Harnessing Untapped Potential: A Theory for Engaging Recent Graduates in Alumni Advocacy to Support Institutional Advancement Goals

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HARNESSING UNTAPPED POTENTIAL: A THEORY FOR ENGAGING RECENT GRADUATES IN ALUMNI ADVOCACY TO SUPPORT INSTITUTIONAL ADVANCEMENT GOALS

A Dissertation Presented

by

ERIN M. VALENCIK

Submitted to the Graduate School of the University of Massachusetts Amherst in partial fulfillment of the requirements for the degree of

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HARNESSING UNTAPPED POTENTIAL: A THEORY FOR ENGAGING RECENT GRADUATES IN ALUMNI ADVOCACY TO SUPPORT INSTITUTIONAL ADVANCEMENT GOALS

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I dedicate this dissertation to those in my life who made countless sacrifices and offered endless encouragement so that I could earn this degree.

To my husband, Chad:
I appreciate all of your love, patience, support, and willingness to make sacrifices throughout this process so that I could have the space to flourish.

To my children:
Thank you for your unending love and laughter that fueled me through this process. I hope this work demonstrates to you that you can accomplish anything you set your mind to now and in the future.

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To my friends and colleagues:
Thank you for your steadfast support and encouragement that has enabled me to complete my degree and see this study through to fruition.
ABSTRACT

HARNESSING UNTAPPED POTENTIAL: A THEORY FOR ENGAGING RECENT GRADUATES IN ALUMNI ADVOCACY TO SUPPORT INSTITUTIONAL ADVANCEMENT GOALS

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At the same time institutions and advancement offices are struggling to effectively engage recent graduates who are essential to the health and longevity of the engagement and philanthropy pipeline, public institutions are attempting to constrain rising college costs that threaten quality and accessibility. A large and ongoing contributing factor to increased college costs is reduced state funding for higher education that remains below historic levels. Given the current environment of declining numbers of new donors, the funding challenges that face higher education, and recent graduate motivations to participate in cause-based philanthropy, political advocacy may be one approach that can effectively engage recent graduates in meaningful ways that align with their capacity and inclination. It may also serve as a way to set recent graduates on a positive trajectory for a lifetime of engagement and giving, thus enabling them to help their alma mater address critical needs now and in the future.

The purpose of this study was to explore how recent (up to 10 years since graduation) undergraduate alumni from the University of Massachusetts Amherst perceive and/or engage in alumni advocacy efforts. Using a constructivist grounded theory design to understand the unique, lived experiences of individuals and the meaning made from them, this qualitative study proposes a substantive theory to inform future scholarship and practice regarding how recent graduates may be inclined and able to
engage in alumni advocacy efforts. Such participation is valuable as it may assist to sustain high quality educational offerings that serve students, institutions, and society while also assisting recent graduates to define their role as alumni and establish a strong foundation for a lifetime of engagement and giving.
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CHAPTER 1
INTRODUCTION

Higher education fundraising is flourishing with a record number of institutions conducting and completing $1 billion campaigns, numbers of major gift prospects surging, and charitable donations to higher education have reached an all-time high (EAB, 2016). However, there is a sense of unease among advancement professionals as a small number of donors can be credited for contributing the most gifts while there has also been a steady decline in number of new donors (EAB, 2016). This decline has been driven by shrinking rates of participation among recent graduates, particularly at institutions that are graduating increasingly larger classes (Linder & Meu, 2019). This trend has underscored concerns about a potential lost generation of future major donors. Given this environment, it is more important than ever to build a strong engagement and philanthropy pipeline to ensure the sustained livelihood of higher education institutions.

To ensure the health of the philanthropic pipeline for higher education, institutions need to invest in building a tradition of engagement and philanthropy among alumni early on. Satisfied alumni promote and recommend their alma mater to others, help create strong professional networks that benefit students and alumni, volunteer their time, give back financially, and more. Such engagement helps prepare the recent graduates of today to become the major donors of tomorrow (Masterson, 2017). With this in mind, focusing engagement efforts on recent graduates is vital so that a strong foundation is set for lifelong relationships with their alma mater that can inspire future giving as their capacity to give grows. As such, this study explores alumni advocacy as a vehicle for sustained alumni engagement and support to public higher education institutions.

Statement of Problem

My dissertation study is timely and relevant as it addresses a two-fold problem. At the same time institutions and advancement offices are struggling to effectively engage recent graduates (Linder
& Meu, 2019; Masterson, 2017), public institutions are attempting to constrain rising college costs that threaten accessibility. A large and ongoing contributing factor to increased college costs is reduced state funding for higher education that remains below historic levels (Mitchell et al., 2017). The sections that follow address each of these problems before leading into how alumni advocacy could be a vehicle for addressing these issues.

**Challenges with Engaging Recent Graduates**

How to best engage recent graduates is challenging and unclear. With evolving technology, it has become increasingly difficult for institutions to stay relevant to their alumni as social media and other technology have made them less dependent on their alma maters to remain in-the-know or stay connected with their former classmates (Masterson, 2017). Acknowledging this, institutions have attempted to offer value to their alumni in ways that meet their needs by hosting events, maintaining affinity groups, offering opportunities for lifelong learning, providing career support, and facilitating mentoring programs, among other offerings. They also offer a variety of ways for alumni to contribute back to their alma mater through volunteerism or giving—yet, each approach comes with limitations. Volunteer opportunities could include serving on an advisory board, speaking at an event, serving as a mentor to students, and more. However, the number of available appealing volunteer opportunities that align with an alum’s interests and talents are likely limited (EAB, 2016). Additionally, many may be time or location bound. Regarding giving, recent graduates are not often thought of as strong charitable givers in comparison to older alumni with a greater capacity to give (Smith, 2021), as they are likely just beginning their careers, have limited personal finances, and are working to pay their student loans. Nonetheless, their coming of age represents a significant opportunity as they are situated to become the beneficiaries of the largest transfer of wealth in history as they enter their peak earning years (Linder & Meu, 2019) underscoring the potential for them to become some of higher education’s most valuable supporters. By targeting this insufficiently tapped group of recent graduates early on, institutions can
ensure the long-term sustainment of philanthropic gifts by moving engaged alumni with significant future earning potential into the pipeline early (Smith, 2021).

Recent graduates of contemporary times typically include millennials born between 1981 and 1996 and the early end of Generation Z and born after 1996 (Pew Research Center, 2020). Rather than engage out of a sense of responsibility to an organization, these individuals engage to improve the world, are motivated to support causes they believe in, and possess a desire to have a lasting impact (Smith, 2021; Linder & Meu, 2019; The Millennial Impact Report, 2019; Masterson, 2017). Additionally, recent graduates of today are mission-driven, often fluent in philanthropy, believe in the power of activism, and want to be involved in driving change (The Napa Group, 2021; The Millennial Impact Report, 2019). As such, it is not uncommon for recent graduates to engage with multiple nonprofits (The Millennial Impact Report, 2019) and amidst various causes they are passionate about, education is among the issues this demographic cares about the most. However, while they view educational institutions as deserving of their support, many do not view them as needing their support as much as other causes. With such competition for the time and attention of recent graduates, institutions need to make their case for support to these individuals in an appealing way that conveys urgency, need, value, and makes it simple for them to engage (Linder & Meu, 2019; The Millennial Impact Report, 2019; EAB, 2016). Accustomed to the tailored experiences offered by many brands and organizations they engage with and follow, today’s recent graduates expect their alma mater to know them and approach them with personalized appeals for their support (Linder & Meu, 2019). They are also largely influenced by their peers and more likely to engage in opportunities when their peers are also participating (Linder & Meu, 2019; The Millennial Impact Report, 2019). When considering how they may engage, recent graduates see their assets as having equal value and do not view serving as a volunteer or making a financial gift as more valuable than signing a petition (The Millennial Impact Report, 2019). With this in mind, they seek to give back in multiple ways that could involve contributing their time, skills, talent, or
expertise (Linder & Meu, 2019; The Millennial Impact Report, 2019; EAB, 2016). This group is also discerning regarding when and how they give their time, talents, and finances and are more likely to participate when they have confidence and trust regarding when and how their contributions will be used (Linder & Meu, 2019). Given diminishing rates of participation among alumni and the importance of a healthy and robust engagement and philanthropy pipeline to the future sustained livelihood of institutions, it is more important than ever to engage recent graduates soon after graduation in impactful and fitting ways so they may maintain positive connections with their alma mater that inspire future gifts as they come into their own wealth and career success.

Declining Support for Public Higher Education

At the same time institutions are struggling to effectively engage recent graduates, public institutions are attempting to constrain rising college costs that threaten accessibility. A large and ongoing contributing factor to increased college costs is reduced state funding for higher education that remains below historic levels (Mitchell et al., 2017). Despite small recent gains, state appropriations total only half the amount of what they were in the 1970s (Mortenson, 2015). Should state appropriations continue to decline at such a rate, they are predicted to reach zero before 2060 (Mortenson, 2012; Mortenson, 2015). Declines in state funding relate to competing public welfare needs that may “crowd out” state support for higher education. These needs include Medicaid, health care costs, K-12 education, police and fire protection, and corrections (Webber, 2018). As public welfare programs are often viewed as having immediate needs, higher education funding, with options for alternative revenue streams, may be prioritized by legislatures on a lesser level (Webber, 2018).

Reduced funding whether through state appropriations, declining alumni participation, or other sources, is detrimental for students, institutions, and the economy. Specifically, insufficient funding has contributed to tuition increases (Ma et al., 2015) and reduced educational quality as institutions attempt to balance their budgets with cost cutting measures such as reducing faculty, decreasing course
offerings, deferring maintenance, or eliminating programs, which has negatively affected the affordability and accessibility of public higher education (Mitchell et al., 2017). Since the 1970s, when adjusting for inflation, the average public college tuition has increased by 274 percent while the median household income has grown by only 7 percent (Mitchell et al., 2016). Such tuition increases make access challenging for many and may most directly affect students of color (Allen & Wolniak, 2015) and low-income students (Mitchell et al., 2016; Avery & Hoxby, 2013) as students from low-income families are more likely to come from communities with lower percentages of college-educated adults and less resourced high schools. As a result, they are less knowledgeable about financial aid resources available and tend to overestimate the actual cost of higher education when making decisions about whether and where to apply (Bergerson, 2009; Bettinger et al., 2009). Engaging alumni to address issues such as reduced state funding and the associated implications on affordability and accessibility could be a way to effectively engage recent graduates to maintain a strong support pipeline while also addressing critical needs.

Political Advocacy as an Underutilized Solution

Underengaged recent graduates pose a threat to the future of higher education as they are a vital group to engage who are essential to the health and longevity of the engagement and philanthropy pipeline that institutions rely on to sustain high-quality educational offerings that serve students, institutions, and society. Given the current environment of declining numbers of new donors, the funding challenges that face higher education, and recent graduate motivations to engage cause-based philanthropy, political advocacy may be one approach that can effectively engage young alumni in meaningful ways while also helping institutions now and in the future. Within the context of higher education, political advocacy may be considered the efforts of colleges and universities to bring attention to issues affecting higher education and educate elected officials about the impact of related policy decisions (Walker, 1991; Underwood, 2012). While there are a number of Intermediary Public
Policy Organizations (IPPOs) that focus on national policy issues affecting higher education (for example, American Council on Education (ACE), Institute for Higher Education Policy (IHEP)) (Orphan et al., 2018), higher education groups focused on advocating for higher education at the state or regional level are less common. Those that do exist are sometimes still organized nationally despite striving to educate and connect leaders to advocate for higher education within their state or regional environment (for example, State Higher Education Executive Officer Association (SHEEHO), American Association of State Colleges and Universities (AASCU)) (American Council on Education, n.d.; American Association of State Colleges and Universities, n.d.; State Higher Education Executive Officer Association, n.d.; Institute for Higher Education Policy, n.d.). Such lack of a presence of higher education advocacy groups at the state level could be due to different state needs and contexts, as well as insufficient numbers of professionals to engage within a bounded environment to affect change. However, with sufficient resources and organization, engaging in advocacy efforts to affect higher education at the state level may be a way to strengthen the relationship between states and their public institutions. Such efforts could include contacting legislators, the governor’s office, local politicians, or serving on a political action team (Weerts et al., 2010).

Despite limited research on this topic, alumni may be a key group of stakeholders to engage in such efforts as they are uniquely situated to be strong advocates for their alma maters since they are free from the restrictions placed upon lobbyists, are examples of products of their institution, likely have influential stories to share, and in many cases, are registered voters whom legislators have elevated interests to hear from, particularly as elections approach (Koral, 1998). Not considering alumni voices as influential toward affecting the future of public higher education is a missed opportunity to engage them in low cost, meaningful ways that make a positive impact on students and society. With intentional programs in place, institutions can assist their alumni to present a unified message (Koral, 1998) regarding significant concerns and time calls to action around key state and federal funding cycles.
(Weimer, 2005). For this study, alumni advocacy may be considered the organized or independent actions of alumni to educate and/or influence elected decision makers regarding the interests of higher education, need for state funding, and potential impacts of legislation.

Should action not be taken to engage recent graduates in meaningful ways now, the health and longevity of the engagement and philanthropy pipeline will suffer, contributing to detrimental consequences that harm students, institutions, and society.

**Impact on Students**

Reduced funding affects students as financial aid intended to help them afford the cost of college, often falls short of the funds needed to persist through graduation, leaving families little choice but to take out large loans they will need to one day repay (Goldrick-Rab 2016a; 2016b). Additionally, over time, programs like the Pell Grant, intended to assist low-income students access higher education (U.S. Department of Education, n.d.), have diminished in value. When the program began in 1972 it covered 80 percent of the total cost of attending the average public institution and all costs of attending community college. However, today the same grant only covers about 30 percent of the cost of attending a public institution and less than two-thirds of the cost of attending a community college (Goldrick-Rab, 2016a).

Taken together, these circumstances create a dire environment where a quality, public college education is becoming increasingly less accessible and affordable. Given the current environment of growing college costs and the need for postsecondary education, many students feel they have no choice but to take out lofty loans as a means to ensure a better future. Such actions have contributed to a student debt crisis where increasing numbers of students are defaulting on their loans. Should the

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1 Cost of attendance is considered all costs for attending college that may include tuition and fees; room and board; an allowance for books, supplies, transportation, dependent care, etc. (Federal Student Aid, n.d.).

2 It is estimated that by the year 2027 nearly 70 percent of all jobs in the United States will require some form of postsecondary education (Carnevale, 2020).
trend continue, nearly 40 percent of students who began college in 2003 are predicted to default by the year 2023 (Scott-Clayton, 2018). As alumni, and recent graduates specifically, have likely been affected by increased college costs and reduced state funding that has resulted in them taking out large student loans, their personal stories and the impacts of their debt shared through alumni advocacy efforts could be particularly influential to affecting needed change related to state funding and the accessibility of public higher education.

**Institutional Consequences**

As institutions seek alternative methods to bridge funding gaps, some have given up autonomy and embarked in business partnerships as a means of sustaining their operations (Mitchell et al., 2017). While such partnerships may please external constituents such as wealthy donors, corporations, and foundations with targeted research agendas, they undermine faculty autonomy (Schrecker, 2010) and compromise the charter between higher education and the public that is committed to “developing research to improve society, training leaders for public service, and educating citizens to serve the democracy” (Kezar et al., 2005, p. xiii).

**Donors**

Specifically, apart from alumni, others choose to support institutions for a variety of reasons and may include faculty, staff, parents, and friends of the institution. Among various source groups, non-alumni individuals account for contributing about 18 percent of total gifts to institutions, surpassed only by foundations (30 percent) and alumni (26 percent) (Council for Advancement and Support of Education, 2019). When considering the impact of this group and others, it is important to acknowledge that among all donations, the majority of gifts commonly come from a small percentage of donors (Kozobarich, 2000; Drezner, 2011; EAB, 2016; Linder & Meu, 2019; Schiller, 2019) potentially enabling those with the greatest wealth to exercise undue influence over the trajectory of higher education programs and policies. Exploring the motivations of contemporary donors who make large gifts to higher
education, Strickland (2007) found that these donors are inclined to give based on their interest to cultivate change and desire to have a transformative impact through their donations. With such desires, come expectations of greater involvement that may be achieved through volunteerism or political advocacy, measures of accountability, and partnership (Grace & Wendroff, 2001). While such gifts may be perceived as beneficial and necessary to elevating institutional quality, they may also be restricted in ways that are detrimental to promoting access and equity. Such gifts may also come with targeted agendas that are misaligned with an institution’s mission or goals and may not further the public good mission of higher education.

**Corporations & Foundations**

Corporations and foundations also play a critical role in helping to further the impact of higher education through philanthropic support and strategic partnerships (Worth, 2000; Abbott et al., 2011). In an increasingly competitive marketplace, corporations have seen the value of evolving their relationship with universities from donors to investors (Abbott et al., 2011). With this evolution, the capacity for corporations to invest in higher education remains, but how funds are allocated has changed. Gone are the days of unrestricted gifts, replaced by targeted investments that further strategic objectives. In this new environment, corporations prioritize ongoing, holistic relationships with institutions, often motivated by their enhanced access to student recruiting, executive education, faculty consultants, sponsored research, licensing opportunities, and joint proposals for federal funding that seek to benefit the company and institution (Abbott et al., 2011). When aligned, strategic partnerships of this nature offer mutual benefits to both parties and have the ability to elevate the prominence of the institution to attract additional support. However, similar to the relationship of institutions with high-level donors, the investments of corporations have the ability to restrict how funds are allocated and may come with their own agendas, so extra care must be taken before entering
such relationships to ensure there is a mutual benefit that aligns with the values and goals of the institution.

Historically, alumni and foundations have contributed the largest share of philanthropic support to higher education. Since 2007, foundation support has surpassed alumni giving, with more than 40 percent of foundation support coming from family foundations (CASE, 2019), some of which are influenced by alumni (CASE, 2019; Strout 2004; Jordan, 2002). Foundations may be inclined to give to higher education for a variety of reasons that may be as broad as benefiting humanity or as narrow as research on a rare health condition (Smith, 1993) and like corporations, foundations are inclined to invest in people and causes for which they are passionate.

In the realm of foundations, scholars have acknowledged the rise of a new, more aggressive style of philanthropy in higher education that seeks to reshape the arena by influencing changes in public policy. In August 2010, the Chronicle of Higher Education published an article about the rapidly growing influence of major national foundations such as the Gates Foundation and the Lumina Foundation for Education. In the article, Terry Hartle of the American Council of Education (ACE) characterized this new type of philanthropy enacted by foundations such as Gates and Lumina as “advocacy philanthropy” (Ashburn, 2010, para. 22), a term that has since been embraced by other scholars focused in this area (Kelly & James, 2015). Taking a closer look at top higher education funders, Kelly and James (2015) found that Gates and Lumina ranked near the top of the list in terms of the number of grants awarded and total dollars spent on higher education, indicating how active they are in this arena. However, despite the large dollars spent on higher education, Gates and Lumina were also found to give a much smaller proportion of their overall funding for higher education to colleges and universities than the other foundations. Instead, Gates and Lumina invested more in nonprofit research organizations, government agencies, and the media (Kelly & James, 2015) in their efforts to affect policy,
illuminating the difference between a new model of advocacy philanthropy and the more traditional approach.

Critics of this new type of philanthropy question the role of foundations in public matters, as these foundations seek to hold colleges and universities accountable, but have not been elected and face little democratic accountability for the targeted agendas they advance (Parry et al., 2013; Kelly & James, 2015). Some also feel that higher education practitioners and educators have been purposefully excluded in the development of policy reform strategies that have broad implications for all (Parry et al., 2013; Kelly & James, 2015). Furthermore, in lieu of having the right stakeholders at the table, critics have expressed concern for whether these powerful foundations have invested enough in the basic research needed to test their ideas that in some cases could jeopardize or devalue the democratic purpose of higher education (Kelly & James, 2015).

Taken together, while fundraising efforts and philanthropic gifts from external constituents such as those mentioned here and others beyond the scope of this research may help to mitigate the effects of rising costs and reduced state funding, they are not the panacea to reduced state appropriations (Daniels, 2016; Grant Thornton, 2016). Alumni advocacy has the potential to balance out the ability of those with the greatest wealth to influence the trajectory of higher education policies and programs by engaging alumni as advocates to increase state funding for higher education. Activating alumni with authentic experiences from which to draw from and whose actions may be seen as altruistic (Weerts & Ronca, 2009; Underwood, 2012), can also send a strong message to legislators who have a responsibility to their constituents and the communities they serve. Through alumni advocacy the need for institutions to seek alternative methods to bridge funding gaps may be diminished, helping to maintain the integrity of the public-good mission of higher education.
**Detriment to Economy**

If nothing is done to make higher education more accessible and affordable, the United States will soon feel the consequences, as having a more educated citizenry pays public, private, social, and economic benefits to all (Kezar, et al., 2005; Ma et al., 2016; Institute for Higher Education Policy [IHEP], 1998). On the individual level, over the course of a lifetime, those with a bachelor’s degree earn 84 percent more than their counterparts with only a high school diploma (Carnevale et al., 2011). These individuals are also more likely to be employed, live longer lives, have better health outcomes, and increased levels of wellbeing (Ma et al., 2016). In turn, society also benefits from increased tax revenue from these individuals, a reduced reliance on government assistance programs, reduced crime, and greater levels of community engagement (Ma et al., 2016).

Increasing postsecondary credential completion within the United States is also essential to ensure the country has an economically sound future and remains globally competitive. By the year 2027, it is estimated that approximately 70 percent of all jobs in the U.S. will require some form of postsecondary education (Carnevale, 2020) and while the U.S. once had one of the most educated workforces in the world, today we trail behind eleven other countries (Organisation for Economic Co-operation and Development [OECD], 2018). Through a variety of efforts, the credential attainment rate in the U.S. has increased 16 percentage points since 2009 to nearly 54 percent (Lumina Foundation for Education, 2023) but still falls short of the Lumina Foundation’s goal to increase the national degree attainment rate to 60 percent by the year 2025 (Lumina Foundation for Education, 2023).

In Massachusetts, the site for this dissertation study, where there is a high concentration of higher education institutions, the effects of reduced state funding for public higher education are more apparent than ever. Since 2001, state funding for public higher education in Massachusetts has decreased by 32 percent per student (Thompson, 2018). As a result, the average tuition and fees for four-year institutions in the state has more than doubled. Such sharp cost increases have resulted in
more working-class families borrowing money and taking on more debt to afford a postsecondary education. Specifically, from 2004-2016 the average debt per graduate in Massachusetts grew by 77 percent, making it greater than all states but one (Thompson, 2018). Although public higher education strives to be accessible to all as part of the public-good mission of higher education, graduates of public universities in the state are now leaving college with debts that are nearly equivalent to graduates of private institutions (Thompson, 2018).

With the impact on students, institutions, and the economy in mind, it is evident that decreases in funding for public higher education whether it be through reduced state appropriations, declining alumni participation, or other sources, may have far-reaching negative consequences. Such diminished funds result in increased costs and lower spending for research and instruction, while also adding more barriers that make higher education less accessible to underserved students (Flannery, 2021). As a result, such funding deficits hinder public state institutions from “developing research to improve society, training leaders for public service, and educating citizens to serve the democracy” (Kezar et al., 2005, p. xiii). Should alumni and recent graduates specifically be activated to support their alma mater through advocacy efforts, they could assist to gain the state funds needed to avoid such negative consequences while also engaging in ways that fit their capacity and inclination to set them on a positive trajectory for future engagement and giving.

**Purpose of Study and Research Questions**

The purpose of this study was to explore how recent (up to 10 years since graduation) undergraduate alumni from the University of Massachusetts Amherst³ perceive and/or engage in alumni advocacy efforts. The study explored how recent graduates perceived their alma mater as a result of

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³ Naming the institution and state of the study was an intentional decision I made as the researcher to provide important context regarding the site and political/higher education environment experienced by alumni. With this decision, additional steps were taken to maintain participant confidentiality including obscuring the names of some participant involvements and using pseudonyms throughout.
their experiences in the past and present. These perceptions served as a starting point for understanding how each alumnus/na may think about or be inclined to engage in advocacy efforts on behalf of their alma mater now and in the future regardless of their past experience with such efforts. Additional criteria for participants included that they still reside in Massachusetts and were formerly involved in instrumental student activities.\footnote{According to Glanville (1999) instrumental activities have tangible goals associated with membership beyond participation and may include involvement in activities such as: 1) school newspaper, magazine, and yearbook 2) student council, student government, and political clubs; 3) debating and drama; 4) vocational education clubs; 5) youth organizations in the community; and 6) Junior Achievement.} These criteria are important for several reasons. Still residing in Massachusetts, the participants are likely affected by the same policies and potential shortfalls in state funding for higher education. Additionally, legislators may have an elevated interest to hear from them as elections approach (Koral, 1998). Also, having previously participated in instrumental activities as students, these alumni are more likely to be politically involved later in life (Glanville, 1999). Due to the recency of their college experiences, these graduates may better be able to recollect and share their stories. Furthermore, engaging alumni soon after graduation has potential to establish a lifelong connection between alumni and their alma mater that may pay returns to future generations of students and the institution for years to come. The following research questions guide these efforts:

- How do recent graduates perceive their alma mater?
  - How do or may recent graduates engage with their alma mater?

- How do recent graduates perceive the value of alumni advocacy?
  - How do or may recent graduates engage in alumni advocacy?

- Based on participant experiences, how might recent graduates be inclined support institutional advocacy efforts?
Research Approach

To explore and understand how alumni perceive and engage in alumni advocacy behaviors, I utilized a constructivist approach to understand the unique, lived experiences of each individual and the meaning made from them (Jones et al., 2014). A qualitative grounded theory design was appropriate as little is known about the phenomenon of alumni advocacy and an aim of the study was to construct an explanatory theory that uncovered a process inherent to this area of inquiry (Strauss & Corbin, 1998; Merriam, 2009; Chun Tie et al., 2019). Through this design, I explored each participant’s thoughts and experiences regarding their alma mater and political advocacy and the meanings made from them.

To ensure a doable study with “information rich” cases that can be studied in depth (Patton, 2002, p. 230), it was appropriate to use a purposeful theoretical sample recruited through snowball sampling, where alumni from the single institution recommended peers who were able to speak in depth about the topic of interest (Merriam, 2009; Patton, 2002). To meet this goal, 15 recent undergraduate alumni from the University of Massachusetts Amherst who graduated within the past ten years, still reside in Massachusetts, and were formerly involved in instrumental activities as students were recruited to participate.

Information was collected in two phases. In the first phase, participants completed a short screening questionnaire (see Appendix B) to ensure they qualified for the study and to help the researcher get to know more about them and their experiences leading up to, during, and after college prior to meeting. This questionnaire was solely used to provide context for each subsequent semi-structured, one-and-a-half-hour interview.

The second phase consisted of one and a half hour online semi-structured interviews (see Appendix E) that occurred via videoconferencing software and were recorded to ensure the accuracy of data collected. Such interviews were appropriate for this study as they helped guarantee access to participants regardless of their geographic location. Additionally, since data was collected during the
COVID-19 global health pandemic, remote interviews provided a sense of safety and security to me, as the researcher, and the participants by not having them in the same space and requiring them to wear masks that could be uncomfortable or hide important facial expressions that serve as visual cues. Furthermore, the use of videoconferencing software facilitates a face-to-face dialogue, enabling the observation of visual and verbal cues in real time (Salmons, 2012).

Once the data were collected, they were transcribed from the recordings and analyzed through inductive initial coding and then deductive initial coding guided by sensitizing concepts from the relevant literature (Charmaz, 2014; Strauss & Corbin, 1998). By viewing the data first inductively and then deductively through sensitizing concepts from the literature, it enabled new concepts to emerge that could build upon, confirm, refute, or modify prior understandings of the studied phenomenon. Specific to grounded theory, data collection and analysis happened concurrently and cyclically using theoretical sampling, memo writing, and the constant comparative method (Strauss & Corbin, 1998; Charmaz, 2014). Focused coding was later used to identify the most significant and/or frequent initial codes that were elevated to focused codes and then categories depending on their significance and relation to other emerging categories (Charmaz, 2014), ultimately resulting in a theory that provides new insight about the phenomenon of alumni advocacy.

**Significance**

This study is significant as engaging recent graduates is vital to fueling the engagement and philanthropy pipeline that institutions rely on to sustain high-quality educational offerings that serve students, institutions, and society. With multiple benefits, alumni advocacy has the ability to appeal to recent graduates in ways that align with their unique capacity and inclination and affect meaningful policy decisions in support of addressing critical needs such as funding for public higher education as the increasing cost makes an affordable, quality postsecondary education out of reach for many. This type of engagement also has the potential to help recent graduates define their role as alumni and stay engaged.
with their alma mater in meaningful ways that may foster a lifelong relationship, beneficial to the institution and alumnus/na.

Furthermore, current literature and empirical studies on alumni advocacy are limited and much of the available literature that does exist is dated. Upon searching the Council for the Advancement and Support of Education (CASE) website it is evident that the organization has documented practitioner efforts through their Currents magazine that has been in production since 1998, offering several practitioner articles, and more recently there have been select webinars and podcasts offered (Council for Advancement and Support of Education [CASE], n.d.c.). Although not directly focused on alumni advocacy, additional resources exist to help practitioners stay informed about legislative issues affecting institutional advancement that include the professional online community of the CASE Advocacy Network and CASE’s Legislative Action Center, an online hub for advancement professionals to learn about advocacy issues affecting higher education advancement with select resources (Barnett, 2019a). Additionally, in 2007 the Public Higher Education Legislative Advocacy Professionals (PHELAP) organization was established. According to their website, PHELAP is a “volunteer organization of higher education advocacy professionals dedicated to determining best practices for advocacy within higher education, developing important professional networks, and sharing valuable resources” (Public Higher Education Legislative Advocacy Professionals [PHELAP], n.d.a., para. 1). This group holds a national annual conference that brings together practitioners to share best practices related to higher education advocacy and lists 62 institutions that have participated in their annual conference since its inception (PHELAP, n.d.b.). The organization is directed by a volunteer steering committee comprised of six individuals who work in alumni relations across the country (PHELAP, n.d.a.).

Through these organizations, practitioners in the field have published literature about the value of alumni advocacy and strategies for designing and implementing effective programs (CASE, n.d.a.). This literature also provides recommendations about program design and recruitment, messaging,
staffing, and resources for implementing alumni advocacy programs (Koral, 1998; Mayer, 2010; Mayer, 2012; Weimer, 2005). However, to date, recommendations put forth by professional organizations and practitioners in the field regarding alumni advocacy are limited as there is little empirical research to back such recommendations. Specifically, little empirical research exists beyond a few dissertations that touch on aspects of the claimed value of alumni advocacy (for example, Buchli, 2015; Burkum, 2009; Underwood, 2012) and a few mostly quantitative studies that span across alumni relations, touching on topics of public engagement, alumni volunteerism, donor volunteerism, and alumni advocacy (for example, Weerts & Ronca, 2008; Weerts et al., 2010; Weerts, 2015).

According to Weerts, Cabrera, and Sanford (2010) a central problem prior to their study, was that no foundational studies had been conducted to help scholars and practitioners conceptualize the roles alumni play in helping support their alma mater. With this limited foundation, researchers and practitioners have little knowledge to build upon and enact. Given these circumstances, there is a large need and opportunity for future research to fill this void. With an informed understanding of alumni roles and motivations related to advocacy efforts, practitioners may make informed decisions about best ways to engage their alumni, while helping solve dire funding issues that restrict access for students, compromise educational quality, and jeopardize the future of an economically stable and globally competitive nation.

**Definition of Terms**

The following definitions clarify major terms used in this study and are intentionally listed in an order that helps build upon predefined terms:

**Alumnus/na:** The traditional definition of *alumnus* is a graduate or former student of a specific institution. However, from institution to institution this term may be defined differently. Some institutions may limit the term to only include graduates, while others may include any person who is a former student, regardless of whether a degree was obtained (CASE, n.d.b.). For the purpose of this
study an alumnus/na will be considered any individual who has attended and obtained a degree from their institution. Commonly, alumnus is used as the singular masculine noun and alumna as the singular feminine noun. Throughout the study the term alumnus/na will refer to a single graduate of the institution and alumni will refer to multiple graduates of the institution.

**Political and Legislative Advocacy:** “An activity where colleges and universities focus attention and effort on educating elected decision makers about the interests of higher education and the impact of potential legislation, rules, and regulations” (Underwood, 2012, p. 6; Walker, 1991). Such behaviors may include contacting legislators, the governor’s office, local politicians, and serving on a political action team (Weerts et al., 2010). For the purpose of this study the term will be referred to as political advocacy.

**Alumni Advocacy:** For the purpose of this study alumni advocacy may be considered the organized or independent actions of alumni to educate and/or influence elected decision makers regarding the interests of higher education, need for state funding, and potential impacts of legislation. In other words, alumni advocacy refers to alumni participating in political advocacy.

**Alumni Advocates:** “Alumni who are engaged in contributing to the decision making for their alma mater” (Underwood, 2012, p. 4).

**Alumni Volunteerism:** Alumni who engage in behaviors that support their institution. According to Weerts, Cabrera, and Sanford (2010) such behaviors may include mentoring new alumni, recruiting students, and participating in special events.

**Alumni Support:** The contribution of one’s time to volunteer or advocate on behalf of their alma mater and/or the contribution of financial gifts to one’s alma mater (Weerts & Ronca, 2008; Weerts et al., 2010).
**General Engagement:** For the purpose of this study general engagement refers to when alumni engage in support behaviors not related to advocacy. This term is used throughout the study to draw distinctions between advocacy-related engagement and all other forms of engagement.

**Recent Graduates and Young Alumni:** Depending on the institution and context, recent graduates may also be referred to as young alumni. Institutions may categorize this group as those who have graduated within 10-15 years (McDearmon & Shirley, 2009) or those under 35 years of age (House, 2015). More commonly, the term recent graduate is preferred to young alumni as young alumni connotes an age demographic that may not hold true for recent graduates (Bentz Whaley Flessner, 2017). For the purpose of this study the term recent graduate is used as the study welcomed participants of all ages. However, when discussing the relevant literature, the term young alumni is often used to align with previous literature about the population and the way in which it was studied. This population is appropriate for the study as any recollections of their student experience will be fairly recent and potentially more accurate.

**Capacity:** Refers to one’s ability to participate in political activities. Specifically, for this study it relates to the availability of one’s time, resources, and skills (Brady et al., 1995).

**Inclination:** Refers to the likelihood that one will become involved in political advocacy behaviors. Weerts, Cabrera, and Sanford (2010) contend that one’s inclination for political advocacy is formed early in life.

**Conclusion**

Underengaged recent graduates pose a threat to the future of higher education as they are a vital group to involve who are essential to the health and longevity of the engagement and philanthropy pipeline that institutions rely on to sustain high-quality offerings. Concerningly, at the present time a small number of donors contribute the most gifts while there has also been a steady decline in number of new donors (EAB, 2016), thus threatening the health of the pipeline and the prospect of future major
gift donors. Given this environment, it is more important than ever to effectively engage recent graduates soon after graduation in ways that align with their capacity and inclination to build enduring, meaningful relationships that have the ability to affect change now and in the future at their alma mater.

At the same time institutions are struggling to effectively engage recent graduates, public institutions are attempting to constrain rising college costs that threaten accessibility. Specifically, insufficient funding has contributed to tuition increases (Ma et al., 2015) and reduced educational quality as institutions attempt to balance their budgets with cost cutting measures such as reducing faculty, decreasing course offerings, deferring maintenance, or eliminating programs, which has negatively affected the affordability and accessibility of public higher education (Mitchell et al., 2017). Reduced funding whether through diminishing state appropriations, declining alumni participation, or other sources, is detrimental for students, institutions, and society. Given the current environment of declining numbers of new donors, the funding challenges that face higher education, and recent graduate motivations to engage cause-based philanthropy, political advocacy may be one approach that can effectively engage recent graduates in meaningful ways that align with their capacity and inclination. It may also serve as a way to set recent graduates on a positive trajectory for a lifetime of engagement and giving, thus enabling them to help their alma mater address critical needs now and in the future.

Chapter One provided an overview of the dissertation topic, including the study’s background and purpose, research questions, research approach, and significance. Chapter Two provides an overview of the literature related to alumni volunteerism and institutional advocacy efforts; considers the influence of alumni on policy formation; and delves into the sensitizing concepts of capacity and inclination that are foundational for shaping alumni research for advancement (Cabrera et al., 2005). Chapter Three describes the study’s research design informed by the research questions as well as detail
about the methodology, setting of the research, participant sampling, data collection, and analysis. Ethical considerations and design trustworthiness are also discussed. Chapter Four provides the study’s findings, which center on alumni experiences over time, their perceptions, and their capacity and inclination to advocate. Lastly, Chapter Five concludes with a discussion of the study findings by presenting a substantive theory for alumni to become alumni advocates, scholarly contributions related my theory, and offers implications for future research and practice.

CHAPTER 2

LITERATURE REVIEW

Given this context and the rich history of Massachusetts public higher education, this study explored how recent undergraduate alumni from the University of Massachusetts Amherst (UMass Amherst)\(^5\) perceive and/or engage in alumni advocacy as a starting point for understanding how to engage recent graduates to affect policy decisions in support of critical needs. Additionally, it provides a greater understanding about the potential to engage recent graduates as advocates so they may better define their role as alumni, stay engaged with their alma mater, and foster a lifelong relationship that is beneficial to the institution and alumnus/na.

Building on the previous work of Weerts and Ronca (2008) and Weerts, Cabrera, and Sanford (2010), considering an alumnus/na’s capacity and inclination for participating in alumni advocacy behaviors were key components of this dissertation study. Measures of capacity and inclination\(^6\) have been cited by researchers and advancement professionals as important factors used to help identify major gift prospects (See Volkwein et al., 1989; Schiller, 2018). These concepts are also foundational for shaping alumni research for advancement (Cabrera et al., 2005). Rather than employing a traditional conceptual or theoretical framework, this study uses these sensitizing concepts in alignment with the

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\(^5\) The University of Massachusetts Amherst is commonly referred to UMass Amherst or solely UMass as it is the flagship institution of the system.

\(^6\) Sometimes referred to as motivation (see Volkwein et al., 1989).
grounded theory study design (that will be discussed further in the next chapter) as a starting point for learning more about alumni advocacy. This chapter unpacks these concepts, as well as additional factors that helped shape this study. With a better understanding of capacity and inclination, as well as the various external constituents who have the ability to influence policy formation, scholars and practitioners will be better able understand the value of such efforts and how the right alumni may better be engaged through institutionally organized political advocacy efforts. Related to these efforts, recent graduates may be a prime group to engage, as while they may not be financially situated to give as often or as much to their alma mater as more seasoned alumni, they are a group with great future giving potential who are invested in the future of their alma mater (Monks, 2003; Gaier, 2005) and such dedication may be ripe for guiding toward volunteer or advocacy roles. With a better understanding of all of these factors and particularly alumni inclination and capacity related to higher education political advocacy, institutions may be better able to reach, guide, and engage recent graduates in organized action that maximizes the impact of unified efforts to the benefit of their alma mater in the short-term, while fostering engagement that may pay dividends for years to come as recent graduates mature and develop greater levels of human and social capital that they may one day contribute back to their alma mater.

Capacity

Related to volunteerism, Weerts and Ronca (2008) postulate that capacity is the ability of one to commit their time to volunteer; it may also include the ability to commit one’s financial resources and skills (Brady et al., 1995; Verba et al., 1995; Weerts et al., 2010). When considering key factors related to volunteerism, such as political advocacy, it is helpful to consider overall statistics on those likely to volunteer. According to the Bureau of Labor Statistics (2016), about 62.6 million people, or 24.9 percent of the population age 16 and over volunteered for an organization at least once from September 2014 to September 2015.
Throughout one’s life, a combination of demographic factors (age, race, gender), human capital (education and income), and social networks (family structure and work) may influence one’s likelihood of volunteering.

Life Stage and Free Time

Discretionary time that changes with one’s life stage may affect the likelihood that one will volunteer. The analysis of time is important in the context of alumni volunteerism because it suggests that certain lifestyle patterns may promote or “crowd out” opportunities to volunteer (Weerts & Ronca, 2008, p.277). For example, it was once thought that the volunteer labor force consisted mostly of women with time on their hands, suggesting that paid employment crowds out opportunities to volunteer (Wilson, 2000; Markham & Bonjean, 1996). However, overall volunteer activity in the United States is rising (Americorps, 2018) and as women’s participation in the workforce has generally increased over time (Bureau of Labor and Statistics, 2019), they continue to volunteer at a higher rate than men (Bureau of Labor and Statistics, 2016). These facts are supported by a competing hypothesis that suggests that although being employed consumes one’s time, work also serves as a form of social integration and means of building civic skills, both of which increase the chances of volunteering (Brady et al., 1995; Schoenberg, 1980; Wilson, 2000).

Focusing on the importance of time use, a number of researchers have conducted studies that consider the balance of work, personal, and leisure time to understand how discretionary time exists (Singleton & Harvey, 1995; Robinson, 1999; Zuzanek & Smale, 1999) arguing that life stage is critical to considering patterns of time use (Zuzanek & Smale, 1999). Related to this study, such an understanding of discretionary time is important to help consider how alumni of different life stages may make room for volunteering within their discretionary time. When any single demographic, human, or social capital variable is considered alone, an incomplete understanding of one’s time use may be understood at best. Consider three 23 to 28-year-old women, who may be at different points of life. One could be single,
employed, and financially independent. Another could be married with no children, while the last could be married with children and staying home with childcare responsibilities. Considering a combination of these factors, it would be unrealistic to assume the amount of discretionary time each has available would be similar, solely by their age (Zuzanek & Small, 1999). This study will build on what is known about time use as it relates to life stage and available discretionary time to better understand how recent graduate capacity to volunteer as advocates may be influenced by a combination of variables including demographic factors, human capital, and social network resources. In the sections that follow, known variables that influence the likelihood of volunteering will be explored as a starting point for understanding how such variables may be applied to one’s capacity to participate in alumni advocacy efforts among young alumni.

**Demographic Factors**

One of the demographic factors that predict volunteerism is one’s gender. Women volunteer at a higher rate than men across all age groups and education levels, but among volunteers, men and women contribute roughly the same number of hours (Bureau of Labor Statistics, 2016). Women may be more inclined to volunteer as they have been found to rate higher on measures of altruism and empathy, and assign a higher value to helping others (Wilson & Musick, 1997). In alignment with this value, women are more likely than men to participate in informal volunteering or “helping” behaviors such as assisting a friend or neighbor (Wilson & Musick, 1997).

Additionally, among major race and ethnicity groups, Whites continue to volunteer at a higher rate (26.4 percent) than Blacks (19.3 percent) (Bureau of Labor & Statistics, 2016). This difference may be due to generally lower levels of education, income, and occupational status among Blacks given systemic marginalization (Wilson, 2000) and could also be greater than statistics suggest due to compensating social resources that make Blacks more likely to volunteer, such as ties to their community (e.g., church) (Wilson & Musick, 1997; Wilson, 2000). When controlling for socioeconomic
factors such as education and income, the gap in volunteer rates among Blacks and Whites diminishes (Musick et al., 2000).

Age also is related to one’s likelihood to volunteer (Bureau of Labor Statistics, 2016). In their study that sought to create profiles of supportive alumni, Weerts and Ronca (2007) found that for each unit increase in age, alumni were 1.09 times more likely to volunteer at their alma mater. In line with this finding, the Bureau survey found that individuals ages 35 to 44 years old and 45 to 54 years old were most likely to volunteer, while those between the ages of 16 to 24 and 25 to 34 were least likely to volunteer (Bureau of Labor Statistics, 2016). Wilson (2000) hypothesizes that lower volunteer rates among younger age groups may be related to reduced structure that was formerly provided by school-based activities and increased social freedoms aligned with predominantly single and childless living. Additionally, differences in volunteer rates may be due to changes in social networks throughout one’s life as aging reconfigures social roles, creates new opportunities, and imposes different constraints. Furthermore, people of different ages and generations have different outlooks on life, which may change their attitudes toward volunteering (Wilson, 2000). With such information in mind, this study sought to better understand how young alumni may better be engaged through advocacy efforts that align with their individual capacities to help meet institutional needs while also furthering their potential for lifelong engagement with their alma mater.

Social Networks

Social networks are an important component that have been found to influence the likelihood that one will volunteer (Wilson & Musick, 1997) and family structure is a contributing variable to these networks. Marital status and the presence or absence of children help shape one’s family structure and specifically, parents with children under the age of 18 have been found to be more likely to volunteer (31.3 percent) than those without children (22.6 percent) (Bureau of Labor & Statistics, 2016). Additionally, married individuals have been found to volunteer at a higher rate (29.9 percent) than those
never married (19.9 percent) (Bureau of Labor Statistics, 2016; Sundeen, 1990), while single people without children volunteer the most hours (Sundeen, 1990). Higher volunteer rates among parents and those who are married can also be attributed to their social networks (Wilson, 2000) as researchers have found that those with extensive social networks and multiple organization memberships are more likely to volunteer (Jackson et al., 1995; Smith, 1994). Among those who are married, if one spouse volunteers, the chances are the other does too (Freeman, 1997). The bond of marriage may draw individuals into the community, helping increase their likelihood of social connections that prompt involvement or volunteering. However, although this group is more likely to volunteer, the amount of discretionary time available to contribute to volunteer activities may also be limited by the responsibilities that come with marriage (Sundeen, 1990).

In the case of parents, those with school-aged children are more likely to have links to school organizations such as parent-teacher associations, sports teams, or other child involvement activities (Smith, 1994; Wilson, 2000). It is also likely, that when children are in school, some parents may have more discretionary time to spare and commit to volunteering (Gora & Nemerowicz, 1985).

Similar to one’s family structure, one’s work may present competing factors that can restrict or promote the likelihood that one will volunteer. On one hand, those who are employed may have limited discretionary time available to volunteer, while on the other hand, their employment may help build enhanced social networks that may positively contribute to the likelihood they will volunteer. When considering the relationship between employment and volunteer hours some researchers have predicted a negative relationship (Markham & Bonjean, 1996) as paid work hours may limit one’s discretionary time that might otherwise be used for volunteering. This hypothesis is supported by the fact that part-time workers volunteer more than full-time workers (Piatak et al., 2019). However, a complication to this notion is that as income increases with occupational status, so does the likelihood of one volunteering (Wilson & Musick, 1997). This could be due to enhanced skills and social networks of
those in managerial or professional level roles who are more likely to be asked to volunteer (Wilson, 2000). With this in mind, when people state that they are too busy to volunteer, they could be just as likely to be referring to other life responsibilities as they are to the demands of their job (Brady et al., 1995; Verba et al., 1995) and this is worth further exploration.

**Human Capital**

Comprised of various factors including one’s education and income, one’s human capital also influences the likelihood they will volunteer. The importance of education is particularly strong as a consistent predictor of volunteering (Sundeen, 1992; Auslander & Litwin, 1988). Those with higher levels of education are more likely to volunteer at each level than those with lower levels of education and those who are employed volunteer at a higher rate than those who are unemployed (Bureau of Labor Statistics, 2016). Education enhances the likelihood of volunteering because it broadens one’s social networks, heightens awareness of problems, increases empathy, enhances communication and writing skills, and helps build confidence (Musick & Wilson, 2007; Brady et al., 1995; Rosenthal et al., 1998; Wilson, 2000). Those with more education are also more likely to be asked to volunteer, which is partially a function of belonging to more organizations and having broader social networks (Musick & Wilson, 2007).

Related to education, the research on income and volunteering suggests volunteer work is costly and demands resources from those who give their time, skills, and monetary funds (Son & Wilson, 2015), finding a positive relationship between level of income and volunteering (Pho 2008; Wilson & Musick, 1997; Wilson & Musick 1998). Occasionally, a study fails to replicate these findings (Bekkers, 2005) or finds a negative relationship between income and volunteer hours (Choi & DiNitto, 2012), but in general, even when controlling for education and employment, volunteers earn more than those who do not volunteer (Son & Wilson, 2015). This may be because those with higher incomes have enhanced social networks, more freedom in their work schedules to allow time for volunteering, and the skills
needed to translate into various volunteer activities. Additionally, those with high-paying jobs, are more likely to be asked to volunteer (Musick & Wilson, 2007). In a recent study, Son and Wilson (2015) explored the relationship between income and volunteering further, finding that income may be more complex than suggested by previous research. The study explored potential mediating factors such as financial strain and wellbeing, finding that financial strain influences wellbeing, which in turn influences one’s likelihood to volunteer. Those with lower levels of perceived financial strain, generally had higher levels of wellbeing and were more likely to volunteer. Those starting out upon graduating college may also face increased levels of financial strain that could potentially influence their likelihood of volunteering and is worth further exploration.

With the various demographic, human capital, and social network variables that influence one’s capacity to volunteer in mind, this study builds upon what is known to better understand through the individual experiences of recent graduates the combination of factors they perceive to influence their likelihood to volunteer in general and through alumni advocacy efforts. With a better understanding of these personal experiences, recommendations will be offered that practitioners can apply to better engage recent graduates early on through advocacy efforts as a means of making public higher education more affordable and accessible, while also keeping alumni who may one day have the ability to financially contribute, engaged with their alma mater.

**Inclination**

Measures of capacity are not enough to predict whether an alumnus will volunteer (Weerts & Ronca, 2008). In combination with one’s capacity, this study extends the literature on alumni support (Weerts & Ronca, 2007; Weerts & Ronca, 2008; Weerts et al., 2010) to consider how inclination may be an important element to contemplate when thinking about one’s motivations to contribute their time and talents toward advocacy efforts. Inclination may best be understood through theoretical models that are relevant to the literature on alumni support (Weerts & Ronca, 2008); such models include social
exchange theory (Homans, 1961), expectancy theory (Vroom, 1964), and the investment model (Rusbult, 1980). Generally in the context of higher education, social exchange theory considers one’s feelings toward the institution and whether these feelings merit the contribution of one’s time and energy; expectancy theory relates to whether one feels their efforts will be instrumental to creating positive outcomes and whether they are capable of carrying out their role; and finally, the investment model predicts support based on the amount of time, emotion, and energy already invested with the institution (Weerts & Ronca, 2008). As a starting point for understanding these models they are first briefly discussed in relation to their origins and then in greater detail as they may specifically relate to the political advocacy behavior of alumni stakeholders in the sections that follow.

**Social Exchange Theory**

With roots in sociology and behavioral and social psychology, social exchange theory emerged through the work of figures such as George Homans, John Thibaut, Harold Kelley, and Peter Blau (Emerson, 1976). Although a review of the work of each of these theorists is beyond the scope of my dissertation, this study uses the foundational work of George Homans (1961) as a starting point for understanding social exchange theory that has continued to evolve and develop since its establishment. Focused on the social interactions of individuals and dyadic and/or small group relationships (Trevino, 2009; Cook et al., 2013), Homans emphasized the importance of interrelated behaviors. For example, how one person’s behavior, person A is reinforced by another’s, person B and, how B’s behavior thus reinforces A’s behavior. As each person emits a behavior, they may incur costs and have more than one course of action available to them (Cook et al., 2013).

Exemplifying such considerations, Homans (1961, 1974) put forth key propositions that framed the study of social behavior and have since served as a basis for future iterations of social exchange theory (see Homans, 1974). While Homans’s efforts were aimed at understanding elementary behavior, as scholarship around social exchange theory evolved, the later work of Blau (1964) was much broader
in aim and focused on links between social behavior and the groups, organizations, and institutions constituted by such behavior (Cook, 2015). Also, different from Homans work that focused on reinforcement principles derived from experimental behavior analysis, Blau’s writings while also framed in terms of rewards and costs, were grounded more towards a sociological version of microeconomics (Cook et al., 2013; Cook, 2015). Over time, building on foundational works of Homans and others, scholars have expanded social exchange theory to also describe power, relational cohesion, and risk and uncertainty (see Cook et al., 2013).

In the context of political advocacy, social exchange theory suggests that alumni will weigh the costs of serving in a volunteer or advocacy role against the benefits they have received in the past or will receive in the future. The theory suggests that decisions regarding support are thought of in economic terms that emphasize the cost and rewards of one’s relationship with their alma mater (Weerts et al., 2010; Chadwick-Jones, 1976). Such support could be philanthropic, volunteer, or advocacy based. For example, a cost for an alumnus/na could be their time, expertise, or utilizing their relationships as resources to advocate on behalf of their alma mater. The perceived rewards could include the quality of their education, career accomplishments, and social connections as a result of their education (Weerts et al., 2010). This is validated in a number of studies that have found alumni support is at least partially predicted by an alumnus/na’s past and present experiences that help shape their perceptions of quality for their alma mater (Weerts & Ronca, 2008; Weerts et al., 2010; Brittingham & Pezzullo, 1990; Taylor & Martin, 1995). Indicators including alumni satisfaction with their college experience, quality of their undergraduate education, the perceived institutional prestige, and subsequent career success since graduation are factors that help determine whether they may be inclined to support their alma mater (Clotfelter, 2003; Utter et al., 1999; Gaier, 2005; Monks, 2003; McDearmon & Shirley, 2009; Leslie & Ramey, 1988; Brittingham & Pezzullo, 1990; Weerts & Ronca, 2008; Weerts et al., 2010).
Satisfaction

Research has shown that alumni satisfaction with their college experience is related to the likelihood that they will give back to their alma mater (Clotfelter, 2003; Utter et al., 1999; Gaier, 2005; Monks, 2003; McDearmon & Shirley, 2009). In a study of the individual characteristics that are correlated with young alumni giving, Monks (2003) gathered data from graduates of 28 different institutions in the United States and found that the most significant determinant of alumni giving levels was an individuals’ satisfaction with their undergraduate experience. Those who indicated they were very satisfied with their experience gave over 2.6 times more to their alma mater and those who were generally satisfied gave 1.8 times more. Similar to the results found by Clotfelter (2003) and Gaier (2005), Monks (2003) found the development of personal relationships as an undergraduate has positive lasting effects related to future giving. Specifically, alumni who had high levels of contact with faculty outside of class, contact with their academic advisor, or contact with campus staff made higher average donations than those who did not disclose having the same connections. Beyond the general alumni population, giving studies focused on young alumni have found that overall satisfaction is an important factor related to future giving (Utter et al., 1999; McDearmon & Shirley, 2009) and giving levels (Monks, 2003).

Quality and Institutional Prestige

The perceived quality of one’s education also is important over time (Utter et al., 1999; Tsao & Coll, 2004; Weerts & Ronca, 2008). This was demonstrated by Weerts and Ronca (2008), who used social exchange theory to better understand what motivates alumni donors to volunteer at their alma mater. Specifically, they considered the academic and social engagement of alumni when they were students on campus and how such factors relate to perceptions of quality among alumni. Consistent with the results found by Tsao and Coll (2004) and Utter, Noble, and Brady (1999), they found that those who perceived having a quality academic experience and reported being academically engaged as students
(interacted with faculty and staff, were exposed to diverse points of view, and experienced academically rigorous programs) were more inclined to support their alma mater. When examining the previous student experiences of alumni from across 28 institutions, Monks (2003) also found that those who had a high level of involvement through an internship and increased contact with faculty, advisors, or staff made higher than average donations.

While perceptions of institutional quality have been found to be strong predictors of alumni support, how quality is described and measured from study to study is inconsistent. For example, quality has been defined by variables such as satisfaction with academic experiences (Weerts & Ronca, 2008; Tsao & Coll, 2004; Utter et al., 1999), expenditures per student (Leslie & Ramey, 1988; Brittingham & Pezzullo, 1990), attentiveness of administration (Utter et al., 1999), size of institution (Leslie & Ramey, 1988), investment in facilities (Utter et al., 1999), median SAT scores of incoming class (Brittingham & Pezzullo, 1990), and national rankings (Brittingham & Pezzullo, 1990). Quality has also been measured by factors related to institutional prestige such as the age of an institution, national ranking as measured by *US News and World Report*, and strong athletic programs (Brittingham & Pezzullo, 1990; Leslie & Ramey, 1988; Liu, 2006; Holmes, 2009). This study engaged how individual alumni define quality and perceive the quality of their alma mater as a way of understanding how their perceptions may influence their likelihood of supporting their alma mater as an alumni advocate.

*Engagement*

Another important factor related to alumni support is engagement. Studied in different ways over time, some studies have explored student engagement to better understand how it may relate to future alumni support and other studies have considered alumni engagement with the desire to understand how one’s involvement with their alma mater may affect future donor or volunteer behavior. Regarding the importance of student engagement as it relates to future alumni support, the findings are inconsistent.
Weerts and Ronca (2008) sought to better understand what motivates alumni donors to volunteer at their alma mater and were surprised to find that social engagement as a student (participation in academic, social, or professional organizations) was not a significant variable associated with alumni volunteerism, despite the strength of this variable in other studies related to alumni giving. Similarly, when studying factors that influence alumni giving, Utter, Noble, and Brady (1999) found perceived quality, value, and satisfaction to be related to future giving, but did not find engagement through student organization membership influenced a student’s intention to give as an alumnus. Some studies have found mixed results as Holmes (2009) found that involvement with undergraduate activities generally increased one’s propensity to give as an alumnus among athletes, student performers, campus leaders, and those involved in Greek life. However, when involved in an affinity group, the likelihood of giving actually decreased. Holmes attributes this to the fact that many affinity groups are formed based on minority status (i.e. LGBTQ groups, cultural groups, and international student groups, etc.) and it could be possible that members of such groups might feel less integrated into the larger campus community.

Conversely, other studies on factors influencing alumni giving have found a positive relationship among student involvement and future alumni support (Monks, 2003; Rau & Erwin, 2015; Tsao & Coll, 2004). In one study, Gaier (2005) sought to understand how one’s satisfaction with their undergraduate experience may influence future giving and participation, finding that alumni who participated in at least one formal student activity as an undergraduate were 87 percent more likely to give and 154 percent as likely to be involved as alumni. Such findings could suggest that student participation may be more closely related to future alumni participation than giving. This could be particularly true among young alumni, who are more likely to participate, but less likely to give than all other alumni (Gaier, 2005). Overall, such inconsistent findings regarding engagement help illustrate the need for more research to better understand how student engagement may relate to future alumni support including political
advocacy. Based on what is known about alumni satisfaction, it seems likely that students who belong to campus groups would be more engaged with their experience and have increased contact with university staff. Such experiences could positively influence their perceptions of quality and value, as well as their likelihood to give back to their alma mater.

Regarding alumni engagement, Taylor and Martin (1995) found that high-level donors were likely to be involved with their alma mater as alumni. Of the alumni sample studied, 30 percent indicated attending alumni events, 23 percent specified membership in a fraternity or sorority, and 30 percent disclosed involvement with a departmental club or organization. Simply being informed through regular alumni communications, receiving invitations to events, or having opportunities to interact with current students has also been found to be positively related to donor behavior (Tsao & Coll, 2004; Rau & Erwin, 2015). Regular contact may help alumni stay engaged with their alma mater and foster emotional attachment, a known predictor of alumni giving (Tsao & Coll, 2004; Brittingham & Pezzullo, 1990). Alumni may also be more inclined to give their support in the form of financial contributions or volunteering, when requests are aligned with their former involvement as students as previous involvement helps signal what is important to the alumnus (Rau & Erwin, 2015). Such findings further the claim that alumni support and involvement may be predicted and motivated by a combination of an alumnus/na’s past and present experiences with their institution.

**Financial Aid**

The type and amount of financial aid received as a student may also predict future alumni support as those who received support may be more inclined to give back in recognition of support received. Dugan, Mullin and Siegfried (2000) studied recent graduates of Vanderbilt University to better understand the relationship between undergraduate financial aid and future giving as alumni. They found that receiving a need-based scholarship raised the probability of giving back to one’s alma mater, while receiving a need-based loan lowered the probability of giving back to one’s alma mater. They also
found the dollar value of such loans and grants did not have a significant impact on the likelihood alumni may give, nor the amount of such gifts. Extending the findings of this study, Monks (2003) examined a broader sample of young alumni from 28 institutions and also found a relationship among financial aid and future giving. The study found that alumni who reported receiving financial aid made donations that were 5 percent higher than those who did not receive such aid, while loans were found to have a diminishing effect on alumni giving levels. Specifically, students who graduated with $10,000 in debt gave 10 percent less as alumni than those without student loan debt (Monks, 2003). Such findings suggest that loan repayments may discourage alumni from giving back in the years immediately following graduation. This is significant because contribution patterns develop early in life and have been found to be predictive of future giving. With this in mind, student loan debt upon graduation could affect immediate giving patterns of alumni and also reduce the pool from which larger donations could one day develop (Lindahl & Winship, 1992; Worth, 1993).

In a more recent study, McDearmon and Shirley (2009) sought to understand the factors affect young alumni giving and also found that receiving financial awards had a positive correlation with future alumni giving. However, contrary to previous studies, the researchers did not find a significant difference in alumni giving among those who had taken or did not take out student loans. Such findings could suggest a shift in thinking about the cost of college, where students today might be more likely to expect larger debts owed upon graduation (McDearmon & Shirley, 2009) as the data studied in Dugan, Mullin, and Siegfried (2000) and Monks (2003) represented college cohorts graduating between 1988-1990, more than 30 years ago. Also, similar to the findings of Monks (2003), McDearmon and Shirley (2009) found that 58 percent of those who reported having the largest amount of debt (more than $15,000) were non-donors, compared to 63 percent who had zero loan debt and were donors. Across all levels of debt, most who still owed some amount on their student loans, were more likely to be non-donors (McDearmon & Shirley, 2009).
Taken together, factors such as perceptions of quality, institutional prestige, satisfaction with one’s college experience, engagement as a student and alumnus, and financial aid may all be predictors of future alumni support. As most studies related to Advancement have focused on these variables as they relate to giving, this study sought to extend what is known about these factors and alumni support to help understand why alumni may be inclined to support their alma mater through advocacy efforts.

Expectancy Theory

With roots in industrial psychology and applications in organizational behavior (Miner, 2015), expectancy theory focuses on the cognitive antecedents that go into motivation and how they relate to each other. A such, expectancy theory is a “cognitive process theory of motivation” that is centered around the belief that people believe there are relationships between the effort they put forth, the performance they achieve from such effort, and the rewards they receive as a result (Lunenburg, 2011, p. 1). Put simply, one will be motivated if they believe that a strong effort will lead to an optimal performance which will result in desired rewards (Lunenburg, 2011). Established by Victor Vroom (1964), expectancy theory describes behavioral motivation related to three factors: valence (rewards), the anticipated satisfaction or dissatisfaction from an outcome; instrumentality (performance), the belief that one’s actions relate to outcomes; and expectancy (effort), when one’s behavior is affected by preferences among outcomes and the degree to which one believes particular outcomes are probable. While Vroom suggested that the desire or aversion to act toward a particular outcome was based on extrinsic factors, Galbraith and Cumming (1967) extended his view proclaiming that the valences related to specific behaviors can be intrinsic to the behavior or performance itself. Vroom also suggested that the factors of expectancy theory are all related to each other by an equation where motivation is the result of expectancy multiplied by instrumentality, multiplied by valence. As such, the multiplier effect is significant as higher levels of motivation will result when all factors are high compared to when they are low (Lunenberg, 2011). The theory has served as a foundation for much research (see Zboja et al., 2020),
yet concern has been shared regarding the mathematical equation (Lawler & Suttle, 1973). Recognizing such concern among scholars, Vroom (1995) later shared that due to the “unnecessary formalization” with which he originally presented the theory, the equation received more attention than he intended (p. xviii). With this in mind, as well as the qualitative design of this study, the general premise of expectancy theory was used as a guide for this research independent of any mathematical equation.

Using expectancy theory in the context of political advocacy, alumni may have expectations regarding their role in supporting their alma mater that has been shaped by their past and present experiences (Weerts & Ronca, 2008). Such expectations and experiences may inform future decisions regarding if and how they may support their alma mater. In the context of political advocacy, such behaviors may include sharing posts on social media, writing op-eds, emailing legislators, or using relationships to influence change in a way that helps the university.

**External Relations Effort and Alumni Attitudes**

Institutions have the ability to shape alumni attitudes and expectations from before the time they enroll, while they are students, and after graduation throughout their life through efforts to consistently inform and involve them in the life of the university. As previous research has shown, satisfaction with one’s experience, perceptions of institutional quality, and perceived need for support are among the many factors that may influence the likelihood that one will support their alma mater (Leslie & Ramey, 1988; Weerts & Ronca, 2008; Tsao & Coll, 2004; Taylor & Martin, 1995; Utter et al., 1999, Brittingham & Pezzullo, 1990; Liu, 2006). Regular and consistently timed communications are one way to foster emotional attachment among alumni with their alma mater and increase their inclination to provide future support through general volunteerism, advocacy, and/or philanthropic gifts. Communications such as alumni magazines, newsletters, and annual reports help alumni stay engaged with their institution by exposing them to what is happening on campus, making them aware of important research, and providing accountability related to progress and reaching goals (Levine, 2008).
Such communications also provide an opportunity to shape alumni perceptions by illustrating an institution’s need for support, a known factor that influences giving (Taylor & Martin, 1995).

According to the *Chronicle for Philanthropy*, those born after 1964 state they have stopped giving to charities because the organization hasn’t kept them informed. Additionally, across all generations, 33 percent of those surveyed shared that they stopped giving because they were unsure if their contribution made a difference (Perry, 2005). Such data underscores the importance of effective communication for maintaining meaningful relationships with alumni. Beyond communication efforts, investing in alumni by offering an array of engagement opportunities is also related to future support. Institutions have the ability to shape alumni attitudes and affect future giving through investing in alumni engagement initiatives. Harrison (1995) found a positive relationship between increased expenditures on alumni activities and future alumni giving. Such activities could include promoting alumni groups, participating in events, offering job placement support, recognizing alumni, and more (Harrison, 1995).

Exploring alumni attitudes with the lens of expectancy theory, Weerts and Ronca (2008) found that alumni donors who agreed with the statement “alumni should support their alma mater through volunteer service” were twice as likely to volunteer at their alma mater (p. 289). However, the source responsible for developing such views was unclear as external relations efforts where not a significant predictor of volunteer service. The researchers hypothesize that alumni decisions to volunteer could be more closely aligned with their personal values about service than institutional solicitations. Prior research supports this notion, as being civically engaged in one’s youth may also influence the likelihood that one remains civically engaged later in life (Zaff et al., 2003; Glanville, 1999). Such research informs the current study and provides a foundation for extending previous findings to learn more about when and how alumni attitudes are formed and how such attitudes and perceptions influence one’s decision to support their alma mater.
Charitable Involvement

Another stronger predictor of alumni support (in the form of giving) is participating in or donating to other voluntary and religious groups (Brittingham & Pezzullo, 1990; Astin et al., 1999). Specifically, among young alumni at a large-public university, McDearmon and Shirley (2009) found the strongest variable related to predicting donations was making gifts to other charities or nonprofit organizations. Those who donate to education, appear to be particularly generous as James (2008) found that educational donors gave twice as much to charities as non-educational donors. James’ (2008) analysis also found that educational donors gave three and one-half times more to religious organizations. Related to this finding, a large number of young alumni surveyed by McDearmon and Shirley (2009) indicated they made gifts to religious organizations. However, this category did not represent the largest group of donations among young alumni. Other colleges and universities received the largest percentage of gifts from young alumni donors. This could be because gifts were also made to a spouse’s institution, alumni desired to contribute to an institution where they furthered their education, or motivation to contribute to an institution in the community where they live. These findings illustrate great potential among alumni and young alumni in particular, who value charitable service to also become involved with political advocacy in support of their alma mater.

Volunteerism and Civic Engagement

Being civically engaged early in life increases the likelihood that one will continue to be civically engaged later in life (Zaff et al., 2003; Glanville, 1999; Astin, et al., 1999). In a longitudinal study of college students that collected data upon entry to college, senior year, and nine years after college entry, Astin et al. (1999) found that spending six or more hours engaged in volunteer work in college nearly doubled the chances that the individual would be involved in volunteer work years after college. Additionally, those who reported volunteering "frequently" in high school were more than twice as likely
to devote at least some time to volunteer or community service work nine years later than those who did not volunteer work during high school (p. 196).

More specifically, when considering civic engagement in the political realm, literature suggests that one’s likelihood of becoming politically active relates to family background and political experiences from one’s youth (Verba et al., 1995; Glanville, 1999). Such experiences could include observing parents’ voting behaviors, communication among children and parents, and participating in instrumental extracurricular activities such as student government while in high school or college (Kelly, 2006; Verba et al., 1995; Glanville, 1999). Building upon this knowledge, Glanville (1999) found that participation in instrumental extracurricular activities during high school and college positively predicted political involvement in early adulthood independent of one’s personality traits and established political attitudes.

Collectively, these studies suggest that those who have participated or currently participate in charitable service, civic engagement, or instrumental extra-curricular activities may also be inclined to support their alma mater through political advocacy efforts. Through the lens of expectancy theory, alumni who engage in this form of volunteerism may see a purpose and value in the causes they support. With this may also come an understanding of how they may apply their time and talents to achieve specific outcomes that further advance their alma mater.

**Investment Model**

Lastly, the investment model, theoretically grounded within interdependence theory (see Kelley & Thibaut, 1978) and proposed by Rusbult (1980) suggests the decision to remain or leave a relationship depends on one’s satisfaction with the balance of the cost and rewards, relative to alternatives, and the extent with which they are already invested in the relationship (Le & Agnew, 2003; Weerts et al., 2010). As part of the model three factors are key, *satisfaction level*, the subjective evaluation of the relative positivity or negativity that one experiences in a relationship in relation to the comparison level of other
alternatives; *quality of alternatives*, when one evaluates their current circumstance in comparison to alternatives and chooses to stay or leave a relationship based on the anticipation of superior outcomes; and the *investment size*, the belief that tangible or intangible resources attached to a relationship may be lost or seriously diminished upon termination. Such resources could include time, effort, emotions, etc. (Le & Agnew, 2003; Rusbult, 1980). Taken together or individually, these factors are antecedents of commitment level and influence whether one is likely to stay or leave a relationship. The model was tested in Rusbult’s (1980) study that sought to assess the adequacy of the investment model for predicting commitment and satisfaction in ongoing associations and relationships by conducting two experiments focused on romantic relationships. Both experiments successfully predicted commitment with the most dependable results reaffirming the importance of the balance of costs and rewards; consideration of alternative options; and the investment size to predicting commitment levels in relationships (Rusbult, 1980).

Relating this model to alumni volunteerism, Weerts and Ronca (2008) sought to understand more about how the extent of time, emotion, and financial commitment already invested in the university may influence alumni donors’ inclination to volunteer. They found the number of degrees earned from the institution by an alumnus/na was important to predicting whether a donor was likely to volunteer at their alma mater. Specifically, they found for each degree earned, a donor was 1.79 times more like to volunteer (Weerts & Ronca, 2008). However, having family members who previously attended the same institution was not found to be a significant predictor of volunteerism.

Extending this model to the context of alumni advocacy, an alumnus/na may commit their time to organizing with others and writing their legislator to advocate for a policy that could directly impact the accessibility of public higher education. In such an instance the cost to the individual would be their time, and the potential reward, the passage of an important policy. An alternative option for the alumnus would be to hope legislators saw the value of the policy even without alumni letters. However,
without their support, the outcome would likely be more uncertain. Following the logic of the model, if the alumnus/na were to discontinue their efforts of reaching out to legislators before budget decisions were made, the impact of their previous work could be lost and the investment of their time and effort could go unrewarded. According to this model, when weighing all factors, an alumnus/na would be inclined to write their legislator about a policy they truly believe in and value, since the time invested would be worth the potential reward. Additionally, following this logic, over time the inclination of the alumnus/na would grow stronger to not waste the time and effort already invested.

**Emotional Attachment**

An important factor that may influence one’s inclination to be invested in the future of their alma mater, emotional attachment is described by Mael and Ashforth (1992) as a sense of belonging or feeling of oneness with one’s alma mater and is a known predictor of alumni giving (Brittingham & Pezzullo, 1990; Beeler, 1982; Gardner, 1975\(^7\)). Such attachment can be fostered by keeping alumni informed through regular communications, providing engagement opportunities through event invitations, or offering opportunities to interact with current students (Tsao & Coll, 2004; Rau & Erwin, 2015). Specifically, communications such as alumni magazines, newsletters, and annual reports help alumni stay engaged with their institution, regardless of their location by exposing them to what is happening on campus, important research, and providing insight regarding future goals (Levine, 2008).

Additionally, symbols such as traditions and rituals are important elements that may foster an emotional attachment or sentimental feeling towards one’s alma mater. Building on their previous study (Ashforth & Mael, 1989), Mael and Ashforth (1992) suggest that institutions steeped in tradition have the ability to foster a feeling of oneness with one’s alma mater and sense of belonging among alumni that may enhance their loyalty and likelihood of supporting the institution for years to come. Institutions can create such connectedness with alumni through school colors and songs, celebrating the success of

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\(^7\) Beeler (1982) and Gardner (1975) are frequently cited foundational dissertation studies.
athletic teams, and institutionalizing rituals that celebrate the institution's identity such as welcome festivities, homecoming parades, reunions, and commencement (Mael & Ashforth, 1992). Similarly, a sense of unity with one’s alma mater may be enhanced by emphasizing threats such as reduced state funding, or needs related to fundraising that empower alumni to take action and make a difference (Mael & Ashforth, 1992).

**Extent of Relationship**

Having family members who attended the same institution may also influence one’s inclination to support their alma mater (Holmes, 2009; Wunnava & Lauze, 2001; Clotfelter, 2003) as having a close relationship with a relative who is also an alumnus/na may help foster a strong emotional connection that can build through childhood, upon acceptance, and be maintained after graduation. Among a number of factors known to influence alumni giving, Holmes (2009) found that alumni with close relatives who graduated from the same institution were 6 percent more likely to donate than those without family connections. Alternatively, when considering the importance of family association to volunteerism, Weerts & Ronca (2008) did not find that family association as a critical element related to predicting alumni volunteerism. Considering the inconsistent findings among studies regarding family associations ability to predict future support (financial or volunteer), demonstrates the value in exploring this further by learning about the personal experiences of alumni that may influence whether or not they engage in support behaviors such as political advocacy. Additionally, those with more than one degree from an institution may be more inclined to support their alma mater (Brittingham & Pezzullo, 1990; Weerts & Ronca, 2008). Specifically, Weerts and Ronca (2008) found that for each additional degree earned, alumni donors were 1.79 times more likely to volunteer with their alma mater. This finding is supported through the investment model and suggests that years of affiliation and depth of connection are important factors that predict future support.
In alignment with the grounded theory study design, these models provide valuable sensitizing concepts for understanding more about how recent graduates may think about and engage in alumni advocacy behaviors. Under the umbrella of social exchange theory, mixed findings regarding student engagement present opportunities to further explore whether quality academic experiences and positive co-curricular experiences may also relate to the likelihood that alumni may participate in advocacy behaviors. Should there be a relationship, institutions would have an opportunity to proactively engage and educate their students in ways that may make them more inclined to advocate on behalf of their alma mater after graduation. Additionally, developing a better understanding of alumni motivations through expectancy theory may provide insight regarding which individuals may be most inclined to participate in advocacy efforts so that from early on, institutions may maximize their resources to engage these individuals in the most meaningful ways. Finally, the investment model may also be useful to explore and extend what is known about the inclinations and commitment of donors and alumni volunteers (Weerts & Ronca, 2008), to alumni who may be inclined to volunteer through political advocacy efforts. As Weerts, Cabrera, and Sandford (2010) recommend that volunteerism and political advocacy be studied as two distinct but interrelated roles, further research in this area will help illuminate ideas for how to best engage and retain dedicated alumni advocates.

Influence of Alumni on Policy Formation

Among the various external constituents that have the ability to influence policy formation such high-level donors, corporations and foundations, governance boards, and government officials, they all have at least one thing in common that includes their ability to influence the future of higher education through their financial, political, or position power. With so much power often in the possession of the few, the ability of alumni to influence important change and have their voices heard may be diminished. However, among all external constituents, the voices of alumni should not be discounted, as they are important advocates who are critical to the success of their institution. Alumni are a unique group who
may be inclined to support their alma mater as lifelong members of their institution, who are entitled to any positive recognition that comes through association and also bear responsibility to maintain and advance the reputation of their alma mater to strengthen the value of their degree (Barrett, 1989; DiBiaggio, 1989). Alumni have the ability to affect change at their alma mater through a variety of support behaviors that may include philanthropic gifts, volunteer service, or political advocacy (Roszell, 1989; Weerts et al, 2010). This study will use what is known about alumni giving, volunteerism, and political advocacy as a foundation for learning more about how and why individual alumni may engage in political advocacy support behaviors.

### Giving

As state support of higher education has declined, universities must seek financial support from alternative sources, including their alumni (Kozobarih, 2000). However, while a broad base of support comes from a large number of individuals, the long-held view of about 80 percent of gifts come from only about 20 percent of donors (Kozobarih, 2000; Schiller, 2019), has been replaced by the 90/10 or 95/5 rule with most dollars increasingly coming from less donors (Drezner, 2011; EAB, 2016; Schiller, 2019; Linder & Meu, 2019). This illuminates that the majority of alumni who have the capacity and inclination to give might be at financial deficit to influence change and make a difference compared to the large gifts of powerful donors. It also underscores the need for institutions to cultivate diverse relationships to contribute to the ever-evolving pipeline of university supporters who may be donors, volunteers, or political advocates, as when alumni are unable to give financially, they may choose to support their alma mater in other ways such as through volunteerism or political advocacy. Through their connections, they may also assist to find others who can make contributions and assist to cultivate potential donors through their personal stories and passion for their alma mater (Barrett, 1989).

Although most alumni gifts may not compare in size to those with greater giving capacities, each contribution matters. Beyond the contributions garnered through individual alumni donations, alumni
giving also affects the institutional rankings of colleges and universities published in U.S. News and World Report’s Guide to the Best Colleges (Levine, 2008). The guide is published annually, and rankings are partially informed by the number of alumni who give to their institution, regardless of the amount they give (Machung, 1998; Drezner, 2011). Competitive standing among the rankings is valuable to institutions as it signals quality and value, while helping to attract new students and additional support from potential donors (Machung, 1998). Should alumni be perceived as not willing to support their own alma mater, it may signal to other potential donors that the institution is not worthy of supporting (DiBiaggio, 1989).

Volunteerism

Beyond philanthropic gifts, alumni may volunteer their expertise guest lecturers, voice concerns related to legislative issues, assist to recruit new students, mentor new alumni, serve on advisory councils, and enhance the reputation of the institution through their professional success and speaking positively about their institution to others (Barrett, 1989; DiBiaggio, 1989, Weerts et al, 2010). Engaging alumni on advisory boards can also serve as a tool for bringing them closer to the mission of the institution, so they can further assist with its development (Barrett, 1989). Alumni also provide valuable feedback for administrators to consider and implement. Their feedback can be particularly useful as it comes from the perspective of former students who have a vested interest in seeing the university evolve and thrive (DiBiaggio, 1989).

Despite the growing emphasis on leveraging alumni support for higher education, much of what is known about alumni involvement (distinct from giving) is based on practitioner accounts (see Barrett, 1989; DiBiaggio, 1989; Koral, 1998; Simonetti, 2013, etc.) with the exception of a few more recent studies (see Weerts & Ronca, 2008; Weerts et al., 2010). Without a strong foundation in this area, researchers and practitioners have limited knowledge to build upon and enact. Given these circumstances, there is a large need and opportunity for future research to fill this void. This study
contributes knowledge to help fill this void by connecting with individual alumni of UMass Amherst to learn more about how they may support their alma mater and the factors influencing their likelihood to lend their support through political advocacy behaviors, specifically.

In their study of alumni donors, Weerts and Ronca (2008) sought to create a profile of university alumni poised to support their alma mater through volunteer time, professional expertise, and political advocacy. They found that related to the capacity of alumni donors, those who live in the same state as their institution and who were generally service oriented were more likely to volunteer with their alma mater. Related to inclination, their findings revealed that those who were academically engaged as students, held the belief that they should support their alma mater, and had multiple degrees from the same institution, were more inclined to volunteer. Building on these findings, Weerts, Cabrera, and Sanford (2010) executed a foundational study that focused on alumni volunteers who were not donors at a single institution to better understand a range of common support behaviors that extend beyond giving. The most common support behaviors identified included recruiting potential students to attend the institution, participating in special events, or mentoring recent graduates. Many of the alumni surveyed reported recruiting potential students as part of their volunteer efforts. However, since many of these efforts where not organized through the institution, it was not clear if such efforts were helping the institution to attract the most desirable students in alignment with strategic goals such as achieving a diverse student body. While the study helped document a range of common support behaviors among alumni volunteers, it is evident that more remains to be learned about what motivates alumni to volunteer for their alma mater and what makes them more inclined toward different volunteer options. This study will use what is known about volunteerism in general, and alumni capacity and inclination related to giving, as a strong foundation to contribute new knowledge related to alumni political advocacy support behaviors distinct from volunteerism and giving.
Advocacy

Beyond the federal context for higher education advocacy enacted by IPPOs, it is difficult to identify organized advocacy groups designed to address state-specific needs outside of efforts organized and led by specific institutions as part of their overall government relations strategy. As part of such strategies, institutions are increasingly incorporating alumni into their efforts to advocate for policies and legislation that advance their alma mater as evidenced by the number of institutions that have been noted for their organized efforts to utilize alumni as political advocates (Barnett, 2019b).

Alumni differ from large IPPOs by nature that their contributions to their alma mater come from individuals and must be harnessed and directed through organized grassroots or grasstops efforts, or university-guided programs. When taken together, alumni contributions in the form of donations, volunteerism, and advocacy can draw attention and influence change through the strength of their numbers and voices. While Weerts and Ronca (2008) discussed alumni support in the forms of volunteerism and political advocacy, Weerts, Cabrera, and Sanford (2010) built on the previous work, distinguishing them both as distinct, yet interrelated roles that may be thought of as different branches of the same tree. Beyond merely giving their time back to their alma mater through volunteerism, alumni have the potential to be excellent political advocates for their alma mater on issues that matter. As many public institutions depend on state and federal funding, alumni have the ability to support their alma mater by making their voices heard by legislators to influence policy and budget outcomes. Furthermore, in many cases, alumni residing in the state of their alma mater are registered voters with whom legislators have elevated interests to hear from, particularly as elections approach (Koral, 1998).

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8 Grasstops approaches involve having key stakeholders or opinion leaders connect in person with legislators, while grassroots efforts typically use mass communication tools to mobilize a variety of supporters who may include faculty, students, alumni, trustees, parents, and others to be in touch with legislators via letters, emails, or phone calls (Cook, 1998; Barnett, 2019b).
Recognizing alumni as inherent advocates and supporters, institutions have an opportunity to call upon and activate their alumni in support of institutional needs while also setting them on a trajectory for a lifetime of engagement and support. In order to do so effectively, the importance of communication with alumni cannot be underestimated. According to the Chronicle for Philanthropy, those born after 1964 state they have stopped giving to charities because the organization hasn’t kept them informed. Additionally, across all generations, 33 percent of those surveyed shared that they stopped giving because they were unsure if their contribution made a difference (Perry, 2005). Such data underscores the importance of effective communication. Barrett (1989) suggests that the levels of alumni engagement with advocacy efforts are built on a number of factors dependent on effective communication such as the degree of trust built over time, level of commitment felt towards institution, how much information one’s alma mater is willing to share, and how well the institution articulates its needs. With the right information and outreach, relationships with alumni may be leveraged to play a critical role in helping institutions fulfill their unmet financial needs and meet their goals now and in the future.

Across institutions, advocacy is happening in a variety of ways that fit the institutional needs and political environment of each state. For example, a number of institutions including Penn State, the University of Washington, the University of Wisconsin, the University of Florida, and The Ohio State University have been noted for their organized efforts to align alumni with issues that match their interests, empower them with information, and activate them as political advocates who may harness their passion for their alma mater to influence policies and legislation (Barnett, 2019b; Hill, 2019; Ohio State University, n.d.). Among these efforts, institutions are leveraging technology to inform and educate their alumni on an ongoing basis and around key funding cycles so they may be empowered to advocate on behalf of their alma mater by contacting lawmakers, signing petitions, or attending events. As a subset of these efforts, Penn State students are also encouraged to advocate on behalf of the
university through the Lion Caucus, a campus student organization that seeks to engage students with elected officials and educate them about issues and legislation that affect the student experience. Such efforts to engage students early on align with the research findings of Weerts and Ronca (2008) who suggest engaging students in civic activities can be an effective way to grow future alumni volunteers and advocates.

Taken together, these programs illustrate the varying priorities and needs of different institutions that seek to inform and activate their alumni in support of institutional priorities that will benefit future generations. Such efforts have helped to advance institutional excellence and make public higher in their state more accessible to all. While the previous work of Weerts, Cabrera, and Sanford (2010), helped identify a range of common alumni support and attributes of alumni that may make them more likely to engage in support activities, this study seeks to build upon their work through the lenses of capacity and inclination, to hear from individual alumni regarding their past and present experiences with their alma mater. Such accounts will give a voice to alumni stories and experiences to provide a better understanding of how alumni perceptions of their alma mater may inform how they think about and engage in alumni advocacy efforts in the future.

Young Alumni

Given what is known about the potential to engage alumni to support their alma mater and affect policy, young alumni stand out as a group that should not be overlooked. Although this group may not give as often or as much to their alma mater as older alumni, they are a group with great future giving potential who are invested in the future of their alma mater (Monks, 2003; Gaier, 2005) and such dedication may be ripe for guiding toward volunteer or advocacy roles. In a study that examined patterns of giving among young alumni, Monks (2003) found that most young alumni do not give at all or give less than most other alumni in a single year. Building on this finding, Gaier (2005) found that young alumni were also less likely to give than older alumni, but more likely to participate in university
activities. As part of the study, young alumni indicated that they were reluctant to make financial gifts based on their limited financial ability. Some also reported that they had negative feelings about being solicited for donations since they had just given the university a lot of money in the form of tuition payments. Additionally, although need-based loans enable many to afford a college education, upon graduation these loans may make recent graduates feel as though they are already supporting the university through their repayments, therefore moderating their likelihood of giving. Supportive of this thinking, Marr, Mullin and Siegfried (2005) found that all quantities of need-based loans lower the probability of giving during the first eight years after graduation between 8 and 16 percent. Building upon the knowledge that this group may be less inclined and able to make a financial gift but more likely to participate in university activities (Gaier, 2005), there could be an opportunity for institutions to harness any positive alumni feelings toward their alma mater to engage this population in meaningful and impactful advocacy efforts. Such engagement would support institutional needs while also setting recent graduates on a positive trajectory of engagement that could lead to a lifelong relationship with their alma mater.

Despite being less likely to give, Gaier (2005) also found that when young alumni were compared with other graduation periods of alumni who lived within a close proximity to their alma mater, giving was positively significant, demonstrating that recent graduates living in the same state as their alma mater are highly interested and involved in the affairs of their alma mater and therefore should not be disregarded. Similarly, Weerts and Ronca (2008) found that those who live in the same state as their alma mater had a greater capacity to volunteer their time to their alma mater. Knowing this, should recent graduates remain living in close proximity to their alma mater upon graduation, they may be prime candidates to engage as alumni advocates since many would likely be registered voters within the same state and be among those legislators want to hear from—especially as elections approach (Koral, 1998).
When considering why young alumni may be more likely to stay involved with their alma mater, Gaier (2005) suggests that they may have more discretionary time since they may not yet have the family responsibilities that older alumni have. Young alumni also have more recent ties to their alma mater that may be stronger than those who graduated many years ago. Higher levels of participation among young alumni suggests that this group may be very inclined to support their alma mater in ways that fit their capacity such as participating in events, volunteering their time, advocating on behalf of their alma mater, or making smaller financial gifts that fall within their means. If institutions can maintain regular, positive instances of engagement with this group, such connection may eventually contribute to increased giving over the course of their lifetime. Ways of maintaining a positive connection with this group could include staying in touch via communications, engaging them through events, or encouraging them to volunteer or advocate on behalf of the university in ways that align with their capacity and inclination. Given the great potential of this group to be engaged in meaningful ways soon after graduation and the potential for this engagement to grow of the course of their lifetime, this study focuses on understanding how and why recent graduates from UMass Amherst may engage in political advocacy support behaviors on behalf of their alma mater so that this population may be better engaged in ways that align with their individual capacities and inclinations to support their alma mater now and in the future.

**Institutional Advancement**

Acknowledging alumni as a key group of stakeholders with the potential to affect policy decisions on behalf of their alma mater, institutional advancement and alumni relations professionals have an opportunity to engage them in ways that build their connection with the institution, and help influence important policy outcomes in support of critical needs. An overview of institutional advancement with a focus on the history and progression of alumni relations will be helpful for understanding this connection.
Today, institutional advancement, sometimes referred to as advancement, is generally understood to be comprised of development, communications, and alumni relations (Kozobarich, 2000; Arnold, 2003; Todd, 2000). Collectively, this area of an institution is tasked with raising money, communicating with external constituencies, and forging a lifelong connection between alumni and their alma mater. Sometimes thought of as “friend raisers,” alumni relations professionals focus on building relationships with and engaging alumni, while development professionals, commonly known as “fundraisers” build upon those relationships and further cultivate them to secure financial gifts (Dolbert, 2002; Arnold, 2003). Despite the unique functions of each role, both roles exist on a continuum and are not entirely separate (Dolbert, 2002). Together, the role of advancement professionals is to: identify, inform, interest, involve, and invest their alumni over the course of their lifetime as potential future donors (Roszell, 1989; Dolbert, 2002). Such goals are accomplished through a variety of volunteer opportunities; programs; services; and strategic online, in-person, and print communications with alumni (Johnson, 2018; Todd, 2000; Brant, 2000).

Organization and Role of Alumni Relations

The field of alumni relations has origins that date back as far as 1792 at Yale when alumni designed a class structure and appointed class secretaries named during their senior year of college to begin compiling class address lists and biographical records to be shared with alumni (Forman, 1989; CASE, 2018). By the year 1821, the first alumni organization was established at Williams College to ensure that “the influence and patronage of those it has educated may be united for its support, protection, and improvement” (Forman, 1989; CASE, 2018). In the years that followed, additional alumni organizations formed at public and private institutions such as the University of Virginia (1838), Bowdoin College (1840), and Amherst College (1842) (Forman, 1989). Functions of such groups included alumni volunteers maintaining alumni records, collecting dues to support activities, producing publications, and
organizing events and annual meetings (Dolbert, 2002). The Princeton organization, established as early as 1826 had unique aspirations, attempting to raise $100,000 in 1832 on behalf of the institution.

To this day, within the field of alumni relations, many institutions cultivate their alumni communities through the organization of alumni associations (Fisher, 1989). These associations may be comprised professional staff charged with representing alumni, the institution, or both, as well as a volunteer board of directors (Fisher, 1989; Dolbert, 2002). Generally organized following an independent, interdependent, or dependent model, each type of association receives varying levels of funding from the institution and autonomy (Fisher, 1989; Dolbert, 2002; Forman, 1989). Independent alumni associations typically have a leader who is a staff member and reports to a volunteer alumni board of directors. This type of association generally receives no or minimal funding from the institution (Fisher, 1989; Dolbert, 2002). Interdependent models of alumni associations have a leader who is a staff member who reports to a volunteer alumni board of directors as well as institutional leadership; partial funding is received from the institution, but the majority of funding is self-generated (Dolbert, 2002). Lastly, dependent alumni associations essentially function as university departments, have a leader who reports to institutional leadership, and receive all or most funding from the institution (Fisher, 1989; Dolbert, 2002).

In support of alumni relations objectives, regardless of the type of organization, the primary role of alumni associations continues to be to promote meaningful and lifelong relationships between alumni and their alma mater (Todd, 2000). In support of such efforts, a wide variety of programs and services for alumni are organized (Todd, 2000). They may include opportunities for education and lifelong learning; career services; community service programs; events such as socials, reunions, and homecoming; alumni awards; volunteer opportunities; regional chapters; professional and affinity chapters; and student advancement programs, among others (Johnson, 2018; Dolbert, 2002; Grafton, 2000, Dibbert, 2000; Lennon, 2000; Dolbert, 2000; Coleman, 2000; Chewning, 2000). The ultimate goal
of such programs is to engage alumni in meaningful ways that generate positive feelings that may one day translate into philanthropic support (Todd, 2000; EAB, 2016; Masterson, 2017). However, alumni represent more than an opportunity to secure future private gifts, they may also enhance institutional government relations strategies by assisting to secure state appropriations during a period of declining state support of higher education (Mitchell et al., 2017).

**Government Relations and Alumni Advocacy**

The importance of government relations programs as part of institutional advancement has been documented since the 1970s. However, the literature focuses primarily on the role of a single government relations professional to monitor, strategize, implement, and evaluate policy-related efforts (Crawford, 1977; Hornback, 1977; Vickrey Jr., 1977; Kennedy, 1986; Morse, 2000). Unique to higher education, with the exception of proprietary schools, all institutions are considered nonprofit organizations with a 501 (c)(3) status. Such classification affords them “tax exempt [status] and means that, according to Internal Revenue Code, they cannot devote a substantial amount of activities or resources to attempts to influence legislation” (Cook, 1998, p. 143). While this status limits the activities of the institution, it does not limit the activities of independent stakeholders such as alumni, faculty, and students who may advocate on their own, as opposed to at the request of the institution (Cook, 1998). Specifically, alumni are uniquely situated to be strong advocates for their alma maters since they are free from the restrictions placed upon lobbyists, likely have influential stories to share, and in many cases, are registered voters whom legislators may care to hear from as elections approach (Koral, 1998).

Prior research suggests that alumni volunteerism and advocacy efforts may be happening in a variety of ways, some of which are organized through the institution and others that are happening independently (Weerts et al., 2010). Weerts, Cabrera, and Sanford (2010) found that alumni seemed most likely to engage in advocacy-related behaviors with their legislators, independent of any organized opportunities for advocacy through their alma mater. Such a finding illustrates that alumni may be
interested in advocating on the behalf of their alma mater and there is potential for them to participate in related efforts organized through their institution. However, in the absence of institutionally organized efforts, it remains unclear what information sources are informing alumni communications with legislators. It is also unknown if the messaging coming from these individuals is in line with institutional priorities or could potentially be dividing and redirecting attention to different issues. Acknowledging this reality, it is important to understand more about alumni inclinations and capacity surrounding alumni advocacy so that institutions may develop intentional programs to assist their alumni to present a unified message (Koral, 1998) around significant concerns and time calls to action around key state and federal funding cycles (Weimer, 2005). With this understanding, institutions may better reach and engage motivated alumni to volunteer in this important and meaningful work. This study will use the sensitizing concepts of capacity and inclination, as well some of the other factors unpacked in this literature review as a foundation for learning more about how young alumni may engage in advocacy behaviors and what motivates or constrains them from engaging in such behaviors.

Conclusion

As demonstrated through this literature review, there are many reasons related to capacity and inclination that may make alumni more likely to give or volunteer with their alma mater, while the research regarding political advocacy remains limited. Also using the concepts of capacity and inclination, Weerts and Ronca (2008) studied alumni donors who volunteered at their alma mater to create a profile of those more likely to lend their support through volunteerism. Related to capacity, they found that those who resided in the same state as their alma mater, women, and those who were service oriented and civically engaged, were more likely to volunteer. They also found that those who were engaged as students, had more than one degree from the institution, and generally held the belief “alumni should support their alma mater through volunteer service” were more inclined to volunteer. Building on this study, Weerts, Cabrera, and Sanford (2010) focused on the individual support behaviors
of alumni volunteers who were not donors to document their behaviors related to volunteerism and advocacy. Related to volunteerism, they found alumni were recruiting potential students, mentoring new alumni, and participating in special events, while those who were engaging in political advocacy behaviors were contacting legislators, the governor’s office, and local politicians. This study helped distinguish volunteer and advocacy behaviors as distinct behaviors that the scholars described as being “different branches of the same tree” and also identified that many alumni were participating in such behaviors independent of any institutionally organized efforts (p. 351). While such initiative on behalf of alumni demonstrates their desire to support their alma mater, it also leaves to chance whether or not such efforts are well-informed or aligned with the strategic priorities of the institution.

This study builds upon these works to understand more about how the past and present experiences of alumni, as well as their current life circumstances may influence their capacity and inclination to get involved in political advocacy on behalf of their alma mater. Related to these efforts, recent graduates were a prime group to study, as while they may not be financially situated to give as often or as much to their alma mater as older alumni, they are a group with great future giving potential who are invested in the future of their alma mater (Monks, 2003; Gaier, 2005) and such dedication may be ripe for guiding toward advocacy roles. Additionally, recent graduates have more recent ties to their alma mater than those who graduated many years ago and may have more discretionary time since they may not yet have the responsibilities that come with raising a family (Gaier, 2005). While this group has been found to be less likely to give (Gaier, 2005; Monks, 2003), they are more likely to participate in university activities (Gaier, 2005) and higher levels of participation among recent graduates suggests that this group may be very inclined to support their alma mater in ways that fit their capacity such as participating in events, volunteering their time, advocating on behalf of their alma mater, or making smaller financial gifts that fall within their means.
With a better understanding of why recent graduates may be more or less inclined to engage in advocacy behaviors on behalf of their alma mater, institutions can design intentional programs to engage students as advocates and extend their engagement post-graduation in meaningful ways that fit their capacity and inclination. Such engagement may set recent graduates on a positive trajectory to stay connected to and engaged with their alma mater immediately after graduation and throughout their lifetime, which may inspire future financial gifts to their alma mater as their capacity to give grows. Furthermore, by engaging recent graduates in meaningful political advocacy behaviors that fit their capacity and inclination, and timing calls to action around key funding cycles, these alumni may assist to ensure public institutions remain affordable and accessible to the communities they serve.

CHAPTER 3

METHODOLOGY

While higher education fundraising is currently thriving with a record number of institutions conducting and completing $1 billion campaigns, numbers of major gift prospects surging, and charitable donations reaching an all-time high, there is still a sense of unease among advancement professionals as a small number of donors can be credited for contributing the most gifts while there has also been a steady decline of new donors (EAB, 2016). This decline has been driven by shrinking rates of participation among recent graduates (Linder & Meu, 2019), a trend that has underscored concerns about a potential lost generation of future major donors. Given this environment, and to ensure the health of the philanthropic pipeline for higher education, institutions need to invest in building a tradition of engagement and philanthropy among alumni early on so that the recent graduates of today may become the major donors of tomorrow (Masterson, 2017). As such, this study explores alumni advocacy as a vehicle for sustained alumni engagement and support to public higher education institutions.
My dissertation study is timely and relevant as it addresses a multi-layered problem. At the same time institutions are struggling to effectively engage recent graduates, public institutions are also attempting to constrain rising college costs that threaten accessibility. A large and ongoing contributing factor to increased college costs is reduced state funding for higher education that remains below historic levels (Mitchell et al., 2017). Despite small recent gains, state appropriations total only half the amount of what they were in the 1970s (Mortensen, 2015) and should they continue to decline at such a rate, they are predicted to reach zero before 2060 (Mortenson, 2012; Mortensen, 2015).

With limited empirical studies beyond a few quantitative dissertations that touch on aspects of the claimed value of alumni advocacy (Buchli, 2015; Burkum, 2009; Underwood, 2012), and only a single sequential mixed methods study (Weerts et al., 2010) that begins to scrape the surface of the subject, there exists an opportunity for qualitative research to make valuable contributions toward understanding more around the topic of alumni advocacy and how alumni may engage in related behaviors. The purpose of this study was to explore how recent undergraduate alumni (graduated within ten years), from UMass Amherst, perceive and/or engage in alumni advocacy efforts. For the purpose of this study, alumni advocacy was considered the organized or independent actions of alumni to educate and/or influence elected decision makers regarding the interests of higher education, need for state funding, and potential impacts of legislation.

Building on the previous work of Weerts and Ronca (2008) and Weerts, Cabrera, and Sanford (2010), considering an alumnus/na’s capacity and inclination for participating in alumni advocacy behaviors over the course of the alumni lifecycle were key components of this grounded theory dissertation study. Measures of capacity and inclination have been cited by researchers and advancement professionals as important factors used to help identify major gift prospects (See Volkwein...

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9 Sometimes referred to as motivation (see Volkwein et al., 1989).
et al., 1989; Schiller, 2019). These sensitizing concepts10 are also foundational for shaping alumni research for advancement (Cabrera et al., 2005). In alignment with the grounded theory methodology of this study, these concepts and the associated models of social exchange theory (Homans, 1961), expectancy theory (Vroom, 1964), and the investment model (Rusbult, 1980) that inform them served as tentative tools for identifying processes that emerged from the data (Charmaz, 2014). This chapter sets the stage for this study by acknowledging the worldview that informs the grounded theory design, followed by the research questions guiding the study, and a more detailed look at the research design and methods.

To explore and understand how alumni perceive and engage in alumni advocacy behaviors, the study utilized a constructivist lens that seeks to understand the unique, lived experiences of each individual and the meaning made from them (Jones et al., 2014). Through my inquiry I sought to understand how recent graduates perceive their alma mater as a starting point for understanding how they may think about or engage in advocacy efforts on behalf of their alma mater. These graduates were selected as a group to be studied due to the recency of their college experiences that may have assisted them to recollect and share their stories. The grounded theory methodology is most appropriate to use when little is known about a phenomenon, and one seeks to construct an explanatory theory that reveals a process related to the topic of interest (Chun Tie et al., 2019). It was most fitting for this study as I was exploring the phenomenon of alumni advocacy as a process that takes place over time ranging from the time one is a student to an alumnus. The result is a substantive theory that reveals an enhanced understanding of alumni advocacy and serves as a strong foundation for guiding future scholarship and practice about ways to best engage recent graduates to enhance the affordability of

10 Devised by Herbert Blumer (1954), sensitizing concepts are different than definitive concepts in that they lack specification. Such concepts are intended to provide initial ideas for pursuing research (Charmaz, 2014).
higher education, while also laying the groundwork for them to remain connected with and support their alma mater throughout their lifetime as their capacity to give grows.

**Research Questions**

The following research questions guided these efforts:

- How do recent graduates perceive their alma mater?
  - How do or may recent graduates engage with their alma mater?
- How do recent graduates perceive the value of alumni advocacy?
  - How do or may recent graduates engage in alumni advocacy?
- Based on participant experiences, how might recent graduates be inclined to support institutional advocacy efforts?

**Overview of Research Design and Methods**

To better explore and understand how alumni perceive and engage in alumni advocacy behaviors, this study drew from the constructivist approach that seeks to understand the unique, lived experiences of each individual and the meaning made from such experiences (Jones et al., 2014). A qualitative grounded theory design was appropriate as little is known about the phenomenon of alumni advocacy and an aim of the study was to construct an explanatory theory that revealed a process inherent to this area of inquiry (Strauss & Corbin, 1998; Merriam, 2009; Chun Tie et al., 2019). Through this design, I explored each participant’s thoughts and experiences regarding their alma mater and political advocacy and the meanings made from them. As grounded theory may be applied in various forms, it is helpful to understand the development of grounded theory to justify the adoption of various elements to help meet the aims of this study.

**Development of Grounded Theory**

Since the original formulation of grounded theory by Barney Glaser and Anselm Strauss in the 1960s, it has become one of the most prominent qualitative approaches in social science research that
has been applied across a variety of disciplines (Bryant & Charmaz, 2007). Over time as the landscape of qualitative research in the social sciences has evolved, scholars have adapted this methodology to fit their own ontologies, epistemologies, and research contexts. Such adaptations have resulted in the emergence of multiple versions of grounded theory including Strauss and Corbin’s (1998) pragmatically based version and Charmaz’s (2014) constructivist version that both differ on multiple levels from Glaser and Strauss’s (1967) original classic version (McCall & Edwards, 2021). Before delving into how grounded theory will be applied in this study, it is helpful to understand the various versions and the strengths and criticisms of each.

**Classic**

Often referred to as classic grounded theory, Glaser and Strauss’s (1967) original version is informed by a realist ontology that asserts reality exists and operates independently of our awareness or knowledge of it (Bryant & Charmaz, 2007). This ontology is complemented by an objective epistemology that postulates a single reality that a neutral, passive researcher discovers through a value-free inquiry (Charmaz, 2008; McCall & Edwards, 2021). This version of grounded theory promotes adherence to a rigorous process for discovering knowledge resulting in a theory that can be generalized and is not time or context specific. General reading may be done early on to establish a problem area for study. However, to maintain a fresh perspective it is recommended that the researcher only completes a focused review of the literature after the emergent theory is developed (McCall & Edwards, 2021).

This version of grounded theory is known for the ability to inductively generate new knowledge independent of preconceived notions and for the systemic rigor and creditability of the approach (Charmaz, 2014). However, later versions of grounded theory assert that truly objective knowledge is not possible, and that researcher values must be acknowledged and weighed for their effect on the research process (Charmaz, 2008). Furthermore, critics of classic grounded theory argue that the studied
phenomenon must be considered within the time and context of the research (Charmaz, 2008, 2014; Strauss & Corbin, 1998; McCall & Edwards, 2021).

Pragmatic

Building on the classic version of grounded theory, Anselm Strauss in collaboration with Juliet Corbin proposed an updated version of grounded theory, sometimes referred to as pragmatic grounded theory (McCall & Edwards, 2021), to align with the changing landscape of social science research. Their version stemmed from an interpretivist ontology that views reality as multi-layered and complex with multiple interpretations (Charmaz, 2014) and a pragmatist epistemology that perceives reality as being actively created as individuals act in the world and oriented toward solving practical problems (Charmaz, 2014; Patton, 2002). This version of grounded theory acknowledges that although not intentional, researchers innately influence a study with their personal experiences and prior knowledge. In this iteration of grounded theory, Strauss and Corbin focus on analytical verification by introducing the procedures of open, axial, and selective coding in addition to thorough questioning and self-reflection (McCall & Edwards, 2021). Instead of adhering to a more prescriptive research process (Glaser & Strauss, 1967), Strauss and Corbin (1998) encourage researchers to employ or reject methodological procedures based on their specific contexts and research goals. Some scholars (eg. Charmaz, 2008, 2014) support this flexible approach, while others (Baker et al., 1992; Heath & Cowley, 2004) do not because such studies may be criticized for what appears to be a lack of rigor or a violation of philosophical underpinnings. Since Strauss and Corbin perceive realities as varied and multiple, they also postulate that the outcome of grounded theory could be a subjective theory based on time and context or a descriptive non-theory with conceptual ordering that helps one gain an in-depth understanding of a process or phenomenon (Strauss & Corbin, 1998; McCall & Edwards, 2021).

In this version of grounded theory, the researcher moves between induction and deduction through interpretation. Strauss and Corbin (1998) contend that since one brings with them their
assumptions, the literature they have read, and conversations had, it is impossible to view the data as if one’s mind was a blank slate. As one reads the data and looks for inductive meaning, they do so through the lens of their prior knowledge and experiences that inform what and how they see. With these human elements at play, it is the responsibility of the researcher to validate such interpretations through constant comparisons with the data. Critical of Strauss and Corbin’s (1998) application of grounded theory, Glaser (1992) warns that it contradicts fundamental tenants of grounded theory by forcing data and analysis into preconceived categories and ignoring emergence to produce conceptual descriptions.

**Constructivist**

Following Strauss and Corbin’s (1998) iteration of grounded theory, constructivist grounded theory was developed by Kathy Charmaz (2014). This form of grounded theory is guided by a relativist ontology that views reality as finite, individual realities influenced by context (Mills et al., 2006), and a subjective epistemology that focuses on the relationship between the researcher and participant and the co-construction of meaning (Guba & Lincoln, 1994; McCall & Edwards, 2021). Fully embracing the constructivist lens introduced by Strauss and Corbin, Charmaz (2014) goes a step further situating the researcher as part of the research and process of inquiry. In this iteration, researcher positions, prior knowledge, and values are acknowledged throughout the research process that includes a continuous dialogue between the researcher and their data (Charmaz, 2014; McCall & Edwards, 2021). Like Strauss and Corbin (1998), Charmaz (2014) encourages memo writing and extends the application of memos by using them as a source of data that can be analyzed along with participant data. Charmaz (2014) contends that by doing this, researchers may achieve a greater awareness of shifts in viewpoints that result through being engaged in the research process and capture these shifts in a way that furthers a study’s quality.
Application of Grounded Theory with Dissertation

To ensure a strong study design, researchers must choose a research paradigm that aligns with their beliefs about the nature of reality, as history, cultural context, and unconscious underlying assumptions shape one’s view of the world and how they perceive truth (Mills et al., 2006). As such, this study was informed by the constructionist research paradigm that rejects the existence of objective reality, instead embracing multiple individual realities that are social constructions of the mind (Patton, 2002). Under the umbrella of constructionism, this study was guided by an interplay of the relativist ontology (e.g., Charmaz, 2014) that believes the world consists of multiple individual realities, influenced by context (Guba & Lincoln, 1994) and the interpretivist epistemology (e.g., Strauss & Corbin, 1998) that views reality as multi-layered and complex with multiple interpretations (Pascale, 2011).

Operationalizing these views involved me as the researcher choosing from among a combination of available techniques, what was most fitting for my specific research contexts and goals (Strauss & Corbin, 1998). Charmaz (2014) describes the major versions of grounded theory as guidelines that form a constellation of methods that are interconnected but different, from which a researcher can choose. She purports that although the different versions of grounded theory may have different foundational assumptions, they also have many similarities that include inductive logic, rigorous comparative analysis, and the aim to inform policy and practice (Charmaz, 2014). In the sections that follow, I focus on some of the areas of departure and how they were applied to this study.

Role of Literature

Historically, the role of the literature has been a highly debated characteristic of the grounded theory methodology. In their original classic version of grounded theory, Glaser and Strauss (1967) advised that literature reviews not be conducted at the start of the research process so that the researcher could maintain their status as an objective observer who was able to discern themes and patterns that emerged from the data. However, this stance contradicts quantitative and qualitative
methodologies that require in-depth literature reviews for question identification and research scoping (Dunne, 2011; McCall & Edwards, 2021). Later, Strauss and Corbin (1998) described the value of being familiar with the literature at start of the research process to establish the phenomenon being studied and what is known about it. Regardless of when the literature review is developed, Charmaz (2014) advocates that “any researcher should tailor the final version of the literature review to fit the specific purpose and argument of his or her research report” (p. 307).

In alignment with Strauss and Corbin (1998), this study utilized an early literature review to clearly establish the topic of alumni advocacy as it relates to alumni engagement and what is known about the phenomenon. This foundation illuminated the potential value of alumni advocacy to address shortfalls in state funding for higher education while serving as a vehicle for continued lifelong engagement and support of one’s alma mater. It also draws attention to the lack of qualitative research in this area and the opportunity for meaningful new scholarship contributions. With a clear understanding of the phenomenon to be studied, the researcher can craft the scope of the study and most appropriate research questions. There is no value in completing an additional later review as the current literature review was revised as warranted throughout the iterative research process and the study findings and emergent theory are discussed relative to prior knowledge in the discussion portion of this study.

Role of Researcher

The role of the researcher within grounded theory varies from one version to another ranging from an objective, passive observer (Glaser & Strauss, 1967), to a balanced interpreter (Strauss & Corbin, 1998), to an integrated co-constructor of knowledge (Charmaz, 2014). In alignment with the constructivist lens that informs this study, I see reality as multilayered and complex, with multiple interpretations. As the researcher responsible for developing and executing this study, I needed to acknowledge that my positions, perspectives, prior experiences, and interactions likely affected how I participated in the study and interpreted the data (Strauss & Corbin, 1998; Charmaz, 2008; 2014).
Therefore, to develop and execute the study responsibly, I needed acknowledge my own prior knowledge and positions and transparently document their potential effect on the research process (Strauss & Corbin, 1998; Charmaz, 2008). To do so and to facilitate a continuous dialogue with the data, I utilized memo writing (Strauss & Corbin, 1998; Charmaz, 2014) to document my perspectives and provide context for future data interpretation. While Charmaz contends that the researcher is an integrated co-constructor of knowledge and advocates that memos are also a source of data that can be analyzed along with participant data (McCall & Edwards, 2021), I chose to solely acknowledge and document my own positions, perspectives, and prior knowledge as recommended by Strauss and Corbin (1998) to not detract from the richness of the participants’ experiences.

**Quality Criteria**

As grounded theory is an iterative process, it is difficult to predict what the data will show at the end of the study. However, in alignment with Strauss and Corbin’s (1998) version of grounded theory, a primary objective of the study was to create a substantive theory that provides an explanation of process, action, and interaction within a particular time and context. Different versions of grounded theory are known for the flexibility of study design and application of methods. For example, Strauss and Corbin (1998) invite researchers to use or reject study procedures based on their own contexts and aims, describing the various procedures as items on a smorgasbord table from which one can choose among available options according to their “tastes” (p. 8-9). Similarly, Charmaz (2008; 2014) purports that the grounded theory research process itself is a social construction and therefore more than a mere recipe or set rules that can be followed and emphasizes the importance of the flexibility of the approach. Under the umbrella of grounded theory, various strategies can be used to respond to emergent questions and new insights while simultaneously constructing the method of analysis and completing the analysis (Charmaz, 2008). For this reason, researchers must think through what they are doing, how they are doing it, and why. Through this understanding and the use of reflexivity,
researchers can continue to improvise their methods and justify their decisions as rigorous and fitting for their research context and aims (Charmaz, 2008).

With the wide variety of options available as part of grounded theory, it can be challenging to discern a quality grounded theory study from those that are less than adequate. To ensure a rigorous and quality study, I utilized the criteria for evaluation provided by Charmaz (2014) that include credibility, usefulness, resonance, and originality. To develop a credible and rigorous study I ensured there was sufficient data to merit my claims, practiced reflexivity, documented and shared my decision-making process related to my study design, engaged in member checking with participants to ensure the accuracy of transcripts, and utilized peer debriefers for constructive feedback as the study evolved (Rossman & Rallis, 2012). To develop a useful study, I sought a true understanding of the research participants lives and the matters that are important to them regarding higher education. This understanding helped guide the research to provide a strong foundation for future scholarship and practice (Charmaz & Thornberg, 2020). To achieve resonance, I periodically took a step back from the data and reflected on how the emergent categories and developing theory represented the fullness of the studied phenomenon often sharing my thoughts and reasoning within a trusted community of practice (Charmaz, 2014; Charmaz & Thornberg, 2020). Lastly, the study demonstrates originality as it offers new insights and a unique conceptualization of the studied phenomenon that will prove valuable for guiding future scholarship and practice (Charmaz & Thornberg, 2020). In alignment with my beliefs, these criteria assume the that conclusions developed through grounded theory are suggestive and context dependent (McCall & Edwards, 2021). These criteria are also characterized as comprehensive since they address both the scientific and creative aspects of qualitative research (Corbin & Strauss, 2008). By addressing these criteria and using their related guiding questions provided by Charmaz (2014) I have thoroughly demonstrated the intentionality, rigor, and usefulness of my research.
Site and Sample

Through my inquiry I sought to understand how recent graduates of UMass Amherst perceive their alma mater to better understand how they may think about or engage in advocacy efforts on behalf of their alma mater. The grounded theory approach was well suited for exploring this process to generate a substantive theory as a starting point for considering how best to engage future alumni in meaningful ways that align with their capacity and inclination to get involved with their alma mater through advocacy. This study focused on undergraduate alumni of UMass Amherst who were once involved in instrumental activities (Glanville, 1999) as students and remained residents of the state as alumni. Justifications for the appropriateness of this site and sample are provided in the sections that follow.

Site

The study took place at a single public university in Massachusetts, UMass Amherst. According to the official website for UMass (umass.edu), it is a four-year public research institution that is also the flagship of the state’s five-campus university system. The institution seeks to have a positive impact on the Commonwealth and beyond by offering a high-quality education that is accessible to all qualified individuals, regardless of income or social status. UMass was an appropriate institution to focus the study around as public institutions rely on state funding to operate and keep tuition rates more affordable. Additionally, Massachusetts has a robust storied history of challenges and shortfalls of state appropriations for higher education (see Crosson, 1996; Bastedo, 2005; Tandberg & Anderson, 2012). Since the alumni participants still resided within Massachusetts at the time they were interviewed, they were likely affected by the same policies and potential shortfalls in state funding for higher education. Additionally, legislators may have an elevated interest to hear from them as elections approach (Koral, 1998). Focusing on one institution assisted me to identify additional research study participants through the recommendations of their former classmates.
Sample

This study used purposeful theoretical sampling to identify participants. Purposeful sampling is widely used in qualitative research and is appropriate when one seeks to discover, understand, or gain insight and therefore must choose a sample from which the most can be learned (Patton, 2002; Merriam, 2009). Patton (2002) contends that, “the logic and power of purposeful sampling lies in selecting information-rich cases for study in depth. Information-rich cases are those from which one can learn a great deal about issues of central importance to the purpose of the inquiry” (p. 230, emphasis in original). Within my theoretical sampling procedure, snowball sampling was used as a recruitment method as it would have been personally challenging to locate recent undergraduate alumni currently living in the state of Massachusetts, who have some level of knowledge of or exposure to higher education political advocacy and were formerly involved in instrumental activities as students.

Undergraduate alumni who graduated within 10 years were fitting for this study due to the recency of their college experience that may have made it easier for them to recollect their experiences. Additionally, participation in instrumental student activities often available to undergraduates has been linked to political involvement later in life (Glanville, 1999). According to Glanville (1999), instrumental activities have tangible goals associated with membership beyond participation and may include involvement in activities such as the school newspaper, student government, political clubs, student alumni associations, etc. Through my role as an advancement professional I have come to know a number of students who are now alumni which also was a helpful starting point for inviting alumni to participate via an initial email invitation (see Appendix A). Within my theoretical sampling procedure, recruitment through snowball sampling involved me asking participants throughout the data collection and analysis process to refer me to other individuals who met the criteria to participate in the study. As

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11 Glanville (1999) found that participation in instrumental extracurricular activities during high school and college positively predicted political involvement in early adulthood independent of one’s personality traits and established political attitudes.
the sample grew, so did the “snowball” as I accrued new participants well-situated to discuss the studied phenomenon (Merriam, 2009; Patton, 2002).

In alignment with the grounded theory methodology, as I began to interview participants and analyze data, I also used theoretical sampling to gain a greater depth of understanding about emerging concepts identified during initial data analysis. The result was a theoretical snowball sample that involved initial study participants identifying additional participants who not only met the study criteria but could also contribute accounts that strengthened the emerging concepts. Following this sampling method, I interviewed 15 study participants, continuing sampling and data collection until theoretical saturation was achieved and no new information emerged (Strauss & Corbin, 1998). Since the purpose of this study was to explore how recent undergraduate alumni, from UMass Amherst, perceive and/or engage in alumni advocacy efforts, those who participated did not need to be actively involved or previously involved in alumni advocacy efforts. Regardless of their involvement, their past and present perceptions and engagement with UMass constituted information-rich cases that provided useful insight regarding how they think about advocacy and could be engaged in the future.

The result of this sampling method was a sample that consisted of five males and 10 females who lived mostly in the greater Boston area ranging in ages from 23-29. Most of the study participants identified as being white, two identified as Asian, and three participants identified as other or more than two races. Regarding their family structure, most study participants disclosed they were not married and without children, with one participant disclosing she was married and also without children. Participants in the sample disclosed that they worked across a variety of industries with most working in education (5), subsequently followed by non-profits (3), and state government (3). The remainder of the sample either worked in or were pursuing careers in sport management, law, or marketing and event planning. Regarding their level of education, the sample was highly educated with 10 participants receiving multiple degrees from UMass that were comprised of either multiple bachelors’ degrees (8) and/or a
combination of bachelor’s and master’s degrees (4). Additionally, four participants achieved graduate
degrees outside of UMass. Regarding their financial aid, all participants received grants or scholarships
to attend UMass, nine disclosed that they had loans for their undergraduate education, and five shared
that they graduated debt free.

Regarding their involvements post-graduation, all alumni shared that they have remained
engaged with their alma in some way whether that be engaging on social media, attending events,
volunteering their time, or giving. Specifically, 11 of the 15 participants shared that they had
volunteered with UMass in some way since graduating. Reflecting on their student experiences, 11
participants shared that they had participated in advocacy efforts as students in support of issues
affecting the student body. However, most participants disclosed that they had not participated in
advocacy efforts in support of UMass since graduating since no such organized efforts exist. The
exception to this was two individuals who participated in such efforts as part of their professional roles
with educationally focused non-profits. Additionally, nine shared that they either have or were currently
participating in advocacy-related efforts not affiliated with UMass since graduating during their
discretionary time, with five of those nine disclosing that they participate in advocacy as part of their
professional roles. Demographic information regarding the study sample is also available in Appendices
F-I. This information has been aggregated into visual charts to provide a comprehensive description of
the sample without compromising participant confidentiality.

Research Ethics

Several measures were taken to ensure an ethical study including adhering to the three ethical
principles that guide Institutional Review Board deliberations. These principles include Respect for
Persons, Beneficence, and Justice (Rallis & Rossman, 2012). Following these principles, researchers must
treat participants as independent autonomous agents, they must maximize benefits while minimizing
harm, and also consider the balance of who may receive the benefits or bear burdens of the research
(Rallis & Rossman, 2012). With these principles in mind, prior to beginning the study, participants were required to sign an informed consent (Appendix C) that transparently outlined the purpose of the study, process for data collection, how transcription would occur, and measures taken to ensure participant confidentiality (Rossman & Rallis, 2012). If the participants had any questions about the study, they were invited to ask questions of me and/or contact the supervising dissertation chair. They also had the freedom to decline to answer questions or discontinue their involvement in the study at any time. Only after informed consent from each individual was obtained did data collection start. Furthermore, to ensure data security, all collected data were securely stored on a computer that only I had access to through a password protected screen.

Beyond these specific steps, I was also consistently mindful of my responsibility to be a moral practitioner who practices reflexivity throughout the research process and transparently shares the rationale for various decisions about design, data collection, and analysis (Rallis & Rossman, 2012). To ensure reflexivity and capture my thoughts and decisions made throughout the research process I kept a journal that I used to capture my reflections after each interview and record my reasoning for research decisions made throughout the study. This journal also served as a space for me to jot down initial impressions, while also considering what informs those impressions. This process is discussed in greater detail later in this chapter.

**Data Collection**

As part of the grounded theory design, information was collected in two phases. In the first phase, participants completed a short screening questionnaire (see Appendix B) to ensure they qualified for the study and to help me get to know more about them and their experiences leading up to, during, and after college prior to meeting. Understanding an alumnus/na’s experiences leading up to and after college was important to understanding their inclination to serve as alumni advocates as Weerts and Ronca (2008) found alumni who had high levels of academic engagement as undergraduate students,
held the belief that alumni have a responsibility to volunteer at their alma mater, and/or had more than one degree from the institution, were more inclined to volunteer. Information gained through this questionnaire was not analyzed but instead provided context for a subsequent semi-structured, one-and-a-half-hour interview that took place online via videoconferencing software. Additionally, with an awareness of the information revealed in the questionnaire, I was better able to navigate the interview and resulting conversation while maintaining the trust of participants by keeping virtual interviews within the promised timeframe.

The second phase consisted of one and a half hour online semi-structured interviews (see Appendix E) that occurred via videoconferencing software and were recorded to ensure the accuracy of data collected. Such interviews were appropriate for this study as they helped guarantee access to participants regardless of their geographic location. Additionally, since data were collected during the COVID-19 global health pandemic, remote interviews provided a sense of safety and security among the researcher and participants by not being in the same space and wearing masks that could be uncomfortable or hide important facial expressions that serve as visual cues. Furthermore, the use of videoconferencing software facilitated a face-to-face dialogue, enabling the observation of visual and verbal cues in real time (Salmons, 2012). The questions for these interviews were organized into sections that consider the past, present, and future of each participant as I explored their perceptions of and engagement with their alma mater and how they engage or might engage in advocacy efforts in the future. Each interview began by learning more about the participant including the factors that influenced their decision to attend UMass, their experiences while a student at the university, their current career and life after college, how they may perceive and engage with their alma mater, and their thoughts about engaging in alumni advocacy now and/or in the future. A semi-structured format was appropriate as it offered a balance of continuity across conversations based on a list of questions, while also allowing flexibility for conversation to grow and reveal unanticipated perspectives from the
participants (Merriam, 2009). To incentivize participation and thank participants for their time, 30-dollar Amazon gift cards were sent electronically to those who completed interviews.

After each interview, the data were transcribed from the recording through the use of a transcription service. The use of such a service helped me to adhere to the timeline of the study and immediately immerse myself in data review and analysis. As the transcriptions were received, to ensure I was immersed in the data from the start, I reviewed each interview and compared the transcription to the interview for accuracy while also noting inflections, pauses, and changes in tone, as well as visual cues that were noted as observations to add to the rich nature of the data being analyzed. Furthermore, to ensure an accurate representation of data collected, all interview transcriptions were shared back with participants to verify their accuracy and adjusted as needed. Lastly, I used Nvivo, a qualitative data analysis software, to help manage and organize data.

**Data Analysis**

To ensure a strong study design, researchers must choose a research paradigm that aligns with their beliefs about the nature of reality, as history, cultural context, and unconscious underlying assumptions shape one’s view of the world and how they perceive truth (Mills et al., 2006). Considering the interplay of the relativist ontology (e.g., Charmaz, 2014) and the interpretivist epistemology (e.g., Strauss & Corbin, 1998) that informs this study, it made sense for me as the researcher to choose among a combination of available data analysis techniques, what is most fitting for my specific research contexts and goals (Strauss & Corbin, 1998). Charmaz (2014) describes the major versions of grounded theory as guidelines that form a constellation of methods that are interconnected but different, from which a researcher can choose. She purports that although the different versions of grounded theory may have different foundational assumptions, they also have many similarities that include inductive logic, rigorous comparative analysis, and the aim to inform policy and practice (Charmaz, 2014). As such, in the sections that follow, I focus on some of the similarities and differences among approaches that I
applied and outline my step-by-step approach to data analysis guided by elements of both Charmaz (2014), and Strauss and Corbin (1998) to meet my study aims.

Using elements from both of these approaches I generated a substantive theory that was inductively generated from the data (Charmaz, 2014) as I interpreted it using my prior knowledge of concepts and theories from the literature, as well as my own experiences to make meaning from of the data (Strauss & Corbin, 1998). By viewing the data first inductively and then deductively through sensitizing concepts from the literature, I enabled new concepts to emerge that built upon, confirmed, refuted, or modified prior understandings of the studied phenomenon. Unique to grounded theory, data collection and analysis happened concurrently and cyclically using a theoretical sampling procedure, memo writing, and the constant comparative method (Strauss & Corbin, 1998; Charmaz, 2014). Utilizing a snowball sampling recruitment method, participants were iteratively recruited based on the initial criteria guided by the literature. Once the first interviews were transcribed, they were analyzed and what was learned from the analysis helped inform theoretical sampling of additional participants who provided further understanding around alumni advocacy. Through theoretical sampling I was able to learn more about participant experiences as students who were involved in a student advocacy group on campus. Specifically, through speaking with one participant involved in that group, I was able to get referrals to other participants who were also involved in the same group and could give their own individual take on a similar experience that was very relevant to the study focus. This helped me more fully understand participant engagement over time and perceptions of their alma mater as a result of their student experience. Additionally, although the aim of my study was never to have representative sample that could potentially be generalized to a larger population, I found as I was growing my sample through theoretical snowball sampling, I had very few male participants. In an effort to have more representation I shared this with existing participants and was able to gain more referrals to speak with.
additional males, helping me to better round out my sample. Demographic information regarding the study sample is available in Appendices F-I.

The process of analyzing the data was broken into steps. First, to help organize my data in Nvivo, I uploaded and classified each transcript by person. Then I made groupings for codes that reflected questions and topic areas from each interview to help me remain aware of the context in which various codes appeared. This proved helpful throughout the data analysis process as I regularly returned to the data viewing it person by person, and also question by question and code by code across cases as part of the constant comparative method.

As I began data analysis, transcripts were inductively reviewed using initial coding to define what was happening in the data as a starting point for considering what it meant (Charmaz, 2014). As part of initial coding, I reviewed transcripts line by line, then segment by segment, and finally incident by incident, writing initial codes as one-word gerunds when fitting that reflected actions happening with the data (Charmaz, 2014). For example, some of these initial codes included volunteering and attending events which reflected actions alumni were taking to support their alma mater. The resulting codes were provisional as I remained open to other analytic possibilities and compared within and across transcripts to ensure they fit the data (Charmaz, 2014). Next, I reviewed the same data deductively, using sensitizing concepts of capacity and inclination from the literature, writing additional codes as warranted, only when they aligned with the data to avoid imposing preconceived ideas. Examples of initial codes that appeared through deductive analysis included exercising and commuting under capacity and giving back and being grateful under inclination. By fracturing and abstracting the data through this process I was able to identify preliminary ideas that could be further explored and analytically examined.

Although I attempted to first view the data inductively, and then deductively, it was inevitable that as I reviewed the data I moved between induction and deduction through my interpretation.
Strauss and Corbin (1998) contend that since one brings with them their assumptions, the literature they have read, and conversations had, it is impossible to view the data as if one’s mind was a blank slate. As one reads the data and looks for inductive meaning, they do so through the lens of their prior knowledge and experiences that informs what is seen and how it is seen. With these human elements at play, it was my responsibility as the researcher to validate such interpretations through constant comparisons with the data within and across cases.

Using the constant comparative approach to data analysis, I first analyzed single transcripts as a whole and then compared person by person, question by question, codes to codes and, and eventually codes to categories to confirm, modify, or discard initial findings that proved to be insignificant. Throughout the process of reviewing the transcripts and coding the data, I also wrote analytic memos (Strauss & Corbin, 1998; Charmaz, 2014) that captured my thoughts about the data to help inform my theory development. For example, in my interviews with participants many spoke of their meaningful interactions with alumni as students that set them on a positive academic and engagement trajectory, sometimes inspiring their future careers and/or modeling ways for them to remain involved with their alma mater post-graduation. As I began to write about this observation, I realized that a number of alumni who participated in organized activities with alumni as students, were still engaging with their alma mater in similar ways. Although no such opportunity currently exists for advocacy at UMass, writing memos about this finding helped me realize an opportunity to extend what was working for general alumni engagement to advocacy so that future alumni advocates could be inspired and educated about advocacy needs, actions, and benefits early on and remain engaged as advocates beyond graduation.

Next, I began the process of focused coding by identifying the most significant and/or frequent initial codes to “sift, sort, synthesize, and analyze” larger segments of data (Charmaz, 2014, p. 138). This process enabled me to evaluate the adequacy and conceptual strength of my initial codes. Then by
studying and comparing initial codes across the data and assessing their fit, I was able to either elevate promising initial codes to focused codes or develop new encompassing focused codes that subsumed several initial codes and served as promising tentative categories. For example, some promising initial codes included attending events, acting as an ambassador, volunteering their time, and political advocacy/volunteering. By using the constant comparative method to compare these codes across the data within and across transcripts, I was able to affirm their validity and elevate them to the focused code of being involved, which eventually laddered up to the final category of alumni engagement. Under the category of alumni engagement are also the focused codes of staying informed and giving. Staying informed developed into a focused code by the same process, subsuming initial codes such as following on social media, staying up with the news, and remaining in touch with others. Giving similarly subsumed initial codes that included income, debt, and accountability that captured the different considerations of alumni before making a financial gift back to their alma mater. Although my data analysis started in Nvivo, I personally found that in many cases writing about my initial codes with examples, whether through memos or initial chapter drafts, enabled me to see greater similarities and relationships among them that then prompted me to go back to the data to confirm my evolving thoughts before I began to elevate initial codes into focused codes to better fulfill and explain the resulting categories.

Additionally, as I developed and scrutinized my focused codes, I began to elevate them as they fit to tentative categories that explained what is happening and represent ideas, events, issues, or occurrences that stood out as significant to the participants (Strauss & Corbin, 1998; Charmaz, 2014). As I considered elevating focused codes from descriptive tools to conceptual categories I used memos to write more deeply about them, define what a category consisted of; the unique properties of a category; the conditions under which a category appeared, was maintained, or changed; the consequences associated with it; and the relationships among categories (Charmaz, 2014). For example,
the category of alumni engagement consisted of staying informed, being involved, and giving, which each subsumed the initial codes or properties mentioned in the previous section. Through my analysis it became apparent that such engagement could be happening in the past, present, and/or future when each alumnus/na had the capacity and inclination to participate thus demonstrating the interconnectedness of the categories. Capacity was often influenced by other life circumstances that affected discretionary time available, resources to participate, and the flexibility of the opportunity. Inclination was often influenced by past experiences, the desire to give back one’s alma mater, the perceived importance of the issue at hand, one’s ability to influence change, and the ability to enhance strong programs or amend unfavorable circumstances. The consequences of most forms of engagement were mostly positive as such efforts were targeted at helping one’s alma mater and current students. However, it became evident that that such engagement was most effective when formally organized and in alignment with institutional needs than when informally undertaken on one’s own. In forming categories, I strived to make them as conceptual as possible, “with abstract power, analytic direction, and precise wording” while acknowledging “the temporal, social, and situational conditions of their production” (Charmaz, 2014, p.189). To facilitate this process, I developed visual diagrams; sorted and integrated memos; and utilized Nvivo, data analysis software to help me visualize themes and relationships among the data (Strauss & Corbin, 1998; Charmaz, 2014). As initial and focused coding do not need to be sequential acts, I moved between initial and focused coding as I sought to enhance my understanding of the data and how they were related.

Finally, once the theoretical scheme was outlined through strong conceptual categories, I began to refine the emerging theory by trimming off excess concepts that were insignificant and/or attempting to further augment poorly developed categories by returning to the data (Strauss & Corbin, 1998). For example, the perceived difficulty of advocating came up frequently throughout my data analysis process but as I continued to refine my writing and my theory it became apparent that misconceptions about
the perceived difficulty of advocating, although prominent in the data, were not comprehensive enough to constitute a category. As I engaged in the constant comparative method, looking across and through transcripts it became evident that those perceptions were related to uncertainties around advocating that were also tied to a need for greater communication and education around advocacy needs and actions. As such, misconceptions about advocacy is incorporated into the category of need for guidance, education, and resources. Lastly, once the process represented by the emergent theory seemed clear and substantiated by the data, I confirmed the theory by comparing it to the raw data to ensure the most complete representation for understanding alumni advocacy.

**Design Trustworthiness and Data Quality**

To ensure a thoughtful and trustworthy study it was imperative for me as the researcher to consider and incorporate my own positionality as an advancement professional who works with alumni within higher education into my writing throughout the research process. This positionality drives my interest about the research topic as I am genuinely interested to learn how recent graduates may be best engaged in ways that fit their capacity and inclinations, so they may remain connected to their alma mater and are able to contribute back in meaningful ways. As part of my positionality, beyond my current professional role, it was also important to consider my upbringing and college experience. I grew up in a middle-class family with one college-educated parent and one parent who was self-employed and responsible for generating their own income from week-to-week. My parents were registered voters who voted in all major elections and spoke to me about the importance and value of being engaged politically. I was also a dedicated student, who played sports and performed well academically. From an early age, my parents instilled in me the importance and value of a college education and supported me by touring colleges with me to find the right fit for my career goal of becoming a broadcast journalist. I was drawn to this career because I found it fascinating to tell people’s stories and wake up each morning, unsure of what adventure awaited.
Ultimately, after falling in love with the campus and academic program, I decided to attend a mid-sized private institution within 40 minutes of New York City. The location would also be a cost saving opportunity as I could commute into the city for internship opportunities without needing to afford alternative housing. To my surprise, with my academic performance and my family’s modest income, I only received a nominal scholarship to attend and a large package of loans that I am still working to repay to this day. My parents sought to do all they could to help minimize my financial burden after graduation and I watched them sacrifice to afford my tuition. Trying my best to do my part and make the most of my experience and opportunity, I became a resident assistant to offset the cost of living on campus and dedicated myself to my student experience inside and outside of the classroom volunteering for Habitat for Humanity and getting involved in instrumental activities that aligned with my political science minor such as the Student Government Association and Student Judicial Board.

Taking all of this into account, it is very likely that my personal experiences and professional role and interests inevitably affected decisions made at each step of the research process and the interpretations of the data analyzed.

To remain aware of my positionality throughout the research process I engaged in reflexivity that provided a space for me to contemplate my initial thoughts, decisions, and reactions. Rossman and Rallis (2012) explain reflexivity as “looking at yourself make sense of how someone else makes sense of her world” (p. 47). As a tool for engaging in reflexivity, I kept a research journal that I used to capture my reflections after each interview, consider what informed those impressions, and record my reasoning for research decisions made throughout the study. For example, I asked questions of myself that included but were not limited to: (a) What led me to this impression? (b) How and why do I see this? (c) How might others interpret the same information? (d) How was I feeling when conducting the interview and how could this have affected the outcome? (Rallis & Rossman, 2012). Engaging in this practice helped
me be aware of my own positionality and any preconceptions I brought to the research process while also assisting me to be introspective about my interactions with the participants.

During the data collection phase of this study, once the transcriptions were complete, I used member checking that involved me sharing initial transcripts back with the study participants to ensure accuracy and to provide an opportunity for clarification, thus enhancing the trustworthiness of the data before engaging in analysis (Merriam, 2009). In addition to the interview recordings, I took minimal notes during the interviews so that I could be fully engaged with the participant and wrote detailed memos (Strauss & Corbin, 1998; Charmaz, 2014) immediately following each interview so that initial thoughts and impressions were captured. This practice along with the use of peer debriefers and sharing design decisions with a trusted community of practice further supported the design and execution of a thoughtful and credible study (Rossman & Rallis, 2012).

Conclusion

The purpose of this study was to explore how recent undergraduate alumni from UMass Amherst, may perceive and/or engage in alumni advocacy efforts now and in the future. Given the research questions posed, the grounded theory design was most appropriate since it enabled me as the researcher to explore the unknown phenomenon of alumni advocacy and construct an explanatory theory that reveals a process related to this understudied topic (Chun Tie et al., 2019). Furthermore, grounded theory was most fitting for this study as I was exploring the phenomenon of alumni advocacy as a process that takes place over time ranging from the time one is a student to an alumnus. The sensitizing concepts of capacity and inclination that are foundational for shaping alumni research for advancement (Cabrera et al., 2005) were used as a starting point to learn more in this area. Finally, utilizing semi-structured interviews for data collection offered a balance of continuity across conversations based on a list of questions, while also allowing flexibility for conversation to grow and reveal unanticipated perspectives from the participants (Merriam, 2009).
CHAPTER 4
FINDINGS

The purpose of this qualitative, grounded theory study was to explore how recent undergraduate alumni from a single public institution in Massachusetts perceive and/or engage in alumni advocacy efforts. The study explored how recent graduates perceive their alma mater as a result of their experiences in the past and present and these perceptions served as a starting point for understanding how each alumnus/na may think about or be inclined to engage with their alma mater. Such understanding was a starting point for also thinking about how they may engage in advocacy efforts on behalf of their alma mater now and in the future regardless of their past experience with alumni advocacy efforts.

As all of the participants were residents of Massachusetts, they could easily speak about their investment in the future of higher education in the Commonwealth and beyond as well as their ideas and thoughts about holding legislators accountable now and in the future. Additionally, due to the recency of their experiences, the alumni interviewed were able to recollect their student experiences and relate them to their current levels of engagement as alumni. The following research questions guided these efforts:

- How do recent graduates perceive their alma mater?
  - How do or might recent graduates engage with their alma mater?
- How do recent graduates perceive the value of alumni advocacy?
  - How do or might recent graduates engage in alumni advocacy?
- Based on participant experiences, how might recent graduates be inclined support institutional advocacy efforts?

To answer these questions and build to the resulting theory, I’ve organized this chapter through the themes that emerged to reveal alumni perceptions of their alma mater followed by how they are
engaging or think they may engage with UMass. Building upon this foundation, I explored how alumni participants perceive the importance of advocacy, their thoughts on alumni power, and stated barriers to advocating. Finally, with this understanding, I’ve presented through the examples provided by alumni, how they may be inclined and able to advocate on behalf of their alma mater in the future.

Alumni Attitudes & Perceptions

When asked about their perceptions of their alma mater, the alumni interviewed shared mostly positive feelings. Generally, throughout their interviews, alumni shared their gratitude for UMass and the experience there. Most alumni credit the university for where they are today, and many believe in the value of the institution for the state. They have great school pride and are excited by the upward trajectory they are able to observe through media coverage and the direction of a chancellor who is well liked and respected. Despite these mostly positive sentiments, and the university being more affordable than many other options, some alumni would still not describe it as affordable. Additionally, alumni are honest to admit that despite all its greatness, the university, like many others, is not without its problems. These findings are illuminated in the sections that follow.

Grateful for Experience

When asked how they perceive the university as alumni, many shared their gratitude for their student experience. Some described their time at UMass as helping them come into their own, others touted the cost savings, shared their gratitude for the lifelong connections forged, and career success.

Peter did not hold back when sharing his love for his alma mater,

I value it for being, I think one of the best institutions of schooling. The bias is obvious, in that I'm an alumnus of the institution, but I really was able to flourish there. So, I let that personal bias be a spokesperson for what the university is because I think it's really great. I really, really, really was touched by it.

Another alumna, Olivia, a first-generation college student, shared her gratitude for the university as it enabled her to have less debt than she may have otherwise had which has influenced her life post-
graduation. She shared, “I'm really grateful that I had the opportunity to be educated at a public university because in a private university, it would've been a lot more difficult. I would've had so much more loans. My life would be so much different now.”

While reduced debt was important to Olivia and several other alumni, Monica shared her gratitude for the abundance of opportunities offered by the institution that helped her grow and make lifelong friends. She described her experience sharing,

I think I perceive UMass to be just this institution that helped me grow as a person and a place that gave me lifelong friends. Every time I think of UMass, I think of it very fondly. I think it's also really hard to find somebody who doesn't think of UMass in the same way because it gives you so many opportunities. I credit UMass and everything that they had to offer to me, to my success as an academic, as a professional, as a person.

Kathryn, a recent graduate of the 4+1 Masters of Public Policy program that enables students to complete their bachelor’s and master’s degrees in just five years, shared her gratitude for her experience as she had a caring advisor who recognized her career interests as an undergraduate student and encouraged her to apply for the 4+1 program that she may not have otherwise considered. When reflecting on her experience and the encouragement she received to pursue her master’s degree she shared, “And she fast tracked my application, and I ended up getting into the master's like a day before add-drop.” Additionally, to help finance her graduate degree, Kathryn was able to secure a graduate assistantship through one of her undergraduate student organization involvements. She shared,

So, I think I ended up paying a thousand dollars out of pocket for my master's degree, which is just unbelievable...So [I'm in a] really grateful place...I think it got me into a [professional] position that I probably would not have been able to be in for at least two more years of work experience.

In each of these instances, alumni shared through their unique experiences the various reasons they continue to be grateful for their college experience. Beyond developing as a person, incurring less debt, forging lifelong connections, and having great careers, alumni also shared that they were grateful for the many options and opportunities afforded to them by the university, professional development resources, and the ability to study abroad, to name a few. When considering these responses, it is
evident that the alumni interviewed took great value away from their experiences that ranged from in the classroom, extra-curricular involvements, and beyond, crediting the university for their accomplishments to date.

Beyond these responses, many of the alumni interviewed explicitly credit their alma mater for where they are today. Whether it set them on a positive career trajectory, helped them form lifelong connections, or helped connect them with inspiring mentors, alumni clearly credit their current circumstances to UMass. Jessica, a newly admitted attorney spoke about the trajectory the university placed her on describing,

I feel like I wouldn't be where I am now if it wasn't for UMass...And I feel like maybe that's part of why I'm still such a strong proponent of it. I had a good job right out of graduation. I went to a law school that I really enjoyed. I now have a job, and it still just feels like it's [UMass] still part of that...I wouldn't trade it. And it feels like I do value it really highly because I don't know where else my life could have been without it.

Elise who works in state government similarly credits UMass for her career trajectory and lifelong connections. She shared,

I think I got an incredible education. I think that I made connections that will last the rest of my life and met some just really smart, amazing people during my time there. And I think those things have really just changed the trajectory of where I am going and where I see myself.

When reflecting on her experience as part of a student and alumni women in public service leadership group on campus, Kathryn had this to say about the first year of the program's existence and her involvement,

So, I got involved in that first year and I got a lot of professional connections. And I think that group is the reason I'm in the career I'm in now. I think I met a lot of women who are in public service careers, and they introduced me to the world of public policy.

Through talking with alumni, it is evident that they recognize that they would not be where they are today without their alma mater. In addition to feeling grateful for their experience, they take pride in it, and credit the university for the opportunities afforded to them that set them on a positive life and career trajectory.
School Pride & Upward Trajectory

Many of the alumni interviewed also proudly spoke about their alma mater and the infectious school pride that made them want to attend initially and then go back to visit as alumni. Alex, a self-proclaimed UMass fan, described his experience sharing,

I had a great experience as a student. I had a great experience as a fan. So, I was lucky to be there during the Chaz Williams NCAA tournament years. We kind of won't talk about football (joking), but we certainly can talk about hockey, winning a national championship, and seeing the resurgence of UMass pride in that way. That was really cool. I have no poor experiences really with the campus in anything, in terms of what the campus was able to offer me.

When considering schools, Cara, like many prospective students had a lot to consider. One thing that she focused in on was campus pride as she wanted to attend a school where students took pride in their education. She explained,

When I was touring schools, I would always look at, okay, are people proud to be wearing the name of the school, whether it's on a hat, t-shirt, sweatshirt? And that's what you'd see all over UMass. People are very, very happy to show that they go there.

Beyond athletics and wearing school colors, alumni discussed their pride in other ways. Peter described one way he has informally volunteered his time as an ambassador of the university by giving tours to prospective students. He shared, “I have given tours to prospective students, like my family. I'm very keen on people should go here. I tried very hard to get my cousin to go here.”

Through their accounts, alumni demonstrated a range of reasons for why they feel pride for their alma mater. Peter spoke of giving his personal time to be an ambassador for the school so that others could have an experience like his, while Cara observed the pride of her peers around her. Alex continues to be energized by what the athletics teams offer whether they are winning or not. Such a variety of accounts show the many ways that alumni may feel prideful about their alma mater and suggest that they may be inclined to continue their engagement as alumni.

Related to their school pride, alumni also spoke of the upward trajectory of the university they have observed since graduating. From the start, Colleen was honest about her mental struggle to attend
UMass, a university that has worked hard to transcend its old reputation of being a safety school.

However, her sentiment quickly evolved from the time she was a student to an alumna. She shared,

I perceive UMass as getting better. I perceive UMass as being viewed as better and not just the throwaway school that I think...it had that reputation for a very long time, being the state university. And I do think current high school students really look at UMass as a great school to get into and really feel proud when they do that.

Andrew also spoke of the infrastructure growth he has observed through his time at UMass and since graduating describing, “Seems like it’s on the up and up. It seems like they’re building new things all the time...And when I was in school, they expanded to the Newton campus.” Molly also spoke of the upward trajectory of the university she has observed as an engaged alumna sharing,

I do feel like it continues to be on an upward trajectory. I think that sort of the quality of the programs that they’re serving, that they’re providing students with...even some of their athletic programs, have continued to do really well since I was a student. I know that's something that alumni get really excited to be a part of.

Through their responses, alumni proudly acknowledged their pride in their alma mater and the progress they can observe on campus that includes quality programs, a positively evolving reputation, new infrastructure, performing athletic programs, and more. They also shared the varying ways that they become aware of such changes and progress that range from staying connected to their group of friends from their time on campus, following UMass on social media, or seeing the university in the news. Such progress was inspirational to alumni and may motivate them to engage in advocacy efforts in the future that may further the upward trajectory of their alma mater.

Belief in the Value of UMass for the State

Alumni also spoke about the value of the university for the state and the importance of having a quality accessible public option within the Commonwealth to serve state residents while infusing the workforce and developing an engaged citizenry. Molly spoke of the value of public higher education to society sharing,

I think public higher education is really invaluable to our society in general. I think that it gives people the opportunity to pursue a more affordable higher education experience that's going to
open more doors for them in the workforce that could offer them...you know, higher paying jobs that will help them support their family and support their community. I think that it opens people's minds to other perspectives and sort of just in general, makes us more a civically engaged, educated, and informed society when people go to college or pursue higher education.

Building on this sentiment Elise talked about the value of UMass to Massachusetts residents and the state. She explained,

It does offer a really wide range of opportunities and I think it's an important institution for our state to have a strong institution and a leader in higher education because it's educating...a lot of the people that I knew at UMass were from Massachusetts. And a lot of those people have stayed in Massachusetts. So, if we want a really well-educated and we want a strong workforce, it's important that UMass continues to do the work that it's doing.

Having a quality accessible public institution in the state was valuable to Jillian, an Asian first-generation, low-income student (now alumna) who didn’t have a lot of guidance regarding how to apply to college. She shared,

So, I didn't really know too much about the college application process...and so a lot of my school options I kind of just focused on like Massachusetts, just because I was a Massachusetts resident, I knew that in terms of financial aid and stuff, I was probably more likely to get aid in-state versus out-of-state.

She also spoke about the importance of higher education as a social equalizer,

...education is a social equalizer. Many studies have reinforced this showing that, you know, education, higher education, education overall, allows greater mobility for folks who have disadvantaged identities. For example, gender minorities, racial minorities, etc., etc. So, I think that that's something that's really important for people who have disadvantaged backgrounds to be able to leverage education as opportunity to move up.

Building on the thoughts of others, Alex spoke about the value of having affordable access to higher education for the Commonwealth sharing,

...I do believe that having an affordable access to education and higher education is incredibly important, for not only building a strong Commonwealth and a strong citizenry... [Without it] there are some people that may not be able to access the opportunities that they may need to be whoever they want to be, follow their dreams or passions, because there's barriers, financially or otherwise.

Additionally, and beyond the Commonwealth, the impacts of the institution may be felt through research and innovation happening at the university. Marisa, who moved around the globe for much of
her upbringing as a result of her parent’s jobs as scientists explained, “I think UMass is doing a lot of really cool research for different things and all of that comes out and helps the greater good, not just UMass students or alums.”

The university often touts its importance to the Commonwealth and beyond as a leader in research and innovation, developing engaged thinkers, who are ready to solve complex problems facing the world. Through their responses, alumni also recognize the importance of having a quality, accessible public option for state residents to infuse the Commonwealth with a skilled workforce and engaged community. Such recognition suggests that they may be inclined to support their alma mater through advocacy if asked.

**More Affordable, but Not Affordable**

When considering where to go to college the alumni interviewed had many considerations including the programs offered, reputation of the institution, size, location, and cost. Ultimately, for many, cost was one, if not the deciding factor of where they would attend, demonstrating the importance of having quality public institutions as affordable options available to state residents and beyond. However, despite UMass being more affordable than some other private options, many alumni acknowledged that being *more affordable* did not necessarily mean their education was affordable and such experiences and understanding could indicate their sensitivity regarding rising college costs and potential inclination to advocate on behalf of reduced costs or more student funding to ensure greater accessibility with less financial burden for future generations. Cara, a first-generation college student from a working-class family was very cost conscious when she was applying to colleges. She spoke very highly regarding the value she places on her education but regarding the cost to attend UMass acknowledged, “it’s not cheap by any stretch of the imagination, but when you compare it to the cost of some other private institutions, it's a lot better.” Cara was fortunate enough to receive sufficient scholarships and merit awards to attend the university at no cost. Without such awards she may not
have attended or needed to take out lofty student loans. Similar to Cara, Molly was also a first-generation college student from a working-class family. Wanting more educational and work opportunities for their child, her parents encouraged and supported her to attend college. Being affordable compared to other options was something that helped influence her decision to attend UMass. As she spoke of the value of her college education she explained, “it's hard to put a dollar amount on it because even though UMass was the more affordable option, it didn't necessarily feel cheap or affordable. It was a still a significant cost to my family and me.” Different from Cara and Molly, Kathryn grew up in a middle-upper class family. She attended private school for kindergarten through eighth grade (K-8) before attending a public high school. When considering her options, despite coming from a more affluent background, she shared that affordability was still her number one deciding factor. She explained, “I think the decision came down to go to UMass and not take out [as much] student loans.” While Kathryn had some loans after graduation, it did not affect her positive view of UMass. She shared,

I would say still view it very positively, still highly recommend it to people that are looking for a quote, ‘I guess it’s not affordable, but it’s affordable compared to some of the other options’— but who are looking for an affordable option.

Such sentiments demonstrated how she was still very cost aware regarding the relative affordability of UMass despite having minimal loans herself.

Together, these accounts demonstrate that alumni are cost aware and sensitive to the cost considerations that affect the decision of whether and where to attend college. Having each made those considerations themselves, they may be sensitive about how rising costs could affect future generations access to a quality public higher education and as such may be inclined to advocate on behalf of their alma mater and higher education for increased state appropriations to higher education.
Not Without Problems

Despite mostly positive views of their alma mater, some alumni demonstrated their investment in the university by discussing problems they have observed and things that they are hopeful will change. Cara spoke of UMass making news headlines for serious issues related to sexual assault and racist emails sent to student groups as well as the university’s response to the COVID-19 global health pandemic. She described her feelings during those times sharing,

So, in that time it was very tough. I’m sitting here, I love this institution, but it was sad to look and see that not a lot was being done, and there was outcry from current students who were living in that environment.

Unsure of what to do or how to help, she signed an alumni petition that a friend had sent to her. She continued, “But other than that, I didn’t do much. And I think that’s because I didn’t think that I could, I was kind of like, ‘Okay, this is something that’s happening once again on campus. What am I going to do about it?’” Additionally, Cara’s experience at UMass left more to be desired due to the COVID-19 pandemic that necessitated her leaving school in March of her junior year. She shared,

It’s hard when you have such good memories in the beginning, and then you hit COVID, you don’t have necessarily the best memories at some points. Even UMass’s COVID response was criticized a lot...and it was hard knowing what to think. But overall, still absolutely love the school, and love everything that I did there. But it’s one of the things, you have to be able to criticize the things that you love too and recognize that things do need to change.

Jillian spoke of her frustration with the priority placed on diversity issues on campus, something that she had been a strong advocate of reforming in her time there. Specifically, she advocated to attract and maintain quality person of color (POC) professors, establish diversity course requirements, and preserve the cultural centers on campus. Jillian had largely mixed experiences on campus with her best experiences related to her work with cultural groups and initiatives and talented faculty, while some of her negative experiences stemmed around taking classes led by professors who were ignorant regarding diversity, equity, and inclusion (DEI) issues in their teaching and not feeling heard by the
administration as she advocated to improve things related to DEI. When asked how she perceives UMass as an alumna she shared,

The same old problems, because I hear from current students, and they're sharing with me their frustrations. And it's sadly unsurprising...I think that administrators could do a better job at least amplifying diversity to the forefront of and their commitment too... not just you know, posting it as their yearly slogan, but genuinely from [the] bottom up because I think, you know, it only makes the school better.

While Jillian’s words convey frustration, they also convey her investment in wanting things to be better at the university for future generations.

Peter who very fondly spoke of his experience at UMass and all that it gave him also expressed his concern for the future of the university. When considering his mixed sentiments he explained, “I think in some ways, that my involvement is sustained because of those things that I really love and cherish and then the things that I think could and should change.” He talked about things like the cost to attend, food insecurity on campus, and the move towards the corporatization of the institution. He shared,

I think there's also been a real hard turn towards the corporatization of the school...Because if the state is going to put it on life support in terms of state funding, then obviously you need to privatize your model...That's also disheartening because I think it undermines the purpose of the public school, which is mission driven instead of profit driven. We're still obviously a nonprofit and a public school, but I think that we have started to behave more like a profit-driven institution than a mission-driven institution.

Despite frustrations, a common thread through these accounts from alumni was their investment in wanting their alma mater to do better. Cara made this evident by talking about her love for UMass, Jillian with her passion focused around educating the community about DEI issues, and Peter through either wanting to make good things better or his belief in things that can and should change. Collectively, these accounts demonstrate that while some alumni may first think to hold university administrators accountable as a way to make UMass better, others such as Peter, are aware of the role that state government plays in supporting public higher education and may be inclined to hold the state accountable for making UMass better as registered voters who care about their alma mater and the
value it contributes back to the state in the form of an accessible quality education. With support, education, and the right tools and resources provided by their alma mater, alumni energy could potentially be guided and focused to outwardly advocate to the state for change. Such accounts provide hope for future alumni engagement in the form of advocacy to drive change around issues that align with the interests and beliefs of alumni to make the institution even better for future generations.

Section Summary

Based on participant responses it is evident that alumni are grateful for UMass and the experiences it afforded them. Most alumni credit the university for where they are today, and many believe in the value of the institution for the state. Additionally, they have great school pride and are excited by the upward trajectory they are able to observe through media coverage and personal connections. Despite these mostly positive sentiments, and the university being more affordable than many other options, some alumni would still not describe it as affordable. Additionally, alumni are honest to admit that despite all its greatness, the university, like many others, is not without its problems. Such findings suggest that alumni may be motivated to support their alma mater through advocacy efforts in the future to repay the institution that gave them so much, help future generations access a quality, affordable public higher education, or to improve circumstances that they acknowledge could be better as a way of helping future students while also adding value to their degrees.

Quality Education

Also informing the perceptions of their alma mater, the alumni interviewed were generally very satisfied with the quality of education they received while at UMass. They spoke of the quality of education they received compared to private institutions in the region, about their experiences with talented and invested faculty, and the emphasis that was placed on critical thinking and discussion in many of their classes. Additionally, alumni also spoke highly of the many options and opportunities afforded by UMass and within those options, their ability to curate unique experiences that helped them
to flourish and grow. Many of the alumni interviewed also credited UMass for helping them discover their career path and prepare them for their professional careers. Related to quality, some alumni also spoke of the importance of having an environment where the university administration values and invites the student voice. These themes are exemplified through their accounts in the sections that follow.

**Quality Compared to Private**

Although some alumni shared that they initially were hesitant to attend UMass perceiving it as a “safety school” where “everyone goes,” none of the alumni maintained this perception after having attended the university and many compared the quality of education they received to be just as good or better than what they received at private institutions for graduate school or may have otherwise received if they had attended a private institution for their undergraduate education.

When asked about her perception of the quality of education she received at UMass, Cara had this to say when considering her education relative to some of her peers,

> I perceive it to be incredible. I mean, Massachusetts is known to have a ton of amazing institutions, particularly private institutions in Boston and all that. But I would put UMass right up there with them in terms of quality of education, and just quality of learning.

Similarly, Jessica who attended a private law school after taking some time off from school after UMass felt that her UMass education enabled her to be well prepared for her future educational and career endeavors. She shared,

> I definitely came out of UMass thinking it was great, I loved all my majors, I felt like I learned a lot, but then especially going on to law school where there’s, particularly at [private university], there aren’t a lot of public-school students there, it was a lot of just private school people that theoretically would have better reputations...I felt like I was at no disadvantage to any other student at law school. And so, to me it felt like a lot of that was from undergrad in that just the types of work that I had to do for classes, I felt very prepared.

Alex reflected on his master’s program at a private university in Boston sharing his surprise regarding the level of academic rigor compared to his UMass education. He explained,
I absolutely felt my classes at UMass were a lot more rigorous. I can honestly say that that was the case and nothing against the teaching staff at my master's program, but it was night and day in terms of the quality of the professors. Because at that school I had a lot of adjunct professors leading classes versus full-time faculty so that was, I think a really big difference...why would you spend all that money to go get a master's degree and not come out with it being like, 'Oh man, I worked really hard for that'? And I don't want to say I didn't work hard, because I did work hard. It is a master's program in a lot of ways, so it was challenging. But it wasn't challenging in the way that my undergrad was, which I thought was really interesting, because this is a school that thinks of itself as super high academically.

Describing her influential experience as an intern on Capitol Hill, Monica described a situation where she was sitting in a room full of Massachusetts members and interns but was the only intern from UMass, where another intern essentially put down the school. She shared, “And someone literally told me, they were like, ‘Oh that was my safety school.’ And I, (because she went to Georgetown) and I said, look at where we are though.” Monica went on to explain how in that instance she realized she really took pride in her school because it helped her have such valuable experiences.

Along with the recognition of their quality academic experiences on campus, has also come a protective nature over their alma mater. Jessica discussed her experience going to law school at a private institution where a lot of people didn’t come from public universities explaining, “I feel weirdly protective of it... it feels like a lot of people's assumption is that UMass is not a top-tier school and I will fight them and ‘no, it is.’” Similarly, although Colleen did not initially want to attend UMass admitting that it was “her financial safety school” and that she felt bitter about attending since she couldn’t afford other options, her sentiments changed after her first year on campus. She now takes pride in her alma mater describing UMass as a school “with immense opportunity and care, and drive” and defends it to others who think otherwise. She shared, “So I perceive it as not a safety school. And in fact, whenever I do go to a [private university] vs. UMass game, and [private university] kids chant that I’m always just like, ‘privileged pricks’ because that's why you are all here [at private university].”

Through their accounts it is evident that the alumni interviewed did not feel like they received a lesser quality education by attending their public alma mater and a few referenced how they valued the
quality of education they received relative to their peers who often paid a much higher cost. Some alumni struggled with the fact the institution’s reputation has not widely caught up with what it offers but did not let that affect their pride in their alma mater or desire to set the record straight with others who undervalue the institution.

**Invested Faculty & Academic Rigor**

Influential to many of the alumni interviewed, were the faculty members whom they interacted with during their time on campus, signaling a high-quality academic experience. Lucas shared that the faculty and staff he interacted with on campus had a really positive influence on him and his experience. He elaborated by sharing,

The professors that I worked with were all very caring people who really wanted to make sure their students succeeded and had opportunities. I was able to work with professors on independent studies, on internships, on community service learning. So, there were a lot of ways to deepen the relationship with my professors and get more out of that experience.

Acknowledging the time put into those relationships, Lucas shared that the time was worth the reward.

Similar to Lucas, Molly had positive experiences with her professors that extended beyond lectures in the classroom. She shared her gratitude for her experience, explaining,

...the real willingness of professors to sort of support me in the classroom, but also sort of my interests beyond that, like a lot of them, were really willing to write reference letters for internships, and recommend those kinds of opportunities and sort of advised me on a career path that was relevant to what I was studying. So, I found that to be really, really beneficial and high quality.

Additionally, Molly shared her appreciation for the quality of professors she encountered and what they brought to the classroom stating, “I had professors who were really engaged in contributing to the academic world, as well as bringing current events into the classroom, so they had some really prolific and timely work, but they were also bringing other perspectives into the classroom.”

Balancing the experiences of Lucas and Molly, Kathryn admitted that although she overwhelmingly had amazing professors, there were also those few classes that people could coast by without learning anything. However, overwhelmingly her experience was positive, encountering
professors who left a lasting impact. She shared, “I think the professors that really helped me think about what I wanted to do in my professional career, there was probably five or six of them. They were really instrumental in my professional development and in my post-college plan.”

Through their experiences, alumni illuminated that their relationships and appreciation for their professors extended beyond the classroom and in many cases, dedicated faculty members made lasting impressions on them that they still recollect as alumni. This finding may suggest that related to advocacy for their alma mater, these alumni may be more inclined to engage based on their positive, lasting experiences.

In addition to appreciation for their professors, the alumni interviewed also shared something that they valued deeply from their time at UMass was how their college education taught them to think critically by engaging in discussions as active learners, helping them to develop skills that can serve them well in any of their future life and career endeavors. Cara described her classroom experience, “It wasn't just like, ‘Okay, hey, here's your content, read it, take a quiz.’ Which I'm sure there were definitely classes like that. Ones that I took were very discussion heavy, which helped me and my learning throughout college.” Building on this, Colleen shared how she valued that her UMass experience was more than “doing school.” She shared the value that she took from engaging in experiences that were complementary to what she was learning in the classroom whether that was extracurricular involvements, study abroad, internships, or quality interactions with faculty. She shared,

I'm pretty good at school, I know how to do school. It's not that difficult. But having conversations with professors on different topics that weren't related to the paper that I was forced to write was valuable, to hear different perspectives and different ideas that way. And really, my extra time on campus was what made my education more and made me value it so much more.

Others described their experiences as academically rigorous, contributing to their high-quality education. Lucas valued being part of a larger community and described the quality of his education sharing, “In terms of getting to be part of a community and think critically about how that community
works, I would say the quality was 10 out of 10.” He went on to explain, “Academically, I think studying what I studied, English and social thought and political economy, basically, is all about really just writing about how different economic systems work and why they work. I think that was very rigorous in quality.” When Peter was asked to define quality related to higher education he explained, “I do put a really high premium on the intellectual experiences of the school. And I think that I would put quality there, in intellectual rigor and what the university is able to offer in terms of debate.” Exemplifying this, he spoke about the various public lecture series offered by UMass to the community, that he often looks forward to attending,

> What a tremendous asset that is not just to students, but to the community at large. And I feel like those are really important spaces to curate also, that are outside of the classroom that bring both professors and students sometimes on equal playing ground to be co-learners in a sort of forward thought.

Elise spoke of how her time in the classroom as a political science major really prepared her for the real world and her career sharing, “the ability to think around an issue in different ways is really important...being able to look at things from different perspectives is really important. And I think that political science classes definitely push you to do that.”

> Through their quality engaging experiences in the classroom, it is evident that alumni learned more than what was between the pages of any textbook, and this is something they have come to value tremendously as they recognize how they were able to take what they learned to think critically and problem solve in their personal and professional pursuits. Such findings suggest that if such quality experiences were threatened due to lack of funding or inability to retain talented and invested faculty, alumni may be inclined to advocate on behalf of their alma mater to help sustain and improve quality offerings for future generations.

**Size Related to Options, Opportunities, and Ability to Curate Experience**

> Many of the alumni interviewed related the quality of their academic experience to the various options and opportunities that were available to them by nature of the size of UMass that with their
own initiative, enabled them to curate their own unique experiences. Elise shared, “I do feel like I got an excellent education and that there were a lot of opportunities to dive into different things that I was interested in through my education, which is I think all you can ask for.” Elise recognized that she was fortunate to have so many options, something she observed did not hold true at some other local institutions with sometimes higher costs. She explained, “I had people from the other five colleges in the classes that I was taking because their schools just didn't have them. And I think that's a cool thing about UMass is there are so many different options.” Marisa also spoke of the many opportunities she encountered and how she chose among the abundant options when it came to selecting her classes. Describing the quality of her classes as great, she explained how she utilized the add/drop option to evaluate her options before committing, she shared,

I would sign up for 22 credits worth of courses and go to all of them for the first two weeks and then drop out of them when I figured out which ones I wanted to take. Some courses I didn't even sign up for, I just saw them on the schedule and would just show up, get the syllabus, and then be like, I want to add this to my schedule or maybe not.

With so many options and opportunities on campus alumni spoke about how they made the most of their experiences and how they valued the ability to curate their individual experiences and make it their own. Peter described his love for his political science major and a program that enabled him to curate his own experience to meet his individual needs and interests. As a result, there were people in his major he never met since his focus was so different than others. He described the program sharing,

There is not a lot of, you have to take this course, this course, this course. It’s not sort of predetermined for students. And so that enabled me to have a political science degree that I know looked remarkably different than other people. There [were] people in my major that I never met before. I never even knew they were in my major because of what they carved out...I think other people took a very American politics focused, or electoral or the science of the political science thinking about those sorts of things. And I had a decidedly more political theory track.

Andrew also acknowledged the many opportunities available to students on campus and recalled advice that his cousin had given him when considering his options for college. He shared that advice explaining, “UMass can be as big as you want, or as small as you want, because you have the opportunity to make
connections with people and organizations and things within.” This advice stuck with Andrew and was something he embraced as a student on campus as he shaped his own experience. Other alumni echoed the sentiment of seeking out opportunities to make the most of their experience on campus. Alex focused on the totality of his student experience explaining, “from the friendships to the teachers and the professors that I’ve gotten to know and work with, the research that I was able to do, I truly made UMass what I wanted it to be.” Similarly, Elise zoomed in on her academic experience sharing, “I really do feel like UMass has really excellent classes. And if you seek out opportunities and really dive into what you're learning, the opportunities are tremendous from UMass.” Building on these sentiments, Kathryn took ownership of the experience she made for herself at UMass sharing,

I was lucky enough that I really do feel like I was set up for success, but I think that that was largely because of my involvement and searching out exactly what I wanted and getting connection through different groups that I was involved in. But I don't know what my experience would've been if I wasn't an involved student and if I was just attending classes and not engaging outside the classroom.

Together the sentiments of these alumni demonstrate the many opportunities that alumni feel they had access to as students at UMass by nature of its size and vast offerings, and within that their recognition of the need for students to be engaged actors driving their own trajectory on campus.

Considering these accounts, if alumni were as invested in their alumni experience as their student experience, they could curate their involvement to achieve personal goals such as building their network of professional contacts or continuing to engage in events, programs, and lectures as active learners, while also giving back to their alma mater in ways that support student and institutional needs within their own individual capacity and inclination.

**Helped Discover Career Path & Career Preparation**

A number of alumni spoke about their quality experiences as students related to how they were able to discover their career path and become well-prepared for future professional endeavors. While some alumni had enrolled at UMass undecided about what they may study, others had ideas that
continued to evolve through their time on campus. Kathryn spoke about a course that helped her reconsider a career in law and prompted her to consider options within the field of public policy. It was through this course that she realized, “I'm really interested in solutions to problems and implementing those things and making healthcare more equitable and accessible for vulnerable populations.” Through that course she described that a fire was ignited within her to explore that option.

Elise started at UMass thinking that she was going to pursue a career in international relations. However, her classes and involvements on campus helped her discover her interest in state government. She shared, “[I] realized that I just felt more of an impact when I was doing things at a more local scale, and that those were the issues that fired me up a little bit more.” Similarly, Molly was aware of her interests when enrolling at UMass but didn’t necessarily recognize how they could be channeled into a career path. She explained,

I didn't necessarily know as a kid that, I wanted to work in politics or a public service. But after going to college and sort of learning about those issues in more real depth...sort of became like a light bulb of a career path for me.

Beyond helping them to illuminate their career paths, alumni also shared how their education prepared them for their careers. Kathryn who now works in state government described how her time at UMass taught her about the landscape of Massachusetts in perhaps unexpected ways. She shared, “So working in state government, I think UMass was kind of almost like a microcosm of the state overall. I think I learned a lot about how things work, and it really helped me in what I do now.” She elaborated explaining,

So, I think it was really understanding structurally how things work, understanding process wise how things work. And I think those really came out of my involvement...in [various student groups].

Other alumni spoke of the skills that they developed while at UMass that have helped prepare them for their current and future professional work. Molly explained, “It really prepared me pretty well in terms of the writing, being able to sort of debate and defend a policy standpoint is something that I have to do
day-to-day, and just general like organization and discipline.” Similarly, as Monica thinks to her future as a lawyer, she is grateful for the writing skills that she will use in her professional work. She shared, “I am an infinitely better writer than I was four years ago...I'm really happy that I have this skill because as I go through a more advanced degree and in my profession, I'll be writing a lot.”

Through these accounts it is evident that courses and extra-curricular offerings were influential in helping alumni find the best career path in alignment with their interests and values. When a student came in undecided or changed their major numerous times, UMass offered an environment that encouraged exploration and discovery to help them discover and refine their career path. As the alumni interviewed are relatively green in their careers but have the potential to advance over the course of their lifetime, such appreciation could be beneficial to encourage future engagement in the form of advocacy or other involvements and gifts.

Values & Invites Student Voice

Although it did not represent a dominant portion of the interviews conducted, there were a number of alumni that signaled the importance of the university valuing the student voice as an indicator of a quality educational experience. Two alumni offered this forward based on their positive or neutral experiences, while a couple of others focused on things that could have been better during their time at UMass. Andrew spoke of his positive experience at UMass and how he felt empowered as a student on campus through his involvement in student government. Specifically, he talked about the Wellman document that was developed by the Board of Trustees that gave students power and voice regarding decisions affecting the campus and the autonomy to oversee student matters that included the Registered Student Organization (RSO) budgets afforded by the mandatory student activity fee. He explained,

Students have legitimate power through that document to influence student life, and there are committees and things associated with it. And also do all the budgets for all the registered student organizations. So that’s a big thing. There’s a whole committee that would do the
budget for all the RSOs (and agencies), which is huge, a lot of power because it's a mandatory student fee.

Peter, who had an overwhelmingly positive experience on campus and also was a leader within student government, had many experiences elevating the student voice and generally spoke of the importance of an attentive administration. He shared, “I would love to see an administration more responsive to the aspirations of what students want their campus to represent. I think that would be really important.” He elaborated that administrators don’t need to be involved in every aspect of student life and when they are it exemplifies the over bureaucratization of schools. Peter talked about his responsibility as a leader within student government to elevate the voice of the student body explaining, “I am [was] an ambassador of the student body—to the agenda of what we're going to set to the administration, and I see the administration as responsible for carrying on that vision.” He elaborated on the dynamic that sometimes created stating, “And I just think [that] can be difficult to work with, and that's nothing personal. That's just structurally the roles we filled.”

Jillian and Billy’s sentiments built on what was shared by Andrew and Peter but with a more critical lean. When considering how he would define a quality educational experience, Billy placed value on a university that “… is supportive and lifts up the student voice and tries to give students power and decision making over what's happening.” Billy was a student on campus during a time where there were a number of riots involving campus students that garnered negative national press. When charged with solving such problems, Billy shared that the university acted without addressing the root causes of some of the issues, something he disagreed with. He explained,

I feel like where we came into a lot more conflict was with vice chancellors and chancellors and people who were making decisions that we didn't agree with... It was very much a top-down kind of, they were making a choice and we were protesting it, and we felt like we had to protest because there wasn't a relationship there to come to a better agreement. And the power dynamics were such that there wasn't anything that we could do to overturn or challenge those kinds of decisions.
Despite instances like these, his student experience was not tarnished as Billy felt heard and supported by those closest to the problems on campus whether they were faculty, staff, or other engaged students. He described the disconnect existing more between those working on the ground and more senior-level administrators who often held the decision-making power.

Like Billy, Jillian also experienced frustration as a student on campus. Committed to community building and creating a safe space for students of color led her to become involved with student government in a leadership position devoted to diversity. Through this role Jillian was able to have closer contact with administrators and made it a priority to advocate for the preservation of the cultural centers on campus. She explained that students realized the university had plans for these centers that students were not aware of such as moving the centers, which was very contentious because students felt they were left out of the decision-making process. She shared,

...administrators just didn’t feel that our input was needed. So, I became [diversity leadership role] to become a kind of bridge between the administrators and students, in order for there to be greater conversations and collaboration and transparency about what was happening.

She went on to explain this was before the explosion of George Floyd, Asian hate, and a variety of racism issues on campus. She described that through those times, “...our cultural centers became even more important to us. And also preserving the history of the centers too. And that was something that administrators, I think, didn’t really fully understand.”

These mixed experiences are recollections of different experiences that happened at distinct points in time based on an individual’s class year and among different environments and political landscapes. Whether they were positive or negative, a common thread that weaves them together is

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12 “On the evening of May 25, 2020, white Minneapolis police officer Derek Chauvin kills George Floyd, a Black man, by kneeling on his neck for almost 10 minutes. The death, recorded by bystanders, touched off what may have been the largest protest movement in U.S. history and a nationwide reckoning on race and policing” (History.com, 2023, para 1).
the importance of the student voice being heard and respected through an attentive and engaged administration. Consistent with the literature, this is also something that is a known indicator of a quality educational experience (Utter et al., 1999). Should alumni engage with their alma mater and former student affiliations after graduation, they might be able to help legitimize student voices to the administration or drive change through the legislature by participating in advocacy efforts that help elevate student needs and concerns to those with decision-making power.

**Section Summary**

Together, alumni accounts illustrate that they have mostly positive perceptions of their alma mater related to the quality of their experience on campus and the education they received. Most alumni indicated that they were very satisfied with their experience and many felt that they received a quality education that was comparable or better than that provided by well-known private institutions in the region. At the same time alumni were able to acknowledge the many things that informed their quality experience such as invested faculty, academic rigor, career preparation, and more, they had mixed feelings about how the administration valued and invited the student voice. Their various experiences may serve as valuable tools for motivating their future overall engagement and engagement with advocacy specifically, affording them the opportunity to amend and strengthen favorable experiences on campus while also reforming and improving areas of concern so that future generations may benefit.

**Alumni Engagement**

Alumni were asked how they engage with their alma mater as a starting point for understanding how they may also engage in advocacy efforts on behalf of their alma mater now or in the future. Through conversation it became evident that alumni are staying engaged in a variety of ways that range from simply staying in the know about things happening on campus, informally acting as ambassadors to the campus, or attending alumni events as they are able. Additionally, a number of alumni are
volunteering their time with UMass, with some also engaging in political or advocacy-related volunteer activities in their community as their schedule permits. Finally, alumni are also engaging with the alma mater by financially giving back to the university as they are able and as aligns with their interests and values. The following sections illustrate these themes through examples offered by alumni.

Staying Informed

On the most basic level, alumni shared that they stay engaged with the university by staying informed about things happening with the campus. This could involve following university pages on social media, reading or watching the news, and staying in touch with campus contacts and former student organizations that they were involved in as students. Alex spoke about staying informed on social media and through contacts at the university. He shared,

I’m really big in Twitter, and Twitter is exactly where I get a lot of my information, from campus sources or even non-campus sources. I still stay in touch with university officials kind of privately. And I think that’s been really nice to again, keep an eye on what’s happening there. So, I have a pulse on the culture...And I think for me, it makes me feel like I’m still part of the community, when I hear about what’s happening in that way.

Slightly different than Alex, Andrew, who lives in the Boston area talked about the various news sources he reads and watches either on television or online, “I read a lot of local news and pay attention to the Globe and the Commonwealth Magazine...definitely stay in tune there. I do listen to some western Mass. news because I want to see what’s going on.” When asked how he watches western Massachusetts news living in the eastern portion of the state, he explained that he takes the extra time to watch it on YouTube sometimes. Andrew’s interest in what is happening in western Massachusetts, demonstrates his potential level of investment in things happening in that area and potentially at UMass that could be possibly be channeled into future engagement and advocacy efforts.

Slightly different than Andrew, Molly shared that one of the ways she stays informed is through her past student involvements. She shared, “I really stay in touch with a lot of the student organizations that I was involved in at the time [I was a student]” Through connecting with one of her past
involvements she shared how she learned that the university had overenrolled this year and the implications. She explained,

...so, a lot of students are living in the UMass Hotel and maybe that’s a temporary problem...but that has a temporary solution. But that makes me think—oh, the university needs more on campus housing options, how do we progress to that point where we actually have enough housing to accommodate the students that want to attend here? It’s great to have students wanting to go. How do we make sure that we have housing to accommodate them?

This example not only illustrates one way that alumni may stay informed, but also a potential avenue for future advocacy. In Molly’s account of this scenario, she uses the word “we” and questions, “how do we make sure we have enough housing to accommodate them.” This language demonstrates her connectedness and sense of belonging to the community and desire to help make things better, something that could easily translate into future political advocacy on behalf of her alma mater.

**Being Involved**

In addition to staying informed, alumni spoke of various ways they remain involved with UMass. A number shared how they speak of UMass to others, essentially becoming unofficial ambassadors of the university. Many spoke passionately about their experiences and how they have tried to encourage others to attend UMass. Marisa explained, “I just have very fond memories of UMass. So, I think very highly of it...I try to convince my nephew to apply there. My sister just had a baby, and she already has her first UMass outfit.” Jessica similarly devotes time to encouraging others to attend UMass. When describing her perceptions of her alma mater, she could not hold back her enthusiasm sharing,

Literally anytime someone mentions that they are considering UMass or that their child is, I am like here's my number, here's my email, I will literally drive out to western Mass. and give you a personal tour. I want everyone to go there. I feel weirdly protective of it.

Describing their talks with prospective students, other alumni specifically spoke of the quality of education students could expect from UMass. Elise shared, “I’ve told younger people who I’ve talked to that UMass, if they're worried about the academics, they're going to feel fulfilled and they're going to feel happy with their choice to go there.” Building on this sentiment, Alex who talks with students about
college options as part of his role at a high school shared, “I do think a lot about how my academic quality was, because I think about when I talk to somebody about UMass for example, I say, ‘Look, I had a really great experience there. The academics are strong.’” These feelings not only represent alumni pride in their experiences as students and now alumni of UMass, but their confidence and enthusiasm to either recommend or even go out of their way to encourage others to reap the benefits of attending UMass. Thinking so fondly of UMass and speaking highly about their experiences are behaviors that could translate well into supporting any future advocacy efforts on behalf of their alma mater.

In addition to speaking with prospective students, another common way that alumni are engaging with their alma mater includes attending alumni events located near them or traveling back to campus to participate. Marisa explained that she missed the university so much after graduation that she literally went to all of them. As many [networking events] as there were, I think there used to be two a year in Boston, I would go to both. The Red Sox games, the Celtics games, I would go to all of the events and just meet people and you start to see familiar faces. Eventually, attending these events became a pathway for Marisa to get more involved as an alumna. She explained that it was through attending alumni events that she met alumni board members, who encouraged her to apply for the opportunity to be part of the board.

Other alumni spoke of how they remain connected and engaged through their former student affiliations that have built-in opportunities for alumni participation. Elise shared, “I visited campus for the [women’s leadership] dinner in the spring.” According to Molly, who was also involved in the student and alumni women in public service leadership group that hosts the dinner, the dinner is an annual event that invites a lot of women leaders from public service, many of whom are alumni, to interact, mentor, and connect with students and program alumni. Similar to this event, designed for students and alumni, Monica spoke of her experience returning to campus for her sorority’s annual recruitment,
A lot of us go up and we make it a big thing. We make it a big trip. It actually has a lot of coordination to it because we have to do so many things and we engage with younger students. So, we have housing...and then within the recruitment event, we're incorporated into the event, so this one will be talking about alumni connections and how [the sorority] has helped us.

Each of these examples demonstrates an alumnus’s desire to reconnect with their alma mater whether it is through participating in as many alumni events as possible, driving from Boston back to campus to participate with alumni and students who have similar interests, or by taking part in an annual tradition that connects students and alumni. Through each of these examples, the alumni spoke about outreach from the university or others that prompted them to engage and the community and connectedness aspects involved in such experiences, which is something that could potentially translate into future advocacy efforts where alumni could be invited to come together and unite around a common cause and interest.

In speaking with various alumni, it became evident that among things such as their work, family, friends, and hobbies—many choose to use their discretionary time that remains to give back to their respective communities through volunteerism. Sometimes this volunteerism is motivated through connections with UMass and other times it is with groups or causes that align with their interests and beliefs. Specifically, more than two-thirds of the alumni interviewed shared that they still engage with UMass through various volunteer opportunities, some of which are one-off opportunities and others ongoing time commitments. Kathryn shared how she gives her time back to the areas of campus that were most influential to her through mentoring,

So definitely still view it extremely positively, still am pretty involved. I'm a mentor for [the student and alumni women in public service leadership group]. So, I try to stay as involved as I can in giving my time. I do a lot of informational interviews with students [from my school] to talk about my path. So, I think I stay engaged in terms of giving as much time as I can to the areas of UMass that were most important to me.

Similar to Kathryn, Jessica has shared advice with others through the Connect UMass virtual community. She has also engaged through former student and current alumni involvements to speak at events for students. She explained,
I mean, I have been pretty involved since graduation…I've met with some people through Connect UMass…I think one of them I maybe did a video chat with, and another just wanted to message, so I've done that. Through the [young alumni organization] I've spoken on a couple panels for admitted students, and there was a law panel.

Marisa’s involvement with volunteerism on behalf of her alma mater is slightly different as she currently serves on [an alumni advisory board] and is the founder of an alumni group on the Connect UMass online platform. She shared,

I actually just started, well not just, it's been a year—the [group name] on Connect UMass and we did our own virtual game night…we're hoping to do an in-person event at some point, or if maybe anyone's on campus for homecoming, meet up for dinner.

Like Marisa, Colleen shared that she is actively involved with [UMass women’s leadership group], explaining, “now being involved with the [UMass women’s leadership group committee]...that has become more of a bi-weekly thing on my calendar.” Taken together, these experiences demonstrate how alumni may be motivated to engage with their alma mater based on personal connections as well as opportunities to support groups or causes that align with their interests and beliefs. Related to advocacy, this presents an opportunity for universities to cater advocacy-related requests for support to alumni based on their past student involvements that may also signal some of their beliefs and values. Additionally, these examples demonstrate the range and flexibility of options available to alumni for ways that they can reengage and volunteer with their alma mater. Some are ongoing time commitments, while others happen once as the result of a special request and such engagement can happen on campus or remotely—sometimes even on the schedule of the alumnus. By continuing to offer flexible and accessible ways for alumni to engage, institutions may also make it easier for alumni to engage in support of future advocacy efforts.

Beyond volunteering for UMass, it became evident through conversations with alumni that many are choosing to use their discretionary time to engage in political or advocacy-related volunteer efforts not affiliated with their alma mater. Of the fifteen alumni interviewed, nine shared that they are
involved in such efforts. Lucas described his recent experience advocating for [a ballot question] as part of the 2022 Massachusetts general election.

I am a conscientious member of my community, so I do get involved in elections a lot. For the example, the recent [ballot question] regarding undocumented folks having the ability to get a driver's license, I saw it as a huge civil rights issue, a huge issue to make sure that, that passed. And so, I was volunteering about three to five times a week to knock doors for that or make phone calls, so I would do that.

Monica also shared her experience being very actively engaged in politics and supporting various political campaigns over the years.

Right now [for] the Massachusetts general election, I've been really engaged in terms of just keeping up with it. I was asked to be a delegate for [the governor] during the MassDems Convention, but I couldn't do it because I was graduating...I sign hold for people every now and then. During the 2020 general election, Massachusetts Senate race, I was really involved in campaigns. I was a digital organizer and then I also was in the Massachusetts fourth campaign, which is the district that I live in.

Peter spoke about his various experiences being involved in political campaigns as well as mission-driven organizations in politics explaining, “I've also held various roles on electoral campaigns. I've twice managed city council races, one in [eastern Massachusetts] in 2018, and then one in [western Massachusetts] in 2021. We won the [first] race, so that was really great.” He continued, “I am part of this [other] group, which has the mission to run first-time candidates to the state legislature and flip how the balance of power works in state politics, because progressive pieces of legislation die consistently."

Slightly different from these alumni, Molly and Andrew shared their community-based volunteer efforts to advocate in support of causes they are passionate about. Molly spoke about her involvement in a local organization interested in advancing more equitable housing in the community.

I did join...a local organization interested in sort of advancing, more equitable housing policy in the community. So, I just recently joined, and I'm trying to get involved in that. I did my capstone in my grad program on the housing crisis affordability and other availability in Massachusetts. So that's something that I felt like I could sort of lend what I had learned to my community because it's definitely hard.
Andrew, who is passionate about the environment has also participated in advocacy on behalf of his interests. He spoke of his experience, “[I’m] definitely involved in advocacy, through organizations like [environmental organization]. I’m on their transportation committee. And I’ve done advocacy on that...I’ve written op-eds... letters to the editor, gone to protests about climate change, and a lot of things.”

Considering how alumni are involved in volunteer efforts with UMass and beyond is valuable because it illuminates that in addition to supporting their alma mater, many alumni have remaining discretionary time that they are choosing to use in support of political causes that may involve advocacy. Through these involvements, they demonstrate their passion and commitment to helping facilitate meaningful change within their communities and demonstrate their knowledge and comfort level with engaging in different actions that support advocacy efforts. Such interests and skills could likely be translated to support their alma mater if such an effort was organized, and alumni were asked to participate.

Giving

Alumni also spoke of engaging with their alma mater through giving. Many give to areas of campus that align with their former student affiliations, while a smaller portion have not yet made financial gifts. Kathryn spoke of her current financial circumstances as a consideration of how she gives financially now and may be inclined to give in the future, sharing,

In terms of the financial giving, I hope one day that I can give even more of my money to the school but for now, I think the best way for me to give back is through my time maybe giving once a year when I’m able to through a Power Hour,\textsuperscript{14} that type of thing for an organization that I care about, that I know would fund something like a scholarship for somebody that has an unpaid internship. So, thinking about those things and trying when I’m able to give back financially as well.

\textsuperscript{14} Power Hour is a designated time during the university’s annual giving days where organizations compete to raise the most money by rallying their supporters to make gifts for a chance for the group to win additional funds.
She continued to explain that as she progresses in her career, and earns more money, she hopes to give even more back to her alma mater. She shared, “As I hopefully progress in my career and that means growing financially as well, I think definitely, UMass would be the place that I would give back to when I'm able to in that way.” Molly shared similar sentiments and behaviors regarding financially contributing back to her alma mater and where she directs her gifts.

I do [give]... modestly, obviously, because (laughs) I’m still early in my career, and I work for the state, so I don’t have a whole lot to give. But giving directly to the organizations that I participated in... I give every year to [them and], I often donate to the Student Care and Emergency Response Fund because I know that that helps students in need.

Marisa also spoke of her giving behaviors sharing that she gives to the student organizations she was part of each year during the university’s annual giving days and as a member of [alumni advisory board] and the associated membership requirement.

So, I love UMassGives.15 I do participate a lot and I obviously participate for the organizations that I was a part of as a student. And so I give to either the [student groups] that I was in or the departments that I was in and then being part of the [alumni advisory board] there is a financial component to being eligible and so I do that as well...So I would say I give partly because I have to as a board member, but also because I do really value what the organizations are doing and want to help future students be able to have the experiences that I had.

Different from these alumni, a few others shared that they have not given to the university with some insights as to why they have not given. Lucas shared, “Yeah, so I would say I do not give. Largely because I haven't been asked and I haven't been asked to contribute to a cause that I would say aligns with me.” Similarly, Peter shared that he hasn’t yet been asked to make a gift to UMass and doesn’t think he would be very inclined to do so despite his gratitude for his experience. He explained,

I don't think that I have [given], and I would not be particularly inclined to do so, if I’m being honest... I would be more inclined to give directly to a student organization, or if it was a specific scholarship or something that I knew what was happening, than to just give into the fund. Because I would like a degree of accountability over that money.

He continued, further elaborating on his thought process,
...even the student groups that I would give to, I'm not inclined to do that at the moment. One, just because I'm not convinced that my contribution would be that impactful, seeing as I work at a small nonprofit and don't make that much money. And two, I think that I would like to see a more sustained, or a better sustained kind of model.

Building on these thoughts Peter shared, “I especially feel that way given how much money I already had to spend to be there. I did get some of the debt forgiveness...but it doesn't erase all of my debt. So, I will continue to be ‘giving’ into UMass.”

Taken together, these alumni responses demonstrate alumni connectedness to their former student affiliations and the student experience in general. Income, debt, and accountability came up as factors that may influence the decision for whether a recent graduate may give, when they may give, and how much. Kathryn pointed out that although she’d like to give more in the future, giving her time is the best way for her to engage at the moment, while Peter stressed wanting some accountability over where his gift was going and how it may help students. Although Peter’s debt payments are not likely going directly to UMass, his sentiment clearly illustrates how he feels like he is continuing to repay the university financially, something that dissuades him from giving back financially. Related to advocacy, takeaways from this section include the opportunity for universities to cater advocacy requests to alumni based on their past student involvements and engage them through accessible advocacy efforts that clearly communicate the need and value of the effort, and potential or achieved outcomes as a result of alumni participation.

Section Summary

Alumni are engaging with their alma mater in various ways that include staying informed, being involved, and giving. On the most basic level, alumni shared that they stay engaged with their alma mater by staying in-the-know about things happening on campus by following university pages on social media, reading or watching the news, and staying in touch with campus contacts and former student affiliations. Additionally, alumni are engaging with their alma mater through various formal and informal involvements that include acting as an ambassador, attending events, and volunteering their time.
Beyond volunteering with UMass, many shared that they are choosing to use their discretionary time to engage in political or advocacy-related volunteer efforts not affiliated with their alma mater signaling their available time, interest in supporting important causes that may involve advocacy, and comfort level and skills to do so. Such interests and skills could likely be translated to support their alma mater if such an effort was organized, and alumni were asked to participate. Lastly, alumni also spoke of engaging with their alma mater through giving revealing that many give to areas of campus that align with their former student affiliations, while a smaller portion have not yet made financial gifts. Related to giving, income, debt, and accountability came up as factors that may influence the decision for whether a recent graduate may give, when they may give, and how much. When recent graduates do make financial gifts, many are in support of their former student affiliations due to personal connections and value and interest alignment. Such findings illuminate various opportunities for how to best engage recent graduates in ways that align with their capacity and inclination in support of critical institutional needs that can be addressed through advocacy efforts.

**Recognize Value of Advocacy Through Actions & Observations**

Through speaking with alumni, it became evident that although no program currently exists for them to engage in organized alumni advocacy efforts through their alma mater, they are generally familiar with and see the value in the concept of advocacy through their various experiences that could potentially extend to future alumni advocacy on behalf of their alma mater. Some alumni spoke of their experiences observing advocacy in action and how they believed that alumni advocacy has the potential to make a difference. With this belief, Monica was a little tentative with her response about the value of alumni advocacy due to the recency of her graduation [2021] and not having much of an opportunity yet to see alumni advocacy in action. She shared,

> I think it can [make a difference]. More voices the better. But I think that I'm not really confident in that answer just because it's like I've only been alumni for a little bit, so I can't fully answer it because I haven't seen it in a way. You know what I mean? But I know it works because I remember when I was interning, one of the deans...came down to D.C. to talk to our member to
try to get money for the state for that specific school. So, I know it happens and I know it can be successful.

Colleen built on this point, sharing her observations of political advocacy efforts and the work it takes to make such efforts successful.

I do think when [the Mayor of Boston] was voted in...that was on behalf of a large political advocacy work. Legislation being passed in general. But again, that...definitely that takes a lot of fricking work and you need people who are solely dedicated to doing that and dedicated to truly put a lot of their time and effort into making that work and ensuring that that works.

Each of these instances demonstrates how alumni are generally aware of advocacy and the impact it can have, but as Monica shared, she is not 100 percent confident in how alumni advocacy can affect change just yet as a more recent alumna who has not seen it in action. By witnessing more alumni advocacy either in action or through communicated opportunities to engage and follow-up communications that share the outcomes and impacts of such efforts, this sentiment may change.

**Former Student Advocacy Participation**

Additionally, most of the alumni interviewed were able to share experiences of participating in advocacy efforts as engaged students on campus who cared about issues affecting the student body. Lucas spoke of his work with a student advocacy organization on campus to help remedy food insecurity on campus.

...[The] Food Security campaign, that was an issue that a lot of UMass students reported that they skipped meals regularly because they couldn't afford them. And so, what that campaign sought to do was to pressure UMass Dining to take steps to make food cheaper and more accessible to students so that students might be able to be more food secure. So that's just one example of, again, the group identified an issue that was affecting undergraduate students as well as graduate students and decided to run a campaign to pressure a decision maker, in this case, the heads of UMass Dining to actually solve the issue.

Andrew also participated in advocacy efforts on campus as a student. He spoke of a memorable experience advocating for more gender inclusive restrooms on campus, something that made national news at the time.

I was involved in the so called the "shit in." So, it was about bathrooms. So, I sat in the bathrooms in [the administration building]. There wasn't enough...gender inclusive
bathrooms...in Central and Baker Hall. The state was saying, "oh, we can't have the bathroom be gender inclusive with multiple stalls under the plumbing code." Because the residents just put gender inclusive signage up...And then they had to change the plumbing code. Big deal. So, people actually went...I didn't really... but people went to Boston, from the advocacy organizations plus from student government and residence life because residence life was getting hammered by the residents. I mean, justified but... [residence life leadership] they went to Boston, and were trying to get the plumbing code changed. And I think they ended up changing it.

Andrew's participation and recollection of these efforts demonstrates that he has firsthand experience seeing advocacy in action and how it can be effective. His participation also indicates that he is willing to support causes that he believes in and that through his experiences he may be knowledgeable about methods of advocacy that could extend to alumni efforts to support issues affecting his alma mater moving forward.

Reflecting on the abundance of opportunities to be involved in causes as a student, Molly shared,

Yes, so I definitely was more politically active as a student at UMass—there were so many different sorts of protests and organizations to belong to at the time. So, I did attend some protests, like in my freshman year, was the year that the student body protested for fossil fuel divestment and sort of did a sit in at [the administration building]. So, I participated in that, not as extensively as some of the students who were arrested—so respect to them. I did go to my classes.

She continued also recollecting issues on campus following the 2020 presidential election, sharing, “I was also a student when Trump was elected President, and there were concerns about sanctuary status and whether or not students who were immigrants would be able to continue their education in the U.S....so sort of advocating for that.” Molly's recollections demonstrate that as student she felt surrounded by worthy causes that she could support though advocacy actions guided by the student body. As an alumna she may not be able to as easily identify and plug into supporting issues affecting the campus without a tailored invitation or request and guidance from the university regarding the specific needs and how to take action. Elise also spoke of her efforts to influence positive change on
campus by advocating with student government to pass a referendum to increase the student activities fee to afford a Student Union building renovation.

Obviously needed to have some money for it. I think there were conversations of if the administration contributed funds, it could have potentially been done without increasing a fee, but if the administration contributed funds, then they would have some control over the building and the students would lose that...I think most students, you don't want your fees to increase. But by doing that, the students were able to fully fund the renovation and thus the building is still [fully controlled by] students.

She went on, “I think that's partially why it was so rewarding...there were a lot of tough conversations...and seeing students use it and be happy with it in a lot of cases, felt like, ‘okay, this was a good thing that we did.” Like Molly, Elise had positive experiences with advocacy as a student and such involvement may channel to alumni advocacy engagement if asked and guided by their alma mater.

These various experiences of alumni engaging in advocacy as students, illustrates their ability to advocate to the administration and sometimes other students to affect important change. Should alumni still be passionate about helping current students and supporting future generations, with the time available and guidance from the university, they might also be able to effectively channel their skills to advocate to the legislature to affect policy decisions in support of their alma mater.

**Participation in Advocacy as Part of Professional Roles**

In their post-college lives, a number of alumni are also participating in advocacy-related efforts as part of their professional jobs. Andrew who is passionate about the environment and climate change issues shared, “[I] do work on different initiatives, including climate change advocacy on the local level, as well as restoration of streams and rivers in our watershed.” Elise shared how she sometimes has the opportunity to support public higher education and educational opportunity through her work in state government. She said, “I work for a person who is a UMass alum and I know her values align with mine when it comes to public higher ed and educational opportunity. So, I do get to do some of that through my work.” In each of these instances, alumni are supporting issues and causes they believe in as part of their professional roles. Andrew engages in formal advocacy through his position and Elise has the
opportunity to specifically support higher education through her work in state government. Through their employment, they have likely gained knowledge and skills that help them to effectively advance causes and such skills could easily be channeled to support their alma mater should they be asked and given appropriate guidance regarding university priorities.

Somewhat different than Elise, Molly shared her experiences working in state government where she balances the relationship among the chambers and is often on the receiving end of advocacy efforts through public hearings and stakeholder meetings. She explained,

I basically have to research and make recommendations on all of the bills that are filed in the legislature that come before the committee... [it involves] taking people’s lived experiences, their stories, but also sort of the facts and the data that certain organizations and experts can provide, and sewing that all together, and deciding how that should turn into a meaningful policy to solve a problem. I really really enjoy that aspect.

Molly’s experience with being on the receiving end of advocacy is unique. Through her account it is evident she is able to take in and synthesize large amounts of information and channel that information to inform potential policy recommendations and solutions. Given her experiences with advocacy as a student as well as her professional work experiences with policy, if asked and engaged, she could assist her alma mater to drive policy change not only as an alumni advocate, but as an alumna who may also be able to contribute to advocacy efforts in an advisory role. Different than Molly’s role in state government, Billy spoke of his previous work with a nonprofit that advocates for high-quality, debt-free public college and some of the challenges presented by the COVID-19 global health pandemic.

A lot of what I had been involved in...had been building strong coalitions with labor unions and other community organizations across Massachusetts. And we had a lot of success with that. And then COVID hit and students left campus, and our main organizing model was campus organizing...I would basically bring it down to two things...COVID really put a lot of advocacy organizations back into the silos that they had been in in the past. And that made it really difficult to build the necessary power across organizations and stakeholder groups to accomplish what we needed to accomplish.

Like Molly, Billy brings unique knowledge regarding effective advocacy practices through his previous work with a higher education nonprofit. His account demonstrates the importance and value of
coalitions for affecting change. Given his passion for high-quality, debt-free public higher education and his unique vantage point from his experiences, he may be inclined to participate as an alumni advocate and the university could also potentially leverage his knowledge and experiences in an advisory role, should it be valuable to advancing efforts.

Similar to their involvement in student advocacy related efforts, alumni participation in advocacy beyond the walls of the university demonstrate how a number of them are knowledgeable about advocacy actions and how to affect change through the legislature, something that could be channeled to support their alma mater if such efforts were organized, and alumni were called upon to act. Furthermore, some alumni have such unique experiences working in support of higher education or with advocacy in general, that their knowledge and experiences could potentially be leveraged in advisory roles as fit or needed to help further advocacy efforts on behalf of their alma mater.

**Political/Advocacy Volunteering**

Beyond their professional work, nine of the fifteen alumni interviewed also are participating in political or advocacy related volunteer efforts not affiliated with their alma mater during their discretionary time. Peter shared,

> Tonight, for example, I'm going to Brookline to be at the picket line for Starbucks workers who are on strike...They have community volunteers who come and keep the picket line alive, because the unions won't deliver the goods to the store while there's a picket line. So, as long as people are on the line, the deliveries won't happen...If teachers are doing standouts, or in this case it's Starbucks workers, very happy to be a part of labor solidarity stuff. So, that's one of the volunteer/civic commitments I have right now.

Peter’s example demonstrates his devotion to labor solidarity as a cause he believes in even if he is not directly affected. This interest and energy could translate to him supporting and advocating fair contracts for faculty or staff, or other causes should the university approach him with such requests. Andrew also supports advocacy efforts in his free time. He spoke about how he is informally involved in environment-related advocacy work in his hometown and more formally involved in the community where his family currently lives.
I talk to folks in my hometown...Because I was involved in Sustainable [Hometown], a local nonprofit grassroots organization too, I still advise them and talk to some of the local elected officials in my hometown, because they ask me questions about the environment now that I work for a nonprofit too, so it's another thing I do is just advise people sort of on the DL [down low]...[I'm] also on the board of [a community-based group]...trying to shut down a compressor station in [eastern Massachusetts]...It's just a big public safety threat. It's near where my parents live, and my grandmother lives.

Andrew’s motivations for involvement stem partially from his interest in the environment and partially from his connection to his hometown and family. Should his alma mater seek to engage him in advocacy efforts, asks could be targeted around his interests or program affinities from his time on campus.

Different than the previous two examples, Elise’s volunteerism after college has mostly focused on political campaigns. She explained,

I've done a little bit of campaign volunteering mostly... Last year I did for a colleague who was running for school committee. I helped her with her campaign, and I've done a little bit with the [governors] campaign this year, just phone banking and things like that.

Her involvement demonstrates her comfort and willingness to support her personal connections and political campaigns through actions that could easily translate to advocacy support on behalf of her alma mater if asked.

Together, the volunteer experiences of these alumni demonstrate how they have dedicated their discretionary time to support mission-driven causes that they believe in. In Andrew's case some of these involvements are formally organized, while in the other he informally contributes as an ad hoc subject matter expert. In the cases of Peter and Elise, they both shared their experiences taking advocacy actions whether it be through picketing or phone banking to further a cause. With specific requests, clearly articulated needs, and guidance from their alma mater, such skills could easily translate to support future alumni advocacy efforts.

Section Summary

Through speaking with alumni, it became evident that although no program exists for them to engage in organized alumni advocacy efforts through their alma mater, they are generally familiar with
and see the value in the concept of advocacy through their various experiences that could potentially extend to future alumni advocacy on behalf of their alma mater. Some alumni spoke of observing advocacy in action and how they believed that alumni advocacy has the potential to make a difference. Additionally, many of the alumni interviewed spoke of their experiences participating in student advocacy, their participation in advocacy as part of their professional roles, and participation in mission-driven advocacy for other causes that they believe in, illuminating an opportunity to channel their skills and interests to engage them in similar advocacy work on behalf of their alma mater.

**Alumni Power**

Contributing to the potential effectiveness of engaging alumni as advocates, conversations with alumni revealed that there is much power among the alumni population, and especially those who remain residents of the state. Alumni represent a large contingent of registered voters located across the various districts of the Commonwealth, who are diverse in age, race, gender, and occupation. As products of their alma mater, many have compelling stories to share and a number are well-positioned in their jobs or through contacts to help influence change.

**Power in Numbers**

A theme that emerged from the data was the power that alumni bring to the table in terms of the total number of alumni who are products of public higher education. Alumni spoke to this in different ways, some pulling from their professional experiences working on advocacy through various nonprofits and others drawing from their personal experiences and perceptions. Andrew talked about the sheer number of UMass alumni living across the Commonwealth and their untapped potential to engage as advocates on behalf of their alma mater.

...there’s a lot of alumni living in the Commonwealth. And if you if those people are tapped, that’s people getting involved writing letters, meeting with people...because I doubt that the legislators know that people care about this [funding] issue. And a lot of alumni probably do care about this, but just haven’t been, you know...sparked or tapped to do it...or have the
talking points or touch points to do it. So, I think it's a huge untapped resource that should be used.

Reflecting on the power of collective action, Molly spoke of how alumni advocacy can be more effective when organized in such a way.

I certainly would feel like they [my efforts] would make more of a difference if I felt like part of more of a collective voice, and those advocacy efforts, like just being one person advocating for an institution that serves like tens of thousands of people in the state is definitely hard.

Peter, who does advocacy as part of his professional work, expanded on this point talking about the importance of individual participation to reach critical mass.

In the grassroots sort of framework, I see that individual participation as important, because that's how you reach critical mass. In an electoral sense, I've been a part of races that have won by 11 votes. So, I think that also my brain has seared in this idea that individual participation does lead to larger sorts of outcomes.

Echoing this thought, Billy shared, “In political advocacy, you’re part of a greater whole, and your power comes from being a collective whole...and I think it can make a difference...but I think it makes the most difference the more people who are participating.” Beyond the numbers of alumni living in Massachusetts, Peter spoke of other strengths of the alumni population, sharing “...there's political weight in the fact that we are spread across the Commonwealth, so we're not just concentrated...we represent probably every single district across the Commonwealth. He expanded on this thought explaining, “alumni are both huge in number, diverse in geography and then diverse in their constituent makeup, in terms of age, other demographics.”

Drawing from their professional experiences working on advocacy efforts in the state, Andrew, Peter, and Billy spoke to the power of legislators receiving numerous messages from constituents.

Andrew explained,

...if a legislator gets five—or ten emails, like that's going to really influence them, you know? Because they don't get a lot, you know, and when they do, it's like, oh, wait, people care about UMass funding? Like, what? I haven't heard about this in 20 years...what?

Peter expanded on this thought.
And it's crazy having run this electoral race, some of these state reps, if they hear from 10 people about an issue, they're like, oh my god, my phones are blowing up. It's ridiculous how small the margin needs to be for a state legislator to feel like all eyes are on them. And so suddenly all across the state, at a threshold of 10 people calling their state rep about something and being like, hey, this thing, flagging this thing. The impact that that would have is crazy. And that's just 10 people from each of the legislative districts. There are 160 legislative districts. We're talking about a thousand people. That's a fifth of my graduating class. We're talking about people who have graduated for the last several decades. I think the potential political power is absolutely enormous. It would just need to be facilitated in some kind of way.

Also recognizing the potential power of alumni advocacy, Billy spoke to the power in numbers of UMass alumni located across the state and how those numbers could be multiplied if other public state institutions were to collaborate on such efforts.

But something that I think is pretty universally effective is if you can get a lot of people from all over the state, from every legislative district, and a lot of people, I'll quantify that. If you could get 150 people from 160 legislative districts to be like, this is really important to me and I need you to do something about it right now, that would be really impactful. And UMass Amherst could probably get there on its own. And then if you were in partnership with the other UMass campuses, you have a multiplier effect. If you're in a partnership with the other public universities and community colleges, you have a multiplier effect.

As illustrated by these accounts, alumni hold more power than most may realize to influence policy decisions by nature of their sheer number, location, and diversity. Should they be activated to advocate on behalf of their alma mater through organized, collective action their presence would be felt, priorities acknowledged, and hopefully policy advanced in support of quality, accessible public higher education within the state.

Well-situated Alumni Positioned to Drive Change

Beyond having power in numbers, it is valuable to consider the multifaceted nature of power and the potential impact that alumni who hold positions of power could have on policy decisions. Such positions could include accomplished alumni with strong networks or alumni who hold positions of power within the legislature. Cara explained,

Whether it's their name is well known in government or different realms—if you have those well-known names, even the not so well-known names that have connections—it all stems back into if you can advocate, then you can really make change when you are at that point in your life...
Building on this point Kathryn shared, “I think it would be great if you could get even more UMass alums into positions of power into the decision-makers seat that were passionate about the cause.”

Complementing this approach, Kathryn also talked about the value of also enacting grassroots efforts that have power in numbers,

I think in terms of advocacy, I think that, yeah, if there’s a big enough force, I think you can always kind of push forward a cause hopefully and be a part of the discussion or at the decision-making table. So yes… I think in terms of alumni advocacy, I think it can definitely make a difference.

Drawing on her experience working in state government, Elise spoke of the value of having alumni in positions of power with decision-making abilities in the legislature and having ways to reach those people.

I think the most effective ways are often when we see alumni in positions of power, whether it be in the state legislature or in a cabinet position or things like that. I think when alumni can reach the people who are making decisions about policies and funding and where public higher ed is going in our state, if alumni are advocating and can really connect their experience and I guess mostly their successes to UMass and public higher ed as a whole, it can help others to understand the importance of funding higher ed.

Considering the value of having alumni in positions of power, those who are passionate about public higher education may consider electing alumni who are the products of public higher education within the state who likely understand the value of these institutions and are receptive to addressing their needs. Additionally, if alumni themselves are not in positions of power but may have a line to those who are, they have the ability to activate their influential contacts on behalf of public higher education to reach decision makers and advance important priorities related to public higher education.

Ultimately, power is multifaceted and while having sheer numbers of alumni to activate on the grassroots level can be effective, it likely can be even more effective when complemented by grasstops efforts that also involve activating select alumni in positions of power to help drive important conversations and influence policy change on behalf of their alma mater and public higher education.
Uniquely Positioned Products of Alma Mater with Stories to Tell

In addition to power in numbers and by position, alumni are uniquely situated to be advocates for their alma mater since they are products of the institutions and likely have compelling stories to share. Olivia expressed her willingness and desire to hear from someone who has experienced what they are advocating for so that she could evaluate her support based off of a firsthand account.

I feel like I’m more willing to take the word of someone who has been there and done that, than someone who just is in theory, “this is what should happen.” Someone who has lived experience will be able to tell you, "I lived through this, this is what my experience is," and give a different perspective.

Building on Olivia’s point, Monica expressed the importance of alumni being involved as advocates for their alma mater since they offer the ability to share their stories and demonstrate to stakeholders how they have potentially overcome adversity and achieved success with the support of public higher education. She explained,

…it’s more empowering and persuading for a company executive who grew up in poverty advocating because UMass really uplifted them and their degree helped them get to the spot versus a student who's in poverty right now.

Molly, who works in state government also echoed the power of personal stories for influencing policy decisions, especially when those successes can be attributed to one’s alma mater.

I do think it is because alumni are sort of uniquely positioned to speak to the experiences that they gained from their alma mater, and to speak to the career and the life that they were able to build after their alma mater, and if their university sort of contributed to that path, or helped them get to where they are today…I think those are really powerful stories that make an impact in advocacy.

Complementing large numbers of alumni who may reach out to their legislators, and alumni in positions of power well-situated to drive change, compelling alumni stories may also sway legislators to provide greater support to public higher education as a means of ensuring an educated and engaged citizenry to sustain the future of the Commonwealth. With the right communications in place to request support and prompts and resources to guide actions, alumni may be effectively activated to help drive policy change on behalf of their alma mater.
Voting for Those Who are Supporters of Public Higher Education

Through speaking with alumni, it is clear that they can see the value of alumni advocacy, even if they are not 100 percent confident about how to participate in support of their alma mater. When considering things they can do outside of any organized effort, a common theme that alumni spoke about as part of their power to influence support for public higher education was voting for those whose values aligned with this priority. Just as it is important to have alumni willing to tell their stories it is equally important to have legislators who will listen to and prioritize these stories.

Elise and Kathryn spoke to this as they shared their thoughts about the power of their vote. Elise shared, “I try to vote for candidates who support funding public higher ed and things like that.” Also, related to voting, Kathryn explained her belief in free public higher education and her desire to vote for those who support that stance or are generally supportive of public higher education. She explained,

I mean, I think I’m a big believer in free public higher education. So, I think I’m voting for people and passionate about the cause of making public higher ed free. I think that that’s the solution and that’s the future. And I think that voting people into office that share that kind of political agenda is the best way that I can do that. Or at the very least, if it’s not a free public higher ed option... I think just education in general, both education before college and public higher ed.

As someone who works for a nonprofit, understanding the potential impacts of advocacy, Andrew articulated some things that could be addressed through advocacy and how alumni at a very basic level, should think about issues related to higher education when voting.

So, I think if we want to make UMass better, make more affordable...expand housing, make it more accessible, keep staff and professors, make it a better institution, I think we need more state funding. So, I think the alumni should be thinking about that when they vote and do the advocacy.

Through these accounts, it is clear that even when not prompted by their alma mater or organized in a specific way to advocate on behalf of public higher education, alumni always have the power to be informed voters and put their votes behind candidates who prioritize supporting public higher education. With supporters of higher education in office to receive and hear alumni stories, alumni voices can be amplified and prioritized at a level that helps drive change.
Consequences of Inaction

While articulating the value alumni advocacy could contribute to enhancing access to a quality postsecondary education, some alumni also noted that the absence of advocacy could also have unintended negative consequences for public institutions and future generations.

Similar to some of the other alumni sentiments about amending unfavorable circumstances or enhancing quality ones, Alex expanded on these points articulating the importance of speaking up.

I think as long as you believe in it and you want to speak positively of it, I think advocacy is important. And I would say actually to that point, if you have something you want to change or that you didn't like about UMass, I think it's so important for you to speak up, because at the end of the day, if you don't speak up, who's going to know? No one really knows unless somebody talks about a belief or feeling you're having about it.

Building on Alex’s point and drawing from her experience working in state government, Elise stressed the importance of not assuming that legislators know what the needs are for public higher education.

She explained the value of hearing from alumni,

I think when the people who are in positions of power don't hear from public higher ed grads, and their voices are just left out, they might be like, "Well, why are we going to fund this more?" If you don't have someone there saying, “because X, Y, and Z, I'm thankful for this and this,” it won't be something that they necessarily consider, so you need to ensure that they are considering it.

She continued, “And there are a lot of people [legislators included] who didn't go to public schools...who just probably don't or might not have the same understanding of why it's so important. So, you got to make sure that they're hearing it.”

Further painting a picture of what might happen if public higher education in the state ceased to exist or existed in a much-diminished capacity, Jessica articulated the importance of alumni being advocates for their alma maters.

I think, again, for me it comes back to the idea that it affects everyone who went there, and then even the state broadly. If UMass, something happened, or it went downhill, or whatever, then that affects the state as a whole, like the state's reputation, the state's workforce. I know a lot of people... I think, wasn't Massachusetts just again ranked as the top education state and one of the top places to live, and so I just think that non-advocacy could hurt if it is a place where advocacy is needed.
Reflecting on his experience advocating for public higher education as part of his work with a higher education nonprofit, Billy also stressed the importance of institutions being part of greater advocacy efforts, if not a driving stakeholder.

I think public higher education needs to learn to advocate for itself, and I think nothing is better than the institution itself mobilizing its own stakeholders to advocacy. I can at [public higher education nonprofit] say, "UMass Amherst needs this, help me help UMass Amherst get this," but if UMass Amherst says, "We need this, help us get this," there's no middleman.

Considering these alumni accounts it is evident that they believe in the importance and value of advocacy for higher education and recognize the potential unintended negative consequences the absence of advocacy could have for the state and future generations. Acknowledging these factors, introduces uncertainty regarding the barriers that may be preventing them from activating on behalf of their alma mater, a topic that will be explored more in future sections.

Section Summary

Taken together, it is very clear that alumni, and especially alumni living in the state, hold tremendous power to influence policy decisions on behalf of their alma mater. As informed and invested voters, they have the ability to put their votes behind candidates who prioritize supporting public higher education, potentially helping to amplify and prioritize alumni voices at a level that helps drive change. Also, by sheer number, alumni represent a large contingent of registered voters located across the various districts of the Commonwealth, who are diverse in age, race, gender, and occupation bolstering the potential effectiveness of grassroots efforts. Complementary to these numbers, others are well-positioned in their jobs or through contacts to help influence change at the grasstops level.

Furthermore, as products of their alma mater, many likely have compelling stories to share that could be influential to driving policy change. With the recognition of the multifaceted power alumni hold to influence policy decisions through advocacy, many alumni also acknowledged the potential unintended negative consequences inaction could have for the state and generations to come. With this in mind, it
is important to explore the barriers that may be preventing alumni from advocating on behalf of their alma mater and needs to activate them effectively.

**Need for Guidance, Education & Resources**

As evidenced in previous sections, many but not all alumni interviewed expressed that they are familiar with and comfortable engaging in advocacy efforts based on their previous student experiences, professional roles, and volunteer involvements related to political causes, nonprofits, and advocacy. Additionally, they recognize the value and need to have accessible, high-quality public postsecondary education options available to all in order to support future generations of students and foster a healthy and thriving Commonwealth. Furthermore, given the multifaceted power alumni hold through their pure numbers, positions of power, influential stories, and votes to cast, they are well situated to be influential actors in support of advocacy efforts on behalf of their alma mater and public higher education. However, despite their familiarity with advocacy in general, its value, and potential tactics, many expressed uncertainty around the specific needs for the university, how efforts may be organized to be effective, and what to say, who talk with, and when to take action. Without direction from their alma mater, their knowledge, skills, and experiences will remain untapped. To remedy this, institutions need to clearly communicate their needs, provide education, focus efforts, and develop resources and tools to make advocating easy and accessible for all alumni to act regardless of their experiences or backgrounds. These topics will be explored in the sections that follow.

**Uncertainty Regarding Needs & What Advocating for Alma Mater Entails**

Through speaking with alumni, it became evident that something preventing them from advocating on behalf of their alma mater was being uncertain of its needs. Although willing to participate as able, Cara shared, “And I think just the overall issue of it or the overall need for it [advocacy] hasn't been expressed as well as it could be.” Jessica shared a very similar stance, explaining, “I guess I just don't really know what the issues are or how to actually speak to them.”
Molly also agreed that it would be helpful if her alma mater could articulate the needs and challenges as a way of better engaging alumni. She explained,

Is it a political change?... Is it a funding issue? And where is that money coming from? Is it more of a resource issue? Do they need more talented faculty or something in a particular area? That kind of thing. I think it would be really helpful if they articulated challenges.

Echoing Molly’s thoughts, Colleen shared,

Well, what exactly do you want me to do? Do you want me to go to the state house? Do you want to meet so and so representatives? Do you want me to come to campus? I would need UMass to define the actions that you need of me and then also what would it be for? Why would you need this and what do you see the benefit of that happening?

Elise built upon these thoughts sharing she need for clear communication regarding the university’s needs, the value her advocacy could contribute, and how she could help,

I think it’s always helpful to understand just what exactly I’m advocating for, what certain funding is going to be used for, how it’s going to benefit students in the short term or the long term... So, I think understanding the need and then knowing where to go and where to direct that.

Sharing ideas for how institutions could more effectively communicate their needs to alumni, Alex shared his thoughts,

I mean it could be as simple as sending along talking points in a postcard. I don't know how people... But like, "UMass needs you. Put the U back in UMass. And then here's the advocacy things we need." I don't know. I'm just a marketer here. But I think those types of things would go a long way, and just putting it in front of people's faces and making it really clear that, "Hey, we've got an ask, and hopefully you can answer the call."

Based on alumni responses it is clear that while many alumni have a general awareness of some issues affecting public higher education, they are not sure of the most pressing needs identified by the university and how they can help influence positive change as part of a larger coordinated effort. Regardless of their knowledge and familiarity with advocating, with more clear direction regarding their alma mater’s needs, where to focus their efforts, and how they can help, alumni would feel better informed and able to advocate knowing their efforts would be put to good use to hopefully effect change on behalf of their alma mater.
In addition to not being certain of the needs of their alma mater, a number of alumni also shared that despite being familiar with advocacy and general actions that can support advocacy efforts, they were unsure of specifically what advocating for their alma mater may entail. Colleen shared her thoughts, explaining,

I guess I don't know what political advocacy, what alumni would be doing. That's why I had trouble answering that question, because again, do you need me to go to the state house during the workday? I'm not doing that. Will I gladly sign a petition for UMass to get more money? Absolutely fricking yes. Will I vote for a candidate that says that they want to fund the UMass system much more depending on what their other views are? Yes, it's definitely a big factor [but not the only factor].

Building on Colleen's points, Marisa shared similar thoughts.

I would say I agree [alumni should support their alma mater through political advocacy], but also I'm not entirely sure what that entails...to be honest, I know what it is sort of, but I don't necessarily know what time commitment or involvement it would entail if I were to check a box that says, "Yes, I'll advocate on behalf of UMass." I don't really know what that means.

Andrew, an alumnus who is fluent in advocacy and does advocacy work as part of his professional role at a nonprofit agreed with these sentiments sharing, “So I think I know what to do, but I don't know when or... So, I would say, I do know, but I don't know. Does that make sense?” He expanded on these thoughts highlighting some gaps that could be filled through organized efforts of the university, sharing,

I would, I'm pretty good about making phone calls about different things. When people activate me, or other organizations do. So, I would say timing is important for the amount of time to take but also when to do it because I could set up a meeting now, but I wouldn't necessarily know the talking points...I guess the legislative session isn't even open right now. But it could be a good time to talk to them.

In the face of uncertainty, alumni appear to be on pause about how to best take action to support their alma mater and priorities for funding.

**Need for Guidance & Education**

To help activate alumni as informed and effective advocates, many alumni shared that they would need more guidance, education, and resources from their alma mater. For example, despite his
comfort level with advocating through his various experiences, Alex shared that he would need more information and direction from UMass to advocate effectively. He explained,

I'd probably need some training on the things to advocate for, or at least what the campus's greatest priorities are. I never would want to say that I know exactly what UMass needs. I mean, I can make some inferences. But if UMass wanted to put together an advocacy committee and say like, "Hey, we need help, and if you want to get involved, let us know," I'm happy to jump in and, at least if I have time, be there, because I'd love to know what UMass needs. What are the priorities that are going to be coming down the line?

Jessica also expressed that she would need more guidance and education from the university to be able to advocate confidently and effectively and to correctly direct her advocacy to the those who hold the decision-making power.

I mean, I think part of it is I don't know enough about any of the issues to be able to actually speak to them. I know that generally, it's underfunded and that student fees are often raised to make up the deficit...I also don't know who do you go to because right now, everyone who I've talked about it with is part of UMass. Usually, with the Alumni Association or the [alumni advisory board], we used to talk about it but those aren't the people that can make the change...I don't really know who is besides politicians, generally, but that doesn't really get me anywhere. And so, I think those are probably two of the biggest things.

Molly also expressed a greater need for education around who holds the decision-making power related to advocacy efforts, so that she and other alumni could be more confident and effective advocates. She shared, “I think sometimes people don't fully understand that relationship...like maybe they bring concerns to the university where that the university isn't the one that holds that power. Maybe it's the state, and vice versa.”

Reflecting on how she may participate in advocacy efforts on behalf of UMass, Colleen spoke about her need to be informed on issues in order to be effective with her efforts and her desire to be aligned with the university to not inadvertently work against strategic efforts. She explained,

...if it's something that I know a lot of information about and I feel comfortable writing an op-ed to try to persuade public opinion, yeah, but I would also want to make sure that I'm not misquoting or misusing anything so I would probably want to reach out to other folks at UMass to ensure that I fully understand and comprehend what's going on...with political activism, there's a lot of strategic steps that sometimes if you're not that volunteer, you're really not helping the situation. I would want to make sure that I could be the best volunteer in that regard for what was needed.
Related to education and information, alumni demonstrated their investment and critical lens for advocating by sharing the information they would seek out or would like to receive to evaluate their potential participation in advocacy efforts and how they could best be effective. While Alex previously admitted he was busy and desired the institution to make advocacy as easy as possible given time constraints, he also shared his willingness and desire to learn more.

So, I would say I also am the kind of person that goes out and seeks out this type of information on my own. Nobody sends me this kind of information. I just look it up and can tell year to year what's going on. Do I download the trustee reports? Yep. Stuff like that. It goes above and beyond what a normal alumnus probably would know, but it just helps me think about... “Okay, what do I need to know about what's happening there?”

With his proactive efforts to stay educated and informed in mind, Alex also shared his desire for UMass to proactively communicate important information to alumni.

And I would say I think UMass could do a better job at getting information to folks, in the sense where it's like, unless I really looked for it, I probably wouldn't find out. And if I didn't have a Google alert for anything that said UMass Amherst, I probably wouldn't know half the things that are happening, just because, again, I'm not out there directly. So, I think there's definitely challenges there.

Molly spoke about the combination of information she would like to receive that includes a history of the challenge, facts and data over time, and real-life experiences that help humanize the issue and illustrate a need for change. She explained,

I really appreciate like facts and data supported by real life experiences. So, for example, if there's a historic funding issue like... I appreciate seeing the line item in the budget, or even just like the numbers... If you're losing money, I want to see that over time, but also relate that to what the real-life impact is that that's having at the university, because I'm not there. I might not necessarily see it, and you know I might not have had the same experience as other students on campus. So, telling a story, a personal story that relates to the issue or the need.

Molly used the example of student hunger on campus to help illustrate her point.

I think, student hunger is an unfortunate example of where that can be really powerful. What are the statistics of students who are hungry on campus? And then, if you have students who are even anonymously willing to share what the barriers they face to being fed on campus are, that's really helpful to hear.
Billy spoke of the opportunity for institutions to remove or minimize barriers to advocacy based on his professional experiences. Sharing this would be important for all, but most important for those who have never politically advocated before. He explained,

I think you'd need to talk about... [that] political advocacy actually doesn't have to be hard. I think you'd need a little education both of what is the problem we're asking you to help us with and how can you help us? And your help won't take that much time. I think that would be really important and a barrier, you need to figure out effective ways...to overcome that barrier for a lot of people.

He continued, elaborating on opportunities for institutions to engage in proactive education from early on. He shared,

And I think in general, obviously there's barriers of people are really busy and capacity and time, and it's not infinite...But I mean fundamentally, if the university was...helping educate you as you were coming through the university as a student or as a family member who’s supporting a student, that would eliminate barriers down the road because you would be educated to understand why this is important.

These accounts from alumni demonstrate the need for alumni to have more information regarding advocacy needs and how they can specifically help further important causes on behalf of their alma mater. While Alex demonstrated his dedication to go above and beyond to receive the information needed to be knowledgeable about what is happening at his alma mater, this is likely not the case for most alumni who are busy with other work and life responsibilities. As such, institutions need to proactively communicate with and make information available to alumni so they can be informed and effective advocates. Such information could include the history of challenges, facts and data over time, what to do, when to take action, and where to direct their efforts. Education about issues and advocacy could be on a continual basis through regular communications and has the potential to start when alumni are students on campus through a variety of mediums that could potentially include communications, courses, and student involvements.
Contributing to the education and resources needed to be an effective advocate, alumni shared ideas based off of other experiences with advocacy regarding what tools and materials would help facilitate the ease and likelihood for them to engage in such efforts.

A number of alumni spoke about the need for talking points to help them speak about the most pressing issues. Molly shared that she doesn’t feel like the university has asked her to advocate and while she does it on her own, she sometimes struggles to know if she’s doing it well.

I usually just do [advocate] on my own. But I think sometimes, like I even struggle to find that balance between...Well, how might I be representing the different organizations that I do volunteer for and belong to at the university. Like maybe the [alumni organization] doesn't want me saying like, raise the tuition (laughs) or something like that.

Andrew elaborated on the benefit of talking points and resources for how to tell your story. He explained,

And in my day job, I build them [action alerts] and you know, we give people language to help guide them on what the issue is with...talking points and how to tell your own stories, because I think that's a big thing is telling your story.

He shared other ideas tools that would be helpful resources of alumni to advocate, “maybe have a newsletter about advocacy opportunities with higher education funding would be good.” He continued, “And make it easy...have action alerts, have fact sheets, and websites where people can learn about the issues. I think would be huge...The simpler, the better, you know?” Reflecting on the resources that would be helpful for her to have to advocate on behalf of her alma mater, Kathryn shared her interest in attending events to become more informed. She shared,

...maybe coming out of this pandemic and having more in person opportunities to engage with alumni, specifically for people in Boston, I think the UMass Club hasn't been able to be utilized fully over the past two years. So, are there events that alumni could go to [to become informed]?
She continued, sharing that additional resources could also be helpful for educating alumni about effective advocacy for UMass, “I think definitely having accessible information and a guide would be helpful for sure.”

Based on alumni responses it is clear that more tools and resources would help them to be better educated and informed advocates on behalf of their alma mater. Such tools would also enhance the ease and likelihood that they would participate in such efforts. Knowing this, should institutions have the capacity, they may want to consider developing a toolkit of resources that can help alumni easily and effectively act in support of their priorities and needs.

Section Summary

Given the accounts shared by alumni, it is evident that with proactive clear communication regarding institutional needs, coordinated guidance regarding how they can help, and resources to support such efforts, alumni may feel better enabled to enact their skills, talent, and power to take action to influence positive change on behalf of their alma mater.

Value of Intentional Student & Alumni Connections

Potentially contributing to the education and empowerment of alumni, it became evident through conversations with participants, that interactions with alumni as students were influential and, in many cases, left lasting impressions. For some now alumni this involved participating in events with alumni, hearing alumni speakers, or having an alumni mentor. Such exposure helped illuminate ways to stay engaged and give back to their alma mater after graduation and in many instances inspired future alumni engagement that in the future could be channeled to support advocacy efforts.

Learning Student to Alumni Role Progression

When alumni spoke of how they currently engage with their alma mater or may engage in the future, a common thread spoken about involved their student experiences participating with alumni that later translated to them similarly staying involved as alumni. Jessica spoke of her involvement as a
student representative on a recent graduate advisory board and how her student experience easily transitioned into future alumni involvement with the same group. She shared,

So, it feels like with the [recent graduate advisory board], it was nice to kind of know that that was something that would continue after college...it felt like it was meant to still be something that you did after college. Not like, oh, that's weird that you're still involved with that. It was like, no, this is meant to be a post-graduation thing, which I do think helped almost ease the transition a little bit and make me want to stay involved with it.

Like Jessica, Monica was exposed to alumni engagement opportunities as a student through her involvement with her sorority. She spoke of the tradition of students participating with alumni that has now translated into her own alumni involvement with the same group,

I think it's really been a cultural thing within my sorority that alumni are always coming back...It's like a tradition in a sense, just to stay involved. And young alumni typically go up because A, we don't have kids. And B, we’re probably the most connected to it, but older people come up too.

Through her involvement with the Student Alumni Association, Cara was also exposed to a number of event opportunities where she was invited to participate alongside alumni through the group’s partnership with the Alumni Association which demonstrated to her a natural progression of how she could continue her involvement post-graduation as an alumna.

Working with the Alumni Association for years, things like Homecoming and those big events that were like, ‘Hey, we want to see alumni here.’ Like the student alumni networking night...it’s interesting just because I did engage with them as students. Engaging with them as an alum is just a natural progression for me.

Molly who was involved in a student and alumni women in public service leadership group as a student spoke of her naturally evolving experience with the group first as a student fellow who benefited from alumni mentorship, then a student board member who collaborated with alumni to plan programming, and eventually an engaged alumna who still returns to campus for their annual event. She described the event sharing,

They have an annual workshop where they do a dinner and invite a lot of different women leaders in the public service. There’s a mentorship element to it, too. So, you get assigned a mentor somebody who works in the field that you’re interested in, and they check in with you, you know, like weekly or bi-weekly. So, it was really really impactful program.
Different from the other alumni, Andrew who was involved in various groups that did not have a built-in alumni component admitted that he was not sure how to get involved after graduating. He explained,

I think it could be effective [to participate with alumni], because people leave the university... And this is a way to, you know, say, "Oh, this is the group I was involved in, or, you know, tangentially that's just how I can plug back in...Because right now, at least... I don't know how to plug in.

In many of these instances, alumni had the opportunity as students to participate in events or programs with alumni who were influential to their college experience. As they participated with alumni, alumni essentially modeled for them what their engagement could look like after graduation and in many instances these students (who are now alumni) continue to participate in the way that was modeled to them. Alumni who did not have this opportunity, such as Andrew shared that he thought it would have been a helpful way for him to be aware of ways to reengage with UMass as an alumnus. Such experiences illuminate the value and opportunity to develop intentional student and alumni experiences around advocacy.

**Meaningful Interactions with Alumni as Students**

Beyond the mere exposure to alumni engagement opportunities as students, current alumni also spoke of meaningful and transformative experiences that they had with alumni as students that has motivated them to give back to their alma mater and the next generation in a similar way. Monica spoke of some positive experiences hearing from and interacting with alumni as a student,

There are these things that really helped me, and these were from young alumni. My freshman year, this woman...she's incredible. She works for the UN [United Nations] right now and she had a sit-down lunch with a ton of people of color, students of color...She came all the way up from [Washington] D.C. just to talk to us.

In addition to this experience, Monica also had an amazing experience as a student who participated in a college-sponsored program that afforded her the opportunity to intern in Washington, D.C. She spoke about value she took from this experience and how that experience inspired her to give back as an alumna. She shared,
In D.C., I saw so many alumni come engage with us as mentors, as people helping us find jobs. These people, the bond that UMass had created between me and just people who wanted to help me really influenced me wanting to help them because it’s like all about uplifting the community. And especially in D.C. I think the most memorable moment where I realized, I think this is where I realized how much I valued UMass.

Molly also had positive experiences with alumni mentors. She explained that through her student involvements she was fortunate to find mentors in each, many whom she is still in touch with today. She shared,

I had a few different mentors in the [student and alumni women in public service leadership program] that really helped shape my career path and the decisions that I was making about what I was going to do after I left UMass. And...[student group advisor] was an amazing mentor, and some of the [alumni advisory board] members that I've kept in touch with.

Kathryn and Jillian both spoke of their meaningful interactions with alumni and how they now seek to be involved and support the next generation of students. Kathryn shared, “I had such a good experience and because my interactions with alums was so meaningful, I just feel like that's a no brainer...if I could be helpful to one person talking about what my career path was... that's an easy choice.” Reflecting on her own experience and how helpful and approachable alumni were to her as a student, Jillian shared she would also be inclined to help students who reached out to her for support,

That would be something that I would like 100% support, because that's actually what I did as an undergrad was reach out to alums in that way. And, you know, ask for history, ask for information, ask for how they...their knowledge. And I was able to connect with alumni who gave me their time because they too cared about these issues. So that would be something that I would, happily do for the next generation of students.

In each of these examples, alumni shared the very meaningful experiences that they had with alumni as students. In some cases, these interactions affected their career path. It also helped them as students expand their “UMass community” beyond the campus demonstrating the vast nature and power of the alumni community. The meaningful interactions experienced by these now alumni have inspired them to continue giving back to their alma mater in a similar way and demonstrates how intentional student and alumni connections related to advocacy could be beneficial for educating and inspiring students about how to participate and stay involved in such efforts as alumni.
Section Summary

Through intentional interactions with alumni as students, many now alumni had influential experiences that left lasting impressions and illuminated a natural progression for how they may stay engaged with their alma mater beyond graduation. Additionally, many participants shared that their positive interactions with alumni as students helped illuminate ways to stay engaged and give back to their alma mater after graduation and in many instances inspired future alumni engagement. Such accounts demonstrate an opportunity to design similar experiences around advocacy so that students have the opportunity to learn about advocacy needs and efforts while participating with alumni and remain inclined to continue their involvement in an alumni role after graduation.

Inclination

In addition to and beyond their involvement with alumni as students, when thinking of how alumni may be inclined to engage with and support their alma mater through advocacy efforts, it is valuable to understand what factors they consider as part of their decision-making process. In speaking with alumni, it became clear that important considerations for engagement included their desire to give back, being asked, alignment with their interests or values, likelihood of making a difference, and the approach to advocacy. In the sections that follow these are explored in terms of general engagement to establish a baseline for participation and later advocacy to understand how alumni may think about engaging in advocacy efforts on behalf of their alma mater now and in the future.

Desire to Give Back

Related to inclination, when considering how they currently engage or may engage with their alma mater in the future, many alumni spoke of their desire to repay the institution that gave them so much. Some also spoke of the value they continue to take from their experiences as alumni as motivating factors for them to continue engaging. Cara explained her motivation for giving back sharing, “...if I can give back, whether it's giving job advice to a current senior or anything like that, once again, I
got so much from that school, I wouldn't be here without it. I wouldn't have all those fond memories.”

Like Cara, Monica also desires to give back to her alma mater. She explained,

I really take pride in the fact that I graduated from UMass and I graduated UMass twice. UMass has a lot of problems. I'm not going to say it's a perfect institution because it's not. But what it gave me is something that I, in a sense, want to repay.

Regarding how she engages, Monica is not likely to give money at this point in her life based on her current financial circumstances as a recent graduate. However, she is very committed to giving back more financially to support students as she is able in the future, mentioning that she would like to go as far as starting a scholarship to help others. She shared, “I'm really likely to engage with UMass if they're not asking me for money...At some point, I want to start a scholarship. I already have intentions of giving back to UMass, but that scholarship's going to be in the future.” Her desire to engage at this level stems from her many positive experiences with alumni as a student that helped her find her career path.

Similarly, Molly shared her gratitude for the alumni who positively affected her student experiences and is inspired to give back so that other students have the opportunities and support she once had. She shared,

I feel that way, because I know that certain opportunities that I had at my alma mater were made possible through alumni volunteerism or alumni philanthropy. And you know if some alumni hadn't made the decision to give back in that way, I wouldn't have had those opportunities. Whether it’s scholarships or internships, or even just sort of mentorship programs. And so, I feel like it’s important to continue to make those opportunities available for students and to give in those ways when I can.

Colleen built on Molly’s thought sharing, “I think if you don’t give back to what gave to you, then you are a thief...I think you should always try to work for the person coming behind you to have a better experience than you.” When asked how and when this belief formed, Colleen shared that it developed during her upbringing through her involvements with her local community and was consistently refueled during her time at UMass. Explaining her gratitude, Marisa shared she is inclined to give back to her alma mater because she feels that it gave her so much more than she bargained for. She also recognizes that not all alumni feel as she does and provides additional insight,
I feel like I took advantage of every opportunity it was given to me on campus. I know some people that I’ve spoken to that are more young alums, they feel like UMass took a lot from them in terms of money...obviously they had to pay for a lot of things. Whereas I feel like I really got the bang for my buck if you will, like I did everything possible. I don’t regret a single thing. I did as many jobs as I could, I applied to as many scholarships as I could. I took unpaid internships that UMass was able to help me pay for. I did as many student groups as possible. I performed for things, I traveled with UMass, I studied abroad. I feel like I just took advantage of as many opportunities as I could that I have to give back in some way... I got a lot from the university.

Within the desire to give back to their alma mater out of gratitude for their experiences as students on campus, many alumni also spoke about their desire to engage to help students as a way of supporting future generations to have the same quality or better experience than the one they had. Elise explained it this way,

I guess pass the torch on mentality. I’m thankful for what I got from UMass and want to pass the torch to the next group who graduates and ensure that the torch is still flaming and going and strong...I guess just a lot of the resources that I have and the connections that I have now are because of my time at UMass. And if I want other people to be able to benefit from it, I need to use whatever I can to make sure that it can continue to serve students.

When responding to why she engages with her alma mater, Marisa explained, “I do really value what the organizations are doing and want to help future students be able to have the experiences that I had.” She expanded on the value of alumni engagement, sharing, “Not to mention a lot of people who have either children or nieces, nephews...you would want them to have a good experience as well. So, by giving back, you get to assist the future generations in coming up.”

Beyond general benefits of engagement that could support the next generation, alumni also specifically recognized the value of alumni advocacy as a tool for enhancing the student experience for future generations. Olivia spoke about the importance of speaking up about things that could enhance the student experience, even after graduation to benefit future generations, sharing,

...if you went and you realized that there was something missing, I think then advocating for the school to be like, "This is what this school is missing" is also a form of advocacy. Telling them what they did or didn't do right or what is missing is also really important because it might not benefit you because you already have that experience, but it could benefit other students or other people who will be in your position.
Peter shared his view, that regardless of one’s experience as a student there is an opportunity to make things better at the institution through advocacy. He explained, “there's the opportunity to really amend some of the circumstances that were either unfavorable to us, that we could change. Or two, expand upon the things that were really great through our advocacy.”

When asked if alumni should advocate for their alma mater, Kathryn had this to say, “I think it's important to think about future generations...[alumni] should be thinking about future generations and being able to access the same level of education that we were able to and not go into serious debt.” She expanded on this point explaining that she would be willing to advocate to amend unfavorable circumstances on campus or to enhance current offerings. She also shared an example of something that affected her family that she hopes advocacy could change,

...one thing I think that was wrong, that is something that I had a lot of conversations about is the housing issue for transfer students. My sister was a transfer student when she came to UMass and was a part of the creation of the Transfer RAP\textsuperscript{16} Program and having transfers live together in a living learning community. So, I don't think it was great to see that they're going to be at a hotel so far away from UMass.

Marisa also shared her thoughts regarding whether it is important for alumni to be advocates of their alma maters, explaining,

So yes, I definitely do...we had a lot of opportunities because of the institution, because of our time on campus. We want it to do well, we want to increase the value of our degrees, we also want to help future generations have access to those things and ensure that society gets a little bit better.

Given these responses it is evident that alumni see the value in enhancing the student experience for future generations whether that be through general engagement, volunteerism, giving, or advocacy. Although no organized way to participate in alumni advocacy currently exists at the institution, the fact that alumni recognize the value it could contribute signals that they may be inclined to participate if asked and the cause aligned with their values, interests, and capacity to take action.

\textsuperscript{16} Acronym for Residential Academic Program.
In addition to their general gratitude and desire to give back and their interest in supporting future generations, alumni are also motivated to engage with their alma mater for the benefits they are receiving now or may receive in the future. Such benefits include adding value to their degrees and the continued support and services offered by their alma mater to alumni. Jessica explained, “I also do think that there's an element of the better experience people have at UMass, the better of a school it becomes, and the higher in rankings it goes, and the more valuable everyone's degrees become.” Colleen also shared one of her motivations to make financial gifts is to help the school rise in national rankings, “I always want to give, because I do know the value of my donated dollar being an undergraduate alumna and how that reflects U.S. News rankings and other reporting structures.”

Among many reasons Cara has been inspired to engage, one stems from an interaction she had as a student with an alumna that left a lasting impression. She shared,

I remember an alum once told me, “Because of you guys, the value of my degree has skyrocketed. I graduated in the '70s and now...” She's like, "When I grew up people were like, 'Oh, you went to UMass, whatever.'" She's like, "Now, I tell people I went to UMass, and they're impressed." And that is 100% because of what the current students and administration [are] doing.

In addition to what the university has done for her in the past, Elise shared she is motivated to engage based on what the university continues to offer her as an alumna. She shared, “I really appreciate and continue to appreciate the networking and the opportunities that [the student and alumni women in public service leadership group] has afforded me and can see the difference that it's made, not only to me but other folks who are in it and continue to be.”

Related to engaging with their alma mater through advocacy specifically, alumni are also motivated to participate based on benefits they may receive now and in the future. Marisa spoke of the importance of the institution’s reputation and ranking at any given point in time explaining,

You really want to push for better for the future generations and if the school does better, it ultimately helps you as well. You went to a top tier institution, whether you went there when they were 99 or number one, doesn’t matter. But currently they’re at whatever level they are and that helps you in that case as well.
Jessica and Alex also shared their hopes that other alumni may also be inclined to engage in political advocacy. Jessica explained, “[it] comes back to their own degrees of making their degrees more valuable.” Alex also reflected on how alumni have the ability to positively influence the reputation of their alma mater, sharing,

I think if they believe that the university has done enough for them, then they absolutely should, because I think it only helps the reputation around here as people are more positively favoring the university... that speak up and talk about it.

Although not her first consideration, Cara also thinks about what she may get back from her alma mater by lending her support through advocacy. She explained,

It's unfortunately selfish, but the more you put into your university, the more you're going to get back, even as alumni. The more opportunities you're going to have to make connections, whether it's professional or otherwise, [or] just being able to have greater opportunities with your degree. Once again, you get out what you put in.

Building on this sentiment, Marisa also spoke of the value proposition for weighing the likelihood she may participate in advocacy where she would consider the benefits of participating for herself and others. She shared, “So why does it resonate with someone who's advocating? What are you getting for giving your time? What are you getting for traveling somewhere to sign a petition or post on social media?”

Based on these alumni comments, it is clear that when considering whether they may participate in advocacy efforts, the alumni interviewed not only consider the benefit to their alma mater and future generations, but also the benefits they may reap from doing so. Alumni recognize that a thriving institution helps add value to their degree long after the time that they’ve left the university and continued engagement post-graduation may also be helpful for their future professional endeavors.

When considering how to appeal to alumni to advocate, institutions should consider highlighting the benefits to alumni among other benefits to help market the need and opportunity to participate, so that
alumni may weigh the various costs and rewards as they consider when, if, and how they may contribute their time and talents.

**Being Asked**

Many alumni also revealed that being asked to participate is an important element of their decision-making process regarding engagement, sharing that within such a request, who asks them to get involved and the value their participation could contribute can influence their decision to engage.

Olivia, who works as the director of admissions for a high school in the state shared,

> I think it just takes a little bit extra for me. I don't think I would volunteer myself to talk about UMass Amherst here at the high school, but if someone were to ask me, "Can you be part of a panel?" or a student were to ask me a specific question, I would gladly talk about UMass.

Similarly, Jessica spoke of her discussing her experience at UMass with prospective students explaining how she is more than excited to share her experience and support but that those conversations are typically the result of others bringing UMass up to her. She shared, “I would say whenever that comes up it's more as a reaction to people bringing it up to me, rather than me personally seeking out those opportunities.” Related to giving as a form of engagement, Lucas reflected on not giving to the university sharing,

> ...so, I would say I do not give. Largely because I haven't been asked and I haven't been asked to contribute to a cause that I would say aligns with me. Again, like most things, if asked and it was something that I think aligned with my values, I probably would agree.

Together these accounts demonstrate the importance of alumni being asked to engage with their alma mater as a first step in gaining alumni support, something that could easily translate to alumni engaging in political advocacy on behalf of their alma mater. Similar to these responses about general engagement, alumni also shared that being asked to participate in advocacy efforts on behalf of their alma mater is an important element of activating their participation and within that, who asks them to get involved and the potential impact they could have can influence their decision to participate. Jillian shared that if she were contacted to advocate on behalf of her alma mater and the
cause aligned with her values, she would advocate. However, she also shared that she has not been contacted by UMass since graduating in 2021. She explained, “UMass has not emailed me at all. Even my personal email, you know?” Molly also shared that she does not feel that she has been asked to advocate on behalf of her alma mater. She said, “...sometimes I don't really feel like the university necessarily asks me to advocate on certain issues...so, I don't really feel like I've been asked by the university to advocate on its behalf.” Further signaling the importance of being asked, Billy described his willingness to advocate on behalf of UMass if asked, explaining that such feelings stem from his desire to make a difference. He shared, “Me personally, again, I'm pretty all in, like if I was asked.”

Similar to general engagement, these accounts demonstrate the importance of alumni being asked to engage in political advocacy on behalf of their alma mater as a first step in gaining their support. In the examples shared, alumni acknowledge their willingness to advocate on behalf of their alma mater. However, without a specific request or prompt, alumni may not think to act on their own and if they did act on their own, they may not have the right information at their disposal to do so effectively, leaving them as an untapped resource to further policy goals. To successfully activate their alumni, institutions need to be in touch, communicate needs, and appeal to them for their support through specific asks that resonate with their motivations and make clear how they can help and potentially affect important change.

Although not mutually exclusive, within the ask to engage, some alumni shared they would be more responsive to a personal invite, while others shared that the value they could contribute would be the most important factor influencing their likelihood to engage. Monica explained, “While I have connections to UMass, I know I'm getting a generic email that's sent to 5,000 alums, 30,000 maybe. The more personal, the more likely I am to do it.” Marisa also echoed this sentiment sharing, “I would definitely say any personal invitation, any time I get a personal invitation to anything, I'm a million times more likely to do it than if I just get the generic email.” Slightly different than Monica and Marisa,
Kathryn explained that she is always happy to engage with organizations she was part of as a student, but that generally she is willing to talk with anyone who seeks her out that she can help. She shared, “So I would say when organizations that I was a part of reach out to me, I'm always happy to stay engaged.” She continued, “I think I'm willing to chat with anybody if they're able to seek me out and my experience is helpful to them.” Such thoughts convey the importance of the value she may contribute is related to her decision to engage. Building on Kathryn’s thoughts, Alex shared that he wouldn’t really be affected by who asked for his help or support if the ask was aligned with something he was involved in as a student. He shared,

...as long as it was something that was related to something I did, I don't care who asks. It's like, I want to be there to help. If, I don't know, [fundraiser] was like, "Alex, the band needs your help," and I know that he didn't have anything necessarily to do with the band, but I'd be like, "Hey, if he's fundraising [for] the band, I'm all for it. “Heck yeah, take my money.” So that doesn't really matter.

Very similar to general engagement, when asked to engage in political advocacy, some alumni shared they would be more responsive to a personal invite through their current or former student affiliations, while some others shared the value they could contribute would be highly influential factors affecting their likelihood to engage. For example, when Marisa spoke about factors that would influence her motivation to advocate on behalf of her alma mater she spoke about personal relationships and connection as key, sharing, “Also, connection, so like I said, anytime there's a personal invitation, I'm much more likely to respond than if not.” Building on this thought Colleen shared that requests from groups she was formerly affiliated with as student or through personal connections would be key to activating her participation,

If other people, if faculty members that I had reached back out, if student organizations that I were part of reached back out... I'm also close with [staff name]. I'm close with other folks and the Alumni Association, too. So, if either...had reached out...then I would feel more inclined to set my time and be able to dedicate to it.

Sharing similar thoughts to those of Marisa and Colleen, Billy explained,
I think for most people, I mean, it's always better if you have a personal relationship with the person asking you... maybe you would be hearing more from your department head, or someone you worked with, or your advisor or whatever.

Elaborating, he also explained that an invite from top-level leadership could also be motivating, "But yeah, I think either top leadership or a really personal relationship would probably be the two ways that I would think off the top of my head that who asks would make a difference."

Similar to general engagement and in addition to relationships and personal connections, when considering the various catalysts that could prompt alumni to engage in advocacy efforts, the value they could contribute was a big factor. Colleen shared that really intentional asks where she was targeted due to her skillsets or knowledge would be appealing since she would be more confident in her ability to thoughtfully contribute value. As no organized advocacy program or efforts exist at UMass for her to draw examples from, she instead offered examples that draw from general engagement, explaining,

I do feel like I'm pretty involved right now, but if somebody were to have done their research on me in particular and had asked for a specific thing that I know I could do well, such as speaking about working in higher ed or speaking about going to grad school or speaking about living in Boston, or “you're involved with [UMass women’s leadership group], we have this person, we have this alumna who could relate really well to you,” that would definitely be a catalyst for me to be involved more.

Billy also described his willingness to advocate on behalf of his alma mater if asked, explaining that such feelings stem from his desire to have a significant impact on problems that need to be solved. He shared,

I would be motivated to do something. I don't know if that's true for everyone else, but I think being asked and feeling like if I'm asked to do something...what I'm doing is having a substantial impact on the problem that we're trying to solve.

Very similar to the responses about general engagement, the responses from alumni related to political advocacy indicate the importance of being asked to engage with their alma mater as a first step for them considering whether and how they may participate. For some alumni, being personally asked through a former student affiliation or personal connections would make them more inclined to participate than a general request. Other alumni also spoke about their ability to contribute value in a
way that would further the cause, and their ability to help students as key motivators. Such findings are valuable to note as institutions consider how they may request support from and appeal to their alumni to participate in advocacy efforts.

Alignment with Interests and/or Values

Other factors that alumni consider related to their inclination to engage with their alma mater is how closely the request or need relates to their interests and particularly for advocacy, whether the advocacy effort aligns with their beliefs and values. Oftentimes, such alignment may be signaled from an alumnus’s current or former program affinities, but other times it could be related to a general interest. As such, when alumni evaluate whether or not to engage with their alma mater, many shared that it would be important for the opportunity to align with their interests or values. For example, Jillian described that her decision to engage would be related to alignment with her interests and a degree of accountability, sharing that she would be more inclined to engage with a program or group that she was previously involved in.

I think for me, it’s more like issue based. If it’s, you know, a department that I personally support, or an organization on campus that I’ve personally been involved in...I would like to know where my time, energy, and money is directly going to.

Jessica and Billy also engage with their former involvements based on the alignment with their interests as well as the personal relationships they’ve maintained over the years. Reflecting on general engagement, Jessica explained, “...just because of my personal involvement and background, if anyone at the Alumni Association is like, ‘We need this from you,’ then I will say yes no matter what.” Billy also shared, “I engage with the university around specific programs or departments that I still have relationships with people who work there, and part of alumni networks that are supportive of those programs.” In Jessica’s case her trust in the relationships she has maintained through her former involvements as well as the missions that drive the work of these groups likely make her inclined to give such unwavering support before considering the specifics of an actual request, while Billy’s continued
relationships with those affiliated with his former student involvements inspire him to give back as he is
able.

Alex also provided a couple of examples of how he may engage related to his passions, sharing,
“It really depends on kind of what it is. If there's something that I feel really passionate about, let's say
it's athletics, then yeah, I'm usually the first one to jump in. ‘Let's go.’” Not related to a specific
involvement, he provided another example tied to his belief regarding the importance of strong, quality
faculty members. He explained,

...let's say it's an ask about writing a letter of support for somebody who's looking for tenure,
that's something that I feel passionate about, because I believe in strong quality of educators.
And if they are a professor I believe embodies that...I want to be supportive of their attempts to
become a tenured faculty member.

These accounts demonstrate the importance of interest alignment, sometimes signaled from an
alumnus’s current or former program affinities, to activating them to engage with their alma mater.
Sometimes a motivating factor as part of their decision could also include the personal connections they
have maintained since graduating. As such, inviting alumni to participate in advocacy efforts through
their current or former campus affiliations and personal connections could be helpful to gaining their
support.

Regarding advocacy specifically, alumni had no shortage of interests that they would be inclined
to advocate for. Similar to general engagement, they shared that of the ways they currently engage or
think to engage in the future, most are through their former student affiliations due to the connections
that exist with the people and/or programs and the fact that those organizations align with their
interests. Ideas mentioned included college affordability, increased funding, student debt, food
insecurity among students, DEI initiatives, new infrastructure, free higher education, student athlete
compensation, among others. Olivia spoke of her willingness to help a department she was affiliated
with through her time on campus, “If someone were to come to me and be like, "Hey, the [department
name] is advocating for this, can you come speak about it?" I would be willing to do that.” She
elaborated on this thought sharing, “If it’s something I’m interested in, I’m more likely to do it. If it’s something that’s more general, not really specific to me, probably not.” Monica spoke of her interest in advocating for new infrastructure based on her experiences working for the [campus department] as a student.

Oh buildings. Yes. New infrastructure. If they were like, "We need you to advocate on behalf of replacing [auditorium name]." I’d do it in a heartbeat. There are so many building violations, it will cost more for them to bring the building up to the code than to just demolish it and build a new one.

Beyond the personal connections fostered through student involvements, Alex, who was a member of the campus marching band spoke of his motivation to engage in advocacy-related efforts connected to his affiliations from his time on campus. He explained,

...if it’s something related to something I’ve got interest in, like let’s say the band needs new practice fields. "They do" (whispers). If you sent me something where it's like, "Hey, we’re fundraising for this, or we need somebody to advocate for this X, Y, and Z thing," heck yeah, I’m all over that. Because again, it has something that appeals to me as a former band member and something I know that people need. So those really would be the things that would be like, yeah, get it up off the ground, because they need you, or they need something like that.

He expanded on this point reflecting on his passions and what else may motivate him to engage in advocacy sharing,

Depending on the cause and how passionate I was interested in it, I might go to a lobby day if they have one or do something where it would be like... Go to a rally or something like that in support of a specific thing, again, time permitting and depending on the [importance of the] specific thing they’re rallying for or against.

These accounts demonstrate how alumni interest in topics related to advocacy requests can motivate and fuel their participation. With this knowledge, institutions could track student involvement, as well as any alumni involvement, and then appeal to alumni based on their former and current involvements to hopefully prompt their engagement.

In addition to aligning with one’s interests, alumni also spoke of the importance of the advocacy related effort aligning with their values. Different than general engagement, through speaking with alumni, it became evident that while alignment with their values would be a motivator, misalignment
would be a deterrent. Alumni provided examples of each scenario to help paint a picture of their considerations as they may evaluate requests for their support. Jillian spoke about how UMass requesting her help, wouldn’t be enough to motivate her to take action. She shared, “If I feel that the issue aligns with my values. I think everything just for me is about if it’s aligned with my values and how I like experienced UMass, rather than just being like, oh, because it’s UMass.” She continued,

I don’t think that there should be an obligation to always be on the side of their alma mater if they [alumni] feel like the money isn’t going to the right place, or whatever the policy issue is, is not fair. I don’t think there should be like a blind support just because they graduated from a place. I think everything needs to be done [with] a very critical lens.

Lucas shared a similar sentiment explaining, “Yeah, again, I think it’s about whether I believe in what the alma mater is doing.” He also expressed that sometimes advocating for one’s alma mater doesn’t necessarily mean advocating with them and gave this example to illustrate his point.

On the Board of Trustees, for example, there are five student trustees, but only two of them get to vote every year. I mean, UMass officially, I think is against that position. So, in that regard, I guess, I’m not advocating for the university, but in my own beliefs for it, I would be. Because I think having a democratic system where there’s more student voice is a good thing, so that’s how I would participate.

Like Jillian and Lucas, Marisa expressed some intricacies as to how she believes alumni may evaluate requests to participate in political advocacy on behalf of their alma mater. She shared,

I think if it was a cause I really believed in. So, if there was pretty much anything having to do with Hispanic or Latin American relations, I would definitely help with that cause without question. Even if I didn’t have the time, I feel like I would make the time. So, if it was a cause that I really believed in or an organization that I was a part of while on campus that needed assistance, I would definitely go for that.

However, Marisa also discussed how she recognizes that her inclination to help her alma mater may not be the same as some other alumni who may not feel the same way as the institution may act. She explained,

So, I think if you went to the institution, ideally you would support what they believe in. But I also think there are people who, maybe don’t feel the same way that UMass would act. I mean, I personally do, but I can’t imagine that someone who doesn’t believe in a policy that UMass is trying to push would assist with that.
Also focusing on the importance of value alignment, Peter shared, “I think the most important thing would just be if it aligns with my values.” He elaborated on this point,

And know also that while I love UMass, sometimes UMass doesn't love me. So, I want to know... what administrators want as bureaucrats might be different than what is in the student's best interest. And again, that's not a personal thing, that's just the structure that we've created by privatizing the school. They're CEOs and we are viewed as customers. And I think to get us to revert back to this public service mission, we need to undermine that with a different funding logic.

To exemplify what he was talking about, Peter shared his understanding of two different higher education bills that would benefit higher education in different ways. He explained,

And I think those nuances of how the money is being allocated are important. Where the CHERISH Act does not impact students' costs at all. At most it would freeze tuition and fees, but it's a bunch more money that the state is committing to the school. The Debt Free Future Act, for example, eliminates tuition and fees. So, it's a tuition and fee free education. And that is something I'm strongly inclined to advocate for. Whereas the other bill, I think actually then makes it harder for students to advocate for a reduction in cost because the state did increase its appropriation for public colleges, but students didn't see any of that.

These alumni accounts demonstrate, that while many alumni have love for their alma mater and want to help it succeed and support future generations, particularly regarding advocacy, alumni are also very evaluative about where they put their time, energy, and resources as they consider the causes they may support. Many of the alumni interviewed credit UMass with helping them develop the ability to think critically and question the status quo and those skills are something they would employ to evaluate requests to participate in advocacy efforts to ensure they are acting in alignment with their beliefs. Different than volunteering and giving, where if alumni do not believe in a cause they may choose not to participate, in the case of advocacy, if alumni are opposed to the stance of their alma mater, they may choose to advocate against it. As such, advocating on behalf of higher education may not always mean advocating on behalf of their alma mater, especially if alumni are opposed to the position of the university on important matters. With this in mind, it may be valuable for institutions to have a pulse on alumni sentiments through alumni surveys, advisory boards, social listening, or other methods prior to undertaking specific advocacy agenda items and soliciting their support.
Likely to Make a Difference

Another factor that alumni brought up regarding their decision to engage with their alma mater through general engagement or advocacy, was whether their contributions were likely to make a difference. Regarding giving, alumni shared that they would want a certain level of accountability over where their gifts are going and the impact they could have. For example, Olivia shared her uncertainty regarding the impact of a gift and genuine need sharing,

I'm not willing to just give money, especially because I know universities, they have a lot of money and what is my $5 going to do? I'm just not. I would rather spend my money, my $5 on a coffee than to throw $5 into a pot of whatever it is that they're trying to raise money for.

Building on Olivia’s sentiments, Elise explained that she feels more comfortable giving to smaller affiliations than the university as a whole as she still works to payback her student loans, since she would feel more confident that her gift would make a difference and help a program she was familiar with. She shared,

…it's always helpful to get a grasp of what is my contribution going to. I am still paying off my loans. So, when I think about those smaller things, it feels different than giving to the university as a whole because I think it's harder to swallow just giving a lump sum to UMass when I'm still paying UMass than it feels to give to a smaller program that I know I benefited from during my time there, if that makes sense.

As recent graduates are often just starting out in their careers, they may be more discerning regarding how, when, and how much money they may contribute back to their alma mater. This is likely also the product of the fact that while making less, these recent graduates are also likely paying back their student loans. Although the alumni quoted here had positive experiences at the university, they are not all inclined to freely give to UMass without a deeper understanding of the need and potential impact of their gifts given that making even a small gift could be considered a larger sacrifice among their limited financial resources. As advocacy efforts don’t always have a cost and can result in positive outcomes for the university, asking recent graduates to advocate on behalf of their alma mater may be a better fit for their post-graduation capacity and inclination than asking them to make financial gifts.
Regarding advocacy, a number of alumni shared that they would be more inclined to participate in advocacy efforts on behalf of their alma mater if they thought their efforts were likely to make a difference and how they defined such difference varied among participants. For example, Billy shared that he is all in to assist with advocacy efforts but that something else that is a motivating factor to him is the degree of potential impact his actions may affect and the ability to make a big difference for the cause at hand. He shared his sentiments, tying them into the university’s “Be Revolutionary” brand campaign,

So, I think being asked, and then the scope of that ask. If I felt like we were advocating for debt-free college in perpetuity for everyone in Massachusetts...I would be right there, but I would still do it, even if the ask was smaller than that. I think more people would do it if they felt like it was a quote, unquote revolutionary ask. Literally, every time I'm listening to NPR and I'm like, it's UMass Amherst, be revolutionary. I'm like, just do that.

Reflecting on whether her contributions would make a difference, Jessica compared contributing time to advocacy efforts to contributing time to volunteering or making a gift to UMass and explained how with advocacy she has greater uncertainty regarding the potential impact of her efforts, which can be a deterrent.

I think just some sort of assurance that what I was doing could help. I don't need any sort of guarantee but it's like you don't want to shout into an empty void. And so, even the stuff that I've done, even if I just give $5 to [former student affiliation], I know that that goes towards the [graduating senior event] budget or towards an open house or something—or if I'm on a panel, even if attendance is low, I'm sure one thing that I say will ring true with someone in attendance. So, with those, it's like there's no guarantee that someone I talk to is going to be encouraged to go to UMass and then go to law school, but it could theoretically.

She continued to describe her hesitation about engaging in advocacy considering the more recent politically charged climate and observing advocacy actions in the news and what appears to her as a lack of change based on those efforts. She shared, “Maybe my vision's tainted because of the political climate...but it seems like even mass protests don't do anything in terms of large federal law change...So I would want to know that my efforts wouldn't 100% go to waste.” Like Jessica’s sentiments, Olivia

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17 Acronym for National Public Radio.
shared how she would be more invested taking part in advocacy efforts if she had some assurance that her efforts would make some level of difference. She explained, “If it was something that I’m really interested in, I would love to know that this will make a difference, this will get X result. I think I’m more willing to try harder for that.”

Slightly different than Jessica and Olivia, Elise spoke about her efforts paying off, explaining that the impact achieved would not necessarily need to be that the policy goal was attained because creating greater awareness around an issue could also be a valuable step in the right direction for future efforts. She explained,

Yeah, I guess maybe not like that it would pay off because I guess you never really know if it's going to pay off. But if I could see an advocacy [opportunity] and I was like, oh I think this is something that people are going to notice, people are going to talk about because that's something that can lead to it paying off. Sometimes things don't happen A-B-C, direct causality, but I think if I saw something that was really-well organized and that I was like, “Oh I think this is really going to make people think about this or make people talk about this in a positive way,” then I would be more likely to get involved.

Related to one’s efforts making a difference, Colleen explained she would be more inclined to participate in advocacy efforts where she and her skills were specifically targeted. She said, “[if a contact] had reached out being like, ‘Colleen, we know that you could do really well doing this,’ then I would feel more inclined to set my time and be able to dedicate to it.” She also shared her disappointment when her efforts don’t payoff.

But sometimes it [advocacy efforts] really doesn't because of variety of outside factors. I’m trying to learn that it is okay to kind of walk away if that doesn’t happen, but I also would be like, fucking bullshit that I spent so much time and effort to make sure that this happens, but it didn’t because of X-Y-Z reason that was completely out of my control.

Considering these sentiments shared by alumni, education about the process of advocacy might be helpful to setting realistic expectations for the time they may commit to such efforts and what the potential outcomes and impacts could be. Such communication could help to better set up alumni and their efforts for success and encourage greater future participation.
Alumni also revealed that when considering if they would participate in advocacy efforts on behalf of their alma mater, they would consider the amount of organization behind the effort related to the likelihood that their efforts could make a difference and also related to the time investment needed on their part. Jessica shared that she would want some level of reassurance that she was part of a collective effort that has true potential to affect change through having a power in numbers,

I wouldn't want to be the only one doing it. Just again, maybe that's my pessimistic side coming in but it's like me writing a letter to a senator alone probably isn't going to get them to give thousands more dollars to the university. And so, I would almost need assurance that it would be a group of people that actually has the potential to make change.

Molly shared this sentiment explaining,

I certainly would feel like they [my efforts would] make more of a difference if I felt like part of more of a collective voice, and those advocacy efforts, like just being one person advocating for an institution that serves like tens of thousands of people in the state is definitely hard.

Building on this, Lucas shared that he would be motivated to engage in practical efforts that aligned with his values. He explained,

...by practical, I mean something that is coordinated at a scale large enough to matter. So, like a statewide campaign, a citywide initiative, whatever, where there's organizations with members. People who know each other, who know the issue and are willing to go for it and are going to go to bat for it. Whatever those organizations might decide to do, to me, becomes practical because then it's an organized effort that goes far beyond the reach of any one individual.

Billy described the organization needed from the university to clearly articulate problems, solutions, and potential actions to achieve those solutions with resources to help. He compared it to his previous involvement with a higher education nonprofit, explaining,

I think, and this is where [higher education nonprofit] kind of played this role, and some of the coalitions played this role, but having someone explain to me, "What are the most important issues that we're facing right now, and what are solutions to those issues, and how can I ask the people who are decision makers to implement those solutions?" It's a little technical, but that was what we really did at [higher education nonprofit] was say, "So, here's an agenda that we think will help all of our public college campuses across the state. Here are the problems, here are the solutions, and here's an email you can send, a phone call you can make, an event you can go to, a group you can join to move that forward.
Building on Billy’s points about coordination and resources to help affect change, Andrew talked about having staff organizers from the university who can track legislation and budget-related matters and activate people around important issues and timing.

...having somebody to track the legislation and track the budget would be huge, because I don't honestly have the time...having something like that would be helpful for the alumni, having somebody tracking it, watching it, and then be like, "Okay, this is a good time to go banging on the doors."

He elaborated on these points sharing that it would be great to have experienced individuals on staff writing emails, “having communication staff to write the emails, because that's a whole that's a lot...somebody with experience doing the political stuff because there's different ways even to write those emails...make them more effective for clicking.” Andrew further expanded on the importance of having relationships as part of organized efforts to help facilitate and track actions among volunteers.

...organizing also is about building relationships, so say I was working with somebody who's the organizer, then being able to reach out to them...because the other thing is, it'd be good for the university to know if I met with, you know, senator, blah, blah, blah, you know? That information is important for the university or whoever is organizing on their behalf too. So, I think building community with the staff or the volunteers, with the organization running the advocacy would be big.

Reflecting on the difference that advocacy can make, Molly shared her desire to have more organized efforts for advocacy on behalf of her alma mater so that more alumni could participate. She shared, “I do wish that there was sort of a more organized venue or opportunity for that advocacy, because I know there are so many other alumni who, you know, share [various] concerns, and want to be a voice for that.”

Given these accounts shared by alumni, it is evident that they see the value in being part of collective, organized efforts to help affect change. With an organized effort, alumni can feel more confident about what the need is, the value that can be contributed to the institution, and how they can help. Additionally, with coordinated efforts supported by staff resources, they can be assured there is a level of expertise guiding their efforts, with real people available to answer their questions and support...
them. With such organization in place, and an assurance of more alumni participating, alumni may also be inclined to act through recognizing their collective power in numbers among the alumni community and feel more confident that their time and actions will make a difference. Lastly, such coordinated efforts would enable busy alumni to participate with greater ease by having clear calls to action and resources to support their efforts.

**Striking a Balance**

Another theme that came out of speaking with alumni about their inclination to advocate on behalf of their alma mater was the importance of striking a balance in regard to the methods used for advocacy in order to maintain relationships critical for advancing policy forward. Most who spoke to this were contemplative about how to best proceed. Jessica spoke about her desire to not push boundaries or come off “too edgy,” sharing,

> Going back to the speaking [at the state house] thing, I would want to know that there was a set time for us to come and speak and they’re prepared to hear us speak rather than being like we are going to go in. We’re going to see if they will listen to us so that we can get this. I feel like I am not one to push boundaries. And so, if it was like no, we organized this. They agreed to hear us…I would be comfortable doing [it] because I would want to know that I was doing that sort of advocacy on good and appropriate terms.

Molly also spoke of the importance of striking a balance with advocacy efforts based on her experiences working in state government. She explained,

> ...with my job, I am definitely allowed to advocate in my free time for the causes that I care about but trying to also like strike a balance between advocating for what I care about and maintaining respect for the institution that I also work for. So... I think that can sort of influence my decision about what issues I want to engage on, or when I want to engage, or the way in which I want to. And I think, other alums share that, and maybe even the university struggles with that sometimes.

She continued sharing,

> ...those relationships that you have with legislators, they are fragile, and they are give and take, and a legislator is probably not going to want to champion you if they also feel like they're a little bit under attack by you. And so, it's sort of finding that fine line between somebody who supports the cause and is willing to advocate for something...you know, maybe they're willing to advocate for free lunches on campus for students in need, but they're not willing to go all the way in terms of you know canceling student debt or making UMass free for in-state students or
something. So, crucifying them for not being able to go that extra mile in your opinion when they can be your ally in this other area...balancing those relationships is really challenging.

Related to the importance of relationships and striking a balance with advocacy efforts, Elise spoke about the importance of coordination and understanding conversations being had and efforts underway so that new efforts can add to those causes (if intended) and not take away. She explained,

…it’s important to have those conversations and understand what’s being done because there are folks at UMass talking to people in the legislature and having those conversations, and you just want to make sure that your advocacy is adding to those things instead of taking away from those conversations. I think sometimes you want to make sure that you’re fostering those relationships and understanding the work that’s being done...Because there are a lot of people who are doing this kind of stuff every day and who are trying to make a better system. And I think that's sort of where you want to make sure that your advocacy is connected symbiotically in a way that you understand what's happening, and you're productively adding to that conversation and not just trying to see what sticks kind of thing.

Elise expanded on these thoughts reflecting on her role working in state government, sharing,

So, I can tend to shy away a little bit more just from some of the organized efforts that are specifically targeting State House members, mostly because I love the role that I play as a staffer, and I do try to advocate in the ways that I can through that role...Don't get me wrong, there's a role for all different types of advocates and all different types of advocacy. It depends on who you are as a person and what type of advocacy I guess works for you and speaks to you... sometimes it is also useful to have people who are asking for the big things and being like, why isn't it happening kind of thing because it can light a little bit of a fire.

Sharing a different perspective, Billy shared some alternative thoughts about striking a balance questioning if that strategy toward advocacy really pays off. He spoke about needed funding for higher education sharing,

I feel like the institutions are trying to protect relationships that don't yield what the university needs. And I guess they're doing that because they think it could get worse, but at this point I don't know how much worse it really could get. I guess are we hedging against the idea that if you aggravate them [legislators] they'll make things even worse for you? I guess so. But to me, it just doesn't seem like it has stopped things from getting worse. It doesn't seem like it’s helped things get better. And at the end of the day, even if they get rid of the last 25% [of state funding], the university could charge that to the students in a heartbeat.

Molly described the intricacy of balancing the need to criticize things to make them better while also trying to uplift your alma mater,
... [it’s] kind of like finding that fine line between, like criticizing your alma mater, and also trying to uplift it, and that that can be a really challenging, balance to strike sort of like in your conversations with people, but also just personally, like I personally think criticizing something you love, so that it becomes better, is not a negative thing. But I also, don’t want to offend the organizations or the university in my advocacy. So, like trying to strike that balance, too.

Most alumni articulated the importance of striking a balance related to the type of advocacy tactics employed, expressing that it’s okay to criticize what you love to help make it better. Adding to this belief, many stressed the importance of relationships with legislators to help accomplish policy goals and the need to sometimes walk a fine line regarding what may or may not be realistic to achieve in a given session. Differing from the majority of opinions shared, Billy used the example of higher education funding, questioning how much worse things could really get than the current situation and if protecting relationships would ever really yield the needed result since in his opinion, it has not thus far.

Considering the thoughts shared by alumni about the importance of striking a balance with advocacy efforts, institutions need to consider the types of advocacy strategies they would like to enact and the various potential implications of such strategies related to engaging alumni and achieving policy goals.

Section Summary

Through speaking with alumni, it became clear that their inclination to engage with and advocate on behalf of their alma mater was influenced by their genuine desire to give back based on their student experience, the value they could contribute for future generations, and rewards they continue to receive as alumni. Additionally, alumni revealed the importance of being asked to engage with their alma mater and the effectiveness of personalized requests of their time through personal connections or program affinities. While there current and former involvements sometimes signal their interests and values, alumni shared the importance of value alignment specifically when considering whether or not to engage in advocacy efforts, pointing out that advocating for higher education may not necessarily mean advocating for their alma mater if their values and beliefs regarding issues affecting higher education were misaligned. Lastly, alumni spoke of the importance of the approach of advocacy
as something they would consider when deciding whether to engage. Some shared the importance of
striking a balance through enacting respectful yet effective strategies when approaching legislators,
while others emphasized the need to abandon the fear of offending to drive change. Such findings
reveal opportunities for how to best appeal to alumni and gain their support to engage in advocacy
efforts targeted to solve critical issues affecting their alma mater.

Capacity

Although most alumni shared that their desire to advocate for a cause on behalf of their alma
mater would be their first consideration before committing their time, another large factor affecting
their ability to participate is their capacity to partake in such efforts. Through speaking with alumni, it
became clear that in addition to their desire to advocate for a cause, the time they have available,
financial considerations, timing of requests, and the ease and accessibility of opportunities were all
factors that would affect their ability to advocate on behalf of their alma mater. In the sections that
follow, capacity will be considered regarding general engagement opportunities as a starting point for
ultimately understanding how alumni may also consider their capacity related to engaging in political
advocacy efforts on behalf of their alma mater now and in the future.

Time Available

A major consideration for alumni before they engage with the university is how much time it
may take to participate and whether they have the time available. As alumni spoke about considerations
of their available time for general engagement and then later spoke of their available time related to
supporting advocacy efforts there were many similarities. However, a distinction regarding advocacy
was that alumni appeared more willing to make time to engage in advocacy efforts if they perceived the
cause to be very important and the effort was well-organized and flexible.
Regarding general engagement that may involve things like attending events, volunteering, or giving, Olivia shared that she would need to evaluate her available time relative to the ask and that sometimes distance can also be a factor as she evaluates her available time.

I would factor in time and distance. If it was here in Boston, gladly very easily. If it was out in western Mass., I would have to take the time to be like, ‘Okay, what day is it?’ I’m willing to make the drive. Just when does that fit into my schedule?

Also, related to distance and time available, Elise shared, “I am based in Boston now, so things that are in person on campus are harder for me typically. So, I think if I have the time and it seems like something that would be beneficial, I would consider it.” Building on these considerations, Cara spoke of her busy work schedule with Major League Baseball, explaining,

So, it’s not fun, I do have to pretty much be on call 24/7. The only full days that I get off are the days that the team doesn't play... There will be times where I’m going to my hot yoga class, I'll get there, it’s a 30-minute drive...and I'll get a message, "Hey, can you be in in an hour?" So, I'm like, okay, well I have to drive back and get ready.

In this instance, Cara’s intense and unpredictable work schedule can be a barrier to her committing her time to engage with her alma mater for opportunities that are time specific. Due to the nature of her current role and being temporarily located in out of state, she shared, “I always try to look for things that I can do remotely or virtually.”

Colleen who has a hybrid work schedule, spoke about her many commitments outside of work that involve volunteering for various community groups as well as [UMass women’s leadership group]. To manage her various involvements among her discretionary time, she tries to be strategic with her time. She explained,

So, when I do go into the office, I plan it so that it’s also the same day as another event that is in the city. Whether or not that is through my own volunteer work with [name of group], a civic engagement council with the city for residents between the ages of 20 and 35 or any other additional volunteer things I'm looking at doing or other social events, just meeting up with my friends for dinner...and then I'm back home.

When considering her busy schedule and how she manages her involvements, she shared, “I think because I don't have any major responsibilities right now. I live with my partner, but I don't have any
dependents. I don't even have a pet. I am taking advantage of that.” While Colleen is very involved, she also shared that she tries to set boundaries by limiting herself to no more than two meetings a night, returning home by 10 p.m., and keeping the weekends free for her personal use.

Also, along the lines of having boundaries, Alex shared his need to evaluate requests for his time. He explained, “I think just in terms of, ‘Do I have the time?’... A lot of it just comes down to if it's something that I just don't have time for, even though it's a great thing, then I won't do it.” He continued by explaining, “And I feel bad, but I also am like I know where I'm at and I don't want to do 10 things and do them poorly instead of doing one thing and do it well.” He continued by explaining the value he places on his time and how that can also factor into his evaluation, a sentiment also shared by another alumnus. He explained,

I've already tried to be a leader of the UMass alumni marching band alumni group and some other things. So, it's like I've got enough on my plate. And I also do want to be conscious of my time. I'm not a full-time employee of UMass. I'm not a part-time employee of UMass. So, I want to make sure that I'm giving enough where it's like, 'Okay, don't overwork yourself for a school that...' It's great. Don't get me wrong, but they're not paying me, and my time is just as valuable as anyone else's. So, there's that too.

Building on the findings for general engagement, when considering whether they may participate in an advocacy-related effort on behalf of their alma mater, many alumni also considered the time it may take relative to the discretionary time they have available and how it could fit among their other commitments. However, a distinction in the responses related to advocacy was that when time was limited, a number of alumni suggested that they would make time to advocate depending on the importance of the issue at hand. Colleen began by considering what those potential asks of her time could look like, sharing,

If there was strategic step or you just need a person to sign a petition, then yeah, absolutely I'd do that. But if you need, again, people to commit to going to the State House, commit to one-on-one meetings, to commit a large amount of time and energy, it really truly kind of depends on what I'm doing.
She continued that she would also need to consider things happening in her personal life to evaluate if she had enough time to support the effort in a truly helpful way. She explained, “Also, what's currently going on in my life as well. Do I actually have time that I can dedicate to this to learning more and advocate more in the best of my ability?” Even with her desire to engage in advocacy efforts and support her alma mater, time would still be a big consideration for Monica and especially as she looks to start law school. She shared, “Well, next September, I will be back in school once again...Within the next three years, I would say my time is the biggest thing.” Kathryn also acknowledged her limited time but explained if there was something she was passionate about supporting, she would do what she could to assist. She explained,

I think time is limited, but if it's something that I'm really passionate about, then I absolutely would spend the few minutes calling my rep [state representative] or calling my senator to talk about something. And again, I've been on the other side of that, I was an intern for a state rep. I know how important constituent engagement is. So, yes, absolutely. Would it kind of take that step as well, if somebody said to me, "Hey, UMass could potentially get millions of dollars more in funding, can you take a few minutes to talk to your state rep?" Then yes, definitely would do so.

Reflecting on his considerations for supporting an advocacy effort on behalf of his alma mater, Alex’s answer differed from his response about his time available to engage in general efforts. Despite his busy schedule and limited time, he shared that he could potentially see himself making time to engage in an advocacy effort that was really important,

…it’s the time and it’s the specific thing that somebody’s advocating for. I think at the end of the day, if it's really that important, you make time, but at the same time, sometimes we just are maxed out. I've got a million and one things going on here.

Also busy, but willing to make time for an organized effort that he was passionate about, Andrew shared, “I think time, but I think I would make time if I if I knew...when it's most effective, what to say, what the talking points are at the time.” Building on this thought he elaborated considering time consumed by his job and how advocacy would need to fit around other commitments.
I'd have to really manage... if it's something like a letter or a meeting, that would take up a lot of time because I can't do lobbying for UMass while I'm doing my day job, but I'd have to take time or meet with them [legislators] on a weekend or something. So, I think time is a big thing.

Acknowledging that time is finite, alumni spoke to the importance of having the time available to engage with their alma mater. As recent graduates are very busy, many spoke of the efforts they enact to budget their time and set boundaries so that they can effectively participate in their involvements in a way that enables them to do a good job, maintain balance, and not be overcommitted or spread too thin. Related to general engagement, alumni shared that sometimes there is just not enough time to give to some requests. However, related to advocacy, a number of the same alumni shared if the request of their time was important enough, they would make time to participate indicating that alumni are aware of the potential importance of advocacy related policy issues affecting higher education, something that institutions may harness to gain their support.

**Financial**

Another consideration for alumni regarding whether they engage and how they engage with their alma mater are the financial resources needed and whether they have them available. Related to general engagement, Olivia spoke of her own financial circumstances and having very limited discretionary funds despite working two jobs. She explained,

> I think honestly for me, it's the financial piece. Definitely when I was working, literally two months ago when I was working two jobs, not that I was living paycheck to paycheck, I kind of was, but still I was able to put $50 away in my savings every month, which isn't a lot.

With finances so tight and potential travel expenses, it might be too much for someone in her circumstance to devote the time and money to drive out to campus from Boston to volunteer or even make a small financial contribution. Colleen, also compared the cost of attending some UMass alumni events to another school and how the cost can limit participation. She shared,

> I know for UMass events you pay a little bit more and then you pay for your own food and drink in some cases. And I don't think anybody's angry at that. But obviously you're not going to go to every single New York City social...because of your own budget and whatnot.
Building on Colleen’s point, Marisa spoke about perks or incentives that can help ease the financial burden on alumni to participate with their alma mater suggesting, “I think free parking is also a big push for when people have to go places to do things. Maybe... if someone were to travel to do something, reimbursement would be an option.”

Building on these considerations, when recent graduates evaluate their capacity to specifically participate in advocacy efforts, finances are also something they consider. Colleen shared how she may potentially need to weigh the benefit of using her personal time off (PTO) to support such efforts. She explained,

There’s definitely the financial barrier, obviously. That goes into can I take time off work to do this? Probably not. That to me is truly the gray area...well, it's one thing for me to take a day off and go to Amherst and I make that a fun time for myself, because I always find it fun to go back to campus. But if you’re making me take a day off to go just be a body somewhere and where I’m losing my own PTO, then I have kind of an issue and it really has to be truly something that I fully believe in.

Also reflecting on potential costs associated with advocating, Monica considered her personal situation, describing her limited budget, “If it's picking up my phone and calling my state rep [representative], my senator, my state senator, my member of Congress, I'll do it. If you want me to go and pay for it myself, I'm not going to go. Money.” She elaborated, “…[the] State House, Congress, wherever you want me to go. If it's going to cost me... I live about 30 miles out of Boston. That's like maybe a quarter tank to and from. Gas is expensive right now.” Elise also described how finances may factor into her decision to advocate, “Finances in some ways, I guess kind of connected to time, but if you're going out and still working more to try and make ends meet, you're not going to be able to spend more time doing the advocacy work.” Elise’s statement implies that there is a value connected to someone’s time and when finances are tight, recent graduates could potentially need to use their discretionary time to earn income. Furthermore, upon graduation some alumni may work hourly jobs where they may not be compensated if they do not work, so time away from work to engage in advocacy may also not be financially feasible.
Given these findings, when making requests of recent graduates’ time, whether for general engagement opportunities or advocacy, institutions should consider the potential “cost” of alumni giving their time relative to their life stage and potential earnings. A number of alumni shared about their limited finances, admitting that they hope to contribute more financially in the future when they are further along in their careers. Even when financial gifts are not solicited from alumni, there can still be a cost for their participation whether it be paying to attend an event, traveling to campus or the state house, or taking time away from their job and potentially forgoing needed income. When possible, it may be helpful for institutions to offer remote options to engage that are not location bound or offer financial assistance or incentives to this demographic to aid passionate alumni to be able to advocate more effectively with less barriers to their engagement.

Timing

Slightly different than the amount of time alumni may have available to engage with their alma mater, timing can also be very important factor that affects their ability to engage. A number of alumni spoke about the seasonality of their work potentially affecting their ability to engage with the university. For example, Cara who works for Major League Baseball, explained her busy and variable work schedule that could potentially be a barrier to engaging, “It depends. So, beginning of the season, the [days off] were very rare. We would get one every two weeks...But towards the end of the season, we actually have one or two days each week.” Marisa also mentioned the timing of regular events and opportunities happening through the campus each year could either support or prohibit alumni from engaging. She pointed out, “I personally feel like UMass is a pretty good job of keeping things on a schedule every year. So...if somebody can't go at that time ever, that might be an issue for them.”

Regarding advocacy specifically, other alumni spoke about the importance of the timing related to alumni schedules as well as the urgency associated with the timing of the various asks and whether there was a best time to advocate to the legislature to increase the likelihood of affecting change. Alex
spoke about his schedule in relation to requests for his time and the relative importance of the issue at hand, explaining,

If there's a day where they [the university] picked advocacy day and I've already got seven other things I've got to do, something's got to give. And so unfortunately, maybe that's the one that comes off the table if it's again not... I don't know. If it's funding for new streetlights, I don't need to be there.

Molly who works in state government shared, “It depends on the time of year actually. Like right now, the legislature is in recess, so I have much quieter days in August. But you know, certain parts of the session are really really busy.” Building on these thoughts, Elise, who also works in state government, echoed Molly’s thoughts adding that she has more flexibility with her schedule in August to potentially give more time. She shared, “right now, we're working from home for August, since this is sort of our legislative recess time, and our schedules are a little bit more flexible. But typically, I'm in the office three to four days a week.” Billy shared a similar sentiment as he reflected on his responsibilities working full-time for a nonprofit and also as a City Council member, “So it's variable. There's definitely some ebbs and flows to the whole. August is great. We're in a great spot. We're not doing too much council stuff, and things are pretty light at the full-time job as well.”

Given these responses, it is clear that the timing of various engagement opportunities is an important factor affecting whether alumni may be able to give their time. Similar to general engagement opportunities, the timing of advocacy opportunities may affect an alumnus’s ability to participate relative to their own schedule and commitments. Regarding advocacy specifically, the urgency associated with the timing of the various asks and whether there was a best time to advocate to the legislature to increase the likelihood of affecting change could also affect an alumnus’s ability and inclination to participate in such efforts.

**Ease & Accessibility**

Lastly, related to capacity, alumni spoke of the importance of offering easy, accessible, and flexible ways for alumni to be involved. Related to general engagement, Cara spoke about seeking
remote ways to be involved based on her current physical location, “For me, just looking for digital or remote ways to be involved. And I know we talked about this, email communication, social media would be a great way to get it out here.” Olivia echoed this sentiment sharing that it is generally easier for her to engage online, explaining, “On social media, it's very simple, very easy for me to follow. I would be more inclined to do that stuff if I felt connected to that group.”

Alex spoke of his personal preference to sometimes be the person working in the background without having a specific title or role as it affords him greater flexibility for how he participates, explaining,

I've always [liked] kind of working in the background and not necessarily having a title or specific thing, but just kind of know that I give my 2 cents to the people I know on the council or...That's kind of where I find the best use of my time. It's like I may not have enough time to actually be there and sit there.

Peter also spoke of his desire to engage on his own terms, sharing, “When it's a learning, if it's an opportunity for me to continue learning at the institution in that sort of self-selecting way, I want to be a part of it.” In each of these instances, regardless of the type of engagement, alumni voiced their preference to have easy, accessible, and flexible ways to engage with their alma mater. They also shared their desire to be able to participate on their own terms versus participate in something that would require a longer-term commitment with potentially less flexibility. Such insights are valuable of institutions to consider as they design engagement opportunities for recent graduates and especially as they may think about ways of approaching alumni to engage in advocacy efforts in the future.

When reflecting on the importance of offering easy, accessible, and flexible ways for alumni to be involved in advocacy efforts specifically, the sentiments regarding general engagement held true but alumni had more to say that stemmed from their uncertainty regarding what such efforts may entail and the fact that participating in advocacy can be perceived sometimes as a difficult and overwhelming undertaking. Some alumni addressed the ease of the ask and associated effort. For example, Elise expressed, “I think when it's easier to advocate, you're probably more likely to just because you're
probably not spending as much time or effort doing it.” Building on this point Olivia shared, “I feel like I’d be willing to do something that is simple, I don’t know, signing a petition or very simple things. Like I said, I’m not a person to make calls or go to things.” She elaborated on this thought explaining that she would want the ask to be very clear and easy to accomplish with resources provided to support her efforts, so that advocating would take less work than the effort she is required to put in at her full-time job.

Like, "What exactly do you want? We want 20 signatures, get 20 people to sign this petition." Or if I were okay with calling people, if I felt like that was something I needed to do like, "We need you to call 20 people. These are their phone numbers, call them." That would be something simple and easy for me to do. But I don’t think I would take the time to figure it out on my own because I’m already doing that with work…I would just want someone to give me a list and be like, "This is what I want you to do."

Cara also spoke of the value of having a resources and guides to assist her with her efforts.

So, it’s having a how-to. “Hey, these are the ways that you can do it.” I know some advocacy groups do pre-written letters or emails or something. “You can use this template or use these resources; you can call this person. This is how you reach out to this legislator, this administrator.” Having just that basic, here’s a little guide path…it would be helpful.

Other alumni spoke of the importance of having flexible ways to engage in advocacy efforts. Considering the busy lives of recent graduates and alumni in general, Monica questioned, “Does it have to be during 9–5? It really just depends on the time of day and time. I can call on my lunch break, I can’t go on my lunch break.” Building on Monica’s considerations, Alex addressed the value of having different flexible access points to get involved with advocacy, he explained,

Again, those access points that I said earlier, that’s where people need the comfortability to feel like, "Yeah, it’s really easy to me." We’ve all got jobs we’re working, and it’s hard. Long hours, long days. But if you can make it easy for us to be able to participate in our own ways, that’s great.

In thinking about how she may participate, Jessica addressed the overwhelming feeling of a request to participate in advocacy efforts, sharing that it would be helpful to have small digestible steps to act on to encourage participation.
I think just anything with smaller rather than larger steps. So, I think if the steps that you could
take were just more digestible... it seems overwhelming as a broad concept right now, it's a
super overwhelming thought to be like we need to get more funding for UMass. So, you're like
where do I begin? What do I do? That seems like a lot of work. And so, I feel like if maybe it was
broken up into, “hey, we're reaching out to this group of alumni to work on this step. We're
reaching out to this group to do this step and we're reaching out to you to help with this one
small step,” I think that could be more easily thought through and accomplished instead of, “oh,
this whole process falls on me.”

She also clarified some of her earlier thoughts explaining that doing something like speaking to the
legislature would not be intimidating and would be low effort for her since she would be able to speak
from her own experiences, versus, study, prepare, or craft a something on her own to try to deliver an
effective and compelling message.

I think if I was basically given that sort of prompt of “Speak to your own experiences, what
money did you get? How did you go to UMass?” Then that's something that I already know and
that I can speak to. It's not me trying to learn the history of UMass's funding and what went
wrong and when it started to decrease. And so, I think that's kind of the difference in my mind
of...That's almost still a simple task for me because I don't have to do a bunch of research and
organize other people to go and speak with me. It's just me talking about what I know. That still
seems kind of on the simpler, almost baby steps, for me personally. But I also am not afraid of
public speaking, and I know a lot of people would be. So that, I think, also affects part of it. It's
like for me, that wouldn't be that big of a deal. It would even be maybe a little fun whereas
other people would be like no way. You're asking way too much.

Building on Jessica’s sentiments about advocacy feeling overwhelming and the importance of the ease
of asks and flexibility of opportunities to engage, Billy addressed what he sees as misconceptions about
advocacy, comparing participating in advocacy to other forms of participation such as general
volunteerism or making financial gifts. He described advocacy as the simplest form of support that
alumni can engage in, explaining, “it's more equal to ask someone to be an engaged and active
advocate, political advocate, and citizen, than it is to ask them for their money, or ask them for hours
and hours of their time [to volunteer].” Elaborating, he shared,

I think asking someone to be a mentor in a program, or help teach a practicum class, at least
these are the things that I'm thinking of as a volunteer, or attend the Alumni Advisory Board, or
help fundraise for their department, those take a lot of time. If you just say, "Hey, the state
government, send an email. The state government is funding us at X this year, but we need X so
that we don't have to raise tuition and fees, please send this email," that's a 15-minute task,
versus a whole volunteer project for a person. So, I think my answer, do I think it's good and
should you [alumni] do it? Yes, in both cases, but do I think one is more possible than the other? I also think that, yes.

He elaborated explaining, “I think we're trained to think that being a volunteer is easier, and that political advocacy is hard, but that in fact, most of the time, it's the opposite.”

Given these sentiments from alumni, it is important for institutions to offer easy, accessible, and flexible ways for them to be involved in advocacy efforts. Continuing to share the sentiment that they would like to be involved and support their alma mater, alumni need flexible ways to plug into such efforts with options regarding how to engage that involve small, simple steps to act upon. Additionally, for alumni who are less experienced and knowledgeable regarding advocacy, education is needed to help frame the various requests of their time and to enable them to participate efficiently. As alumni learn more about the needs, efforts, and how they can be effective, they may become more inclined to grow their participation over time.

**Section Summary**

Through speaking with alumni, it is evident that in addition to their desire to advocate for a cause, the time they have available, financial considerations, timing of requests, and the ease and accessibility of opportunities are all factors that affect their ability to advocate on behalf of their alma mater. When using general engagement as a foundation for understanding how alumni may think about their capacity regarding advocacy there were many similarities, but also some clear distinctions that are important to note. For example, regarding their time available to engage, alumni were very clear that time is finite, emphasizing their desire to engage but also not wanting to be spread to thin. However, despite these sentiments, related to advocacy specifically, a number of alumni voiced that they were more willing to make time to engage in advocacy efforts if they perceived the cause to be very important, there was a timely and/or urgent need, and the effort was well-organized and flexible, demonstrating their understanding of the potential importance of advocacy-related efforts. Regarding the ease and accessibility of engaging, alumni shared regardless of the type of engagement, their
preference to have easy, accessible, and flexible ways to engage with their alma mater. They also voiced their desire to be able to participate on their own terms versus participate in something that would require a longer-term commitment with potentially less flexibility. However, regarding advocacy specifically, alumni discussed a perceived level of difficulty that comes with the mention of engaging in advocacy that likely stems from a lack of information about their alma mater’s needs, what actions they could specifically take to help, and the time commitment associated with such requests. Such perceptions signal a need and opportunity for more education and enhanced communication around advocacy efforts so that engaging in this way is less intimidating and more familiar to alumni who could be critical advocates.

**Chapter Summary**

Since formally organized opportunities to engage in advocacy do not currently exist at UMass, alumni are not engaging in this way. However, recognizing the value of advocacy, participants in this study largely shared their willingness or desire to do so in the future if asked and with the right resources and opportunities in place as long as the efforts aligned with their interests and values and fit their capacity to support. Alumni shared that much of their desire to support their alma mater stems from the quality of education they received, their desire to support the next generation, and to continue to add value to their degrees.

Through alumni accounts it also became evident that many are engaging with their alma mater informally and formally by staying informed, attending events, volunteering their time, and giving back financially when able. Additionally, many of the ways alumni engage with their alma mater now are the result of how they interacted with and observed alumni interacting with UMass while they were students on campus. This signals the potential value and opportunity for institutions to design organized advocacy efforts that students and alumni can participate in together, so that students become educated early on about the value and potential impact of advocacy and are encouraged to continue
such involvement into their alumni lives. In addition to the aforementioned forms of engagement, many alumni shared that they choose to use their discretionary time to engage in political or advocacy-related volunteer efforts affiliated with other organizations that stand for causes they passionate about, signaling their available time, interest in supporting important causes that may involve advocacy, and comfort level and skills to do so. Such interests and skills could likely be translated to support their alma mater through advocacy if such an effort was organized, and alumni received personalized requests through their contacts or former campus affiliations to participate. Finally, another theme that came out of speaking with alumni about their inclination to advocate on behalf of their alma mater was the importance of striking a balance in regard to the methods used for advocacy to fit within their personal comfort level and in order to maintain relationships critical for advancing policy forward. This finding could help institutions to proactively anticipate and address alumni questions and concerns as part of targeted invitations to participate.

Related to their capacity to engage in such efforts, alumni acknowledged that their life stage that in many cases involved limited familial responsibilities provides them the flexibility to engage with various causes and interests during their discretionary time. Related to engaging in advocacy efforts on behalf of their alma mater, alumni discussed the importance of having the time available, their sensitivity to the various “costs” associated with participation, the timing and urgency of requests; and the need for easy, accessible, and flexible ways to engage that work within their busy lives. They described their preference for short-term opportunities to engage and need and desire for education and resources to help them understand the needs of their alma mater and specifically how they could assist to advocate efficiently and effectively. Such education and resources are imperative to removing barriers and uncertainties around advocacy, while specifically debunking misconceptions about advocacy being hard in order to empower alumni and help them reach their full potential as effective advocates on behalf of their alma mater.
CHAPTER 5

DISCUSSION

This study explored how alumni perceive and engage in alumni advocacy behaviors. Utilizing a constructivist lens that seeks to understand the unique, lived experiences of each individual and the meaning made from them (Jones et al., 2014), I investigated how recent graduates perceive their alma mater as a starting point for understanding how they may think about or engage in advocacy efforts on behalf of their alma mater. These graduates were selected as a group to be studied due to the recency of their college experiences that likely assisted them to recollect and share their stories. A qualitative grounded theory design was appropriate as little is known about the phenomenon of alumni advocacy and an aim of the study was to construct an explanatory theory that uncovered a process inherent to this area of inquiry (Strauss & Corbin, 1998; Merriam, 2009; Chun Tie et al., 2019). Through this design, I explored each participant’s thoughts and experiences regarding their alma mater and political advocacy and the meanings made from them.

Resulting from the study is a substantive theory that reveals an enhanced understanding of alumni advocacy and serves as a strong foundation for guiding future scholarship and practice about ways to best engage recent graduates to enhance the affordability of higher education, while also laying the groundwork for them remain connected with and support their alma mater throughout their lifetime. This final chapter provides an interpretation of themes that emerged from participant accounts and how such themes extend, build upon, or refute what is known about alumni engagement and advocacy to ultimately reveal how recent graduates might be inclined to support institutional advocacy efforts. The chapter will also discuss implications for practice that institutions may consider when developing alumni advocacy efforts and present ideas for future research.

Through grounded theory analysis, participant accounts answered the following research questions:
• How do recent graduates perceive their alma mater?
  o How do or may recent graduates engage with their alma mater?
• How do recent graduates perceive the value of alumni advocacy?
  o How do or may recent graduates engage in alumni advocacy?
• Based on participant experiences, how might recent graduates be inclined to support institutional advocacy efforts?

Theory Overview

Through engaging the grounded theory methodology to construct an explanatory theory that reveals a process related to the topic of interest (Strauss & Corbin, 1998; Merriam, 2009; Chun Tie et al., 2019), I was able to develop a substantive theory to guide future scholarship and practice. The structure and flexibility of this methodology enabled me to conduct a rigorous study evaluated against quality standards (Charmaz, 2014) while choosing from a “smorgasboard table” of options to employ (Strauss & Corbin, 1998, p. 8-9). Specifically, through speaking with participants in semi-structured interviews and engaging in constant comparative data analysis, a process for recent graduates to engage in alumni advocacy emerged that is detailed here via a top-level overview that will be expanded upon in subsequent sections.

Based on the experiences shared by alumni participants it became evident that their experiences over time, including their student experiences were foundational to how they think about and may engage with their alma mater now and in the future. Many spoke about having high-quality experiences inside and outside of the classroom, the value of their education, the influential and sometimes lasting relationships they formed, and positive and negative experiences that made enduring impressions. Given their experiences, participants shared reasons affecting their inclination to support their alma mater as alumni. These reasons included giving back to the institution that gave them so much, supporting the next generation as they were supported during their time on campus, and
believing that their contribution could make a difference. In addition to these reasons and regarding advocacy specifically, alumni shared that they would also be inclined to engage to make successful programs even better or to amend unfavorable circumstances while also adding value to their degree.

Coupled and sometimes overlapping with their inclination to engage with their alma mater, alumni shared that their capacity to engage would be the other large factor affecting their decision to support their alma mater. Factors such as their life stage, the physical proximity of engagement opportunities, the flexibility of opportunities offered, and time they have available would all influence their likelihood of engaging. Many participants shared that having recently graduated, they felt that they had less life responsibilities and more discretionary time to engage with their alma mater if the cause aligned with their interests and values, with values being extremely salient among advocacy efforts. Although some alumni admitted they were extremely busy while enrolled in graduate school, many acknowledged that once that commitment came to an end, they sought more ways to engage with their community, demonstrating that large commitments such as graduate school, while time intensive when enrolled, are finite and limited to a specific period of time and therefore should not preclude this group from participating all together.

Regarding how alumni currently engage or may engage with their alma mater in the future, it became evident that many engage in ways that were modeled to them in the past and were influential to their student experience. In many cases such experiences involved meaningful interactions with alumni at programs or events, mentoring relationships, hearing their experiences through alumni panels, or participating on alumni boards in a student role, signaling an opportunity for institutions to create intentional opportunities for ongoing joint student and alumni advocacy involvement to encourage sustained alumni involvement after graduation. Given this, and through the accounts of alumni, it became clear that many engage in ways that they are familiar with and feel they can contribute value. On the most basic level this involves staying informed by following their alma mater on
social media, watching the news, or staying in touch with their networks of alumni friends. Sometimes this also involves informally engaging by acting as an ambassador for the institution, occasionally attending events, volunteering their time as mentors to students, or giving back modestly through financial gifts when able. Specifically, regarding advocacy, since no formal program exists at their alma mater, alumni are currently not likely to engage in such efforts on behalf of their alma mater. However, many shared that they previously engaged in advocacy efforts during their time as students on campus, currently participate in advocacy work as part of their professional roles, and/or volunteer to support advocacy-related efforts during their discretionary time for causes they are passionate about, suggesting that they may also be likely to advocate on behalf of their alma mater under the right circumstances.

Given their experiences with their alma mater in the past and present, many alumni shared their belief in the value of public higher education to create an engaged citizenry within the state and beyond. They also highly-value having accessible options for higher education within the state, as many of the participants interviewed were first-generation students or came from working-class families with moderate finances, helping them to truly appreciate and value the opportunity to attend UMass. Additionally, beyond the value participants place on public higher education, through their various experiences on campus and post-graduation, alumni recognize the value advocacy efforts can contribute and the power the alumni population holds to influence change now and in the future through power in numbers as registered voters living within the state who have influential stories to share.

Despite their experiences and beliefs, these alumni are not currently advocating on behalf of their alma mater for a variety of reasons that stem from the need for more information, guidance, and resources. Specifically, given their busy lives they would need to be asked to advocate and would be more likely to engage through a personal invite coming from someone they knew or through a former student involvement that aligns with their interests and values. They would also need to understand the needs of their alma mater and how they could help affect change. This understanding could develop
early on by institutions educating students about the importance, value, and methods of advocacy, while providing them opportunities to engage in advocacy-related efforts on behalf of their alma mater with alumni. Such experiences could allow students to learn from alumni, while exposing them to valuable ways to remain involved with their alma mater after graduation. Additionally, communicating regularly with alumni to keep them in the know about campus happenings, issues affecting their alma mater, and outcomes of previous support efforts whether they be volunteer, giving, or advocacy-related may make them more inclined to support their alma mater. To further appeal to alumni and compel them to advocate on behalf of their alma mater, institutions could send personalized and well-timed communications that align with alumni interests and values based on their former student and current alumni involvements. Such communications could also provide information and ways to learn more about particular issues, offer flexible options for lending support, and resources for taking action. By strategically educating students early on, providing them opportunities to advocate with alumni for important causes, and maintaining regular, informative communications with alumni after graduation, institutions may better educate and appeal to recent graduates in ways that align with their inclination and capacity so they are more likely to engage in meaningful ways that affect important change while setting them on a positive trajectory for a lifetime of continued engagement and giving.

In sum, my findings revealed that the likelihood of becoming an alumni advocate is influenced by one’s experiences over time that includes the past, present, and future as well as one’s physical location during these times. One’s inclination to engage combined with their capacity to do so influences the likelihood that they will partake in advocacy efforts. Furthermore, by participating in ongoing joint student and alumni advocacy involvement, students may become more educated and informed about advocacy needs and potential actions, while observing alumni actions to advocate on behalf of their alma mater that model to them what their future continued involvement as alumni could be. Under these circumstances, and when empowered with the right resources, information, and
guidance from their alma mater, alumni will confidently embrace the opportunity to drive meaningful change and support their alma mater through advocacy. This theory is illustrated in Figure 1 below and its contributions are expanded upon in the sections that follow.

**Figure 1**

*Theory of Becoming an Alumni Advocate*

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**Past, present & future** – One’s experiences over time that include before they were enrolled at their alma mater, time at UMass, current alumni life after UMass, and future alumni life.

**Location** – Where an individual is physically located at any point in time. For example, legally residing either in the same state as their alma mater and/or their proximity to campus as it relates to their likelihood of engaging in advocacy efforts.

**Inclination** – One’s desire to engage in advocacy efforts on behalf of their alma mater based on experiences that happened in the past, present happenings, and things that could happen in the future. Their desire to engage can sometimes also overlap with capacity considerations.

**Capacity** – One’s ability to engage based on a variety of factors that include their life stage, the time they have available, finances, ease and flexibility of opportunities, etc. Ability to engage can sometimes overlap with inclination considerations.

**Joint student & alumni advocacy involvement** – Ongoing opportunities to engage as students with alumni and as alumni with students in advocacy-related efforts on behalf of their institution to affect positive change. Such involvement helps students become educated about advocacy early on and exposed to how they may remain engaged post-graduation. Alumni in these roles also can influence positive change while staying connected with their alma mater, students, and helping to improve the student experience.

**Resources & information** – The education about advocacy that one receives over time through various involvements before, during, and after college. This includes guidance through information and resources received over time to help one act on behalf of their institution.

**Individual** – Is the person (student & alumnus/na) over time affected by their environment and information and resources to take part in advocacy actions on behalf of their alma mater.
Scholarly Contributions Connected to Theory

A significant contribution of this study is the insight into the alumni decision-making process regarding how they decide whether and when to engage in advocacy efforts on behalf of their alma mater with alumni revealing that they would first consider their inclination to participate and then their capacity to do so depending on the ask and the cause. Related to this takeaway, it became apparent early on in my data analysis that although inclination and capacity are illustrated as two distinct sensitizing concepts in most existing literature, there is an interconnectedness between the two that make it challenging to consider one without the other in my data. In their quantitative study, Weerts and Ronca (2008) spoke of this complexity and the tendencies for the boundaries between inclination and capacity to become blurred when these sensitizing concepts were operationally defined as predictor variables. However, by nature of the design of this qualitative study, there was great freedom and flexibility regarding the application of these sensitizing concepts based on how participants spoke about them. As such, although inclination and capacity are broken out into two different themes for clarity as part of the resulting theory and discussion in this chapter, within each, overlaps are discussed and weaved into the discussion as they naturally fit the recollections and experiences of participants adding nuance and depth to their accounts and this study’s findings.

Inclination

Through this study it became apparent the importance values play in activating alumni to advocate on behalf of their alma mater. In their study of alumni likely to support their alma mater through volunteer service and political advocacy, Weerts and Ronca (2008) ultimately hypothesized through their findings and discussion that the belief that one should support their alma mater through volunteer service may likely be value related. My dissertation study extends their research and found their hypothesis is particularly true regarding advocacy, with alumni sharing that they would be inclined to advocate for causes they were passionate about that aligned with their values on behalf of their alma...
mater. However, on the flip side of this, alumni also shared that should their alma mater advocate for something that went against their values they may be just as compelled to advocate against such positions.

Extending what is known about inclination as it relates to advancement, this study also revealed that alumni are inclined to support their alma mater to give back to the institution that gave them so much and to support the next generation as they were supported during their time on campus. In addition to these reasons and regarding advocacy specifically, alumni also shared that they would be inclined to engage in advocacy efforts on behalf of their alma mater to make successful programs even better or to amend unfavorable circumstances while also adding value to their degree through an enhanced institutional reputation. Such motivations relate to social exchange theory (Homans, 1961), which in context of this study suggests alumni will weigh the costs of participating (time, talents, expertise) against the benefits received in the past and yet to be received in the future. Such rewards could include the quality of their education, career accomplishments, and social connections as a result of their education (Weerts & Ronca, 2008; Weerts et al., 2010).

Additionally, alumni overwhelmingly shared that they were inclined to support their alma mater when they believed that their contribution could make a difference. The difference made could include bringing greater awareness to an issue and/or influencing a policy change. Related to inclination and in the context of this study, this belief exemplifies expectancy theory (Vroom, 1964), which suggests that alumni are likely to support their alma mater when they believe their efforts and/or their specific skillsets are likely to make a difference. Building upon this belief, alumni in this study also shared that their confidence in such efforts would increase if they were to participate in an organized effort and were part of a collective group working to influence change. Alumni accounts revealed that having increased certainty around important issues and efforts helps alumni feel confident that their efforts and time will not go to waste, making them more likely to participate in advocacy efforts.
Deepening what is known about alumni programs and participation (Johnson, 2018; Dolbert, 2002; Grafton, 2000, Dibbert, 2000; Lennon, 2000; Dolbert, 2000; Coleman, 2000; Chewning, 2000), participants in this study revealed that in addition to alignment with their interests and values, an important factor influencing their likelihood to engage with their alma mater was whether or not they were asked. A number of alumni shared that they have not given because they have not been asked and greater numbers of alumni shared that they have not engaged in advocacy on behalf of their alma mater because they had not been asked, were not certain of the institution’s needs, or how they could help, signaling a need for more effective communication (Barrett, 1989; Levine, 2008) and education around issues affecting their alma mater. Building on this and extending upon the recommendations of Rau and Erwin (2015) related to giving and volunteerism, many alumni shared that they would be more likely to generally engage and engage in advocacy on behalf of their alma mater if they received a personal invite potentially through a personal connection or former student affiliation. In direct alignment with expectancy theory (Vroom, 1964), participants explained that such invitations would instill confidence that the request would align with their interests and values and that the expenditure of their, time, talents, or money would be put to good use. Such findings further the notion that alumni support and involvement may be predicted and motivated by a combination of an alumnus/na’s past and present experiences with their alma mater (Weerts & Ronca, 2008; Weerts et al., 2010; Brittingham & Pezzullo, 1990; Taylor & Martin, 1995). These sentiments also demonstrate the value of personalized requests, quality relationships, and need for an understanding of the impact of their contribution as well as accountability regarding how their contribution would be used to help their alma mater.

**Capacity**

Although most alumni shared that their desire to advocate for a cause on behalf of their alma mater would be their first consideration before committing their time, another large factor affecting their ability to participate is their capacity to partake in such efforts. Through speaking with alumni, it
became clear that in addition to their desire to advocate for a cause, the time they have available, financial considerations, timing of requests, and the ease and accessibility of opportunities were all factors that would affect their ability to advocate on behalf of their alma mater.

**Discretionary Time Available**

A major consideration for alumni before they engage with the university is how much time it may take to participate and whether they have the time available. In most cases, alumni shared they were very involved in community groups, causes, or general volunteer efforts beyond the responsibilities of family or work, raising the same question posed by Weerts and Ronca (2008) of whether so many involvements may “crowd out” opportunities to support their alma mater (p. 277). Building upon what was found by Weerts and Ronca (2008), this study also found that those who were active in one dimension of civic life, tended to also be active in others. When considering when and how the ethic to become civically engaged formed, alumni shared that they had formed such ethic through their upbringing, high-school involvements, and/or in college through the courses they took and activities they participated in, underscoring the importance of early-civic engagement and confirming what was found in previous studies, that those who were civically engaged early in life whether before college, during college, or both, were more likely to continue engaging in similar ways beyond graduation (Weerts & Ronca, 2008; Astin, 1999; Glanville, 1999, Zaff et al., 2003).

Deepening what is known about life stage as it relates to volunteerism and advocacy specifically, alumni participants underscored the importance of life stage, sharing that their ability to be so involved and balance their commitments was partially due to the flexibility their current life stage affords them as most alumni interviewed were not married and none had children of their own to care for, suggesting that recent graduates may be a key group to engage in advocacy efforts soon after graduation before the obligations of other life responsibilities could take hold of their time. Although prior literature has suggested that marriage enhances one’s social network and the rate at which one will volunteer (Bureau...
of Labor Statistics, 2016; Sundeen, 1990), alumni in this study spoke of the freedom afforded to them by not having the responsibilities that come with marriage and children, providing them greater flexibility with their time to volunteer. Given the life stage of participants in this study which consisted of alumni ranging from 23-29 years of age, the most demanding potential time commitment disclosed by this group was the commitment of graduate school for those who were enrolled, with many participants sharing that they either had just finished graduate school, were currently enrolled, or planned to attend in the very near future. These findings demonstrate the general flexibility traditional-aged recent graduates may have regarding the available time they may devote to advocacy efforts on behalf of their alma mater or other efforts. Additionally, even when graduate school may demand the time of these alumni, it is important to note that commitment is temporary and bounded, with many alumni sharing that they were looking for ways to become more involved in their communities after graduate school was over.

Furthermore, as alumni spoke about considerations of their available time for general engagement and then later spoke of their available time related to supporting advocacy efforts, there were many similarities. However, a distinction regarding advocacy and a key contribution of this study was that alumni shared that they were *more willing to make time* to engage in advocacy efforts if they perceived the cause to be very important and the effort was well-organized and flexible. In alignment with inclination, such sentiments underscore the significance of value alignment as an indicator of importance and related to expectancy theory (Vroom, 1964), demonstrates their desire to assist in ways that may affect change and are well-organized to maximize the time they contribute and likelihood of success toward an intended outcome.

*Financial*

Another consideration for alumni regarding whether they engage and how they engage with their alma mater are the financial resources needed and whether they have them available. Although
financial resources are typically cited as a barrier to recent graduate giving (Gaier, 2005; Smith, 2021),
this study revealed that financial costs and resources were also considerations for engaging by attending
events and volunteering, as well as advocacy-related efforts. As recent graduates, participants were
open about their current limited financial resources and how such limited resources can sometimes
weigh on their decision of whether and how to engage with their alma mater. Considerations shared
included the cost associated with using their personal time off from work if needed, the expense of
affording gas to travel if required, and for some, the necessity to work to make ends meet. In the case of
recent graduates, they may need to use the discretionary time they have available to earn income,
especially if they work hourly jobs immediately following graduation. Therefore, time away from work to
engage in advocacy may also not be financially feasible. These sentiments shared by alumni align with
prior literature that suggests that those with higher levels of perceived financial strain were less likely to
volunteer (Son & Wilson, 2015). As those starting out upon graduating college may also face increased
levels of financial strain that could potentially influence their likelihood of advocating on behalf of their
alma mater, institutions should dispel any misconceptions about the cost of advocating and design
flexible opportunities that require varying levels of time commitment to more broadly appeal to
potential alumni advocates.

Timing

Slightly different than the amount of time alumni may have available to engage with their alma
mater, this study revealed that timing can also be very important factor that affects their ability to
engage. A number of alumni spoke about the seasonality of their work potentially affecting their ability
to engage with the university based on the demands of their work schedule which underscores the need
for flexible opportunities, an idea echoed in previous literature (EAB, 2016). Also, related to advocacy,
alumni spoke about the urgency associated with various asks and whether there was a best time to
advocate to the legislature to increase the likelihood of affecting change. For example, requesting the
help of alumni who work in state government during a legislative recess could be an effective way to get their attention and begin engaging them before another busy session. It could also be a way of commanding more of their attention when they are not pulled between a number of competing priorities. Under the premise of expectancy theory (Vroom, 1964), well-timed calls to action may increase the likelihood that alumni will participate in advocacy efforts as their belief in their ability to affect change increases.

**Ease & Accessibility**

Related to general engagement and advocacy, participants spoke of the importance of offering easy, accessible, and flexible ways for alumni to be involved. Many shared their desire to participate in remote virtual ways when possible, for ease and also flexibility regarding their location at any given point in time. Building on these sentiments and in alignment with previous literature that states alumni of contemporary times value control of their time, flexibility, and autonomy (EAB, 2016), other alumni also shared their desire to participate in ways that gave them more control over their time, were not role-defined, and did not require a long-term commitment.

**Opportunity Alignment**

While recent graduates are open to and desire to support their alma mater in various ways, this study revealed that some ways better align with their capacity and inclination than others. Of the various ways alumni can support their alma mater, recent graduates are more aware of volunteering and financial giving opportunities at their alma mater than advocacy opportunities. This could be due to their exposure to such opportunities from their time on campus and/or having received requests to support their alma mater in such ways. Furthermore, organized advocacy efforts for alumni do not currently exist at UMass. Among the known options, volunteering their time was the most likely way recent graduates shared they may support their alma mater since it aligns with their capacity as a low-
cost way to engage and inclination to help current students or programs that were influential to them during their time on campus.

Regarding giving, a new contribution of this study to the relevant literature was the revelation that most recent graduates understand the value of giving with many of them, including those with higher levels of debt, seeking to give back financially in the future and in larger amounts as their income grows, underscoring a strong inclination to support their alma mater now and in the future. This confirms that recent graduates today may be more likely to expect larger debts owed upon graduation as hypothesized by McDearmon and Shirley (2009) and builds upon their findings demonstrating the philanthropy-minded nature of graduates of contemporary times. Despite this mindset and in alignment with previous literature, participants shared that currently they do not always make financial gifts as they have limited capacity to do so as recent graduates with modest incomes (Gaier, 2005; Smith, 2021), some of whom also have loans to repay (Marr et al., 2005). Concerning advocacy, alumni were more than open to supporting their alma mater through advocacy, but admitted they were not engaging in that way since they had never been asked and did not understand the most pressing needs of their alma mater and how they could help, again signaling a need for better communication (Barrett, 1989; Levine, 2008) and education from their alma mater about the need, ease, and potential impact of participating in advocacy efforts. With more education around advocacy, recent graduates could find that advocacy opportunities better align with their capacity and inclination than previously thought and among other options such as volunteering or giving.

Experiences Over Time

In support of prior literature and through my investigation I found that experiences over time were influential to how alumni may engage with their alma mater following graduation and into their alumni lives. Such experiences could include their satisfaction with the quality of education they received while enrolled, their experiences with civic engagement early in life, and memorable
experiences engaging with alumni as students. These influential experiences created lasting impressions that set a strong foundation for alumni future engagement with their alma mater.

**Quality Academic Experiences**

In support of the importance of experiences over time, I found that satisfaction with one’s experience as a student through high-quality educational experiences supports alumni having positive perceptions of their alma mater that may make them more inclined to engage now and in the future. While perceptions of institutional quality have been found to be strong predictors of alumni support, how quality is described and measured from study to study has been inconsistent. For example, quality has been defined by variables such as satisfaction with academic experiences (Weerts & Ronca, 2008; Tsao & Coll, 2004; Utter et al., 1999), expenditures per student (Leslie & Ramey, 1988; Brittingham & Pezzullo, 1990), attentiveness of administration (Utter et al., 1999), size of institution (Leslie & Ramey, 1988), investment in facilities (Utter et al., 1999), median SAT scores of incoming class (Brittingham & Pezzullo, 1990), and national rankings (Brittingham & Pezzullo, 1990). Quality has also been measured by factors related to institutional prestige such as the age of an institution, national ranking as measured by *US News and World Report*, and strong athletic programs (Brittingham & Pezzullo, 1990; Leslie & Ramey, 1988; Liu, 2006; Holmes, 2009).

Alumni in this study affirmed some of the cited indicators of quality, and in some cases built upon how their experiences with these indicators, could motivate their future participation as alumni advocates. For example, regarding their satisfaction with their academic experiences, alumni spoke of their relationships with faculty, the academic rigor that they experienced, and the quality of education that they received compared to other private institutions that were far more expensive. Specifically, alumni spoke of their relationships and appreciation for their professors with whom they interacted with beyond the classroom, sharing that in many cases, dedicated faculty members made lasting impressions on them that they still recollect as alumni. Such findings build upon prior studies that found
that high levels of contact with faculty and/or staff indicated a quality experience that happened to relate to a stronger likelihood of giving and in some cases higher-than-average future donations from alumni (Clotfelter, 2003; Gaier, 2005; Monks, 2003). Additionally, other alumni spoke about having academically rigorous experiences where they were required to think critically, engage in discussion, and problem solve in the classroom, helping to facilitate their exposure to diverse points of view, which based on previous studies that touch on the importance of quality experiences and alumni satisfaction, suggests that they may be more inclined to generally support their alma mater (Utter et al., 1999; Tsao & Coll, 2004; Weerts & Ronca, 2008). Related to academic rigor, alumni also proudly spoke about the quality of their academic experience compared to theoretically more rigorous private institutions in the region that have longstanding strong reputations and cost more. Comparing their experience at UMass to that of their peers or their own experiences attending private graduate schools, they shared that their UMass education put them at no disadvantage compared to their peers and in some cases, they believed the public education they received at UMass was of superior quality.

Additionally, when speaking of their quality academic experiences, alumni spoke of the size of UMass relative to the many options and opportunities that were afforded to them on campus and within those options, their ability to curate their own unique experience to fit their individual interests and support their career goals. Similar to Leslie and Ramey (1988) who described institutional size related to potential institutional impact in the eyes of donors, these alumni viewed the large size of their alma mater as an asset that offered a vast menu of opportunities. While a large institution may make some feel like just another number on a large campus, alumni participants in this study shared that they valued having the option to make UMass as large or small as they wanted it to be through their involvements, suggesting that they may be inclined to support their alma mater in the future in return for the quality experience they received. Lastly, building upon the findings of Gaier (2005) that state the importance of alumni satisfaction with their academic experiences related to future participation,
alumni described their quality academic experiences that helped them discover their professional paths and prepared them for successful careers.

In alignment with social exchange theory (Homans, 1961), alumni shared their gratitude for their experiences, often crediting UMass for where they are today and desire to give back to their alma mater to “pass the torch” and enhance the offerings and accessibility of the institution for future generations to come. Participants also shared that given their experiences and their desire to repay their alma mater and support future generations, they would be willing to support their alma mater as they were able through giving, volunteering, or advocating depending on the institution’s needs and the value they could contribute within their means. Together, these findings and sentiments can be extended to alumni advocacy and through the lens of social exchange theory (Homans, 1961), they suggest that if asked and the opportunity aligned with their values, these alumni may also be inclined to advocate on behalf of their alma mater based on their positive, quality, and lasting academic experiences.

**Civic Engagement Early in Life**

In alignment with previous studies, this study found that those who were civically engaged early in life whether before college, during college, or both, were more likely to continue engaging in similar ways beyond graduation (Weerts & Ronca, 2008; Astin, 1999; Glanville, 1999, Zaff et al., 2003). When exploring alumni attitudes through the lens of expectancy theory, Weerts and Ronca (2008) found that alumni donors who agreed with the statement “alumni should support their alma mater through volunteer service” were twice as likely to volunteer at their alma mater (p. 289). However, the source responsible for developing such views was unclear and the researchers hypothesized that alumni decisions to volunteer could be more closely aligned with their personal values about service. Prior research supports this notion, as being civically engaged in one’s youth may also influence the likelihood that one remains civically engaged later in life (Zaff et al., 2003; Glanville, 1999). Specifically, Glanville (1999) found that participation in instrumental extracurricular activities during high school and college
positively predicted political involvement in early adulthood independent of one’s personality traits and established political attitudes. To learn more about alumni beliefs related to alumni support, this study asked the same question related to volunteer engagement and separately related to advocacy. Regarding volunteer engagement, participants generally revealed that they thought alumni should support their alma mater if they had a positive experience, wanted to, and were able to give back. Although not the sentiment of most participants, a number of alumni shared the views they sometimes hear from their peers, which is that they paid for what they received in the form of their education and therefore do not feel a responsibly to stay engaged with their alma mater or give back as alumni. Specific to advocacy, more alumni were inclined to say that alumni should support their alma mater through advocacy efforts. However, the reasons were somewhat different, with participants sharing that alumni should support advocacy efforts if there was a great need, they were able to, and it aligned with their values. This finding aligns with previous literature related to volunteerism and civic engagement (Zaff et al., 2003; Glanville, 1999; Astin et al., 1999). Extended to advocacy, it also supports the hypothesis by Weerts and Ronca (2008) that alumni decisions to volunteer could be more aligned with personal values and provides insight that could be valuable to informing and targeting future outreach efforts to alumni related to advocacy.

Engaging with Alumni as Students

A significant new contribution that this study found was that engaging with alumni as students was influential to how future alumni many engage with their alma mater after graduation. Through speaking with alumni, it became apparent how important and influential connecting with alumni was to their student experience while on campus and then their alumni involvement after graduation. For some now alumni this involved participating in events with alumni, hearing alumni speakers, having an alumni mentor, or participating on alumni boards in a student role. Such exposure helped illuminate ways to stay engaged and give back to their alma mater after graduation and in many instances inspired future
alumni engagement in similar ways to what was modeled, that in the future could be channeled to support advocacy efforts. Conversely, some alumni without such experiences also shared that they were not really sure of ways to plug back in or stay engaged with their alma mater after graduation beyond attending an occasional campus or alumni event. Such findings build upon the findings of Weerts and Ronca (2008) by demonstrating how student experiences may play a role in predicting future alumni support. As social exchange theory (Homans, 1961) suggests, feelings about the quality of educational experiences had inside and outside the classroom are weighed against the costs of time, talent, and resources expended in supporting one’s alma mater. As such, designing high-quality experiences are critical to securing the future support of alumni. Building on this, alumni accounts illuminate an opportunity to design quality, integrated experiences around advocacy so that students have the opportunity to learn about advocacy needs and efforts while participating with alumni, and then hopefully remain inclined to continue their involvement in an alumni role after graduation.

Alumni Awareness of Power & Potential Impact

Although practitioners have touted the power of alumni in advocacy-related efforts (Koral, 1998; Simonetti, 2013), through conversations with participants this study revealed that alumni are also aware of the power among the alumni population, and especially those who remain residents of the state to influence policy change. Alumni represent a large contingent of registered voters located across the various districts of the Commonwealth, who are diverse in age, race, gender, and occupation. As products of their alma mater, many have compelling stories to share and a number are well-positioned in their jobs or through contacts to help influence change.

Acknowledging that among all donations, the majority of gifts commonly come from a small percentage of donors (Kozobarich, 2000; Drezner, 2011; EAB, 2016; Linder & Meu, 2019; Schiller, 2019), it is evident that when strategically activated together, alumni have a unique opportunity to balance out the ability of those with the greatest wealth and special interests such as non-alumni donors,
corporations, and foundations to exercise undue influence over the trajectory of higher education policies and programs. Additionally, compared to other interests, alumni actions may be seen as altruistic (Weerts & Ronca, 2009; Underwood, 2012), sending a strong message to legislators who have a responsibility to the communities they serve and who rely on alumni votes for election.

Speaking of their power in different ways, some alumni drew from their professional experiences working on advocacy-related efforts through their jobs, while others drew from their past and present personal experiences and perceptions. As they spoke about their power, alumni touched on different themes that help illustrate their understanding of the power they hold and how they could enact it. For example, they spoke of the power they bring to the table in terms of the sheer number of alumni who are products of public higher education. Also acknowledging the importance of individual participation to reach critical mass, some spoke of their increased likelihood of participating and confidence they would have in their contributions making a difference if they were to participate in advocacy efforts that were organized as part of a larger collective, underscoring the saliency of expectancy theory (Vroom, 1964) in how they think about their potential future participation. Those more well-versed in advocacy efforts and impacts also spoke of the power and influence hearing from a few as 10 constituents could have to influence legislators in support of needed policy change.

Alumni also acknowledged the multifaceted nature of power and the potential impact that alumni who hold positions of power or who have lines to those who do could have on policy decisions. Such positions could include accomplished alumni with strong networks or alumni who hold positions of power within the legislature. Speaking to this value, alumni described their ability to elect alumni who are the products of public higher education within the state who likely understand the value of these institutions and are receptive to listening to alumni stories and to addressing critical needs. They also spoke to the power of their vote to elect and reelect individuals committed to supporting public higher education, potentially helping to amplify and prioritize alumni voices at a level that helps drive change.
Building on previous literature, these alumni sentiments acknowledge that while having sheer numbers of alumni to activate on the grassroots level can be effective, such efforts likely can be even more effective when complemented by grasstops efforts (Cook, 1998; Barnett, 2019b) that also involve activating select alumni in positions of power to help drive important conversations and influence policy change on behalf of their alma mater and public higher education. With the recognition of the multifaceted power alumni hold to influence policy decisions through advocacy, many alumni also acknowledged the potential unintended negative consequences inaction could have for the state and generations to come. With this in mind, their accounts underscored the importance of also considering the barriers that may be preventing alumni from advocating on behalf of their alma mater and needs to activate them effectively.

**Need for Guidance, Education & Resources**

As evidenced by participant accounts, many but not all alumni interviewed expressed that they are familiar with and comfortable engaging in advocacy efforts based on their previous student experiences, professional roles, and volunteer involvements related to political causes, nonprofits, and advocacy. These individuals shared that despite their familiarity with advocacy in general, its value, and potential tactics, they still have uncertainty around the most pressing needs of the university, and how they can specifically help influence positive change as part of a larger coordinated effort which prevents them from taking action. This finding extends prior literature related to giving as having an awareness of an institution’s need for support is also a known factor that influences whether or not one may give (Taylor & Martin, 1995). Additionally, this study identified that those less familiar with advocacy and what it may entail thought that participating in such efforts felt intimidating, difficult, and overwhelming, sharing that they wouldn’t know what to do or where to start. Coincidentally addressing common misconceptions about advocacy, those with more experience advocating suggested that advocating could be one of the simplest ways of engaging compared to volunteering or making financial
gifts, with one alumnus describing it as more equal to ask someone to be an engaged citizen through advocacy, compared to asking them to contribute hours and hours of their time or money that they may not have to their alma mater. Such reasoning is something that more institutions could leverage to increase engagement based on alumni inclination and capacity among recent graduates and other alumni.

As new contributions to this area of study, these sentiments are significant because they signal what could potentially be very significant barriers for alumni to engage in advocacy. As institutions compete to capture a share of the discretionary time alumni may have available to engage it is vitally important that opportunities are communicated through consistent, personal, and clearly articulated communications (Barrett, 1989; Levine, 2008), that are appealing and offer flexible options for involvement to attract alumni of contemporary times who are busy and seek to make a lasting impact (Smith, 2021; Linder & Meu, 2019; The Millennial Impact Report, 2019; Masterson, 2017). Additionally, such sentiments signal the need for education, guidance, and resources around advocacy needs, actions, and the potential ease and simplicity of advocating. Building upon the literature about alumni volunteerism in contemporary times that stresses the importance of offering short-term, clearly defined engagement opportunities (EAB, 2016), ideas shared by alumni to make the thought of advocating more approachable included offering flexible ways to participate that do not require a large or ongoing time commitment, offering small steps that can contribute toward a larger outcome, and providing opportunities for alumni to share their own experiences as they relate to important policy issues as a way of offering a personal touch that required little research or effort on the part of the alumnus/na. Without strategies in place and resources available to educate and guide alumni actions, their knowledge, skills, and experiences will remain untapped and underutilized to help advance their alma mater and there will be a missed opportunity to set them on positive trajectory for future sustained engagement and giving.
Taken together, these significant findings helped shape my resulting theory that postulates that the likelihood of becoming an alumni advocate is influenced by one’s experiences over time that includes their past, present, and future experiences as well as their physical location during these times. Building upon this, one’s inclination to engage combined with their capacity to do so influences the likelihood that they will partake in advocacy efforts. Furthermore, by participating in ongoing joint student and alumni advocacy involvement, students may become more educated and informed about advocacy needs and potential actions, while observing alumni actions to advocate on behalf of their alma mater that model to them what their future alumni involvement could be. Under these conditions, and when empowered with the right resources, information, and guidance from their alma mater, alumni will confidently embrace the opportunity to drive meaningful change and support their alma mater through advocacy. To help actualize this theory, implications are offered in the section that follows.

**Implications**

Using the sensitizing concepts of capacity and inclination helped to understand the factors that go into the decision-making process for alumni regarding how they support institutional advocacy efforts now or may in the future. This study demonstrates that in addition to the factors of one’s capacity and inclination, the importance of experiences over time to informing alumni perceptions of their alma mater that are fundamental to influencing the likelihood that alumni may engage in such efforts. Further, this work reveals implications that institutions and their advancement offices may consider to engage recent graduates soon after graduation in advocacy efforts that set them on a positive trajectory for a lifetime of engagement and giving while also helping their alma mater in ways that align with their current capacity and inclinations. This study also contributes to existing literature focused on alumni support and engagement, providing new knowledge on the understudied area of alumni advocacy that may be used to guide future research.
Prioritize Quality Student Experiences

In support of prior literature, I found that experiences over time were influential to how alumni may engage with their alma mater following graduation and into their alumni lives. Specifically, building on other works that conclude that one’s perceptions of the quality based on their current and/or past experiences with their alma mater predict future alumni support (Weerts & Ronca, 2008; Tsao & Coll, 2004; Utter et al., 1999; Leslie & Ramey, 1988; Brittingham & Pezzullo, 1990; Liu, 2006; Holmes, 2009), I found that satisfaction with one’s experience as a student through high-quality educational experiences supports alumni having positive perceptions of their alma mater that may make them more inclined to engage now and in the future as alumni advocates.

Regarding their satisfaction with their academic experiences, alumni spoke of their relationships with faculty, the academic rigor they experienced, and how their experiences helped them discover their professional paths and prepared them for successful careers. They also spoke of the overall quality of education they received compared to private institutions that were far more expensive. As such, institutions need to prioritize offering high-quality experiences to students so they continue to think fondly of their alma mater post-graduation and are more inclined as alumni to stay involved and lend their support through advocacy and other efforts.

As prior studies have found that high levels of contact with faculty and/or staff relate to a stronger likelihood of giving and in some cases higher-than-average future donations from alumni (Clotfelter, 2003; Gaier, 2005; Monks, 2003), institutions should prioritize attaining and retaining dedicated, high-quality faculty members who are committed to students’ growth inside and outside of the classroom, helping them to discover their professional paths and prepare them for successful careers. Additionally, institutions should prioritize offering quality academically rigorous experiences where students are required to think critically, engage in discussion, and problem solve in the classroom, helping to facilitate their exposure to diverse points of view. Such teaching, learning, and
interactions with faculty will help to develop engaged problem solvers who may be more inclined to support their alma mater now and in the future (Utter et al., 1999; Tsao & Coll, 2004; Weerts & Ronca, 2008) through advocacy efforts. Exemplifying social exchange theory (Homans, 1961), such quality experiences may make alumni more inclined to support their alma mater through advocacy efforts to repay the institution that helped them get where they are today while enhancing the future offerings and accessibility of the institution for generations to come and adding value to their own degrees.

Create Opportunities for Joint Student and Alumni Advocacy Involvement

A significant new contribution that this study found was that engaging with alumni as students was influential to how future alumni many engage with their alma mater after graduation. Such exposure helped illuminate ways to stay engaged and give back to their alma mater after graduation and in many instances inspired future alumni engagement in similar or the same ways to what was modeled. Given this and acknowledging that student experiences play a role in predicting future alumni support (Weerts & Ronca, 2008) it would be beneficial for institutions to partner with advancement offices to design opportunities for students and alumni to engage in advocacy efforts together as a way of educating around advocacy’s impact and value, while also demonstrating specific ways to stay engaged as alumni beyond graduation. Contributing to one’s experiences over time and in alignment with prior research (Weerts & Ronca, 2008; Astin, 1999; Glanville, 1999, Zaff et al., 2003), such experiences would be a way of engaging students in civic engagement activities early on, increasing the likelihood that they would remain engaged in such ways post-graduation. Additionally, such early educational experiences would help to clear up uncertainties and dispel misconceptions shared in this study by alumni about the perceived difficulty of advocating. Furthermore, alumni and students would have a simple avenue for learning about the most pressing needs and priorities of the institution and how they can help while also exposing them to organized efforts and tools for advocating effectively. In alignment with expectancy theory (Vroom, 1964), such exposure may help to increase alumni confidence in the likelihood of the
contribution of their time, talents, and efforts making difference so they may be more inclined to participate in such efforts. Additionally, through their participation alumni and students will witness the impact of such efforts, helping to encourage their continued future engagement in advocacy efforts.

**Communicate Proactively and Consistently with Alumni**

Recognizing alumni as inherent advocates and supporters, institutions in partnership with their advancement offices have an opportunity to call upon and activate their alumni in support of institutional needs while also setting them on a trajectory for a lifetime of engagement and support. In order to do so effectively, the importance of regular communication with alumni cannot be underestimated. Alumni in this study shared they were more than open to supporting their alma mater through advocacy, but admitted they were not engaging in that way since they had never been asked and did not understand the most pressing needs of their alma mater and how they could help, signaling a need for better communication (Barrett, 1989; Levine, 2008) and education from their alma mater about the need, ease, and potential impact of participating in advocacy efforts. Supporting these notions, relevant literature cites that many stop giving to charities because the organization has not kept them informed and they are unsure if their past contributions made a difference (Perry, 2005).

Furthermore, Barrett (1989) suggests that the levels of alumni engagement with advocacy efforts are built on a number of factors dependent on effective communication such as the degree of trust built over time, level of commitment felt towards institution, how much information one’s alma mater is willing to share, and how well the institution articulates its needs.

With this in mind, institutions in partnership with their advancement offices need to develop and implement communications strategies that focus on regular contact with alumni so they can easily stay connected with their alma mater, helping to foster an ongoing emotional attachment, a known predictor of alumni giving that could also extend to future advocacy engagement (Mael & Ashforth, 1992; Brittingham & Pezzullo, 1990; Beeler, 1982; Gardner, 1975). Such communications could include
alumni magazines, newsletters, and annual reports that help alumni stay engaged with their alma mater, regardless of their location by exposing them to what is happening on campus, important research, and providing insight regarding future goals (Levine, 2008), helping to foster a connection that could be channeled toward advocacy efforts when there is a clear need for support and action. To do this effectively, it is also imperative that institutions work with students upon graduation and alumni to maintain updated and current contact lists so alumni may stay connected and informed. Considering alumni accounts shared in this study in combination with the relevant literature, it is clear that with proactively and consistently timed communications that may include interesting and relevant information, as well as timely asks, relationships with alumni may be fostered, maintained, and leveraged to play a critical role in helping institutions fulfill their unmet needs to meet their goals now and in the future.

**Develop Personalized Appeals Focused Around Values**

Beyond keeping alumni informed, to effectively appeal to alumni inclinations to participate in advocacy efforts on behalf of their alma mater, institutions in partnership with their advancement offices need to craft thoughtful invitations to engage alumni that are personalized, align with their values and comfort levels, and signal the benefit to be achieved now and in the future. Through speaking with alumni, it became evident that regardless of their experience with supporting advocacy efforts, they are not supporting their alma mater through such efforts because they have not been asked and are unsure of the needs of their alma mater and how they can help. This is likely due in large part to the fact that no such program currently exists at UMass but also underscores the importance of alumni specifically being asked to engage in such a way. In addition to being asked, alumni revealed that how they are asked and by whom would greatly influence the likelihood they may participate in such efforts. Building upon the previous findings of Rau and Erwin (2015), who found that alumni may also be more inclined to lend their support in the form of financial contributions or volunteering when requests
aligned with their former involvement as students, alumni in this study shared that personalized invitations from campus contacts that they are still in touch with and/or invitations from their current alumni or former student affiliations would make them far more likely to engage, as such invitations would instill confidence that the request would align with their interests and values and that the expenditure of their time would be put to good use (Vroom, 1964).

Furthermore, in order to effectively appeal to alumni inclinations, the content of targeted invitations to participate should reiterate why they are being contacted as a way of reminding them of the value they received through their education while also emphasizing the potential value to be contributed through the expenditure of their time and talents, and the value to be gained by students and alumni now and in the future as a result of their participation. This is supported by alumni accounts that detailed their desire to give back to the institution that gave them so much and their wish to support the next generation as they were supported during their time on campus. In addition to these reasons, and regarding advocacy specifically, alumni also shared that they would be inclined to engage in advocacy on behalf of their alma mater to make successful programs even better or to amend unfavorable circumstances while also adding value to their degree. Appealing to alumni in such a way, addresses the motivations shared by participants through this study while also enacting the tenants of social exchange theory (Homans, 1961) that suggests that alumni will weigh the costs of participating against the benefits received in the past or yet to be received in the future.

To help institutions target alumni through personalized appeals, it is important that they work with their advancement offices keep records of student and alumni involvements so that they may most effectively reach out to alumni with interests and values that align with specific needs and efforts. Emphasizing the importance of value alignment, some alumni participants shared that advocating for higher education may not necessarily mean advocating for their alma mater if their values and beliefs regarding issues affecting higher education were misaligned. As such, failure to effectively target alumni
could result in some alumni advocating against their alma mater if they are opposed to the stance of the university. Additionally, as institutions compete to capture a share of the discretionary time alumni may have available to engage (EAB, 2016; Linder & Meu, 2019), repeatedly targeting any and all alumni who were engaged as students and have experience with advocacy could potentially cause requests for such support to seem less important among other worthy causes competing their time and attention.

**Demonstrate the Scope and Organization of Effort**

To attract alumni participation in advocacy efforts on behalf of their alma mater, institutions in partnership with their advancement offices need to demonstrate the scope and organization of the effort so that alumni understand they are part of a larger collective of organized action, helping to grow their confidence that their individual participation can affect change. In alignment with prior literature (Koral, 1998; Simonetti, 2013), participants made clear through their accounts that they recognize the power held among the alumni population, and especially among those who are residents of the state to influence policy change. They acknowledged that alumni represent a large contingent of registered voters located across the state who are diverse in age, race, gender, and occupation. As products of their alma mater, many have compelling stories to share and a number are well-positioned in their jobs or through their contacts to help influence change. Acknowledging the power of the alumni population and the importance of individual participation to reach critical mass, alumni revealed that they would be more likely to participate in advocacy efforts if there was an organized effort coordinated as part of a larger collective action. Underscoring the saliency of expectancy theory (Vroom, 1964), they shared that such efforts would instill confidence that the contribution of their time and efforts would be put to good use while also having a realistic chance of affecting change.

As such, when designing opportunities for alumni to engage in advocacy efforts it is important for institutions and advancement offices to demonstrate organized efforts to attract more alumni to be
part of timely collective action. Such organized efforts could consist of strategically timed communications that convey the importance and urgency of the need, and how to take action with resources to do so and to learn more. Additionally, such efforts could demonstrate the coordination of grassroots and grasstops strategies (Cook, 1998; Barnett, 2019b) happening at once that could include calls upon a mass number of alumni to take action, actions of those in positions of power or influence who are well situated to drive change, and collaborations with other groups and institutions to amplify messaging and potential impact. Conveying such strategies and sharing intentional resources with alumni will help ensure consistent messaging that is timed to have the greatest potential impact when received, while also demonstrating to alumni the scope of the collective they can join.

**Make it Simple for Alumni to Participate**

As institutions compete to capture a share of their alumni’s discretionary time (EAB, 2016; Linder & Meu, 2019) among other responsibilities, interests, and worthy causes, it is important that institutions and advancement offices not only articulate the need and value of alumni participation in advocacy efforts but also make it as simple as possible for them to participate. Participants in this study spoke of the importance of offering easy, accessible, and flexible ways for alumni to be involved, with many sharing their desire to participate in sometimes asynchronous, virtual ways when possible so they could participate from any location on their schedule. Additionally, alumni shared their desire to participate in ways that gave them more control over their time, were not role-defined, and did not require a long-term commitment. Recognizing these accounts and the fact that alumni of contemporary times engage to improve the world, are motivated to support causes they believe in, and possess a desire to have a lasting impact (Smith, 2021; Linder & Meu, 2019; The Millennial Impact Report, 2019; Masterson, 2017), institutions should intentionally design impact-oriented advocacy opportunities that offer flexible, short-term time commitments and articulate a clear scope and end point for participation.
With such flexibility and clarity regarding advocacy needs and roles, alumni will be more able and inclined to participate.

Additionally, when offering opportunities for alumni to engage in advocacy efforts, institutions and advancement offices should be aware of the barriers to alumni involvement and do their part to proactively remove them before they make requests of alumni. Barriers to participation shared by alumni included their uncertainty regarding what advocating may entail and whether they would have sufficient time to commit and/or the financial flexibility to participate in such efforts. Specifically, they used examples to voice concerns about needing to take time off from work to participate or needing to afford gas to drive to the state house. These sentiments shared by alumni align with prior literature that suggests that those with higher levels of perceived financial strain were less likely to volunteer (Son & Wilson, 2015). With this in mind, institutions need to clearly articulate the need for advocacy, while providing flexible ways for alumni to participate that fit within their capabilities. By removing barriers and offering opportunities that are not time specific or destination bound, alumni can advocate in ways that work within their schedules and financial capabilities. For example, advocating could be as simple as signing a petition, making a phone call while referencing talking points and sharing a personal story, or sending a templatized email with some personalization to legislators.

Furthermore, this study identified common misconceptions about advocacy held by those inexperienced with advocacy and observed by those more seasoned with engaging in such efforts. While those less experienced described the thought of participating as intimidating, difficult, and overwhelming, those most experienced described it as one of the simplest ways to engage compared to volunteering or making financial gifts. As such, these disparities of sentiments illustrate a need for institutions and advancement offices to provide more education and resources around advocacy. Education could start as early as the time students are on campus through civic engagement courses and student involvements that offer opportunities to participate in advocacy with alumni they may also
learn from. With such strategies in place, upon graduation, recent graduates could see advocating as a natural progression of their way to stay engaged with and support their alma mater. Additionally, institutions and their advancement offices could further support their alumni in advocacy-related efforts by providing tools and resources to make their participation easy such as informational websites, email action alerts, talking points, email templates, staff points of contact, and more. Lastly, by keeping alumni informed and communicating back the results (Perry, 2005) of advocacy efforts, alumni may be more encouraged to participate into the future.

Limitations & Future Research

This study heavily relied on alumni recollections of their student experience to better understand how they perceive and may engage with their alma mater now and in the future. However, it is important to note that although alumni perceptions are their true perceptions, independent of the accuracy of their recollections, such recollections may not be accurate portrayals of circumstances and should be evaluated as such. Specifically, Pike (1993) cautions that alumni recollections could be tainted by a “halo effect” that blurs the connection between one’s overall satisfaction with college their actual experiences while enrolled. Building on this Weerts and Ronca (2008) assert that alumni recalling a single positive experience such as their participation in a student group or their experiences with their campus employment, may lead to the alumnus/na positively ranking all areas of their college experience even if such ranking is inaccurate. Additionally, as alumni recollections may become less accurate and change over time (Bridge & Paller, 2012), future research may seek to connect with alumni at various points after graduation to see how their recollections of their experiences and perceptions of their alma mater may evolve over time and what is responsible for those perceptions, so that institutions may better develop personalized student and alumni experiences that meet individuals where they are at in terms of services offered and support requested from the time they are students through their alumni
lives. Additionally, such an understanding may help institutions and their advancement offices to identify the most opportune period post-graduation to appeal to alumni and gain their support.

Another limitation was based on my connection with some of the participants interviewed as I had previously interacted with a number of them through my work in advancement over the course of my career at UMass as students and then as alumni, which could have impacted my positionality as the author of this study. As such, I had a level of familiarity with some of the experience’s participants shared. However, with this in mind I implemented strategies such as member checking and peer debriefing to ensure I was as unbiased as possible during my data collection and analysis. Specifically, I took detailed notes as I met with alumni, recording the audio of our conversations and then had them review and approve written transcripts before proceeding with any data analysis. Additionally, throughout the process of my study design and implementation I shared my thoughts and ideas while maintaining participant confidentiality within my trusted community of practice that included current doctoral students, colleagues, and my advisor to remain conscious and aware of my positionality as a researcher.

Although part of the intentional scope of this study intended to explore information-rich accounts of alumni, a third limitation of this study is the bounded site and sample. Specifically, regarding the site, this study targeted alumni from one distinct research university in northeast that is part of a public system with a storied history of governance and policy issues (see Crosson, 1996; Bastedo, 2005). Additionally, alumni participants described the nature of the politically engaged student body that they were either part of or witnessed during their time as students. As all institutions have unique cultures and traditions, the findings of this study may not ring true to other institutions of various sizes and missions. With this in mind, future research should build upon this study and test the theory I’ve developed by including institutions from across the nation representing various Carnegie classifications for a more complete picture of alumni support that could entail advocacy, volunteerism, and giving.
Additionally, as part of the sample, alumni from a single public institution who were formerly involved in instrumental student activities (Glanville, 1999) were targeted to participate. As such, practitioners should note that these alumni may be more naturally inclined to support their alma mater now and in the future through advocacy or other support behaviors such as volunteering or giving (Weerts & Ronca, 2008; Zaff et al., 2003; Glanville, 1999; Astin, et al., 1999). Future research should also explore alumni considerations for participating in advocacy efforts for those alumni who were not engaged in such activities as students to see if there are similarities and differences in the inclinations and capacity of these individuals. Testing this theory within different student contexts would provide valuable insights for further understanding how to “grow” and target alumni advocates post-graduation. It would also help institutions and advancement offices evaluate whether it would be worth the investment of time and resources to grow advocates from a broad pool of all students or if they should focus their efforts on subsets already likely to engage in such a way over the course of their lifetime.

Furthermore, given the diminishing rates of alumni participation and the importance of a healthy and robust engagement and philanthropy pipeline to the sustained livelihood of institutions, this study focused on recent graduates as there is great opportunity to engage them early on so that they are inspired to remain engaged with their alma mater and grow their engagement in various ways throughout their lifetime as they come into their own wealth and career success. Utilizing theoretical sampling as a procedure with a snowball sampling recruitment method, the resulting sample for this study happened to include traditional-age recent graduates who were enrolled full-time. As not all recent graduates are of traditional age it would be valuable for future research to also explore how nontraditional recent graduates may perceive and engage with their alma mater and advocacy efforts given that their priorities and discretionary time by nature of their life stage may be different. Building on this recommendation and also related to age, a number of alumni in this study acknowledged that participating in advocacy does not have to be age specific. As such, it would be valuable for future
research to focus on understanding alumni perceptions of their alma mater and how they may be inclined to support their alma mater through advocacy or other efforts over time and throughout their various life stages. This would hopefully result in an understanding of the similarities and differences regarding how alumni at different life stages may be inclined to engage in advocacy efforts on behalf of their alma mater as well as barriers to their participation, so that future requests to participate in advocacy-related efforts could be effectively targeted by practitioners to best appeal to a broad range of alumni at specific distinct points of their lives. Taken together, with considerations of the intentional scope of this study and site and sample in mind, practitioners should consider the findings of this study as a starting point for engaging this very targeted audience in advocacy efforts and look for further research in the coming years that builds on these findings to continue to inform future practice.

Finally, as formal advocacy programs start to take shape at institutions, it would be extremely valuable for future research to focus on how alumni who engaged in advocacy soon after graduation maintained their connection with their alma mater and potentially grew their levels and types of engagement and support over time. Such insights from longitudinal data would inform how helpful engaging recent graduates in alumni advocacy is to building and maintaining the engagement and philanthropy pipeline. Lastly, as institutions and advancement offices build and refine their advocacy programs it would be valuable to understand the forms of advocacy that alumni are most likely to partake in. With this understanding, future opportunities could be crafted with a greater likelihood of gaining alumni support.

Conclusion

This study is timely and relevant as it addresses a multifaceted problem. At the same time institutions and advancement offices are struggling to effectively engage recent graduates (Linder & Meu, 2019; Masterson, 2017), public institutions are attempting to constrain rising college costs that threaten accessibility. A large and ongoing contributing factor to increased college costs is reduced state
funding for higher education that remains below historic levels (Mitchell et al., 2017). Related to these problems, this study is particularly significant as engaging recent graduates is vital to fueling the engagement and philanthropy pipeline that institutions rely on to sustain high-quality educational offerings that serve students, institutions, and society. With multiple benefits, alumni advocacy also has the ability to appeal to recent graduates in ways that align with their unique capacity and inclinations to affect meaningful policy decisions in support of addressing critical needs such as funding for public higher education as the increasing cost makes an affordable, quality postsecondary education out of reach for many. This type of engagement also has the potential to help recent graduates define their role as alumni and stay engaged in meaningful ways that may foster a lifelong relationship with their alma mater, while also setting them on a positive trajectory for a lifetime of engagement and giving. Finally, the result of this study is a substantive theory that reveals an enhanced understanding of how institutions in partnership with their advancement offices may cultivate and appeal to alumni advocates, while also setting a strong foundation to guide future scholarship and practice.
APPENDIX A

RECRUITMENT EMAIL

Subject line: UMass student seeking assistance
Dear [participant name],

I am reaching out to you to request your participation in my doctoral dissertation focused on alumni perspectives about higher education advocacy efforts. As a student in the Educational Policy Research and Administration program at UMass, I am very interested in the topics of higher education policy and advocacy. For my dissertation study, I am conducting an empirical qualitative research study to better understand alumni perceptions of their alma mater and their thoughts about engaging in political advocacy behaviors (regardless of whether they have engaged in such behaviors previously) as a way to increase state support for higher education. My hope with this study is to contribute empirical research to an area that has not yet been studied so that alumni may better engage with their alma mater in truly meaningful ways.

To learn more about this topic, I plan to conduct interviews with a small number of alumni starting the week of [Month, day] and I’d like to interview you. I came across your contact information [explanation of how found or referred] and was excited to see that you are an alum who may have a unique perspective to offer on this topic. The format would be as follows:

1. Complete short online questionnaire prior to your interview (5 minutes or less)
2. Participate in an informal informational interview via Zoom or similar videoconferencing software (about 1.5 hours)
3. Optional follow-up interview to provide clarity around emerging concepts (about 30 minutes)
4. Optional post-interview opportunity to review your interview transcript for discrepancies and provide elaboration or clarification on interview responses/findings (about 30 minutes)

All information collected will be made confidential and your individual answers will not be linked with your name in any reports of the data. Your participation would be voluntary, and should you come across a question you would rather not answer, you may state so or skip and move on to the next question. If you have any questions about this study, please feel free to contact me or my dissertation committee chair, Dr. Chrystal George Mwangi at cgeorgem@gmu.edu.

In appreciation of your time, an electronic Amazon gift card will be sent electronically to those who complete one or both interviews. After the first interview, participants will be awarded a 30-dollar gift card and should a participant partake in a second 30-minute follow up interview, an additional 15-dollar gift card will be provided upon completion.

By taking a few moments of your time to offer your insights, it is my hope to help institutions understand how to better appeal to and activate passionate alumni as advocates for their alma mater.

Many thanks,

Erin M. Valencik ’23
University of Massachusetts Amherst
Erin.valencik@umass.edu
603.305.7678
APPENDIX B

ELIGIBILITY QUESTIONNAIRE

Thank you for agreeing to participate in my dissertation research study. Please complete this intake questionnaire to ensure you meet the eligibility criteria for participation. The questionnaire will take approximately 5 minutes to complete and there are no right or wrong answers. After completion, I will be in touch via email to let you know if you qualify for the study. Should you qualify, the subsequent online video interview will be approximately 90 minutes and after the interview you will be awarded a $30 digital Amazon gift card in gratitude for your time and participation. After this interview, you may be contacted for a second 30-minute interview to clarify initial responses and answer follow up questions. Should you participate in a second interview, a $15 digital Amazon gift card will be shared with you upon interview completion. If you have any questions about this study, please contact me at erin.valencik@umass.edu or (603) 305-7678.

Questionnaire Consent

This online questionnaire is an intake screening for the dissertation study, “Untapped Potential: Exploring Recent Graduate Engagement with Alumni Advocacy Efforts to Increase State Support of Public Higher Education” conducted by Erin M. Valencik, a doctoral candidate at the University of Massachusetts Amherst. This study will take about 5 minutes to complete, and all information disclosed will be kept confidential. If you meet the participant criteria for this study, you will receive an official invite to schedule your interview via email with a detailed informed consent form for your review that explains more about the study and your potential involvement.

If you have any questions about this study, please contact Erin M. Valencik at erin.valencik@umass.edu or (603) 305-7678. You may also contact the dissertation chairperson, Dr. Chrystal George Mwangi at cgeorgem@gmu.edu.

1. By clicking “I agree” you are indicating that you are at least 18 years of age; you have read this consent form; your questions have been answered to your satisfaction; and you voluntarily agree to participate in this research study. You may print a copy of this form for your records.
   a. I agree
   b. I do not agree
2. What is your name?
3. In what city and state do you currently reside?
4. What is your age?
5. What is your race?
6. What is your gender?
7. Please provide a brief description of what you do for a living.
8. What is your marital status?
9. Do you have children?
   a. If yes, how many?
   b. If yes, what are their ages?
10. Are you an undergraduate alumnus of UMass Amherst?
11. When did you graduate from UMass Amherst?
12. Please describe your college credentials from UMass Amherst and any other institutions. For example, what did you study and what degrees did you earn?
13. What student groups and/or activities were you involved in as a student at UMass Amherst?
   a. Briefly describe the mission of each student group and/or activity you were involved in.
14. Describe any financial aid you received to attend UMass Amherst. This may include loans, grants, and/or scholarships.
15. How have you engaged with UMass Amherst since graduation?
   a. If yes, please briefly describe.
16. Have you ever engaged in political advocacy?
   a. If yes, please briefly describe.
17. Have you ever engaged in political advocacy on behalf of your alma mater?
   a. If yes, please briefly describe.
APPENDIX C

INFORMED CONSENT FORM

Consent Form for Participation in a Research Study

University of Massachusetts Amherst

Researcher(s): Erin Valencik
Study Title: Untapped Potential: Exploring Recent Graduate Engagement with Alumni Advocacy Efforts to Increase State Support of Public Higher Education

1. WHAT IS THIS FORM?

This form is called a Consent Form. It will give you information about the study so you can make an informed decision about participation in this research. We encourage you to take some time to think this over and ask questions now and at any other time. If you decide to participate, you will be asked to sign this form and you will be given a copy for your records.

2. WHAT ARE SOME OF THE IMPORTANT ASPECTS OF THIS RESEARCH STUDY THAT I SHOULD BE AWARE OF?

As you consider your participation there are important aspects of this research study that you should be aware of including that your consent is being sought for research and your participation is voluntary. Participation will involve participating in a short online questionnaire, participating in a 1.5 hour virtual informational interview, an optional follow-up 30 minute interview, and being generally available after your interview to elaborate, clarify, or ensure accuracy of findings. Although reasonably foreseeable risks are believed to be minimal, there is always a chance that a question could make one uncomfortable or resurrect bad memories. Should this happen, at any point in time participants have the option of skipping questions or discontinuing their involvement. Potential benefits of the study include alumni finding meaningful and rewarding ways to stay engaged with their alma mater, helping ensure a quality affordable college education is accessible to all through increased state appropriations for higher education, assisting institutions to better understand how to engage their alumni upon graduation in meaningful ways that have the potential to increase state appropriations for higher education while laying a strong foundation for a lifetime of alumni engagement and giving. Furthermore, scholars will have a stronger foundation to ground future research in this area.

3. WHY ARE WE DOING THIS RESEARCH STUDY?

The purpose of this research study is to better understand alumni perceptions of their alma mater and thoughts about engaging in advocacy behaviors (regardless of whether they have engaged in such behaviors previously) as a way to increase state funding for higher education to make it more accessible to all. More specifically, I’d like to focus on how recent graduates might be better engaged in these efforts
in ways that align with their capacity and inclination to benefit the university while also setting them on a positive trajectory for a lifetime of engagement and giving. My hope with this study is to contribute empirical research to an area that has not yet been studied so that alumni may better engage with their alma mater in truly meaningful ways.

4. **WHO CAN PARTICIPATE IN THIS RESEARCH STUDY?**

This study will seek participants who are recent (10 years or less since graduation) undergraduate alumni of MSU, who still live within the state of Massachusetts, and were formerly involved instrumental activities as students. These participants do not need to have experience participating in alumni political advocacy to participate.

5. **WHERE WILL THIS RESEARCH STUDY TAKE PLACE AND HOW MANY PEOPLE WILL PARTICIPATE?**

This study will take place online via videoconferencing software (Skype or Zoom). I expect to enroll approximately 15 participants in this study.

6. **WHAT WILL I BE ASKED TO DO AND HOW MUCH TIME WILL IT TAKE?**

If you agree to participate in this study, you will be asked to complete a screening questionnaire (approximately five minutes) and participate in one interview that is approximately 90 minutes long. You may also participate in a second optional follow-up interview that is about 30 minutes long. During this interview, the researcher may seek to clarify emerging concepts. Lastly, the principal investigator may contact you by phone, video conferencing, or email to review your interview transcripts for discrepancies and provide elaboration or clarification around interview responses/findings. This follow-up may take about 30 minutes of your time.

You will be asked to complete a screening process via an electronic questionnaire to ensure that you meet the selection criteria. The questionnaire will take approximately 5 minutes to complete. The minimum eligibility criteria are: 1) recent undergraduate alumnus of the University of Massachusetts Amherst (having graduated within 10 years; 2) current resident of the state of Massachusetts; 3) previously participated in instrumental activities while a student at MSU; instrumental activities are defined as having tangible goals associated with membership beyond participation and may include involvement in activities such as: school newspaper, magazine, and yearbook; student council, student government, and political clubs; debating and drama; vocational education clubs; youth organizations in the community; and Junior Achievement (Glanville, 1999); 4) willing to be audio recorded during interviews (video recording is preferable).

Before beginning the electronic questionnaire, you will be presented with information outlining the consent process. The Questionnaire Consent form states the following: By clicking “I agree” you are indicating that you are at least 18 years of age; you have read this consent form; your questions have been answered to your satisfaction; and you voluntarily agree to participate in this research study. You may print a copy of this form for your records.

During this screening you will be asked questions such as:

- What is your marital status?
- How have you engaged with your alma mater since graduation?
- What student groups and/or activities were you involved in as a student?

You may skip any question that you feel uncomfortable answering.

If you meet the selection criteria, the principal investigator will contact you via email to schedule an individual interview. The interview will be conducted via video conferencing software such as Skype or Zoom.

At the first interview, the principal investigator will engage in the consent process with you. Since interviews will take place online via video conferencing software, the principal investigator will email the informed consent to you in advance for your review and will ask you to electronically sign and return a copy of the consent form. After the you sign the consent form the principal investigator will begin the first interview, which will be video recorded and last approximately 90 minutes. Should you choose to participate in a second optional interview, that interview will also be video recorded and will last approximately 30 minutes.

The first interview will focus on learning more about you including the factors that influenced your decision to attend your alma mater, your experience while a student at the university, your current career and life after college, how you may perceive and engage with your alma mater, and your thoughts about engaging in alumni advocacy. The second optional interview will focus on providing clarity around emerging concepts. You may skip any question that you feel uncomfortable answering. Interview questions will include:

- What are some of your most unforgettable memories of your time at your alma mater?
- How do you perceive the quality of the education you received from your alma mater (past and present)?
- How do you or might you advocate for your alma mater?

The principal investigator may also contact you by phone, video conferencing software such as Skype or Zoom, or email to review your interview transcripts for discrepancies and provide elaboration or clarification around interview responses/findings. This follow-up may take about 30 minutes of your time.

7. **WILL BEING IN THIS RESEARCH STUDY HELP ME IN ANY WAY?**

You may not directly benefit from this research; however, we hope that your participation in the study may make you feel as though you’ve contributed toward helping a quality post-secondary education be more affordable and accessible to future generations. Additionally, this study will contribute to the limited bodies of literature focused on alumni political advocacy to further future scholarship and practice in this area.

8. **WHAT ARE MY RISKS OF BEING IN THIS RESEARCH STUDY?**

I believe there are minimal risks associated with this research study; however, a risk of breach of confidentiality always exists and I have taken the steps to minimize this risk as outlined in section 9 below. A possible inconvenience may be the time it takes to participate. However, I will seek to minimize any risk of loss of wages/income by making myself available for your interview during a time that is convenient to you (e.g., outside of work hours).

9. **HOW WILL MY PERSONAL INFORMATION BE PROTECTED?**
Your privacy and confidentiality is important to me. The following procedures will be used to protect the confidentiality of your study records.

Study records will include contact information, video files, interview notes and interview transcripts. The researcher will keep all study records, including any codes to your data, in a secure location, either a locked file cabinet in the principal investigator’s office or a password protected computer that only the principal investigator has the password for.

Research records will be labeled with a code. A master key that links names and codes will be maintained in a separate and secure location. The master key and video recordings will be destroyed six years after the close of the study. All electronic files including video files, coding databases, and electronic interview transcript documents containing identifiable information will be password protected. Any computer hosting such files will also have password protection to prevent access by unauthorized users. Only the principal investigator will have access to the passwords. At the conclusion of this study, the researcher may publish their findings. Information will be presented in summary format, and you will not be identified in any publications or presentations.

All participants will be asked to select a pseudonym for this project. If participants do not select a pseudonym, the investigator will create a pseudonym for the participant. Participants’ true names, contact information or other identifying information will not be linked in any way to video files and transcripts. Contact information will only be maintained for follow-up interview sessions and will be saved as a separate file by the investigator in a password protected document. Any computer hosting such files will also have password protection to prevent access by unauthorized users. Any participant contact information used to schedule the interview will not be included in the research report.

10. WILL I BE GIVEN ANY MONEY OR OTHER COMPENSATION FOR BEING IN THIS RESEARCH STUDY?

Amazon gift cards will be sent electronically to those who complete one or both interviews. After the first interview, participants will be awarded a 30-dollar gift card and should a participant partake in a second 30-minute follow up interview, an additional 15-dollar gift card will be provided upon interview completion. Gift cards will only be awarded for complete interviews.

11. WHO CAN I TALK TO IF I HAVE QUESTIONS?

Take as long as you like before you make a decision. I will be happy to answer any question you have about this study. If you have further questions about this project or if you have a research-related problem, you may contact the researcher, Erin M. Valencik at (603) 305-7678 or erin.valencik@umass.edu. You may also contact my faculty sponsor, Chrystal A. George Mwangi at cgeorgem@gmu.edu. If you have any questions concerning your rights as a research subject, you may contact the University of Massachusetts Amherst Human Research Protection Office (HRPO) at (413) 545-3428 or humansubjects@ora.umass.edu.

12. WHAT HAPPENS IF I SAY YES, BUT I CHANGE MY MIND LATER?

You do not have to be in this study if you do not want to. If you agree to be in the study, but later change your mind, you may drop out at any time. There are no penalties or consequences of any kind if you decide that you do not want to participate.

13. WHAT IF I AM INJURED?
The University of Massachusetts does not have a program for compensating subjects for injury or complications related to human subjects research, but the study personnel will assist you in getting treatment.

14. SUBJECT STATEMENT OF VOLUNTARY CONSENT

When signing this form I am agreeing to voluntarily enter this study. I have had a chance to read this consent form, and it was explained to me in a language which I use. I have had the opportunity to ask questions and have received satisfactory answers. I have been informed that I can withdraw at any time. A copy of this signed Informed Consent Form has been given to me.

VIDEO RECORDINGS

_______ I do agree to be video recorded during data collection sessions.
_______ I do not agree to be video recorded during data collection sessions.

__________________________
Participant Signature:       Print Name:              Date:

By signing below, I indicate that the participant has read and, to the best of my knowledge, understands the details contained in this document and has been given a copy.

__________________________
Signature of Person          Print Name:              Date:
Obtaining Consent
LETTER OF EXEMPT DETERMINATION

Date: February 17, 2022
To: Professor Ezekiel Kimball and Erin Valencik, College of Education
From: Professor Lynnette Leidy Sievert, Chair, University of Massachusetts Amherst IRB

Protocol Title: Untapped Potential: Exploring Recent Graduate Engagement with Alumni Advocacy Efforts to Increase State Support of Public Higher Education
Protocol ID: 3340
Review Type: EXEMPT -NEW Category: 2 (ii)
Review Date: 02/17/2022
No Continuing Review Required
UM Award #: 

The Human Research Protection Office (HRPO) has reviewed the above named submission and has determined it to be EXEMPT from the federal regulations that govern human subject research (45 CFR 46.104)

Note: This determination applies only to the activities described in this submission. All changes to the submission (e.g. protocol, recruitment materials, consent form, additional personnel), must be reviewed by HRPO prior to implementation.

A project determined as EXEMPT, must still be conducted in accordance with the ethical principles outlined in the Belmont Report: respect for persons, beneficence, and justice. Researchers must also comply with all applicable federal, state and local regulations as well as UMass Amherst Policies and procedures which may include obtaining approval of your activities from other institutions or entities. All personnel must complete CITI training.

Consent forms and study materials (e.g., questionnaires, letters, advertisements, flyers, scripts, etc.) - Only use the consent form and study materials that were reviewed by the HRPO.

Final Reports - Notify the IRB when your study is complete by submitting a Close Request Form in the electronic protocol system.

Serious Adverse Events and Unanticipated problems involving risks to participants or others - All such events must be reported in the electronic system as soon as possible, but no later than five (5) working days.

Annual Check In - HRPO will conduct an annual check in to determine the study status.

Please contact the Human Research Protection Office if you have any further questions. Best wishes for a successful project.
APPENDIX E

INTERVIEW PROTOCOL

Participant Name:

Interview Date:

Introductory Script

Thank you for taking the time to meet with me today. As you know, I am a doctoral student at the University of Massachusetts Amherst and my research is focused on exploring how alumni may influence public funding for higher education by advocating on behalf of their alma maters. You have been selected to speak with me today because you have been identified by a peer as someone who may have a great deal to share about the topic of alumni advocacy. The purpose of this dissertation study is to better understand alumni perceptions of their alma mater and thoughts about engaging in advocacy behaviors (regardless of whether they have engaged in such behaviors previously) as a way to increase state funding for higher education to make it more accessible to all. More specifically, it is focused on how recent graduates might be better engaged in these efforts in ways that align with their capacity and inclination to benefit the university while also setting them on a positive trajectory for a lifetime of engagement and giving.

Today’s interview will focus on learning more about you including the factors that influenced your decision to attend MSU, your experience while a student at the university, your current career and life after college, how you may perceive and engage with your alma mater, and your thoughts about engaging in alumni advocacy.

This interview will take approximately 90 minutes. To facilitate notetaking and data analysis, this video interview will be recorded. Before we begin, I would like to obtain your written permission via the Interview Consent Form previously shared with you electronically. Please allow me to explain the consent form before you sign. [Review consent form with participant and answer any questions they}
may have before having them sign]. For your information, these recordings will be submitted for professional transcription. Once the transcription is received, it will be stored on a secure drive that only I can access. At any point in time, you may request to hear the recording and read any associated transcripts. You may also request that any part or all of the recordings and transcripts be destroyed once the research is complete. All participant information will be kept confidential, and pseudonyms will be used in place of participant names. Your participation is voluntary, you may request that I stop recording and/or choose to stop participating at any time.

I’m looking forward to learning more about you and hearing about your experiences leading up to your time at MSU and beyond. Please reset assured, there are no right or wrong answers to my questions—this is about your experience. Do you have any questions for me before we begin? [Answer questions as needed]. Okay, I’m going to start the recording.

Interview Questions

Participant Background
1. Tell me about yourself
2. What factors influenced your decision to attend MSU?
3. Describe your upbringing leading up to your enrollment. This could include your parents’ backgrounds, youth experiences, high school preparation, etc.

Time at MSU
1. Describe the campus culture and environment you experienced while at MSU.
2. What are some of your most unforgettable memories of your time at MSU?
   - Probe: What makes these stand out?
   - Probe: Are there symbols or traditions that you still think of?
   - Probe: What emotions do these memories elicit?
3. How do you define quality as it relates to higher education?
   - (Examples could include satisfaction with experience, expenditures per student, attentiveness of administration, size of institution, investment in facilities, median SAT scores (or the like), national rankings, age of institution, performance of athletic programs, etc.)
4. How do you perceive the quality of the education you received from your alma mater (past and present)?
   - Probe: How did your education prepare you for your career?
   - Probe: How did faculty/staff affect your experience?
5. While a student at MSU, how were you involved outside of the classroom?
   - Probe: How would you describe the quality of these experiences?
- Probe: What motivated you to get involved in these things?
- Probe: Describe any barriers to student involvement outside of the classroom

**Current Work/Life After College**

1. Describe what you do for a living.
   - Probe: What motivates you to do this type of work?
   - Probe: How does your income affect your wellbeing?
2. Describe your typical day. This could include your job, family, friends, etc.
3. What consumes your free time outside of work?
   - Probe: Do you have hobbies? What are they and how do they consume your time?
   - Probe: Do you have family responsibilities? What are they and how do they consume your time?
   - Probe: Do you have social or community commitments? What are some examples and how do they take your time?
4. How do you participate in civic engagement activities, if any?
   - Probe: When and how do you think you developed the ethic to be civically engaged?
   - Probe: Why do you think it is important to be civically engaged?
   - Probe: How do you make time for these activities?
5. Describe your political activity/involvement
   - Probe: What motivates this involvement?
   - Probe: When and how did this motivation develop?
   - Probe: How do you make time for this involvement?

**Perceptions of and Engagement with Alma Mater**

1. As an alum, how do you perceive MSU now?
   - Probe: What do you believe influences these perceptions?
   - Probe: What would make you more fondly perceive MSU?
2. Describe the value you place on your college education.
   - Probe: When and how did you develop these feelings?
   - Probe: Why do you value your education in this way?
3. Describe the value you place on public higher education.
   - Probe: When and how did you develop these feelings?
   - Probe: Why do you value higher education in this way?
4. How do you decide whether to give back to MSU as an alum whether it be through volunteerism, financial gifts, or advocacy?
5. How do you or might you give back to MSU as an alum? and why.
   - Probe: Why do you or might you give back in this way?
6. How do you decide whether to engage with MSU as an alum?
7. How do you or might you engage with MSU as an alum?
   - (Examples could include financial gifts, volunteerism, advocacy, attending events, reading communications, etc.)
   - Probe: Why do you or might you engage in this way?
8. If you do engage, are the ways you engage formally organized through the university or informally through your own efforts?
   - Probe: How did you learn about these opportunities?
   - Probe: What prompted you to engage in this way?

**Thoughts About Engaging in Alumni Advocacy**
1. Please define what advocacy means to you.
2. Do you agree or disagree with the statement, “Alumni should support their alma mater through volunteer service”?
   - Probe: Why do you feel this way?
   - Probe: When and how did this feeling form?
   - Probe: What do you think is responsible for this feeling?
3. Do you agree or disagree with the statement, “Alumni should support their alma mater through political advocacy”?
   - Probe: Why do you feel this way?
   - Probe: When and how did this feeling form?
   - Probe: What do you think is responsible for this feeling?
4. Do you think it is important for alumni to be advocates for their alma maters?
   - Probe: Why do you feel this way?
   - Probe: When and how did this belief form?
   - Probe: What do you think is responsible for this belief?
5. Do you think alumni political advocacy can make a difference?
   - Probe: Why do you feel this way?
6. How do you or might you advocate for your alma mater?
   - Probe: Why do you or might you advocate in this way?
7. What factors influence (or would influence) your ability (capacity) to advocate on behalf of your alma mater?
   - Probe: Do you have competing responsibilities that affect your available time? If so, please describe.
   - Probe: How does/would the ease or difficulty of advocating influence your decision?
8. What factors influence (or would influence) your motivation (inclination) to advocate for your alma mater?
   - (Examples could include the desire to give back in appreciation of your own educational experience and/or career success, the desire to give back to help the next generation have access to a quality education, to ensure a financially stable and globally competitive nation, the amount of your time already invested)
   - Probe: How do you perceive the need of your alma mater?
   - Probe: Do you believe your efforts would make a difference and why do you feel this way?
9. What barriers related to your ability or motivation may prohibit you from advocating on behalf of your alma mater?
   - (Examples could include competing commitments or available time, the ease or difficulty of advocating, the perceived need of your alma mater, lack of communication with your alma mater, not believing your efforts will make a difference, lack of desire to give back based on your own educational experience, belief that no one helped you, so why should you help others, the amount of time already invested)
10. What resources or information might you need to feel comfortable advocating on behalf of your alma mater?
    - (Examples could include education on how to advocate, Templates and contacts for outreach, information to inform appeals to legislators, etc.)
Probe: How would these resources be helpful?
Probe: How would you like to receive and/or engage with these resources?

11. What was or might be a catalyst for you to engage in advocacy on behalf of MSU?
- Probe: How might someone from the alumni office asking you make a difference?
- Probe: How might one of your former professors, advisors, or a staff member whom you were close with asking you make a difference?
- Probe: How might a former classmate asking you make a difference?
- Probe: How might participating with a former classmate affect your decision to advocate?
- Probe: How might participating in an alumni event focused on advocacy make a difference?
- Probe: How might hearing from current students in need of aid make a difference?

Wrap Up

1. Is there anything we didn’t discuss that you would like to share?

Concluding Script

This concludes our interview. Thank you for taking the time to meet with me and share your experiences. Using my contact information on the consent form, please feel free to be in touch with any questions or concerns. Once the interview is transcribed, I will share the transcripts with you, so that you have the opportunity to review them for accuracy. Additionally, following this interview, I may be back in touch to clarify information or ask follow-up questions as necessary. Is this okay with you? If you know of any other recent graduates of MSU (graduated within last 10 years) that currently live in the state of Massachusetts and were formerly involved in instrumental student activities, can you please share their names with me? Do you have any questions for me? I’ll be sending you a $30 Amazon gift card to the email provided on the consent form within the next couple of days following this interview. Should you participate in a second interview, you will also receive another gift card for $15. Thank you and I’ll be back in touch soon.
Figure 2

**PARTICIPANT CLASS YEARS**

<table>
<thead>
<tr>
<th>CLASS YEARS</th>
<th>NUMBER OF PARTICIPANTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2</td>
</tr>
<tr>
<td>2016</td>
<td>1</td>
</tr>
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<td>2017</td>
<td>2</td>
</tr>
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<td>2018</td>
<td>2</td>
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<td>2019</td>
<td>3</td>
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<tr>
<td>2020</td>
<td>1</td>
</tr>
<tr>
<td>2021</td>
<td>4</td>
</tr>
</tbody>
</table>

Figure 3

**PARTICIPANT AGES**

<table>
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<tr>
<th>AGE</th>
<th>NUMBER OF ALUMNI</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
<td>24</td>
<td>3</td>
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</tr>
<tr>
<td>28</td>
<td>2</td>
</tr>
<tr>
<td>29</td>
<td>1</td>
</tr>
</tbody>
</table>

Figure 4

**PARTICIPANT RACES**

- White: 10
- Asian: 2
- Other: 1
- Two or more: 1

231
APPENDIX F CONT.

DEMOGRAPHIC/BACKGROUND INFORMATION

Figure 5

PARTICIPANT GENDERS

Female | Male
---|---
5 | 10

Figure 6

PARTICIPANT MARITAL STATUSES

Married | Not Married
---|---
1 | 14

Figure 7

PARTICIPANT PROFESSIONAL INDUSTRIES

Education | State Government | Non-profit | Other
---|---|---|---
4 | 5 | 3 | 3
APPENDIX G

EDUCATION

Figure 8

NUMBER OF DEGREES FROM UMASS BY PARTICIPANT

1 Degree 2 Degrees 3 Degrees

Figure 9

HIGHEST LEVEL OF EDUCATION BY PARTICIPANT

Bachelors Masters Advanced Degree
APPENDIX H

FINANCIAL AID & DEBT

Figure 10

PARTICIPANT GRANTS/SCHOLARSHIPS

- Received Grants/Scholarships
- No Grants/Scholarships

100%

Figure 11

PARTICIPANT STUDENT LOANS

- Have Student Loans
- No Student Loans
- Not Disclosed

60%
20%
20%
APPENDIX H CONT.

FINANCIAL AID & DEBT

Figure 12

AMOUNT OF STUDENT LOAN DEBT BY PARTICIPANT

NUMBER OF PARTICIPANTS

$0
Up to $10,000
$10,001-20,000
$20,001-30,000
$30,001-40,000
$40,001+
Not Disclosed

AMOUNT OF STUDENT LOAN DEBT

5
2
0
2
4
1
1
APPENDIX I

ENGAGEMENT

Figure 13

PARTICIPANTS WHO HAVE ENGAGED IN ANY TYPE OF POLITICAL ADVOCACY

Figure 14

PARTICIPANTS WHO HAVE ENGAGED IN ADVOCACY ON BEHALF OF ALMA MATER
Figure 15

PARTICIPANT ALUMNI ENGAGEMENT ON BEHALF OF ALMA MATER

<table>
<thead>
<tr>
<th>TYPE OF ENGAGEMENT</th>
<th>NUMBER OF PARTICIPANTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteering</td>
<td>11 Yes, 4 No</td>
</tr>
<tr>
<td>Giving</td>
<td>10 Yes, 5 No</td>
</tr>
<tr>
<td>Political Advocacy</td>
<td>13 Yes, 2 No</td>
</tr>
</tbody>
</table>
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