

Bentley University's Center for Alumni, Parents and Friends

Request for Proposals for a Market Research Project

Introduction

Bentley University, in partnership with and under the auspices of the Bentley University Alumni Association's Global Alumni Board, wishes to conduct a market research study of its alumni. The specific focus of the survey is communications. Bentley seeks to better understand which messages and vehicles are likely to be most effective in meeting alumni needs and wants, while also achieving the communications objectives of the university.

Background and Objective

Bentley will celebrate its centennial anniversary in 2017. Founded in 1917 by Harry C. Bentley as a school of accounting and finance, Bentley is said to have experienced four "unofficial," but distinct eras:

- Phase I: An accounting school that provided practical vocational training for day students in Boston's Back Bay.
- Phase II: A four-year college in Boston that granted associates and baccalaureate degrees in accounting, finance and related business disciplines.
- Phase III: A four-year business college in Waltham, Massachusetts (relocated from Boston in 1968). Residence halls were available, but the majority of students commuted to Bentley until the 1980's/1990's.
- Phase IV: Following the addition of a graduate school in 1974 and a doctoral program in 2006, Bentley transitioned from a college to a university. It is now a comprehensive, primarily residential, world-class business university.

Bentley has approximately 60,000 living alumni, of which an estimated 38,877 hold undergraduate degrees, 12,326 hold graduate degrees, and 3,514 are "double falcons" who hold two degrees. The university's seven-year-old doctoral program has awarded almost 50 PhDs in accountancy or business.

While not the sole barometer for either engagement or loyalty, one challenging metric at Bentley is alumni participation in the university's Annual Fund, which is currently less than 10 percent. The Bentley alumni database has also been problematic and work to improve its functionality has been underway for many years. Some speculate that low Annual Fund participation is the byproduct of a transactional perception about the Bentley educational experience; that is, education viewed as a service that is paid for and carries no further obligation.

That said, the university has a core of dedicated alumni and its Alumni Association has a new and energetic chairperson and board. As the centennial approaches, and with it the likelihood of a major capital campaign on the horizon, the Bentley Alumni Association's Global Alumni Board, along with Division of University Advancement's senior management, wish to develop a comprehensive understanding of alumni feelings and perceptions regarding Bentley's communications.

More Than a Standard Communications Survey

In 2010, as the university prepared to launch a new Alumni Association and fresh programs to engage its alumni constituents, Bentley's Center for Alumni, Parents and Friends conducted an online survey of its alumni to learn how they wanted to connect with the university. While the findings did provide valuable insights into desired alumni programs and events, the response rate was poor and the survey did not ask or yield any feedback regarding the university's communications with alumni.

Additionally, several years ago, Bentley conducted a standardized magazine readership survey of its alumni, under the auspices of the Council for the Advancement and Support of Education. The results provided some indication of reader preferences – what topics they like to read about (and don't), how long they spend with each issue, how much of their news about Bentley comes via the magazine, and so forth. The survey was unable to provide much in the way of insight about what matters to and resonates with alumni, specifically in relation to Bentley and its alumni communications. It is that question, with all its complexity, that we seek to answer in the market research project.

As previously mentioned, in the past couple of years, the university has launched a reconstituted Alumni Association and governing board (i.e., the Global Alumni Board) that's primary focus is to increase alumni engagement with the university – both through U.S. and internationally-based alumni chapters. The administrative responsibility for alumni engagement resides in the university's Center for Alumni, Parents and Friends, under the direction of its executive director.

To date, the Alumni Association has been successful in jump-starting alumni-led chapters across the U.S. and growing a cohort of engaged alumni who are actively improving the life of the university, while gaining tremendous value by networking and participating in their local Bentley community. It is well known that engaged alumni are twice as likely to give their time and financial support to their alma maters, so growing engagement, in a partnership between the Alumni Association and the university, is vital in many ways to the immediate and long-term success of Bentley.

Among the items Bentley wishes to probe are:

- Print and Online Content
 - When it comes to their alma mater, what matters to alumni? What do they want to know?
 - What fundraising messages resonate most with alumni, and how would they like to receive them (e.g., print, email, social media, etc.)?
 - What type of content would help solidify their bond with Bentley both current day and into the future?
 - How could university communications better serve alumni wants and needs?
 - Areas of content could be, but are not limited to, the following:
 - Alumni profiles
 - Class news

- Club and chapter news
 - Alumni networking stories
 - Alumni Association news and events
 - Administrative initiatives
 - Student profiles
 - Student career success and placement statistics
 - Campus news and updates
 - Admissions and university marketing news
 - Financial health and needs of the university
 - Donor profiles and fundraising news
 - Varsity athletics
 - Faculty profiles
 - Opinion pieces by alumni, faculty, students, and staff
 - Faculty research
 - Trend stories on topics that include Bentley people and programs but aren't necessarily limited to them (e.g., Big Data: Big Demand and...Big Threat?)
- Forms of Media
 - What is the utility and perceived value of existing communication vehicles?
 - Alumni magazine (print and online)
 - The alumni magazine is a key area of focus, as the survey results will help drive a redesign project.
 - Monthly e-newsletter (The Bentley Brief)
 - Alumni social media channels (i.e., Facebook, Twitter, LinkedIn, Instagram)
 - Alumni web site (www.bentley.edu/alumni)
- Additional Related Questions
 - What is their perceived mission of the university?
 - How do alumni view the role and value proposition of the recently re-launched Alumni Association?
 - How do alumni self-identify (i.e., by region, age, decade of attendance, degree)?
 - Is there an opportunity to create segmented communications based on alumni affinity?
 - Do alumni from different eras have any common interests/values?

Research Results and Reporting

Bentley has email addresses for approximately 20,000 of its approximately 60,000 living alumni, which may or may not affect response data for an online survey. Whether this mandates a parallel mail survey, or entire mail survey, and what the impact might be on response analysis, is something for which we would like an opinion. We are interested in having the survey results tabulated on an overall basis, as well as segmented by dimensions such as class decade (or "era" perhaps), gender, status (grad/undergrad/both), residence, income and self-reported donor status. We would also expect a

series of cross-tabs based on the survey design (e.g., “of those who said they preferred integrated messaging, 00% indicated a preference for print communications only.”) Whether every question would be cross-tabbed against every other question to determine statistically significant findings is a matter upon which we await the research firm’s point of view.

In addition to reporting the principal research findings as reflected in the data, Bentley expects that the research firm would provide a narrative on the perceived significance of the findings. While formal recommendations are not within the scope of the project, neither would they be discouraged should the firm be so inclined.

Bentley would like a final report on the research approximately three months after the study is commissioned.

Further information:

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