

# ***Beyond the Affinity Portal: The Future of Advancement Online***

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by Jolanne L. Stanton

*May you live in interesting times.*

Ancient Chinese curse

**T**hese are interesting times, indeed, for alumni relations and development professionals who now must become Internet experts as well in order to make smart decisions on how to use new technologies. We must keep up to date with rapid technological changes, embrace novel ideas, and understand the implications of intense marketplace competition. With every new application, product or vendor, recurring questions surface: What is the value and potential of new Internet opportunities for advancement? What is the best way to make effective decisions about using the Internet? What are the risks and rewards?

At the core of such “interesting times” is a precarious promise. College administrators responsible for building relationships are uniquely poised to benefit from the strategic use of new technologies and Internet-based tools. Simultaneously, there is the variable quality of tools and products, and the volatility of the supplier marketplace to consider. The temptation to rush into Internet offerings that promise all kinds of benefits and lucrative opportunities needs to be balanced by an appreciation of the risks of committing to an incomplete solution or a poorly funded vendor.

In the midst of so much change, what is the best way to make decisions about using the Internet in alumni relations and development? This paper addresses the question based on the following assumptions:

1. The fundamental starting place for making Internet decisions is an understanding of the strategic goals of the institution as a whole.
2. Despite the supposed urgency to “live on Internet time” and make decisions now, Internet decisions require a long-term perspective, as they engender significant and lasting effects on relationships with constituents.
3. The Internet is more than an affinity revenue source, and should be considered a key strategic asset of the institution.

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## ***Look Beyond the Affinity Portal***

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“Interesting times” are good times for colleges and universities to take a step back and assess the current online world. Alumni offices are constantly presented with the latest affinity portal, shopping site, start page, or service concept, most of which promise new sources of revenue, improved communications, and enhanced affinities as private sector vendors rush to create an Internet user base.

Let’s take a look at some of these expectations:

- **Affinity Portals.** The proliferation of affinity portals and start pages has created stiff competition for alumni attention. From news- and search-based sites such as Yahoo! and Excite to those that focus on a user’s particular affinities, such as sports, finance, or entertainment, alumni have many choices today. Should a portal focused on a user’s affinity with an educational institution try to compete with these giants? And to what end?
- **Shopping Sites.** Revenue from online shopping has been touted as a vast untapped revenue source for alumni groups. Unfortunately, the shopping model has not materialized as promised for the Internet industry. For non-profit institutions, there is an additional concern that shopping sites confuse affinity consumers, causing them to believe they do not need to donate to their alma mater because they have already “given” through their online purchases.<sup>1</sup>
- **Branding.** The benefits of branding have been misconstrued or overrated, and the concept of online branding is often reduced to the college colors or logo on a Web site. Overlooked is the all-important development of meaningful relationships with and among constituents, cultivated over time and reinforced repeatedly, through strong, consistent service and valuable experiences.

“***Does our use of the Internet accurately reflect the ways we value our unique content and relationships?***”

While there *are* solutions that can support a total relationship-building and communications strategy, sites based on gimmicky products and unrelated services can be a distraction. A new paradigm is beginning to arise, as advancement professionals find that the fundamental point is *not* to create a Web presence that is lucrative or beneficial in the short term. Rather, they focus on implementing highly-integrated Internet-based tools to achieve long-term goals. In other words, an Internet strategy and partnership should not stand alone. They should integrate into an organization’s overarching strategy, and support and extend the reach of the institution as a whole.

It is worth noting that the unwitting pawns in the high-stakes Internet game will be those who do not systematically select their technologies and partners. Let’s examine the key issues that affect this decision.

## ***Protect Your Unique Assets***

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There are unique assets of any alumni organization and its institution that are most enviable to the Internet-based company giants: content and relationships. Content is comprised of resources unique to the institution such as faculty, courses, events, and facilities, including libraries. Relationships result from the trust and respect constituents hold for the institution and, by association, for one another. These assets form the keystone of a successful Web presence and are the very things that Internet giants spend millions to develop as they strive to create online user bases.

Colleges and universities already have natural affinities with potential Internet users. Unique content and relationships are the reasons alumni visit their college or university site, and find substantial value that encourages them to sustain the connection as they return again and again. The alma mater offers the only place on the Internet that can provide these singular features and connections. In this way, colleges and universities have a unique advantage in their ability to use the Internet to good effect.

Protecting and sharing these assets with a huge percentage of an institution's constituents often fall within the purview of advancement offices. Online pages and services all represent a value exchange, where the college or university assets are leveraged, or in some cases, traded, for other benefits. Perhaps the name of a university is used on a site designed to produce revenue through shopping. Or, the alumni database, which is at the heart of a school's relationship with alumni, may be copied for a user interface housed on a vendor's server. Alumni, who share a trusted relationship with the alma mater, become users, or "eyeballs" in Internet-speak, and are aggregated by vendors to provide a market to companies that target a desirable demographic.

Institutions need to ask the difficult questions: What do we gain, and what are we giving away? Is the deal worth it? Do "free" products come at no cost? Does our use of the Internet accurately reflect the ways we value our unique content and relationships?

## ***Strategize for a Worldwide College Community***

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Some colleges and universities today recognize they can leverage their assets and develop their own unrivaled worldwide online communities to the benefit of the institution and its constituents. The Internet becomes a key strategic asset of the entire institution, as the platform for lifelong learning, community building and personalized communications.

### ***Imagine...***

... an alumnus of the College of Engineering logs on to the site, and is greeted by a **personal message** from the Dean announcing the availability of two new **online classes** focused on the professional engineering certification examination. He signs up online and receives a syllabus and a message from the professor welcoming him to the **online discussion group**.

... an alumna changes her home address and place of work three times in five years. But she only needs one **password** to update the alumni directory, send her **pledge** to Annual Giving, **order transcripts** from the registrar's office, look up her local chapter calendar of events, join a discussion on career **networking**...

... a rising senior logs on to find an invitation to an alumni house reception with alumni leaders, and learns about **association benefits**, including those offered **online**, which he can access using the same user name and password he has used for four years.

... the chapter treasurer in Miami keeps **membership records** on the site and shares **participation information** with the regional development officer, who is planning a prospecting visit.

... a senior music major logs on and signs up for a **career mentoring** program that matches her with alumni who are professional musicians. The alumni receive an email of her interest and contact her directly.

... alumni parents of a newly admitted student log on and receive a **personalized invitation** to an orientation weekend reception at the residential college to which the student is assigned.

... members of the basketball booster club log on to find the season schedule on their **online calendars**, and information about ticketing and real-time sportscasts of out-of-town games.

... the Department of Fine Arts publishes an **online newsletter** that includes photos of student and faculty artwork. Notice of the newsletter is automatically sent to alumni of the department during a fund drive for a new exhibit hall.

Forward-looking institutions are exploring ways to integrate on-campus and off-campus relationships. The goal is to extend resources such as online learning and information about the greater college or university community to all constituents, including their most scattered, yet largest group: alumni.

Alumni relations and development offices now have the opportunity to take on a higher profile as representatives of this significant constituent base. The institution's goals and strategy for the campus community will increasingly integrate with those for the off-campus community. Internet-based information, products and services for alumni will not be limited to a news and weather page, an affinity revenue source or even a stand-alone alumni directory.

### ***Collaborate Across Campus***

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First and foremost, alumni relations, development, and communications offices need to establish close ties to the rest of the institution, collaborating on overall strategies and the implications for high tech tactics to achieve them. The goal is to nurture relationships with alumni that are based on what is relevant to them. At the same time, the college or university can reduce administrative costs for database management as well as communications. The result: more meaningful contact with constituents.

For example, if improved communications at reduced cost is a goal, constituent databases that are integrated across campus can be made accessible to users for online updating from both on-campus and off-campus locations. As a result, administrative offices have up-to-date information for sending targeted messages to alumni based on their areas of interest, location, gender or other attributes.

Imagine a graduating economics major indicates she prefers all communications from the University in the form of email—no phone calls or snail mail—and all University offices, from the development office to the economics department, have the information and means to respect that request. Imagine a member of the class of 1981 logs on and sees a message about his upcoming class reunion, including special events planned for former residents of his dorm; he registers online. Imagine the quarterly pledge payment to the Annual Fund is due; a participating alumna automatically receives a reminder email with a hotlink to the Annual Fund page where she can donate using a credit card.

In collaborating across departments, alumni, development, and communications offices not only bring alumni into the fold of the institution at large but also benefit from the college or university

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investment in new technology. As technology decisions are made across campus during this important transition phase to a more comprehensive, system-wide approach, advancement professionals should make it a priority to reserve a seat at the table, and to fill it in a well-informed way.

## ***Plan for the Power of Integration***

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Colleges, universities and their advancement offices that share a long-term view of the Internet will increasingly shift away from an uncoordinated Web presence to a comprehensive site for all constituents. This site will integrate unique content, essential databases and a consistent vision throughout the institution. A comprehensive Internet-based suite of tools and applications will supersede the types of Web products offered to alumni organizations today, such as affinity portals, start pages, or stand-alone online alumni communities.

From a single Internet locale, each part of the community—faculty, students, staff, alumni and friends—will be able to address different needs and unique interests in what the institution has to offer. Imagine an alumnus has a unique user ID and password, giving him access to some on-campus services such as the career center or library resources. Not only is he recognized by the system as an alumnus, but is also identified by his role within the institution, say, as a chapter volunteer, leadership donor or reunion committee member. As a result, he has access to restricted features such as chat, message boards, calendars and databases designed for online meetings, group planning and data sharing.

Products and services for alumni will seamlessly integrate into an institution's systems and assets and deliver them in a customized and personalized way to constituents. This unique technology architecture, known as an enterprise information portal (EIP), or a platform, can launch information and services to facilitate relationships and share content, while simultaneously acting as a net to capture data, streamline administration, and support services and programs.

## ***Find the Right Partner***

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Creating an enterprise information portal (EIP), or platform, that is integrated into the very fabric of a college or university represents a fundamental strategic decision about how the institution wants to relate to its constituents in the future. Commitments made today have long-term implications for advancement organizations, in terms of the

### ***The enterprise information portal (EIP), or platform, will:***

- Create a single, well-organized, visually consistent and easy to use site providing universal access for all constituencies to each institution's systems, content and databases.
- Provide authenticated access through a single sign-on to the site where alumni can build on their relationships and affinities by:
  - Using networking and community tools
  - Tapping into campus resources such as the Registrar's office or the library
  - Finding old friends
  - Ordering books from the campus store
  - Taking advantage of online learning opportunities
  - Buying tickets to campus events
  - Automatically updating the alumni database online
- House the institution's unique content and route access to systems such as directory databases on the college or university website, not a click away at outside sites.
- Recognize each constituent's role or relationship to the institution, and provide a customized and personalized experience through targeted messaging, email services, integrated event management and a flexible, choice-based content management system.
- Integrate and streamline alumni relations, development, and communications office efforts, enabling a coordinated vision and design of the information systems that support these organizations.
- Be flexible, and built around industry standards.
- Evolve with the institution's growing needs.

quality and scope of what institutions offer alumni today, and how technology choices will help achieve administrative and organizational goals tomorrow.

Finding the right Internet partner and planning for the future requires up-to-date knowledge of the Internet marketplace, as well as insightful business savvy. With the institution's strategic plans and reputation at stake, it is critical to assess current and long-term goals of the institution, and it is worth taking the time to research vendors who provide services to the education community.

Here are some key questions to ask in evaluating the fit with potential partners:

***Q: Is the prospective partner dedicated to the education community? Does it have relevant experience?***

Measure the company's commitment to the education community by looking at the scope and range of its products and services, as well as experience with higher education clients. Education should be its focus.

***Q: Are your goals aligned with those of potential partners?***

If you and your Internet partner have fundamentally different goals, you can predict problems. For example, an alumni association's goal to increase involvement and develop online course offerings may conflict with a vendor's goal to generate substantial revenue from merchandise sales, leading to very different requirements about how the technological tools should be developed and supported.

***Q: Is the company's business model sustainable?***

Your only assurance of a stable and enduring Internet solution is the vendor's ultimate success. Investigate the soundness of a prospective partner's business model and look for sustainable revenue sources and a path to profitability. The staying power of Internet-based businesses is somewhat elusive today, as economic realities have burst the Internet bubble of years past. Many dot com business models have proven untenable and advertising-based revenue has not been reliable. Indicators point to a fee-based business model as a more sound foundation for these companies.<sup>2</sup>

What does all this mean for you? Look for partners with a solid immediate funding situation, and also sustainable plans for development and growth in the future. Note who has invested in

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the company, as this can be an indicator of how professionals in the field have evaluated the potential for long-term success.

**Q: Does the potential partner have a reputation for technical leadership? Does the company have both the technical expertise and experience required to support you in the long term?**

The Internet is developing so quickly that today's technical solutions may become obsolete in the near future, making it important to ensure that the company has the resources and commitment to technical leadership. Measure this by the size of its in-house programming staff, as well as its record of delivering timely, appropriate applications, tools and technology. Also, look at its own list of technology partners: if its partners include industry leaders in key technical, business, application and content areas, it is more likely to offer the technical leadership you want.

Increasing integration will also require that the vendor is experienced in working with other university units and network resources. Ask for references.

**Q: How flexible is the potential partner's product suite?**

Require maximum flexibility so you can build out the tools and functionality that will allow your systems to communicate and integrate. Look for integrated partnerships with technology leaders of the elements you use: databases, student information systems, distance learning, etc. Be wary about hidden integration costs and effort: Exactly what does "integration" mean for the prospective partner? How long will it take and who will pay?

**Q: Is the company visionary in its mission?**

Identify a partner with an eye on the big picture: how will it help you develop online offerings consistent with your own organizational goals and growth over time? A good partner is visionary for itself *and* you.

## **Checklist for Advancement Offices**

- Understand alumni needs and interests.** What information do they want? What interest do they have in opportunities your college or university could offer? How do they want to connect with the institution and with other constituents?
- Assess current offline programs and services.** What would you like to do in the future? How could online applications help you do them better, or with fewer resources?
- Evaluate the way you manage long distance relationships.** The Internet can enable personalization and networking without taxing resources.
- Take leadership in a developing area.** This can broaden your reach or enhance the concrete benefits you offer. Important areas include lifelong learning, targeted messaging, online giving or event management. Conduct a pilot and measure results.
- Review goals and strategic plans for online offerings.** Do this frequently to ensure they are in concert with those of the institution.
- Assess the campus systems, applications and databases you want to use and how they can operate in a coordinated way.** How can you effectively apply them to your ends? Look for technology partners that are best positioned to facilitate these interactions.
- Recognize that an integrated Web presence will likely accelerate demands for coordinating disparate departments and systems on campus.** Initiate a forward-looking plan to develop ways to facilitate working together.
- Participate in the development of lifelong learning at your institution.** Alumni are a key component of lifelong learning.
- Understand that there is intense competition for users on the Internet, particularly those with some higher education.** Avoid products, services and relationships that distract from your assets and affinities. Focus on the unique resources and services you can provide to your constituents; the Internet is a strategic asset, not an affinity revenue source.
- Champion the use of the Internet to connect on-campus and off-campus communities.** You are the bridge and are well-positioned to provide leadership.

## ***Take a Leadership Role***

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### **Notes**

<sup>1</sup> Jennifer Moore and Grant Williams, "Ringing Up a New Way to Give: Growth of Online Shopping Malls Raises Cash, Questions for Charities," *The Chronicle of Philanthropy*, 16 December 1999.

<sup>2</sup> "Yahoo to Enter Corporate Portals," *www.planetit.com*, 27 June 2000; and Gary Gunnerson, "Corporate Portals," *PC Magazine/ZD Net*, 9 September 1999.

### **About the Author**

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Working with technology providers and the related demands of these "interesting times" is complicated and seems somewhat far flung from the main business of building relationships with alumni. Yet, in truth, advancement offices will be increasingly central figures in the application of Internet tools to their institution's strategy. This technology-age evolution of our concept of the college community will put alumni organizations front and center. For example, the higher education community is currently focused on the potential for and organization of lifelong education through online learning; this is a concept solidly based on the assumption that alumni can and will be increasingly integrated into the college and university community through the Internet. The opportunity is here. The challenge is how to manage change through this period of transition.

## ***Meet the Challenge of "Interesting Times"***

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As we strive to bring together people, systems, processes and organizations in a unified vision, the choices are more extensive and the decisions more complicated. Successful alumni, development, and communications offices will work in concert with each other, aligned with the online strategy and goals of the institution as a whole. They will recognize the leadership potential of their role, in bringing the largest constituent base of the institution into the new worldwide college community. They will value the integration of campus systems and databases that streamlines data and communications management. They will carefully evaluate technology vendors, always giving priority to solutions that support and extend their offline goals. And, they will plan for the future, ensuring they leave a legacy to build upon as technology evolves, and as the interesting times of the Internet ensue.

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