



Maximizing Advancement Forum Resources

In Support of Small Shop Members

Advancement Forum

Your Guide for Today



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Connect with EAB



Thinking Beyond Shop Size

“The thing I like most about EAB is that we are not pigeon holed into small liberal arts schools or a massive shop that raises billions. I love hearing about the ways in which schools are raising funds in different ways and collaborating across segments, there is so much value in that. ”

*Vice President for Advancement and Student Affairs
Baccalaureate College*

Small Shops in The Membership

Advancement Shops With Fewer than 25 FTE

- Agnes Scott College
- Alabama Agricultural and Mechanical University
- American International College
- Antioch University
- Appalachian State University
- Arkansas Tech University
- Bellarmine University
- Benedictine College
- Bennington College
- Cabrini University
- Centre College
- Christian Brothers University
- Clarke University
- Coppin State University
- Delaware State University
- Dixie State University
- East Carolina University
- Frostburg State University
- Georgia College
- Jacksonville State University
- Kean University
- Kutztown Univ. of Pennsylvania
- Lawrence Technological University
- Lesley University
- Lewis University
- Loma Linda University
- Longwood University
- Marymount University
- Missouri Southern State University
- Missouri University of Science and Technology
- MNSCU - Bemidji State University
- Molloy College
- Muskingum University
- New Jersey City University
- North Central College
- Northern Michigan University
- Oklahoma Baptist University
- Park University
- Pittsburg State University
- Pitzer College
- Plymouth State University
- Point Loma Nazarene University
- Saint Michael's College
- Scripps College
- South Dakota School of Mines and Technology
- SUNY Alfred
- Tarleton State University
- Texas Woman's University
- The College of St. Scholastica
- Thomas Edison State University
- Union University
- University of Detroit Mercy
- University of Maryland, Baltimore
- University of Minnesota at Duluth
- University of New England
- University of North Carolina at Pembroke
- University of North Carolina-Asheville
- University of Northern Colorado
- University of Redlands
- University of Wisconsin Oshkosh
- University of Wisconsin-Platteville
- Vanguard University
- Washington College
- Wells College
- Widener University
- Xavier University of Louisiana

Networking Contacts

Looking for a networking opportunity with advancement professionals facing similar challenges? Get in touch!

Advancement Forum Services



How Our Research and Support Staff Partner with You and Your Teams



Setting Breakthrough Strategy

Strategy Reports

Detailed studies with hundreds of innovative ideas to impact top priorities

Best Practice and Resource Library

On-demand digital access to all past studies, webconferences, and toolkits

Advancement Strategy Audit

Research discussion about up-at-night issues and related strategy resources

Webconferences

Access to live and archived webconference presentations, open to all campus staff

CAO Roundtables

Annual summits focused on latest research, with discussion and networking

Analyst Consultations

Phone and email consultations to discuss strategy and implementation guidance



Building a Sustainable Organization

Benchmark KPIs Report

50+ page report presenting data on your shop's sustainability and performance

Board-Ready Presentation Slides

Plug-and-play data on ROI and staffing for presentation to senior institutional leaders

Expert Analysis and Consultation

Phone consultation with EAB experts to explore opportunities and risks



Driving Innovation Across the Team

Implementation Toolkits

Turnkey resources and how-to guides to support best practice installation

Member Networking

Facilitated introductions to members on specific topics and shared challenges

Leadership Team Summits

Annual research summits for AVPs and rising campus leaders

Tactic and Strategy Briefs

Strategy and best practice content built around your priorities

Membership Help Desk

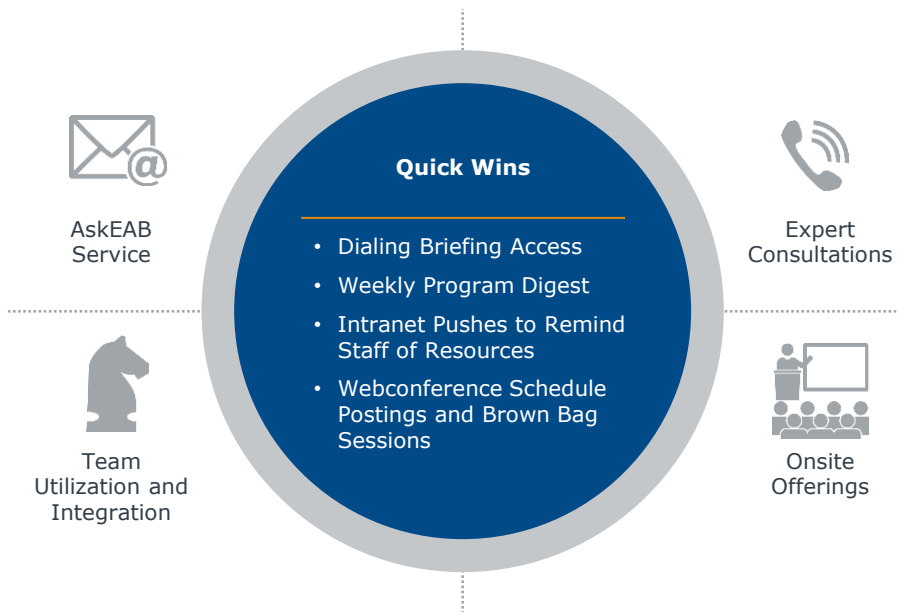
EAB support staff ensure your team gets the right resources at the right time

Onsite Working Sessions

Workshops to educate the team and build consensus among campus leaders

Maximizing Advancement Forum Resources

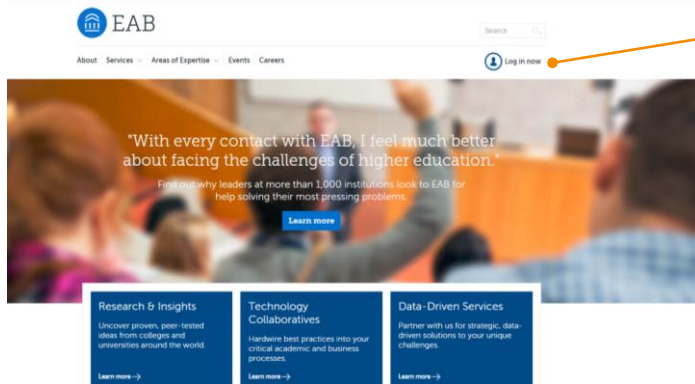
Ensuring Value for Small Shop Members



Get 'Power Users' Signed Up for eab.com

Trusted Partner for Educating Senior Leaders on Campus

Sign Up and Begin Using Today!



Immediate Access to All Content

- EAB will email link to website registration page to any individual (or they can sign up themselves on eab.com "Member Login" tab)
- When prompted, register using college or university email account and create your password

Who at Your Campus?

Frequent Advancement Forum Service Users:

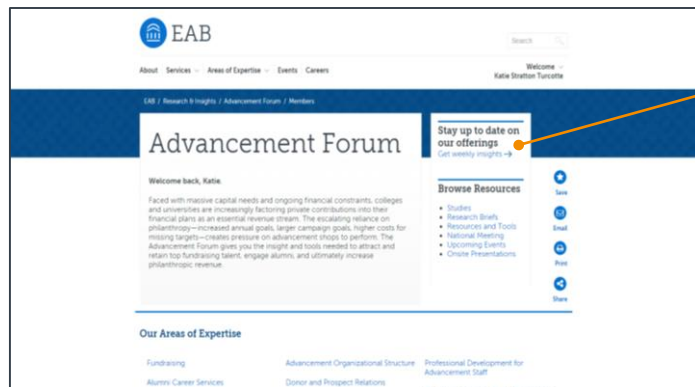
- Chief Advancement Officers
- VPs of Development
- VPs of Alumni Relations
- Directors of Major Gifts, Principal Gifts, and/or Planned Giving
- Directors of Advancement Services
- Campaign Directors

Bookmark or pin the eab.com homepage on your internet browser as a reminder to look here first for answers to the issues you are trying to solve or want to learn more about.



Register for Weekly Advancement Forum Updates

Insight and Resources Delivered to You and Your Team's Inbox



Forum Email Updates

- Weekly insights pulled from the research library
- Access to our most recent research "hot off the press"
- Announcements of upcoming webinars and events
- EAB expert commentary on the key stories of the day

Join hundreds of advancement professionals and receive the Form's weekly updates in your and your team's inbox.



Advancement Forum

The science—and art—of creating quality dashboards

Diana Barnes, Analyst



Strategic and managerial dashboards must include a wealth of high-level, data-driven information that is relevant to the intended audience. But the way the dashboard looks is just as important as the information it provides.

A visually appealing design that complements the data will engage your audience and encourage active and proper dashboard use. [Read these tips](#) for designing attractive and actionable dashboards that track your advancement progress and guide future performance.

[CONTINUE READING](#)

Learn more about creating high-utility dashboards

Our latest white paper will help you create usable dashboards that are more targeted for specific audiences. Learn to distinguish between different types of dashboards, select appropriate metrics, and create user-friendly designs.

[Download the white paper »](#)

Webconference Professional Development Series



Leveraging EAB to Support Your Team

Webconference Brown Bags



Inform staff of webconference professional development series



Encourage staff to register individually through EAB portal



Reserve location on campus to gather and view webconference



View webconference



Complete EAB-created implementation toolkit and guide for practices covered



How to Register

- Anyone on campus may participate at no charge; many members register with dozens of participants
- New webinars listed under “Upcoming Events” in right-hand navigation on eab.com
- Members receive a confirmation email including details for webinar login
- Archived materials are available on the web after all webinars



Integrate the Membership into Everyday Work

Facilitating Service Engagement and Navigation

- 1** Add a link to www.eab.com to your college's intranet
- 2** Conduct ongoing professional development series by hosting brown bag lunches once a month on a relevant webinar topic
- 3** Ask a member of your team to present relevant findings from one EAB report at a meeting to encourage discussion around a top-of-mind issue
- 4** Encourage your team to bookmark www.eab.com to internet browser for convenient immediate access to help with pressing questions
- 5** Set up time to connect with your Dedicated Advisor on a quarterly basis to discuss ongoing priorities.
- 6** Host debrief sessions with your team post EAB national meetings, team summits, webconferences, and reading research briefs.
- 7** Post upcoming webconference schedule in common areas of office; integrate schedule to professional development calendar (if applicable).

Maximizing Organizational Value

EAB's Advancement Forum at All Levels of Your Shop (*Illustrative*)



Engaging EAB's AskEAB Service

Establish First-port-of-call Resource to Identify Relevant Resources



1

Team lead **tasked with developing a strategy** on:

- International fundraising
- Parent fundraising
- Diverse alumni engagement
- Pipeline churn
- Talent acquisition
- Alumnae giving trends
- Benchmarking reports

Staff **connect with Dedicated Advisor** to discuss particular details:

- Asks pertinent follow up questions
- Understand intended audience
- Seeks time and resource constraints

2

Sample Possible Resolutions:

Yes, we actually have examples of that and associated templates!

3

We are researching that at this very moment, I'd let to set up a research call with our experts

4

You know, we just heard that X Institution was doing that- can we connect you?

5

Our benchmarking services helps distill that information, here is your customized report

We touched on this topic previously, but let's see what's changed since then

Levering EAB's Onsite Resource

Integrate Into Professional Development Calendar



Team-wide Retreats and PD Days

Host EAB experts as part of professional development programming for advancement staff

Examples:

- Annual team-wide retreats
- Monthly in-days
- Quarterly all-staff meetings



Engage Rising Talent

Ask rising talent to conduct a **debrief session with audience members**, discussing applicable practices at your institution

Examples:

- Institution sponsored lunch engages high performing staff to conduct information distillation sessions with EAB staff present



Segmented Audience

Consider adapting presentation for various audience members (e.g., development staff, board, volunteer leadership)

Examples:

- Female board members learn about female philanthropic trends
- Alumni relations team receive curated content

Making the Most of Your Membership



Quick Start Checklist

- ✓ Designate staff members on your team to receive eab.com account logins and communications
- ✓ Add your EAB relationship manager to your contacts
- ✓ Sign up for the Forum's weekly e-newsletter
- ✓ Bookmark our website: www.eab.com

Top Ten Reasons to **Contact** the Advancement Forum

If you...

- 1 ... are interested in *supplementing your annual fund* direct mail and phone-a-thon strategy with online channels
- 2 ... want to create a *culture of giving among current students*
- 3 ... are working on *building a parent fundraising program*
- 4 ... want to provide *professional development* resources to your team
- 5 ... are looking to *benchmark* your organization against peers
- 6 ... are interested in partnering to a greater extent with Alumni Relations to *improve cultivation* of top prospects
- 7 ... want to learn about the attitudes and behaviors associated with *successful MGOs* in higher education, how to screen for them in the hiring process, and how to up skill your existing talent
- 8 ... need to educate administration leadership, volunteers, or faculty on *national trends in higher education philanthropy*
- 9 ... would like to *network* with peers from other fundraising offices
- 10 ... *have a question* about trends in higher education and their implications for fundraising

Checklist to Ensure Utilization and Value

Diagnostic Tool For Member Support (Illustrative)

Quick Wins

EAB Resource Utilization Idea	Adopted?
<i>EAB.com Bookmarked</i>	Yes No
<i>EAB Webconference Scheduled Posted</i>	Yes No
<i>Brown Bag Series Planned</i>	Yes No
<i>Quarterly Calls Scheduled with Dedicated Advisor</i>	Yes No
<i>CAO Attendance at EAB Meeting</i>	Yes No
<i>All Staff Receive Daily Briefing</i>	Yes No
<i>All Staff Receive Advancement Forum Updates</i>	Yes No

Longer Term Investments

EAB Resource Utilization Idea	Adopted?
<i>Benchmarking Report Complete</i>	Yes No
<i>Strategic Plan Mapping Exercise</i>	Yes No
<i>Maximize Onsite Offering</i>	Yes No
<i>Team Member Attendance at Team Summit</i>	Yes No
<i>AskEAB Service Utilization</i>	Yes No
<i>Networking Request</i>	Yes No
<i>Diagnostic Audit</i>	Yes No

Good Things Come in Small Sizes

“Small shops are in a unique place. The pressures they face are different than most, but the challenges are the same. Unlike massive advancement operations though, **they are forced to be more innovative and creative with their work.**”

*Jeff Martin
Practice Manager, Advancement Forum*

Thinking Outside the Box

EAB Service Delivery in New and Innovative Ways

Supporting Board Members' Philanthropic Education

1



New Chair Onboarding

New incoming Board of Trustees chair elected for position; coincides with campaign launch

2



Education Required

Incoming chair recognizes a need for board members to better understand their role in the upcoming campaign

3



EAB Informed of Need

CAO informs dedicated advisor of the desire to host a private webconference for the Board of Trustees

4



Pre-reading Assigned

EAB researchers provide board members with pre-reading material to prime upcoming conversation

5



Private Webconference

EAB researcher conducts private label webconference on the topic of board's role in campaign with members

6

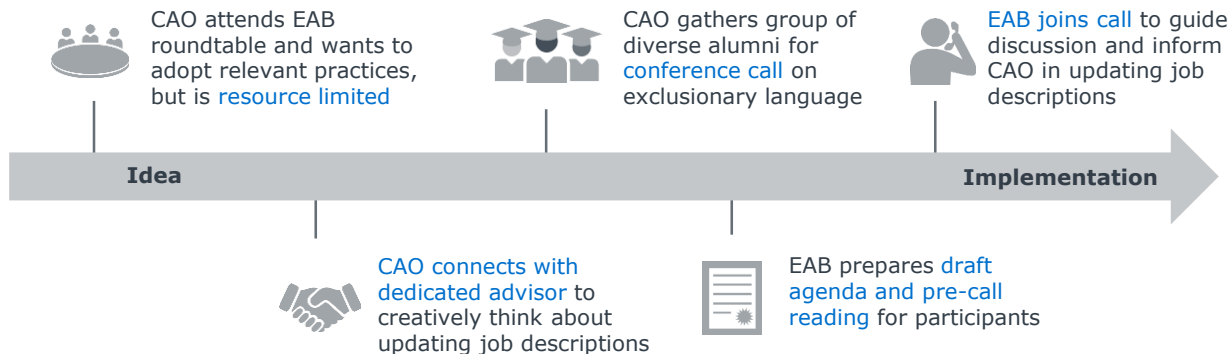


Increased Philanthropy

Board better understands their philanthropic role in the life of the Campaign

Thinking Outside the Box

EAB Service Delivery in New and Innovative Ways



Multiple Successes

- ☒ Reduced time to decision
- ☒ Leveraged EAB to educate alumni participants
- ☒ Updated job descriptions to avoid exclusionary language

“**We were able to engage EAB to make our work easier.** They have all these great resources and were helpful in packaging them and tailoring them to our institutional needs and went above and beyond in joining the call.”

*Vice President, Advancement
Baccalaureate Institution*

Major Strategic Research Initiatives in 2018



The Chief Advancement Officer's Agenda

Competing in a Crowded Major Gift Landscape



The High-Performing Prospect Management Organization

- Emerging staffing models, skill sets, and cost-benefit considerations for growth
- Business intelligence solutions scorecards highlighting opportunities and potential pitfalls
- Beyond "big data": Leveraging prospect analytics to drive MGO performance



Reimagining Academic Partners' Roles in Advancement Initiatives

- Strategically deploying deans and chairs to accelerate pipeline development
- Rightsizing expectations and spurring activity in multidisciplinary fundraising initiatives
- Hardwiring accountability via performance goals, metrics, and dashboards

Preventing a Lost Generation of Donors



Content Marketing and Digital Engagement for Millennials and Gen Z

- Developing a multichannel marketing playbook for young alumni prospects and donors
- Tracking the donor journey, identifying pain points, and creating communication roadmaps
- Curating diverse streams of prospect-ready content from university partners without "reinventing the wheel"



Accelerating Mid-Level Donors Up the Pipeline

- Targeted upgrades and smart discovery for overlooked pipeline prospects
- Prospect engagement strategy: collaborative models for alumni relations and annual giving
- Digital gift officers: innovations in high-velocity donor cultivation

Navigating Today's Talent Crunch

Revitalizing Staff Recruitment and Retention in Advancement

- Innovative strategies to engage passive job candidates
- Revamping the application lifecycle and new-hire onboarding
- Next-generation mentoring programs and new career pathways
- Winning the future: Recruiting and retaining diverse individuals



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