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# Implementing a Culture of Philanthropy at WPI

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## Major Qualifying Project:

### Implementing a Culture of Philanthropy at WPI

*A Major Qualifying Project (MQP) submitted to the faculty of Worcester Polytechnic Institute in partial fulfillment of requirements for the Degree of Bachelor of Science in Management Engineering (MGE) with a concentration in Operations Management.*

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## Abstract

Philanthropy from alumni and parents makes up a crucial proportion of the income of a university. Philanthropic donations fund scholarships, unanticipated academic opportunities, student entrepreneurship, and more. Unfortunately Worcester Polytechnic Institute (WPI) has been experiencing a decrease in frequency of alumni donations and see cultivating a robust culture of philanthropy that builds on the strong school pride as a way to reverse the decline. An outline of a plan to create a strong philanthropic culture at WPI has already been created. The plan needs to be implemented to set WPI up to have a strong philanthropic culture for the future with the hope of an increased percentage of alumni giving back to WPI post-graduation.

## Acknowledgments

I owe the success of the project to;

- Professor Frank Hoy - the academic advisor for the project. Professor Frank Hoy kept the project on track to produce an impactful deliverable.
- WPI's Office of Lifetime Engagement; Peter Thomas, Tracy Baldelli, and Michael Kushmerek - These three provided data, guidance, and have worked alongside me to complete this project.
- Christine Sharry – Director of Student Activities
- Casey Wall – Director of Residential Services
- Julie Chapman and Tyler Gibbs – Admission Office

## Executive Summary

I worked with Worcester Polytechnic Institute (WPI) and the Office of Lifetime Engagement to determine the most effective way to implement a philanthropy based marketing plan at WPI. A marketing plan outlining the keys to creating a strong culture of philanthropy at WPI has already been created by a previous Major Qualifying Project (MQP) team. The marketing plan includes the *when*; times during a student's involvement at WPI that the Office of Lifetime Engagement can spread their philanthropic ideology. I have focused on the *how*; the details on each event or activity on campus. After consulting with part of the team of WPI's Office of Lifetime Engagement as well as conducting my own research into the success of other universities, I concluded that to achieve my goal in the fullest, this project must set the stage for;

1. An increased frequency of donations, especially from recent graduates.
2. A change of the attitude toward philanthropy for current and future students.

In order to accomplish this goal, the tasks I focused on are;

1. A create an environment where students and alumni *want* to give. The Office of Lifetime Engagement refers to this as engaged giving.
2. Create "touch points" of philanthropy which reach a wider range of students than the current methods do.
3. Determine the detailed *when* and *how* in the marketing plan.

I have used my existing knowledge from business classes at WPI, my own research, and guidance from the Office of Lifetime Engagement to successfully implement my predecessors' solution to the problems with the philanthropic culture at WPI. I have analyzed the current culture at WPI and have planned the avenues to funnel the philanthropic message through. The plan created by the previous MQP group gives the key steps in creating a philanthropic culture at WPI but the real world always has challenges causing it to differ from practice. I have had to adjust, modify, and use my knowledge and judgement to implement the plan in the most effective way possible.

I have delivered to WPI and other readers -- through sections 4 and 5 -- my knowledge of what has worked well and what can be improved for future implementation. I aim to put WPI in a successful position 5, 10, and 20 years into the future. WPI will be able to use my implementation plan to successfully continue to spread a philanthropic message to an increased number of WPI students and alumni with the goal being as more students and alumni receive touch points on philanthropy, an increasing percent will become donors post-graduation.

# Table of Contents

Abstract

Acknowledgments

Executive Summary

Table of Contents

1.0 Introduction

2.0 Background/Literature Review

2.1 Giving Background

2.2 Why Donors are Important to WPI

2.3 Why Donation Rates are Decreasing

2.4 Other Schools and their Success

2.5 Millennials and Philanthropy

3.0 Methodology

3.1 Method to Complete Tasks

3.1.1 Research

3.1.2 Consult Office of Lifetime Engagement

3.1.3 Meet with On-Campus Partners

3.2 Examine the Competition

3.2.1 Massachusetts Institute of Technology

3.2.2 Dartmouth College

3.3 Coursework

4.0 Results

4.1 Important Influencers

4.1.1 Insight and New Student Orientation

4.1.2 Resident Advisor and Community Advisor

4.1.3 Admissions Office and Crimson Key Tours

4.2 Student Activities

4.3 Residential Services

5.0 Recommendations

5.1 Student Activities

5.2 Residential Services

5.3 Admissions

6.0 Conclusion

7.0 Appendix



## 1.0 Introduction

Over the past decade, donation rates for universities in the United States have been on the decline. While a handful of schools have successfully reversed this national trend, the majority have not. WPI, being a non-profit, private university, relies heavily on donors to support operating costs and provide scholarships for students. WPI receives about two thirds of its income from tuition. The remaining third of the operating costs are largely paid for by donors and revenue from the endowment which was largely donor funded.

A previous MQP group has detailed the philanthropy challenges that WPI faces and from that, created a marketing plan. The previous group had determined that a certain demographic of the WPI population almost never donates back the school. This group is referred to as NAGS (Not Associated in Greek life or Sports). NAGS make up about one third of the WPI population and less than 1% become donors post-graduation (An average of 3% of all alumni have become donors).

This project sets out to take the identified problem and rough plan of how to solve it and move it one step further -- the end goal being to begin implementing the plan created by the previous group. While the marketing plan created by the previous group was the basis of this project, my own research, findings, and identified issues in practice has led to elements in the marketing plan to be added, removed, or modified.

I started the project with my own background research on donor profiles, other schools and their success, and WPI. Once I had a solid foundation, I took the previous groups marketing plan and began my implementation. While consulting with the Office of Lifetime Engagement, I identified the most important on-campus groups with whom I

would focus on creating partnerships with. I worked with Student Activities, Residential Services, and Admissions to forge a professional relationship between the Office of Lifetime Engagement. Through my findings, I have created a set of recommendations.

## 2.0 Background/Literature Review

The goal of this project is to take an already created marketing plan and implement it as effectively as possible at WPI. The marketing plan details the way to increase the culture of philanthropy at WPI, thus increasing frequency of donations and number of donors WPI will receive in coming years. In this chapter I will justify why WPI relies on donors, why donation rates are dropping, how other schools implement similar marketing plans, what WPI's target audience is, the reasons behind why WPI's path to philanthropic success differs from other schools, and the background research I had to do to better work towards my recommendations.

### 2.1 Giving Background

Across the nation, including WPI, universities have experienced a decline in annual giving (The WPI White Paper, 2016). This decline has been attributed to largely;

- The increase in higher education costs
- An increase in other charitable options
- The millennial generation having a different outlook on philanthropy

The handful of universities across the country that have been successful are the schools that market philanthropy to a diverse population of students. Their message has a wide reach across campus.

WPI has experienced a decrease in alumni participation from approximately 17% to 8% over the past decade. On top of this, 45% of WPI alumni are millennials while millennials only make up about 18% of the donors last year.

## 2.2 Why Donors are Important to WPI

WPI is a non-profit organization (WPI 2018). This means every dollar put into the school from tuition, donations, grants, etc. goes back into the school. WPI receives 64% (The WPI White Paper 2016) of its total revenue from tuition. Tuition covers the majority of the running costs of the school. Donations and gifts fund buildings such as the Foisie Innovation Studio, the Rubin Campus Center, and the Bartlett Center (WPI 2018). Other donations are used to fund professors and courses at WPI to enrich the educational experience. But the majority of donations come into play on a more individual level such as making study abroad programs possible and providing scholarships to students who may otherwise not be able to afford attending WPI.

As tuition rates and overall costs of attending college rise nationwide in parallel to the importance of having a college degree rising, scholarships and financial aid are more important than ever (Trends in Higher Education 2018). 97% of WPI students receive some sort of financial aid or scholarships at an average of \$19,225 per student (WPI 2018). Students rely on receiving financial aid and scholarships that are made possible in part by donors.

## 2.3 Why Donation Rates are Decreasing

Donation rates nationwide have been declining for the past decade (The WPI White Paper 2016). As listed above, there are multiple reasons that donation rates have decreased. Some issues, such as increased operating costs of universities nationwide is a topic for another project, but other issues are more relevant.

Millennials treat philanthropy differently than the baby boomer generation (What You Don't Know About Your Youngest Donors 2016). With millennials making up an increasing portion of the WPI alumni population, the WPI Office of Lifetime Engagement is shifting their target audience focus to better cater to millennials. Millennials differ from previous generations, and therefore, research shows that millennials often give when these conditions are met;

- The donor has a personal connection such as a story driving their donation.
- The donor can direct the gift to a particular cause (scholarship, athletic team, class, etc) as well as donate in non-monetary ways.
- The donation message is simple and easy to understand.

As research shows, to spread the message of philanthropy, a student needs to experience 7 touchpoints of philanthropy (NonProfits Source 2018). Touch points are anything from a student reading a poster in the campus center to attending a seminar on the importance of philanthropy. It is shown that a student who has had 7 or more touch points is much more likely to be a donor in the future.

The issue the Office of Lifetime Engagement faces is the difficulty in engaging a wide range of students. The schools that have been successful in combating the decline in participation have reached a much broader audience than WPI. Engaging students that participate in multiple on-campus organizations, student government, sports, etc. is not an issue as they are engaged on campus and will hear messages about philanthropy. 30% of students fall into a category of participating in 0 or 1 on-campus organizations (such as clubs, groups, or Greek life), no athletics, and no student

government. These students make up a significant portion of the WPI student body and future alumni body and would be less likely to come in contact with any touch points (Creating a Culture of Philanthropy 2018).

## 2.4 Other Schools and their Success

A number of schools over the past decade have been successful in reversing a national trend of a decrease in donations (The WPI White Paper 2016). WPI, being a unique school, does not fit the exact profile of some of these schools but parts of their success are useful to examine.

Giving a clear view of the current trends across the nation, WPI's White Paper on annual giving rates is a formal document put together by the Office of Lifetime Engagement detailing the current giving trends and recommended changes to the giving programs. From the White Paper, it is clear some peers of WPI have had success in preventing a decline in participation. Schools such as Massachusetts Institute of Technology (MIT) and California Institute of Technology (Cal Tech) have managed to maintain strong numbers of donors (participation % of alumni) and consistent yearly donations: a few have even grown during this period of national decline.

From Forbes's 2017 Grateful Grad Index, one can see the median donation amount, participation percentage, and the "Grateful Grad Index" score. This score is based on a survey of 1000 students from the university post-graduation to determine their satisfaction level. Schools that are well known for strong participation rates such as Dartmouth College, Williams College, MIT, are at the top (Highest level of satisfied graduates) of the Grateful Grad Index score listing with WPI making it onto the list at

#138. While this Grateful Grad index must be taken with a grain of salt due to survey bias and the low number of graduates surveyed compared to the total number of alumni from all years, the index still provides a correlation between graduate satisfaction and an increased chance of the alum to become a donor.

## 2.5 Millennials and Philanthropy

With each coming year, the millennial alumni population grows. Additionally, WPI class sizes have been growing with each incoming class being larger than the previous class -- about a 100% increase over the past two decades.

In a survey at Stanford, a school that has consistently had some of the best donor rates of any school in the country, an employee noted that 61% of millennial alumni preferred contact over email versus the more traditional phone calls or mail. Along with this, millennials expect strong customer service when communicating with alumni offices (Phone Calls, Texts, or Email? 2017). Stanford also heavily utilizes Facebook and other social media to connect with alumni donors such as sending a selfie of the school mascot in random places around campus for each donation (Stanford 2017).

Additionally, millennials have many more giving options than previous generations (How Millennials Are Changing Philanthropy 2018). This means that a university seeking donations is competing with many more competitors to get that donation. Have a variety of giving options helps a millennial direct their money where they want it to go. Going along with this, millennials want to know how their money will be spent. Millennials need to see that their donations matter for them to continue to be donors. Thinking outside of the box, many millennial alumni have been found to be

more willing than other generations to give time and donate their skills to causes they believe in -- instead of money (How Millennials Are Changing Philanthropy 2018). Most statistics are heavily focused on the dollar amount and number of donors -- partly due to the fact it is much harder to keep track of what else has been donated: time, skills, or supplies being donated are harder to quantify. WPI has been adapting their donor options to allow a wider range of donation types (Office of Lifetime Engagement 2018).



### 3.0 Methodology

The goal of this project is to increase the percentage of WPI alumni who will become donors in coming years by creating intentional touch points during their 4 years on campus. A marketing plan, previously created by another MQP group, will need to be implemented into the structure of WPI. The marketing plan, laid out by the previous group, provided a basis to start my implementation plan. Using the marketing plan, I created an initial set of goals;

1. Increase frequency of donations, especially in recent graduates.
2. Change the attitude toward philanthropy for current and future students.

In order to accomplish this goal, the tasks I must focus on are;

1. Create an environment where students and alumni *want* to give.
2. Create “touch points” on philanthropy which reach a wider range of students than the current methods do.
3. Determine the *when* and *how* in the marketing plan.

### 3.1 Method to Complete Tasks

In order to achieve the tasks listed in 3.0, I followed this process;

### 3.1.1 Research

I started with researching the ways other colleges --specifically engineering schools-- implement similar marketing plans and how these schools have managed to sustain a culture of philanthropy within an environment with a decreasing number of donors (The WPI White Paper 2016). In the past 10 years, universities across the country have experienced a decrease in the total quantity of donations received. Some schools have managed to combat this decrease in donations and sustain their donation numbers. Schools such as University of Pennsylvania, Dartmouth University, and Massachusetts Institute of Technology are schools that I researched and examined to determine what they do differently than WPI. Not every detail from other schools' implementation of a cultural philanthropy program applies to WPI but bits and pieces from each school are used in my implementation at WPI.

### 3.1.2 Consult the Office of Lifetime Engagement

Throughout the implementation planning process, I consulted with Executive Director of the Office of Lifetime Engagement -- Peter Thomas, and a team from his department to determine the current standings on the culture of philanthropy at WPI. We discussed where the Office of Lifetime Engagement wanted it to be, and what the Office had for information so far, and where WPI needs to be 1 year, 5 years, and 10 years down the road. We met once per week with part or all of the team of; Peter Thomas, Tracy Baldelli, and Michael Kushmerek.

Peter and his team provided me with statistical information and non-quantifiable data verbally and through documents such as *The White Paper*. The provided information has complimented my research findings and aided in implementing the marketing plan.

The weekly meetings with Peter and his team also provided clear direction for the project. Each meeting ensured that work done in the past week was focused in the right direction and kept the project on track.

### 3.1.3 Meet with On-Campus Partners

Once a clear idea was formed of how the marketing plan should be implemented at WPI, I met with various on-campus departments to discuss how the Office of Lifetime Engagement's agenda can fit in with this key group's schedule. As millennials respond well to peers, the marketing plan targets student events on campus as key *touch points* for WPI students to hear the message of philanthropy.

I started off by meeting with a community advisor (CA) and resident advisor (RA), two of the most influential persons for an incoming freshman. RA's are upperclassmen students who live in the residence halls and are assigned a section of the residence halls. RA's are given a wide range of responsibilities from helping the underclassmen in their section acclimate to WPI to keeping order in the residence halls. CA's have a similar role in the sense that they are assigned a group of freshman to work with during their first semester. The CA's role is to help freshman adjust to college life. These community advisors show freshman where to eat, what the cool clubs to join are, and help them acclimate during their first year in college. The RA's and CA's guide freshman

students through freshman orientation and their first weeks on campus. After that their role slowly diminishes. The RA's and CA's are upperclassmen and are picked as likeable and energetic people, usually heavily involved in on-campus life. Their goal is to guide freshman through life on campus; from where to eat to what are the best events to go to. 33% of WPI students are not involved in on-campus activities and will not participate on campus after this small window of CA's and RA's encouraging them to get out of their rooms and participate.

The second step was to meet with Christine Sharry: the Director of Student Activities at WPI. Christine is the expert in getting students joining clubs, on-campus groups, and attending general events. Christine Sharry is a huge part of student involvement on campus. As such, she knows what events tend to be the most popular among different demographics of students, what events different on-campus organizations put on, and provides a connection to all these groups and events. With her help, I was able to determine which events on campus will be best suited to contain messages about philanthropy.

Third, I met with Casey Wall. Casey Wall is the director of Residential Services at WPI. She manages all the RA's and residence hall events. Residential Services has a huge reach over a broad set of the student population -- almost 100% of freshman and over 50% of upperclassmen.

Lastly, I worked with Tyler Gibbs and Julie Chapman, two key members of the Admissions Office at WPI. I picked these two due to their pre-existing connection to the Office of Lifetime Engagement and their involvement with the Crimson Key student leadership program. The Crimson Key is responsible for the WPI Admissions tours. On-

campus tours are a prospective student's first interaction with WPI and WPI's culture -- and first impressions matter. A culture of philanthropy can be woven into the story of WPI given on these on-campus tours providing incoming students/potential students their first touch point.

## 3.2 Examine the Competition

Two schools in our local area have maintained strong donation rates despite the national trend. I chose to look more in depth at both of these schools: Massachusetts Institute of Technology and Dartmouth College.

Both of these two schools have philanthropy deeply ingrained in the culture of the school. While they are not the same as WPI, I dove deeper to examine why these schools have been successful and how WPI can learn from their success. I began my research by touring both schools and combing their websites.

### 3.2.1 Massachusetts Institute of Technology

Before my visit at Massachusetts Institute of Technology (MIT), I did some background research. I started with browsing [giving.mit.edu](http://giving.mit.edu), MIT's donations website. MIT's website for donations is clean and professional and quickly gets to how vital donors are for MIT's survival. Statistics are clearly displayed such as 91% of MIT students receiving financial aid or scholarships and how only 63% of MIT's operating costs are covered by tuition. Under each statistic is a donation option to help that cause (I.E. under a sports and recreation participation stat is a box to donate to sports and recreation at MIT). Over the past few years, the Office of Lifetime Engagement has

worked to increase the options for donors in the same way MIT is doing in this situation. While unrestricted dollars (money given to the school for any use the school needs) are more useful for the school, many donors want to give specifically to one organization at the school, most often a group the alum had involvement with during their time on campus.

Upon getting as much as I could from MIT's online presence, I visited the school. MIT has a similar profile to WPI. Located in Cambridge, MIT still manages to maintain a mostly self-contained campus much like WPI does in Worcester although outskirt buildings certainly are somewhat lost in the bustling city. I spent some time walking around the school to get a sense of the culture of the school. I was looking for ways that MIT conveyed the importance of donors, philanthropy, and school pride. Sometimes on-campus tours cater to the best parts of campus, I wanted to see the true image of the school. After my own self-guided tour, I took an admitted students on-campus tour with a group of admitted potential MIT undergraduates. The hour long tour covers most of the campus and common places that students might go such as the gym, quad, library, and campus center cafeteria. Compared to the WPI tour, I found the main difference was the lack of personal touch at WPI. The MIT tour was the story of a student with a much of the discussion about that individual's personal habits on campus.

To analyze for research, I listened for the tour guide to give mention to notable donors and alumni at the school as well as important cultural aspects of being an MIT student. As the previous group discovered, school spirit and donations post-graduation have been shown to correlate positively (as school spirit increases that chances that a

student will give back to the school post-graduation increases); because of this I made note of any mentions of on-campus life, school pride, and unique MIT culture.

### 3.2.2 Dartmouth College

I began with browsing Dartmouth College's donation website prior to my visit. Dartmouth handles donations through a slick yet humble giving website titled *Dartmouth College Fund*. Donation options are plentiful and it is clear that each and every donation is valued and important to the school. A statistic on their website states that only 44% of total operating costs come from tuition (compared to WPI's 66%). The website has extensive information of how one-of-a-kind the school is because the school gives such extensive tuition discounts and it is made possible by donors. Many other schools operate in a similar manor, WPI included, the difference being that Dartmouth markets the philanthropic information effectively to educate all prospective students, current students, and alumni and thus gain alumni donors.

### 3.3 Coursework

Using my knowledge gained through my study at WPI, I was able to better understand the previous groups work, more efficiently progress through my project, and create more effective recommendations.

Utilizing my studies in BUS 4030 Achieving Strategic Effectiveness, I was able to better read and comprehend the marketing plan given to me by the previous group. In BUS 4030, I learned "how to develop and execute an effective business plan" (BUS 4030 Syllabus, 2017). A marketing plan is a type of business plan and was thus easy to

apply what I had learned in the course into the marketing plan's implementation. With an understanding of the content of the marketing plan I was able to create my own business plan (implementation plan) for the next steps to take.

With an understanding of the marketing plan, I was able to examine the structure of WPI as an organization to determine which groups may be beneficial to work with. In OBC 3354 Organizational Behavior and Change I spent wrote a Four Frame Paper on the organizational structure of WPI. In referencing this project, I was able to examine which groups will have key impact on my project, how I can best work with them, and what those groups have for goals.

Once I began contacting the on campus groups, I first began my correspondence with emails with each departments. I needed to convey what my project was, why I was contacting them, and get them interested enough to arrange a meeting with me. I needed to be persuasive and sell my mission of creating a culture of philanthropy at WPI. Using my skills learned in WR 2210 Business Writing and Communication, I was able to achieve this.

Lastly, using my business class coursework as training, I was able to effectively communicate the importance of philanthropy at WPI to the three departments at WPI I worked with. At the meetings I had with these on campus groups, I was able to present in a clear and concise manner as I have practiced and many of the business classes. Communicating clearly and concisely allowed me to convey the importance of this project in the short time slot these departments had given me.



## 4.0 Results

Through my work, I concluded the key on-campus partners and programs to work with to implement the philanthropy marketing plan are;

- Insight and NSO
- RA's and CA's
- Residential Halls

The three most influential departments that will work with the Office of Lifetime Engagement are;

- Student Activities
- Residential Services
- Admissions

## 4.1 Important Influencers

Through my research I determined the key groups on campus that are vital in working with the Office of Lifetime Engagement to implement the marketing plan. These groups were chosen for multiple reason but they all share one common trait: All 4 key groups interact heavily with the entire student body during their early weeks on campus. All incoming freshman -- before their first A term and during -- participate more heavily in on-campus activities than they will in their upperclassman years. Students who are involved on campus are easier to reach with messages of philanthropy than NAGS. Due to freshman having a higher tendency of being involved on campus than they do in later years, the Office of Lifetime Engagement will have an easier time spreading messages of philanthropy to freshman -- specifically during their early days/weeks on campus. On top of freshman being more involved, freshmen are in a “moldable” period of their college career when they are discovering where they fit in at school.

The first group I began working with is Student Activities and their Director Christine Sharry. Student activities runs the majority of events and organizations on campus -- events such as homecoming (in partnership with the Office of Lifetime Engagement), leadership programs, and 200 different clubs and activities.

To aid in reaching students who are not involved in on-campus activities, I worked with Casey Wall -- the Director of Residential Services. A large percentage of the freshman student body will reduce their on campus participation as they progress in their WPI careers. Almost 100% of incoming freshman live on campus while only 50% of upperclassmen do. However, as Casey Wall has pointed out, the 50% that continue to live on campus tend to fall into the NAG category. This statistic indicates that

upperclassmen residence halls may contain a much higher concentration of NAGS than may be found anywhere else on campus. On top of this, RA's are highly influential leaders in a student's life on campus. As such, I found Residential Services to be crucial in reaching NAGS and implementing touchpoints of philanthropy.

Lastly, the Julie Chapman and Tyler Gibbs provided insight into the Crimson Key tour guides and how the Office of Lifetime Engagement can work with the tours. The on-campus tours are the first interaction a student will have with WPI and thus is the first touch point in a four year journey. First impressions are important -- setting WPI up as a school with a strong philanthropic culture will change an incoming student's perspective of WPI.

Each on-campus group that I worked with provides key touch points with incoming freshmen. Each of these three departments -- Student Activities, Residential Services, and Admissions -- oversees a key touch point for a freshman students and beyond.

#### 4.1.1 Insight and New Student Orientation

New Student Orientation (NSO) is a 4 day program for all incoming freshman starting 4 days before A-term classes. NSO and Insight are run by Student Activities and their community advisors (CAs), as well as Residential Services and the residential advisors (RAs). New students have a structured and very busy schedule with social mixers, campus scavenger hunts, and various other on-campus events. The day starts with breakfast and ends with a late night dessert and night events. For 4 days, new students are building their school pride and setting the tone for the coming 4 years. At

the end of the 4 days, all new students walk across the Earle Bridge officially welcoming them into WPI.

All new students start NSO by being placed into groups with their neighbors called Insight Teams. Groups are approximately 12-15 students and led by an upperclassman called a community advisor (CA). CA's introduce new students to WPI campus and life at WPI. CA's take their insight teams to the dining halls for meals, to the quad for games, tell them what the best clubs to join are, and help them navigate their new social lives. NSO is a major part of a new student building his/her identity on campus and forming their first impressions of WPI as an insider: First impressions matter.

During the 4 days of NSO, many freshman join clubs, form their friends groups, and are actively involved on campus. The Insight groups and NSO impact a student's outlook on WPI and sets the tone for their opinions of WPI. On top of being a key influence to incoming students at a malleable period, Insight groups and NSO events encompass the entire incoming student body. Every single WPI students has attended events such as the *Welcome Assembly* and *Can We Talk?* Philanthropic messages conveyed at these NSO events will have a larger audience than any other on-campus events.

Planning for NSO and Insight are air tight -- if the Office of Lifetime Engagement wants to add or change the schedule it needs to be done in advance and with very careful planning. Planning takes place 6+ months before Insight or NSO begins and every minute of the day is scheduled to keep freshmen active and to use the time efficiently.

## 4.1.2 Resident Advisors and Community Advisors

As mentioned above, the CA's lead the new student Insight groups during New Student Orientation. CA's are a strong influence on incoming freshmen; for many CA's are the first upperclassman the freshman interacts with. CA's are looked up to for knowledge about campus life and as a general guide through life. CA's are the expert's on-campus life. From the CA job description, "[a CA] is designed to foster and maintain an environment where a student can grow academically and socially". CAs are most active in a freshman's first term on campus with a decreased roll B term. After B term a freshman no longer has a CA.

Training for community advisors is handled by Christine Kobza in Student Activities and takes place in C through D term each year (applications submitted before December). CA training happens in evening training sessions during the weekdays. Christine Sharry suggests A and B term meetings to get on the CA training schedule.

Working alongside the CA's are the RA's. RA's, or resident advisors, are upperclassmen who live in the freshman and upperclassmen residence halls alongside the students. The RA's provide some of the duties of the CA in terms of providing campus life guidance and help to new students. RAs also maintain order in the residence halls by solving conflicts, assist with student needs, and solve issues that may arise.

Training for RA's is handled by Matt Foster in Residential Services and takes place just a few weeks before A term starts, in August a couple weeks before Freshmen move in. Training is a jam-packed couple weeks of training for the start of the year. It is

important to note that RA's tend to be highly involved in RA responsibilities and do not have time for other sports or activities.

RA's and CA's generally tend to be fairly active on campus. Most RA's and CA's are involved with other on-campus groups on top of being involved in their NSO roles. Because of their high level of influence on new students and their ability to get new students involved on campus, RA's and CA's are key factors in getting new students involved on campus. An involved student is more likely to have higher levels of school pride and gain more exposure to messages of philanthropy.

### 4.1.3 Admission Office and Crimson Key Tours

On-campus tours are a future WPI students' first interaction with campus. Tyler Gibbs and his team of Crimson Key tour guides provide tours for prospective WPI students. Tours can vary depending on the audience (prospective students vs. accepted students) and in length but the general content and how the tour is given is the same.

The tours consist of a short information session led by an Admissions staff or Admissions intern and a tour of campus. The tour goes through academic buildings, the library, classrooms, and dining halls. Some tours may include residence halls although most do not -- residence halls tours are usually separate. It is important to note that even separate residence halls tours are led by Crimson Key tour guides, not Residential Services.

Tours are usually a WPI student's first interaction with the school, community, and another student. The first impressions a student leaves with post-tour shapes their coming four years at WPI.

Training for the Crimson Key tour guides takes place in the winter. Applications to become a tour guide are submitted by any upperclassman who wants to apply. At the end of B term, future guides are selected to attend training in C term. About half the tour guides are returning tour guides but all tour guides must attend the training. Training consists of a handful of meetings throughout C and D term with a large packet of homework given to the guides at the beginning. The packet serves as a Crimson Key tour guides' bible and additional training outside of the meetings. Meetings usually involve lecture style training from Tyler Gibbs, Admissions interns, and invited guest speakers. Tyler Gibbs has invited someone from the Office of Lifetime Engagement to be a guest speaker at one of these training sessions.

## 4.2 Student Activities

Student activities are a key part of a student's life on campus. Most students are involved with at least one club on campus, with some in 3 - 4 clubs. Student activities covers a broad range of events from large events such as homecoming to small club-hosted events. The head of Student Activities, Christine Sharry, provided insight on the on-campus Student Activities and some of the most popular clubs and events.

Currently, large events have high attendance rates among students already involved on campus. For example, Greek life students are much more likely to attend homecoming than a student not involved Greek life. Christine Sharry notes that some of these larger events are being redesigned for future years to be more inclusive to all audiences but as they are now, these larger events do not target a wide variety of WPI students.

Many students who may not be attending larger events on campus are still involved on campus with a club or organization. As I have noted before, alumni frequently give back to the school to organizations of the school that influenced them while on campus. For example, Christine Sharry gives back to a scholarship fund that she was awarded while attending college. Being so, student clubs that benefit the most from alumni donations and often have a “legacy” feel to them may be good candidates to target for fundraising. One of the clubs that has benefited the most from club-alumni donors is the Glee club. Christine notes that the Glee club has a strong, loyal following and reinforces the idea of a legacy and frequently has alumni appreciation events. Christine believes if we instill a feeling of lifetime engagement with a club or on-campus group, donation numbers may increase significantly.

Like the Office of Lifetime Engagement, Christine Sharry also struggles with getting all students involved in on-campus activities. There is always a large percentage of students, upwards of 50% of the student body, with little to no involvement on campus. Christine does not heavily pursue this group as many of them don’t want to be involved on campus. The issue is not that there is no club or activity for that student to join but rather they are not interested. To reach these students, Christine recommends using advertising in key locations. Students not involved in on-campus activities still use the library, specifically tech suites, the campus center, dorm rooms, dining halls, and classrooms.

As it is Christine’s mission is to involve as many students as possible in on-campus activities, writing off NAGS (a large portion of the WPI student population) and not attempting to reach out to them is common issue shared across WPI. It is in



Christine's interest to reach the NAG population as it is the Office of Lifetime Engagement's. Writing off a large portion of the student population leaves a huge portion of the students untapped.

### 4.3 Residential Services

Residential Services is a key group to work with to reach the NAG population and a broad population of the student body. As stated before, almost every freshman spends the first year in the freshman residence halls with about half of upperclassmen staying on campus for their following years. As Casey Wall has pointed out, a large portion of the upperclassmen staying on campus are NAGS -- many athletes and Greek members live off campus.

It is important to note that many upperclassmen stay on campus, the majority of these upperclassmen stay in the same residence halls year after year. For example, sophomores are able to move into Faraday and many tend to stay there for their junior and senior year instead of "upgrading" to East Hall. Many of these students have a loyalty and connection to their residence halls giving each residence hall a sense of community. Each residence hall holds their own events such as the Faraday BBQs twice per year and Morgan hall's trivia nights.

Casey Wall was clear in stressing that a residence hall is not a dorm -- simply a bed to sleep in -- but a home for students. Residence halls are where a student does homework, eats food, spends time with friends, and lives. Casey Wall has pointed out that many alumni who come back to visit campus visit their old residence hall as that is where many of their college memories took place.

Taking a look at RA influence on students living on campus, the role changes slightly between freshman and upperclassmen residence halls. Freshman residence halls have about twice as many RA's per student compared to upperclassmen residence halls. This is largely due to an 18 year old spending their first year living away from home needing more supervision than a 21 year old senior. Because of this, freshman residence hall RA's tend to be much more hands on in solving issues and checking in on their students. On top of having a lower concentration of RA's in upperclassmen residence halls, upperclassmen halls have a different setup -- usually a suite style with a kitchenette and living room. Upperclassmen also have the ability to choose who they dorm with meaning they often are living with their friends, unlike freshman year where students may have friends in other rooms or on different floors. All this added together means that upperclassmen residence halls tend to have their doors closed and students tend to stay inside their suites because everything they need is inside their room -- food in their kitchen, living space in the suite (vs. a shared common room in the freshman residence halls), and their friends.

Residence halls at WPI have a large following on social media and through the RA community. RA's tend to be very passionate about Residential Services and even have their own periodic RA alumni reunions (separate from class reunions). Many alumni RA's return for Residential Service's events on campus. For a social media following, the Residential Services is most active on Facebook with just under 5,000 followers -- many of which are alumni. On their main Facebook page, smaller sub groups exist for each residence hall. Click rates are tracked by Residential Services on all posts.

Overall, Residential Services have a huge reach over the student population -- especially the NAG population. Casey Wall, Matt Foster, and the Residential Services Department are very willing to work alongside the Office of Lifetime Engagement to achieve a mutual goal. Many students find their connection with WPI through the residence halls and may become donors to Residential Services/WPI in the future given successful implementation of the marketing plan.

## 5.0 Recommendations

Given my findings, I recommend that the Office of Lifetime Engagement work with;

- Student Activities
- Residential Services
- Admissions

To achieve the goal of increasing the number of future donors.

For each group, I recommend the following:

### 5.1 Student Activities

With the goal of achieving an increase in future donors, I recommend working with Student Activities in a variety of ways.

First, I recommend interweaving messages of philanthropy in the freshman address (Sunday of NSO). I suggest working with the President's Office to weave in a message on philanthropy. I recommend subtly mentioning donors that have heavily influenced WPI by donating buildings and providing financial aid/scholarships to such a large percentage of the student population.

Many on-campus clubs and organizations have benefited heavily from alumni donors giving restricted donations to that club or organization. Many students have a strong connection with clubs or organizations with which they spent their time with at WPI -- many with cult like followings. Because of this, I recommend that the Office of Lifetime Engagement meets with club and organization leaders from groups that have

benefited heavily from alumni donors; groups such as rowing, glee club, SAE, and many more.

Lastly, in working with Student Activities, I recommend that the Office of Lifetime Engagement meets with the Office of Multicultural Affairs to weave in a piece about philanthropy at the A term welcome event and the Connections program in mid-June. A high percentage of international students at WPI only attend Multicultural Affairs event's and receive financial aid assistance through the Office of Multicultural Affairs.

## 5.2 Residential Services

To achieve an increase in future donors, I recommend working with Residential Services, specifically Casey Wall and Matt Foster.

I recommend creating a poster containing messages of philanthropy. The messages should be brief and easy to skim over by someone passing by in the hallway or waiting for an elevator. The messages need to be non-pushy, contain statistics on how many people receive aid, tie giving to a student's connection with WPI, and offer a variety of ways to give. I recommend hanging these posters in all residence halls: upper class and freshman. I also recommend that the same poster is put into digital form and posted on the Residential Services Facebook and other social media pages.

Second, I recommend working with Matt Foster to get involved in RA training for the coming year. RA training takes place two weeks before school starts -- but planning for the training takes place C and D term. Someone from the Office of Lifetime Engagement can work with RA's to help them understand the importance of philanthropy and how philanthropy has affected them at WPI. To help connect with the

RA population, the Office of Lifetime Engagement could attend the next RA alumni reunion.

### 5.3 Admissions

The third group I recommend working with is the Admissions Office, specifically Tyler Gibbs and Julie Chapman.

I recommend working with Tyler Gibbs to weave philanthropy into the on-campus tours. Tyler Gibbs has suggested that someone from the Office of Lifetime Engagement attends the B term reunion of all Crimson Key tour guides that will be returning for the following year. By C term when the tour guide's packet is assigned for studying, all philanthropic material should be woven into the packet. The philanthropic material should include information such as important donors to the school, scholarships made possible by donors, and other notable philanthropic pieces. The material should be woven into the existing tour route and speaking points and should not drastically change the length of the tour as the tours are run on very tight schedules.

Lastly, I recommend working with Julie Chapman to arrange a table sitting at accepted students' day. Accepted students day is a huge pride day for incoming freshman -- many of which are receiving scholarships provided by donors. The table sitting should include posters and information of scholarships future students are receiving and how they are made possible.

## 6.0 Conclusion

Through my research, meetings with on-campus groups, and work done by the previous MQP group, I created the recommendations of the next steps for the Office of Lifetime Engagement to take.

A decline in donors -- a problem -- was identified by the Office of Lifetime Engagement. From there, the previous MQP group determined the cause to the problem and laid out the first steps to reverse the trend. I took the next steps of the project: determine the next steps and beginning the implementation of said steps.

I began my work with background research. My research included background reading on millennials and philanthropy, other schools that have maintained strong donation rates, and WPI and philanthropy. With that research and the marketing plan and findings from the previous group, I determined the key on-campus groups that the Office of Lifetime Engagement needs to work with to achieve their goal of increasing the future number of donors. I created a bridge between the Office of Lifetime Engagement and the three on-campus departments I identified: Student Activities, Residential Services, and Admissions.

I created a set of recommendations for the Office of Lifetime Engagement to take as next steps with each on-campus departments. More work will still need to be done but the connections created and recommended steps will aid the Office of Lifetime Engagement in achieving their goal of increasing the number of donors in coming years.

## 7.0 Appendix

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