Episode 166: Jay Dillon

**KL:** Katie Linder

**JD**: Jay Dillon

**KL:** You’re listening to “Research in Action”: episode one hundred and sixty-six.

[intro music]

# Segment 1:

**KL:** Welcome to “Research in Action,” a weekly podcast about topics and issues related to research in higher education featuring experts across a range of disciplines. I’m your host, Dr. Katie Linder, research director at Oregon State University Ecampus, a national leader in online education. Along with every episode, we post show notes with links to resources mentioned in the episode, a full transcript, and an instructor guide for incorporating the episode into your courses. Visit our website at ecampus.oregonstate.edu/podcast to find all of these resources.

**KL:** On this episode, I'm joined by Dr. Jay La Roux Dillon, a social scientist and founder of Alumni Identity Fundraising Consultants. His research and consulting practice helps institutions identify ideal alumni donors through the lens of social psychology and data science. Dr. Dillon was previously director of alumni engagement at the University of San Francisco and executive director of alumni strategic initiatives at UCLA.

He is dedicated to improving philanthropy in order to bring social justice and equity to education. He holds a doctorate in organization and leadership from USF, and a masters and bachelor's degree in music from UCLA.

Thanks so much for joining me on the show today, Jay.

**JD:** It's a pleasure Katie. Thank you so much for the invitation. I'm glad to be here with you to talk about research in higher education.

**KL**: Yeah, I'm super excited to talk about some of your research on alumni. And I'm wondering if you can just start by giving us a little bit of context on this research on alumni development and engagement.

**JD:** Well, one of the things you probably experienced as a college graduate in the United States is this very unique thing, which is an idea that alumni are supposed to give back to their alma mater. And why? Because their alma mater helped create who they are today. And if you think about that, and you think about universities around the world, where else do you see people wearing a college sweatshirt on the weekend? Or being such fans of college sports? These things that are uniquely American that tie the American college graduate back to their institution has been something of a curiosity for me for some time. And, of course, my entire career, you could look it up on LinkedIn has been in higher education fundraising. And at some point, five or six years ago, I decided to go back to school to see if I could do some original research to really get at this question and answer why is it that alumni feel like they should give back? And then why do some alumni donate and others do not? It seems to be something very untapped.

**KL:** Well, I'm sure this is an area that a lot of people ,especially higher education administrators, want to know the answers to these questions. And, I mean, I can remember back when I was graduating from my undergrad which was at a relatively small private institution. I probably heard from at least three people the importance of giving something because they wanted to be able to say percentage-wise how many of their graduates were giving something, and they said “we don't even care if it's five dollars; give us something so that we can kind of count you in our roster of people who are giving.” That has stuck with me for, you know, years after I graduated that this is something that's important. It's not necessarily the amount of money, of course that matters too, but just the fact that you've done it.

So I'm curious what kind of led to your interest in this topic? I mean, is this something that as a student you remember this. Is this something that through your work with, you know, development you've. wanted to know more? Like, what some of the context there?

**JD:** Of course no student thinks about fundraising, right? Students have a lot on their mind and they may pass the development office or the alumni house on their campus, but it's mostly an afterthought and that's okay. Because students are supposed to do what students do and that is learn what they need to lead our generation into the whatever, right? And so as I was a student, I didn't think about fundraising at all until I needed a job, and all students need jobs. And so I started as a marketing assistant at UCLA in the alumni office right after I finished graduate school. And it was my home base, you know, it was exciting for me to work at my alma mater. A lot of people that work in development get their start this way because of course you can’t study it in school. You can't get a degree in fundraising, for example.

So I started to get interested in this work because I come from a family of educators. Everyone in my family is a teacher—parents, sister grandparents, and I thought I was going to be a teacher too. But then I found this part of education that's horribly important and that's funding. And in particular in higher education, where the model has changed so quickly from publicly-funded higher education to what wome would characterize is now privately-funded public universities, like UCLA. It's very important to understand the motivations behind giving and as I worked in this industry, you know began my career. At the end of maybe six or eight years. I started to question some of the fundamental things that we were doing. For example, I think most universities target older alumni. Alumni that closer to the campus, alumni of certain class years, because they feel like those folks are more likely to give. And as it turns out, there's nothing in the literature that pans it out and pans that out. It's just an assumption that keeps getting passed from generation to generation of fundraiser.

And so I wanted to figure it out. I wanted to do an empirical study of alumni identity and alumni giving to see if I could suss out what are the factors and characteristics of someone's decision to give their alma mater.

**KL:** So I'm curious, Jay, what kinds of research methods or design did you choose when you want to study this topic? You knew what your questions were, you knew what you were trying to get at, how did you go about designing that study?

**JD:** The first thing I had to throw out the window was an experimental design because there was just not enough evidence in the literature to run an experiment the way we might want to, even in in social science. So I had to figure out a way that I could use existing alumni data to try and answer some of my research questions, which, again, we're why do some alumni give and others do not? And what is it about this unique American college experience that creates these identities? These strong identities with your alma mater?

So I decided to do a study by creating an instrument and building off of a questionnaire that was first put together by a guy named Travis McDearmon—10 or 15 years ago now—for his dissertation. And it was to try and find a way to measure how much of someone’s self-identity is related to where they went to school? So you mentioned you graduated from a small liberal arts college. Where did, what was the name of that school Katie?

**KL:** This was Whitworth University. It's in Spokane, Washington.

JD: Got it. Okay. So this instrument would be designed to figure out how much of you how much of you, how much of Katie, how much of your self-identity is actually related to the fact that you went to Whitworth. Does that make sense?

**KL:** Yeah, that's fascinating.

**JD:** And so building off of Travis's great work and the role identity theory, that's a big part of social psychology, we tried to insert alumnus or alumni into that matrix and we built this questionnaire to get at that number and we call it the alumni identity score. And by gathering alumni identity scores from a representative sample of alumni, we can then run those scores up against various factors and characteristics that the university has on file for them whether it's did they participate in the student group? Have they ever made a donation? Did they receive a scholarship? What age are they? All, you know, any possible demographic behavioral characteristic you can think of. And then to use statistics to see if there are relationships meaningful result relationships and causal relationships between those factors and characteristics and an increased level of identity.

So that's where we start to get some interesting findings and, you know, just to select one that I mentioned earlier, you know, that it doesn't matter if somebody lives close to a campus or 9,000 miles away; that does not impact their alumni identity. Whether someone is young or old. We have people who reported equal levels of high and low identity irrespective of their age.

So it was extremely helpful in my initial research just to bring some counterbalance to these stories that we've been telling ourselves in higher education fundraising for years that older alumni who live closer to the campus will have greater affinity and therefore donate more proactively. And it's just not true.

**KL:** So I'm curious, Jay, what else you have learned so far from this research because that's a pretty impactful piece of data that you just pulled out there. Are there other things that have come out of this so far?

**JD:** Well a few items now that I've done this research across six schools. So I should mention that you know, this this was my doctoral research, this was my passion project while I was the alumni director University of San Francisco, and that's quickly spun out into a full-time consulting gig for me. And now I've done this work on alumni identity at five or six schools, working on the sixth now. And across all of these studies there have been three findings that have remained constant: The first is that age has nothing to do with alumni affinity; distance from campus has nothing to do with alumni identity; and class year has nothing to do with donations. So that's been true across large universities, small liberal arts college. And enough of a representative sample now that I think I can make those statements pretty concretely. And this is important because part of our business in higher education fundraising is to try and figure out who is most likely to donate and to spend our coveted resources on trying to engage those individuals? And so just those three findings alone I have found her disrupted the industry quite a bit and have led to my getting more and more calls from colleges and universities to help them figure out what actually does influence alumni identity and giving?

**KL**: So I'm curious, Jay, and your research may or may not kind of speak to this, but we know that recently we've had all kinds of different higher education scandals with various institutions. One of the schools that I'm an alum for had one of these scandals. There’s all kinds of things that are starting to come out about previous administrators, sexual harassment, you know, all different kinds of things. We see in the news all the time and I'm curious if this kind of instrument that you've developed could also kind of look at the variable of particular moments in time where people might decide to stop donating because of something that has occurred on that campus, or because of maybe a political statement that's made that they don't agree with, or something along those lines. Is that something that you think this instrument could potentially point to? Or is that a totally different kind of pathway?

**JD:** That's a very insightful question, Katie. It's something that I considered a great deal when I was designing the alumni identity instrument and let me use athletics as an example because that probably applies across the board. Whereas, maybe, scandals and some other things don't quite affect every school. But, you know, imagine for a moment doing an alumni identity study at a school that has a very strong athletic program, and then asking the question, “Well, what if the athletic program was not as strong? Or what if the teams all you know started losing all of a sudden or started willing all of a sudden? How would that impact someone's alumni identity? And this is a perfectly fine question to ask. As it turns out, it doesn't matter. In the studies that I've done, including questions about whether or not somebody is a fan of sports, or do they feel that they are closer to the university when the athletics teams are winning versus losing? Those questions don't particularly correlate with identity or giving at all. And there are some other studies to that have looked at this, albeit a bit sideways, at trying to make the case for why winning teams influence and help increase giving to a campus. And I don't I don't have any reason to say that that's incorrect. But what I can tell you right now, it doesn't matter if a team is winning or losing because someone's alumni identity is something that was created over time, and it is not responsive to these individual moments whether it is an athletic success, or a scandal, or something of that nature. You are not going to convince somebody that a part of who they are needs to change because of something that happened at their alma mater. Does that resonate with you?

**KL:** Yeah, I find it interesting because I'm, I think what I'm wondering about more is less about an identity, but more about an alums concern that their money will not be spent in a way that is aligned with their values, and that identity, that could have been shaped from their time at that institution. But if something happens at an institution and the alum says, “This isn't, I don't want to give my money to that. I'm concerned, you know, I have concerns that it's going to be spent in a way that is not aligned with my values.” That's more of what I'm thinking about. But you're right; it's not going to be a fit for every institution in terms of, you know, what is happening there. I just think of these kinds of stories were seeing in the news more frequently now where institutions are having to disclose that there was an ethical violation or there was something that happened. And I can imagine that this would make some alums think twice about giving their money.

**JD:** Oh, absolutely. And I get what you're saying. It is a very difficult thing to measure as a social science researcher. It's very hard to get people to be authentic and honest when you ask them questions about their perceived value in relation to their alma mater. So I'll give you an example: If you ask alumni in a survey whether or not they have donated to their alma mater, you will get a response that far skews the actual dollars in the door to the university because a lot of alumni think about donations differently than their institutions. If you ask alumni whether or not the institution represents now the values that it did when they were in school almost everyone will agree with you. So these are some tests that I've done in developing alumni surveys over the course of my 15-year career. And what I've learned is this: If you ask alumni to reflect on the past or to predict the future they're going to lie to you. And not on purpose, but just that's the way it is in social science research.

If you ask a love my about who they are today, what made them, what their feelings ar,e what their perceptions are, you can get some really honest answers that give you some deep insights into the alumni soul. And that's what my research on alumni identity is about.

**KL:** Well Jay, this is like scratching the surface of so many things so many interesting topics. We're going to take a brief break when we come back we'll hear a little bit more from Jay about his work with alumni engagement and equity. Back in a moment.

The “Research in Action” podcast discusses research and higher education that has a direct and immediate impact on faculty staff and students across the world including topics that directly benefit student success here at my own institution. Student Success is a top priority and we all work towards that common goal. Oregon State University Ecampus Student Success counselors recently developed the dynamic Ecampus Learning Community where all online students can receive robust support with student success coaching throughout their academic journey, establish an academic support network, and build lasting connections with their peers around the world. More than 90% of students accepted the invitation when it launched, and it's been a resounding success. Tour the community yourself at ecampus.oregonstate.edu/elc.

# Segment 2:

**KL:** Jay, as we were preparing for this episode, one of the things you said was that donor demographics are the enemy of equity, and I was so curious about this statement. Can you talk a little bit more about what you mean by that?

**JD:** Well as I've already shared, some of the demographic assumptions that we make about alumni and giving have more or less been thrown out with the bath water. And these are things like age, and where you live, and what your class year might be. Donor demographics are the enemy of equity because they continue to be part of the engine that drives the way higher education seeks philanthropy. So let me give you an example. If you are an alumni office with limited resources and you don't have a lot of information about who you should try to engage, who might most likely make a gift if you engage them, then you're going to use those resources to target individuals who have made gifts in the past. And this is where the challenge comes in because the graduates of colleges and universities of the past look very different in almost every measure from the college students of today. And from the college graduates of the last 10 to 20 years.

So if you follow that logic just for a second, imagine that the best donor to an institution is right now a 55-year-old white male. That's great. How many, what percentage of that future alumni donor population of that institution is going to fit that category someday? That percentage is going to be much lower into the future. And this is these are just facts; it's not an opinion. This is not a politicized statement; it's look at the numbers. So if our philanthropic engine is set up now to target wealthy individuals who look a certain way, then we must start now retooling that engine if we really are to address the issue of equity in higher education.

And this has been couched in many different ways. I think the thought leaders in our industry are trying to figure out how do we start to engage young alumni more effectively? But I don't think anyone's trying to do it based on research, more on anecdotes. And I think when it comes to anecdotes and equity, that's a very dangerous and fight line.

**KL:** So this is really interesting to me as someone who works for an organization that's really focused on online learning because this is an area, just the modality question, it raises some issues of demographics, but also online learners engage with an institution sometimes differently than traditional learners who live on a campus and who are residential learners for four years. And we are still I think learning about those differences and for good or for bad. It could be for positive, you know, or could be for more negative input with a student’s relationship with the campus. We know, for example that online learners take more time to get to their degree sometimes which might mean that they have a stronger relationship with a campus because they've been there for eight years instead of four doing part-time, you know, courses. But I'm curious, you know, when you're talking about you know when we're looking at these changing demographics, we know that there are so many different variables that come into this the demographics of a student's identity. But also things like course modality, I would imagine, are also impacting this. What are your thoughts on these different variables and how to kind of try to get a grasp on this as campuses are just changing so rapidly?

**JD:** Well, we do have an example of a student and alumni population that has existed for quite some time that is different from the traditional, undergraduate experience and that is adult degree completion. At four of the six universities where I've conducted this alumni identity research, we have also studied the alumni identities of adult learners, that is people over age 23 or 24—so not the traditional undergraduate—who returned to the campus and some special program to complete a degree at night, for example. And, as it turns out, that population of alumni have an equal, if not sometimes stronger level of identity with an institution as compared to their traditional undergraduate on-campus counterparts. So we have that as an example to address your question about modality and online learning, which I think is a fascinating one. Online learning has changed quite a bit since it first came out. As many things have that are related to the web. But the delivery, in terms of the impact on someone's identity, is a fascinating question to me. And I would suspect that if you were to run an alumni identity study of graduates of a purely online program, you would be surprised at the degree to which those alumni feel affiliated with their alma mater. Because I know from 15 years in this business that the assumption would immediately be, “It's not worth our time to engage these people because they never lived in the dorms,” because that happens with adult learners all the time.

**KL:** I'm curious, Jay, if you have ideas of more equitable ways to engage with alumni populations while you're also seeking donations. I mean, how do we do this knowing that these demographics are changing?

**JD:** Well one thing we can do is be more inclusive in terms of the hiring and recruitment and mentoring of individuals who work in higher education fundraising. And as I mentioned before, you can't get a degree in higher ed fundraising as an undergraduate. We've got one graduate program in the country now that's doing this. So how do we recruit people who can help us think differently about fundraising? So that's number one. Number two, I think, is more into the data. And this is where I think we can make a very clear case for why equity needs to be at the very forefront of our thinking when it comes to cultivating philanthropy.

We have this concept in higher education around the idea of donor centricity. And this is the thought that we want to seek relationships with individual individuals of incredible wealth so that the university can be one of their philanthropic interests. It is kind of, a little bit, maybe, backwards. Because if a university were to look internally, if a college were to take a survey of itself, and figure out what resources it needs for which programs to build a new building to support students, we may target individuals differently. But right now the hottest trend in fundraising is to go after folks with incredible wealth and try and seek out what their interests are and see if there's a way to pair their interests with the dollars they have behind them to fund something in a college or university. And that is a challenge. And I think sometimes when it makes the news it's when a corporation makes a large donation to study something that will benefit that corporation’s bottom line.

But there are subtleties way beyond that and I think we've seen some of that play out in the news lately with the latest college scandals. And that is that there is very little transparency about what happens with donor dollars after they are donated.

So to your question about equity, you know, how do we do that? We start to apply some of the things that the private sector uses routinely as ways to identify customers. You know, we think about all alumni as being equally interested in their alma mater, and of course that isn't the case. If we use technology the way Nike and Nordstrom use technology to pinpoint who their best customers are, I bet if we could pinpoint who are best alumni are, it would be a very diverse group of people so long as we didn't think first about who has the most money. Does that make sense?

**KL:** Absolutely.

**JD:** Yeah. So if we if we were able to do that, Katie, we could start investing in relationships with the right alumni from the moment that they graduate. And as they get older, as they accumulate disposable income, as they themselves have children who go to college, we will be right there at the top of mind when we ask for their support. Right now we're not doing it that way, certainly not that strategically that consistently. Instead we're going after the whales. And as I've already mentioned on the podcast here there are going to be fewer and fewer whales in the future.

**KL:** So this is such a rich area, Jay. You’ve given us so many things to think about here. I'm curious what future directions you see for your research on this topic? Obviously, you're not done in terms of thinking about these issues. So, where is this headed now?

**JD:** I'm very interested in the concept of alumni outside of higher education. I think there is an enormous opportunity to study the way an individual's identity is influenced by being an alumnus or alumna or an alum-x of other types of institutions. For example, here in Silicon Valley outside of San Francisco where I live, there is an enormous movement to create alumni communities for employees and former employees of tech companies. Why? Because it shapes so much of somebody's early career—where they start, their work in tech. And so companies like Google has started to invest in alumni engagement as a strategy because they want to be able to identify who among their former employees is most likely to return later in their career, and who might be most likely to use Google services at their next company.

So the idea of investigating someone's alumni identity in reference to a former employer, or a non-profit where they worked, or even a church or religious affiliation, is something that fascinates me because we see this word alumni used all over the place now, not just in higher education. And I think there's an application for that in research as well.

**KL:** So I'm also curious, Jay, you mention that you have spent us out into kind of some consulting work and as broadening this research out into different areas. Can you tell us a little bit about that work and how you got started?

**JD:** Well taking the leap to being a consultant is something that I could not have done without my partner, my wife, who is not only a great supporter, but also a development officer. So she gets this work, in some ways, more than I do. I have spent 15 years working in higher education, and I think with this research had hit a point of wanting to be a change agent and wanting to do something that would be applicable beyond the school where I worked. And so when I started to get some inquiries from fellow alumni directors at other institutions about carrying out alumni identity studies, I started to say yes. And about six months of saying yes made it clear that this was a full-time job. So last August now, so eight or nine months ago I started full-time as a consultant. And I've been doing this work now with a great diversity of schools; liberal arts universities, colleges, very large public schools. It's fascinating to me and I think it's something that I'm just not going to be bored for a while, Katie, I'll tell you that.

**KL:** Well, Jay, this is really fascinating work. I want to thank you so much for taking the time to come on the show share about this research and some ways that people can start to make what you're finding actionable. I really appreciate it.

**JD:** Again, it's been a pleasure Katie. Thank you so much for what you do to help get the word out about good research in higher education because we need more of it.

**KL:** I also want to thank our listeners for joining us for this week's episode of “Research in Action.” I'm Katie Linder, and we'll be back next week with a new episode.

Show notes with links to resources mentioned in the episode, a full transcript, and an instructor guide for incorporating the episode into your courses, can be found at the show’s website at [ecampus.oregonstate.edu/podcast](http://www.ecampus.oregonstate.edu/podcast).

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# Bonus Clip:

**KL:** In this bonus clip for episode 166 of the “Research in Action” podcast, Dr. Jay Dillon talks about applying lessons from more general nonfiction to his research. Take a listen.

Jay, when we were preparing for this conversation, we had a really interesting discussion about a book you've read recently about trash and how it is impacting some of your thoughts on this research on alumni engagement, equity, donation, and so I'm just curious. Can you talk about that a little bit—the book sounds fascinating will link to it in the show notes—but I would love to have you share a little bit with our listeners about how your kind of taking outside experiences of reading books that are just kind of general nonfiction and applying them to some of the work you're doing now.

**JD:** So the title of this fascinating book is, *Rubbish! The Archaeology of Garbage* by William Rathje—I might be saying his last name incorrectly. So as a consultant, I think it's really important to read, and it's fun to read inside your own industry. But then it's sometimes more fascinating to pick up a book, recommended to you by someone else, and see if you can apply its thinking to your business.

So this book is about garbage, and the archaeology that goes into our understanding of history, and as you and our listeners are probably aware, a lot of know about history is from digging up garbage dumps from the past. Whether it's the city of Jericho or Troy, or the Mississippi Indians, or whatever you may be interested in we can learn a lot from trash. But this book is not concerned with the past, it's concerned with the present. And so what's interesting to me, you could read the book, but I'll sum it up for you this way, everything you think about where recycling goes in this country is wrong.

Our landfills are full of recyclable paper. Not from 50 years ago, but from 30 years ago. And the research that's represented in this book from the University of Arizona, goes to show how, while Americans might be at the forefront of being the first to campaign for recycling—here in San Francisco we recycle everything we don't really follow that to its final destination. And so this got me thinking about giving. So stick with me here, Katie and our listeners, it got me thinking about donor dollars. And again this idea that alumni are supposed to give back and many alumni do and God bless them for it. But what actually happens to those dollars? And I don't think alumni have an idea. The same way I'm not sure what happens to the recycling that I put in the blue bin on the curb here in San Francisco. So as I started to play this out, I wondered sort of just aloud to myself, and maybe now to you and your listeners, just how much of philanthropy kind of goes untracked? We are so used to reporting numbers on a yearly basis. How many alumni participated in giving? How many dollars do we bring in? But I can think of many examples over my time as an alumni director, and as a frontline fundraiser, where there have been dollars that have come in and have just sort of disappeared into the ether. And I'm not saying that anything incorrect has happened or unethical has happened, but we're so focused on getting the money that sometimes once we get it, it sits there and it goes unused. And things that could benefit students or benefit the institution just don't materialize the way we thought they might.

So from this book, I take this analogy that we in higher education need to spend some time thinking about donor dollars the way this author and his co-authors have helped me think about recycling. What really happens to it in the end? And if we understood what happens to it how could we do better? How could we be better? How could we bring about some equitable and social change, meaningful change through philanthropy in higher education?

**KL:** Thanks for sharing your perspective on this, Jay.

You've just heard a bonus clip from episode 166 of the “Research in Action” podcast with Dr. Jay Dillon talking about applying lessons for more general nonfiction to his research. Thanks for listening.