



Guide New Partners to High-Return Activities

Perfecting the Partnership: Part Two

Advancement Forum

Perfecting the Partnership

Reimagining the Academy's Role in Advancement Initiatives

A Three-Part Webconference Series

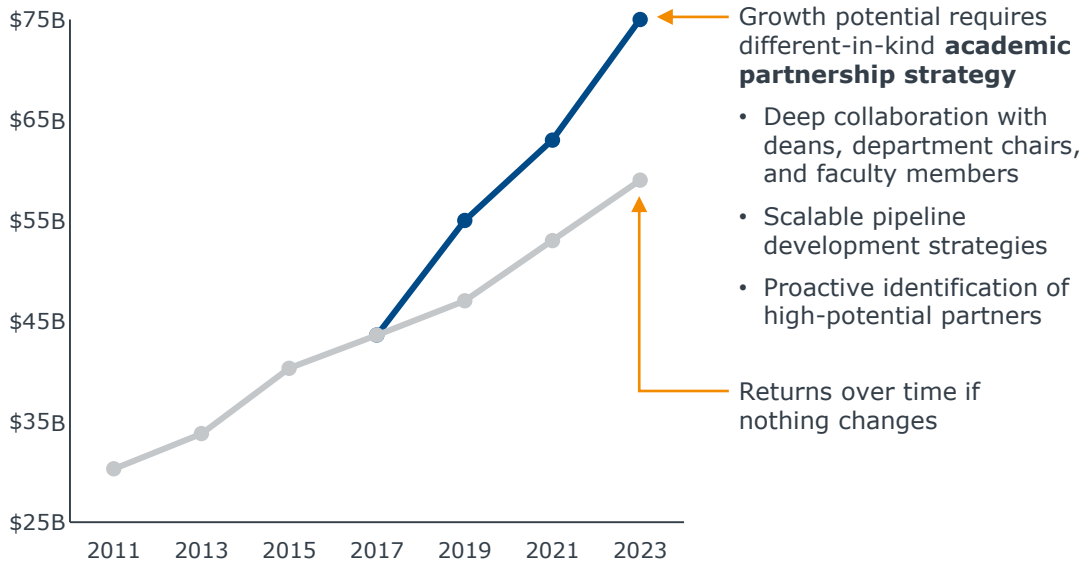


What Got Us Here... Won't Get Us There

Sustainable Growth Relies on Reimagining Academic Fundraising

A New Playbook—With Academics at the Center

Estimated increases in Voluntary Support of Education Through 2023, in Billions of Dollars





New Budget Reality Accelerates Mindset Shift

Post-Recession Academic Leadership Largely Onboard with Advancement

Financial Concerns Persist as Revenue Sources Under Growing Pressure

↔ Federal research funding

↓ State support

↓ Enrollment

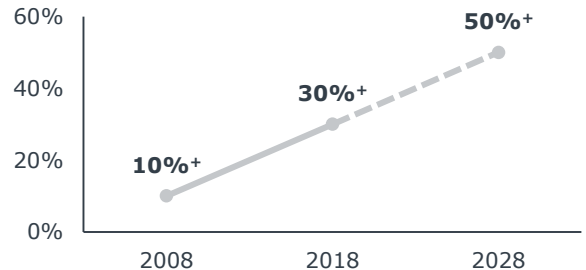
Resulting in Cascading Expectations for Advancement

65% Of **presidents** say advancement is one of their top priorities

47% Of **provosts** are frustrated by the stress of financial needs

Deans Expected to Prioritize Fundraising

Projected Increase in Deans' Time Spent on Development



Meet the Guy Who Turns Off the Lights When a College Closes



Moody's Gives Colleges a Negative Grade

Source: "2018 outlook changed to negative as revenue growth moderates," *Moody's Investors Service*, Dec. 5, 2017, <https://bit.ly/2LmJyJK>; Jeffrey Selingo, Sonny Cheng, and Cole Clark, "Pathways to the University Presidency," *Deloitte Insights*, April 18, 2017, <https://bit.ly/2NnA6TZ>; "Chief Academic Officer Survey: The CAO Job," *American Council on Education*, 2014, <https://bit.ly/2L7kYNR>; Advancement Forum interviews and analysis.



The End of Business as Usual

Compounding Factors Necessitate New Approach to Academic Partnerships

1

Supply-Demand Mismatch

Prospect pools growing faster than ranks of advancement champions on campus

52%

Growth in alumni of record, 2007-2017¹

2

Revolving Door of Academic Leaders

Turnover requires constant onboarding of new partners

5 years

Median tenure of university presidents

3

Faculty Retirement Crisis

Current partners leaving campus with few obvious replacements

33%

Of faculty members are over age 55

Source: Council for Aid to Education Voluntary Support of Education Survey; "The Campus Leadership Role with the Shortest Tenure," EAB Daily Briefing, May 8, 2018, <https://www.eab.com/daily-briefing/2018/05/08/the-campus-leadership-role-with-the-shortest-tenure>; Brian Kaskie et al, "Promoting Workplace Longevity and Desirable Retirement Pathways Within Academic Institutions," TIAA Institute, Mar. 2012, <https://www.tiaainstitute.org/publication/promoting-workplace-longevity-and-desirable>; Advancement Forum interviews and analysis.

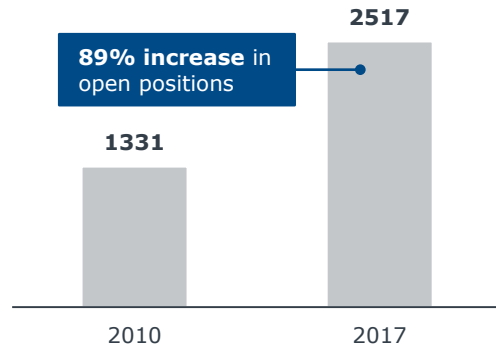
1) Median alumni population in United States higher education.

The Next Generation of Academic Leaders

Understand Fundraising is Important Part of the Job

Recruitment of New Deans on the Rise

*Job Postings for Academic Deans
in the United States*



“Deans hired in the past few years at Elon understand that **fundraising is a key part of their job**. Before that, deans received that message that fund raising was not something they needed to worry about”

*James Piatt,
Vice President for University Advancement
Elon University*



Role Description: Dean, College of Arts & Sciences

Responsibilities include:

- Develop and diversify revenue streams
- Serve as chief fundraiser for the school
- Oversee marketing and public relations efforts
- Meet specified campaign goal

Desired Qualifications:

- Strong management and financial skills
- Demonstrated fundraising experience
- Ability to lead conversations with donors and strategic external partners

Enthusiasm Abounds, But Game Plan Is Unclear



Mandate to 'Do Fundraising' Leads to Wasted Time and Efforts

Unit Priority

Leadership's Missteps

Budget-Relieving Revenue



"We've had so many cuts lately, I need to find dollars to balance the budget"



Overinvestment of time in **annual giving**

Strategic Plan Implementation



"If I get in front of the right people, I can fund everything in my strategic plan"



Attendance at unnecessary **campus events**

Alumni Engagement



"We don't have enough opportunities to engage our top donors on campus"



Creation of new **advisory boards and councils**

Failing to Fill Knowledge Gaps

Status Quo Onboarding Rarely Meets Needs of New Academic Leaders

Approach #1:

One-Size-Fits-All Training Quickly Forgotten



*External conferences,
consultant-led workshops*

- **Information overload** limits long-term retention
- Not tied to **on-the-job learning** opportunities

“It’s **not worth the cost** to have our deans commiserate with other deans on what they don’t like about their development shops.”

*Vice President for Development
Private Baccalaureate College*

Approach #2:

Role-Specific Preparation Rarely Clarifies Next Steps



*Portfolio reviews,
donor listening tours*

- Knowledge gained **not linked to clear tasks** and activities
- Few **accountability measures** to ensure follow through

“We offer professional development for deans, but it doesn’t evolve over time. After a while, **it all starts to sound the same.**”

*Vice President for University Advancement
Public Research University*

Guide New Partners to High Return Activities

Ensuring Success for Academic Leaders



Reinforce Impact of Major Gifts

- Tactic 7: MGO metrics updates
- Tactic 8: Individualized activity plans
- Tactic 9: Deans' advancement dashboards



Rightsize Philanthropy Expectations

- Tactic 10: Mini feasibility assessments



Create Space for Long-Term Visioning

- Tactic 11: Strategy white papers
- Tactic 12: Visioning walking tour

Guide New Partners to High Return Activities

Ensuring Success for Academic Leaders



Reinforce Impact of Major Gifts

- Tactic 7: MGO metrics updates
- Tactic 8: Individualized activity plans
- Tactic 9: Deans' advancement dashboards



Rightsize Philanthropy Expectations

- Tactic 10: Mini feasibility assessments



Create Space for Long-Term Visioning

- Tactic 11: Strategy white papers
- Tactic 12: Visioning walking tour

Losing Sight of What's Important

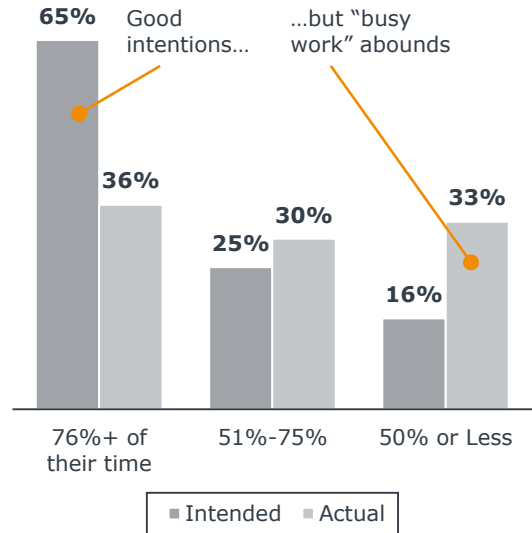
Deans Distract Staff with Low-ROI Activities

Deans Ask MGOs to Do More than Ever



...Taking Time Away from Major Gifts

MGOs' Intended and Actual Time Dedicated to Frontline Fundraising, 2014



A Weekly Reminder of What Works

Clemson's Nudge Emails Emphasizes High Impact Activities

Emails Distill Development into Three Metrics...

What have you done for D.A.D. today?

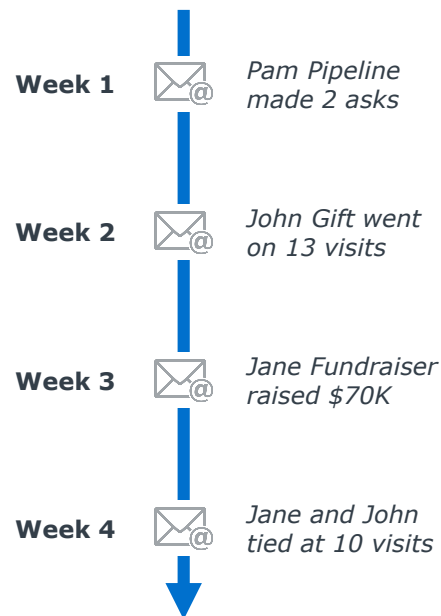
TGiF

DAD Results for the week of October 3-9:

	Individual	University Total
D = Donors Visited	Jane Fundraiser, 11 visits	37 visits
A = Asks Made	John Gift, 1 ask	1 ask
D = Dollars Closed	Pam Pipeline, \$55K in gifts and pledges	\$90K in gifts and pledges

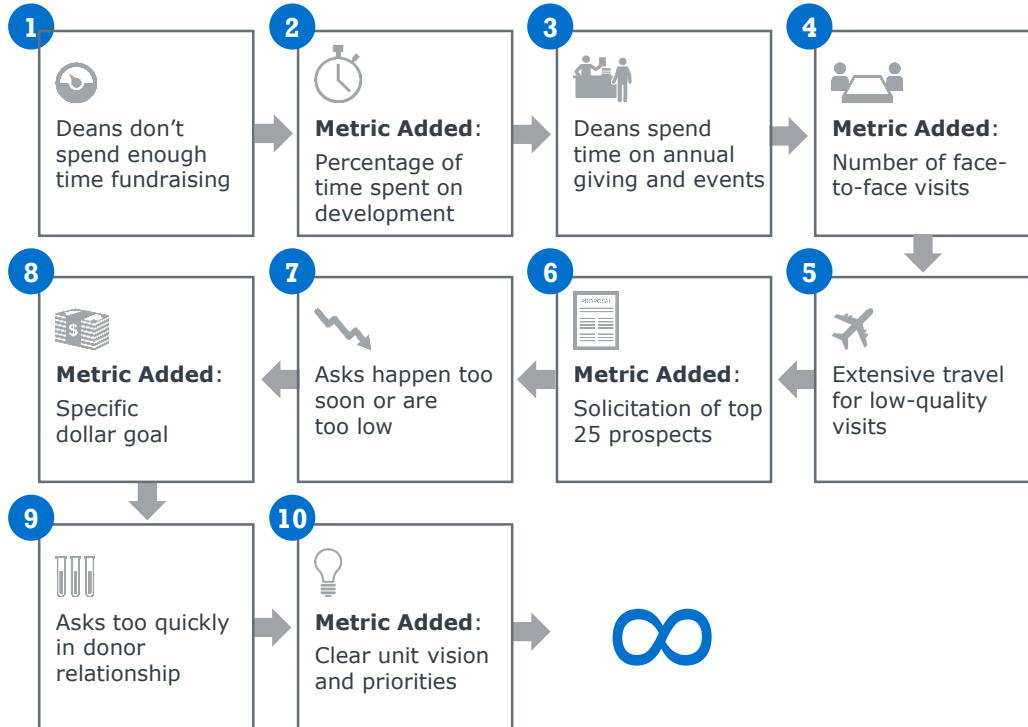
- Same metrics featured every week
- Deans want their DOs to rank highly, let them focus attention here

...And Reinforce What Works, Week In and Week Out



'Can't We Just Incentivize the Right Activities?'

Advancement Metrics for Deans Lead to Unintended Consequences



Moving Beyond Metrics Mayhem

University of Oregon Breaks Goals into Discrete, Personalized Tasks

Activity Plans Focus on Concrete Next Steps



Designed with a Dean's Strengths in Mind

Strength



One-on-one interactions



Assigned Task

Travel to five prospect meetings



Group gatherings



Attend three community events



Written communication



Consult on four gift proposals

Instilling Accountability for Advancement Efforts

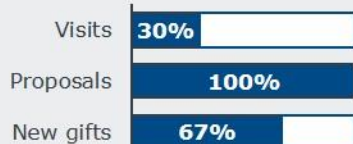
Simon Fraser Uses Dashboards to Direct Activity and Decisions

Sample Fundraising Performance Dashboard

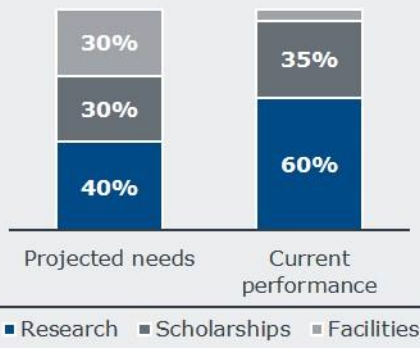
Progress to Fundraising Goal



Progress to Activity Goals



Gift Designations



Top Faculty Fundraisers

- 1 Dr. Morrison
- 2 Dr. Wilson
- 3 Dr. Polyak



Behind goal

"I need to step up my visit game"



Ahead of the curve

"We should refocus our efforts on facilities"



Shared credit

"I don't have to do all of this myself"

Guide New Partners to High Return Activities

Ensuring Success for Academic Leaders



Reinforce Impact of Major Gifts

- Tactic 7: MGO metrics updates
- Tactic 8: Individualized activity plans
- Tactic 9: Deans' advancement dashboards



Rightsize Philanthropy Expectations

- Tactic 10: Mini feasibility assessments



Create Space for Long-Term Visioning

- Tactic 11: Strategy white papers
- Tactic 12: Visioning walking tour

‘Please Raise Money for More Copy Paper’

Misperceptions of Advancement’s Potential Lead to Unrealistic Expectations

Academic Leaders Unaware of Advancement’s Limits

Lack of Donor Appeal



Assumption that any project can be funded in spite of:

- Donor interests and affinity
- Institutional history of similar projects

Impossible Timeline to Gift



Expectation that funds will be available regardless of:

- Donor cultivation cycle
- Prospect and donor capacity
- Other projects in pipeline

Misalignment with Strategic Plan



Presentation of new projects despite:

- Strategic planning timelines
- Ongoing advancement priorities

Misunderstanding Leads to Flurry of Small Asks

“Academic partners ask us to fund their needs all the time. What we need to help them understand is that advancement’s role is to achieve strategic objectives, **not to get small projects done.**”

*Shawn Lyons, Vice President for Development and Alumni Engagement
Centre College*



A Reality Check for New Initiatives

Bucknell Shows Academic Leaders What Philanthropy Can and Cannot Do

Prospect Pool Determines Whether Advancement Gets Involved



Propose Initiative

Dean suggests new project for fundraising, including:

- Resources needed
- Suggested timeline



Assess Prospect Capacity

Prospect research identifies potential donors and shares:

- Overall donor capacity
- Prediction of who will give
- Whether the initiative will be inspiring to donors



Adequate Capacity

Initiative brought to donors



Inadequate Capacity

Dean can fund initiative through internal allocations

Deans Refocus on Alternative Funding Sources

“We want our deans and other leaders to have ambitious visions. We have a responsibility, however, to the University and its stakeholders to make sure we use our resources wisely. Therefore for some initiatives, small or large, we challenge deans to **think about what other funding options they have, including existing resources or campus partners**. We always want fundraising to be part of the solution, but sometimes it shouldn't be the only solution.”

*Scott Rosevear, Vice President for University Advancement
Bucknell University*

Scoping the Dean's Involvement Early On

Rochester Uses Data to Estimate Number of Donors Dean Must Engage

Advancement Staff Use Past Results to Assess Feasibility of New Ideas

Proposal: Laser Lab

Funding Needed: \$10M

If this many donors support the project...	At this giving level...	It will be fully funded in:
One donor	\$10M per donor	5 years
10 donors	\$1M per donor	4 years
25 donors	\$400K per donor	2 years
100 donors	\$100K per donor	1.5 years

Results Predict Where Deans Need to Engage:

- How many prospects will I need to meet?
- What size gifts are we predicting?
- How long will it take to fund the project?



If the dean sees the data and wants to move forward, there is one more step in the assessment process.

Donors Have the Final Say

Potential Prospects Share Opinions on Projects Before Fundraising Starts

Donor Opinion the Final Step in Feasibility Assessment



Project Pitch

Idea presented in one-on-one conversations to 5-10 top prospects



Positive Response

This is great—I'd love more information

- Project greenlighted for fundraising
- Dean expected to work with prospects



Negative Response

You should be able to fund that on your own

- Funding must come from other sources
- Dean understands advancement decision



Making Collective Decisions Around Prioritization of Needs and Feasibility of Success

“Strategic priorities from deans are embraced by Advancement. Collective discussions would also include a qualitative and quantitative review of data, prospect pool, discussion stages and gift tables. **This facilitates a thorough review, leading to collective planning and shared success among stakeholders.**”

*Jason Gray,
Associate Vice President of
University Advancement
College of Arts, Sciences, and Engineering,
University of Rochester*

Guide New Partners to High Return Activities

Ensuring Success for Academic Leaders



Reinforce Impact of Major Gifts

- Tactic 7: MGO metrics updates
- Tactic 8: Individualized activity plans
- Tactic 9: Deans' advancement dashboards



Rightsize Philanthropy Expectations

- Tactic 10: Mini feasibility assessments



Create Space for Long-Term Visioning

- Tactic 11: Strategy white papers
- Tactic 12: Visioning walking tour

‘What’s the Future of Your Department?’

Great Ideas Rarely Captured and Shared with Donors



Struggling to Keep Track of Unit Visions

“Our deans have great ideas. But they’re doing so many things at once—they only write them down when they have to. The best ideas **never get put on paper**, so we forget them, and they never get shown to donors.

*Associate Vice President,
Development
Public Research University*

Visioning Not an Easy Task for Academic Leaders



Perceived as difficult, time-consuming



Can’t solve short-term budget woes



No clear deadline or process

An Easy Template for Busy Academics




Boise State Turns Visioning into Time-Limited, Achievable Task

Deans' Task: Answer Four Questions

Visioning Questionnaire

- 1 | What is your **3-5 year vision** for the unit?  Compelling story
- 2 | What **resources** are necessary to realize this vision?  Potential scope
- 3 | What **gift opportunities** are related to these needs?  Fundraising viability
- 4 | How would you **prioritize** the gift opportunities?  Prioritization guide

Advancement Takes It from There

-  **Development Strategy**
Fundraising plans focused on clear priorities
-  **Prospect Identification**
Vision and opportunities linked to potential supporters
-  **Internal and External Collateral**
Consistent messaging for gift proposals and marketing materials

Turning Visions into Gifts

9 White papers created

\$70M Raised to support priorities

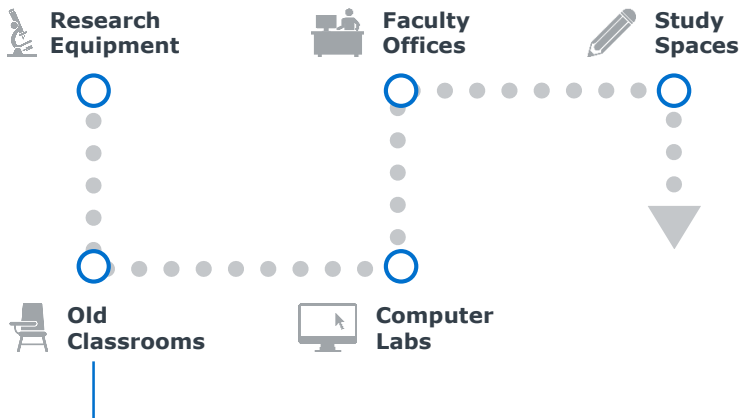
Walk Me Through Your Vision

Group Tour Lets Dean Share Ideas Without Putting Pen to Paper

At Queens University of Charlotte, Stakeholders Walk Through Fundraising Vision

Walking Tour Components

- Attended by dean, vice president of advancement, institution president, and unit MGO
- Lasts one hour
- Includes both short-term and long-term needs



Dean Paints an Off-the-Cuff Vision

Where We Are

"All of our students take at least one class here"

What's the Challenge

"We can't teach flipped courses with this set-up"

What We Need

"Flexible seating options and another projector"

What's My Vision

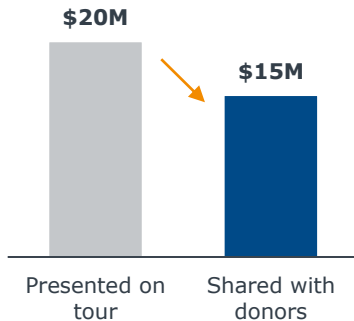
"Our unit will use the latest teaching techniques"

Turning the Tour into a Case for Support

Advancement Staff Determine Realistic Philanthropic Priorities

Transforming the Wish List into Advancement's Next Steps

Total Value of Deans' Articulated Needs



“When we cut down the list, we could have a conversation with the dean about what he could do with other funding sources to make these ideas a reality, and it gave us **a clear direction moving forward.**”

*James Bullock,
Vice President for University Advancement
Queens University of Charlotte*

A Win-Win for Advancement and the Academy



Insight into Unit's Future

Advancement can build enthusiasm among donors and prospects



Comfort with Visioning Process

Academic leaders willing to participate in similar activities in the future

Charting the Path Forward

EAB Resources for Guiding Partners to High-Return Activities

Discussion Questions

- 1 | How effectively do we onboard new leaders to advancement?
- 2 | Are academic leaders focusing on major and principal gifts? Are they distracted by any other activities?
- 3 | Do current leaders over-rely on philanthropy to meet their budget needs?
- 4 | Do any leaders struggle to express a vision for their unit? How can we help them create one?
- 5 | How can we hold everyone accountable for advancement activities and goals?

Next Steps for Implementation

Short-Term

- Turn unit visioning into a clearly-defined, time-limited activity
- Prioritize specific development tasks for new partners

Long-Term

- Tailor onboarding to needs of new academic leaders
- Implement accountability measures to stay focused on top prospects
- Ensure that resource planning relies on all potential sources of funding



Guide New Partners to High-Return Activities

Perfecting the Partnership: Part Two

Advancement Forum