honors Marquette alumni in that region; the work of planning the program knits together key alumni in a shared activity; the panels showcase the genuine expertise of our alumni and faculty; and the social hour provides unusual opportunities for networking across business and generational lines. For me, CIRCLES events have also created lovely moments of serendipity, in which I have made unexpected contacts and been able to imagine new strategies for alumni cultivation.

- *John Pauly, Provost, Marquette University*

CIRCLES has been a great asset for the College of Business Administration. It is an amazing way to reach alumni and engage them. A prime example is Bill Shiel, head of real estate at Walgreens, he clearly appreciates the CIRCLES events in Chicago. This has led to Bill's volunteer work with the Bell Real Estate Advisory Board and with the Real Estate Club as well as a donation to the Real Estate Center Founding Group. I could list many other success stories like this one. In addition, business students are able to network with CIRCLES members as space is always provided for them.

- *Margaret Bernhard, Director of External Relations, College of Business Administration, Marquette University*