Making the Most of Your EAB Membership

An Overview of Resources
The Education Advisory Board (EAB)

Launched in 2007 as a division of the Advisory Board Company, EAB strives to provide the unique insight, collaboration opportunities, and expert advice needed to help make higher education smarter.

WHO WE ARE

650+
researchers, consultants, and technologists on staff

WHO WE SERVE

1,000+
colleges and universities across North America

26,000+
academic and administrator leaders supported

78%
of US undergrads attend EAB member institutions

WHAT WE DO

RESEARCH AND INSIGHTS

Research Forum Memberships offer strategic insights and actionable practices, as well as tools and expert advice to help with their implementation.

Our Research Forums:
- Academic Affairs Forum
- Business Affairs Forum
- Student Affairs Forum
- Continuing and Online Education Forum
- Enrollment Management Forum
- Advancement Forum
- IT Forum
- Facilities Forum
- Community College Executive Forum
- University Systems Forum

TECHNOLOGY COLLABORATIVES

We provide web-based software with dedicated support to help members install technology-based best practices. Bringing hundreds of institutions together to collaborate around a common platform facilitates the sharing of lessons and generation of new insights.

Our Areas of Focus:
- Academic and career advising
- Student retention and graduation
- Student registration and course planning
- University procurement

DATA AND ANALYTICS

Our data scientists take disparate and disconnected member datasets, apply world class analytics and industry understanding, and provide members with insight into their own performance, as well as performance relative to peer institutions.

Our Areas of Focus:
- Academic costs and efficiency
- Faculty workload and time allocation
- Academic program performance
- Enrollment capacity and growth
- University supply costs and pricing

MANAGED SERVICES

With our 2015 acquisition of Royall & Company, the industry leader in strategic enrollment management and advancement services, EAB now partners with members to help grow undergraduate and graduate enrollments, manage financial aid, and increase alumni giving.

Our Areas of Focus:
- Undergraduate recruitment
- Graduate recruitment
- Financial aid optimization
- Alumni participation

Source: EAB research and insights.
Beyond Averages

EAB research focuses on answering one question: “How have successful organizations anywhere solved the pressing problems facing our members?” To that end, our analysts and consultants are dedicated to finding the most progressive and successful practices.

100,000+ Interviews, across Higher Education and Beyond

Across the firm, our staff completes more than 100,000 in-depth interviews each year, probing for innovative new ideas, tactics, and strategies worthy of member time and attention.

Actionable Advice

Rather than simply reporting what we found in the research, our provide detailed recommendations on what to do (and not to do) as well as detailed advice on practice implementation.

How We Conduct a Study

- Literature Review and Expert Interviews
  A literature review and interviews with all relevant experts provide a deeper understanding of root cause problems and help identify new ideas.

- Exhaustive Screening for Breakthrough Practice
  Interviews are conducted with hundreds of colleges and universities to isolate the few dozen that have pioneered truly innovative practices and can show demonstrable results.

- In-Depth Case Study Research
  Multi-day interviews and onsites are completed with these institutions to understand how the practices work and the implementation requirements, benefits, and potential drawbacks.

- Rigorous Analysis and Recommendations
  The research team spends several months synthesizing the research and preparing detailed recommendations to guide members in how to implement the practices and strategies uncovered in the research.

Source: EAB research and insights.
Advancement Forum
Where Members Tell Us We Are Different

Unique Strengths of the Advancement Forum

Distinct Service Through Membership

1. Breakthrough Practice
“The breadth of research that the Advancement Forum produces is noteworthy, but beyond its breadth the way it is presented is noteworthy. It’s not just a story about what one of my colleagues has done, it’s vetted through your research process and then presented in a clear and educational format, which is the best I’ve ever seen.”

Private Liberal Arts College in the Northeast

2. Insight into Top Challenges
“We really rely on your organization to bring us relevant, high-quality information that we can use to build our strategies for the future.”

Public Masters University in the Midwest

3. Actionable Advice
“I always appreciate the rich data from your work which I use to manage up – educating the president and board members about major issues.”

Private Masters University in the Northeast

Beyond Research – Supporting Members in Practice Implementation

4. Accelerate Implementation
“With a lot of other conferences, and research memberships you just get a lot of great ideas that are somehow just supposed to magically happen. What I love about your work is that you provide diagnostics, discussion guides, tools, and templates that I can share with my team and we can immediately implement.”

Public University System in the West

5. Unmetered Access to Experts
“After attending a CAO roundtable and seeing your talent management work, I knew I needed additional support as I headed into a period of heavy hiring. The AF expert was so helpful to me through a series of phone appointments, I was able to implement two practices within a very short period of time.”

Public Research University in the South

6. Internal Case Making
“I recently convened a taskforce of eight members of my team to look into the adoption of one of your best practices, we used your study, on-demand webinars, and EAB experts to help us determine our position and recommendations for the provost and president.”

Private Research Institute in the West

Source: Advancement Forum interviews and analysis.
Ensuring Value Across the Year

**EAB as Your “Go-To” Resource**

- **Sign-up power users** for access to EAB.com so that it becomes the first place your team looks for answers to their most pressing questions

- **Register** to have Advancement Forum research and top news delivered to your inbox

- Utilize your membership to access high-quality professional development opportunities for your staff with little to no additional cost

- **Access to EAB experts** who can curate the best resources for your most pressing issues through a one-on-one consultation over the phone

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Source: Advancement Forum interviews and analysis.
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 EAB Service Users:

- Provost and Deans
- Faculty Affairs
- Undergraduate Affairs
- Institutional Research
- Director, Student Success
- VP, Online
- VP, Research
- Strategic Plan Implementation Teams
- Task Force Members

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.
Stay Abreast of What’s New and Noteworthy

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.

Source: Advancement Forum interviews and analysis.
Introducing the EAB Daily Briefing

The EAB Daily Briefing:

- Daily quick-hit summaries of the industry's key stories
- A roundup of research and insights from EAB.com
- Announcements of upcoming webinars and events
- EAB expert commentary on the key stories of the day

Join thousands of higher ed leaders and get the EAB Daily Briefing delivered daily to your inbox.

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Source: EAB interviews and analysis.
Practical Support for Academic Planning and Task Force Efforts

Consult with EAB Research Experts

Presentations and Working Sessions Customized for Your Institution

Onsite Presentations

What Is an Onsite Presentation?
- EAB experts travel on-site to highlight research findings, lead group discussions
- Members may request one onsite session per year at no charge
- Typical Formats:
  - One- to two-hour formal presentations with Q&A
  - Half-day facilitated working sessions
  - Small groups to audiences in hundreds

Phone or Webconference Consultations

How EAB Offers Remote Support?
- Calling into taskforce or committee meetings
- Briefing the leadership team
- Answering questions, suggesting leads, and providing additional resources
- Reviewing institutional needs and strategic plans

Source: Advancement Forum interviews and analysis.
Integrate the Membership into Everyday Work
Facilitating Service Engagement and Navigation

1. Add a link to [www.eab.com](http://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](http://www.eab.com) to internet browser for convenient immediate access to help with pressing questions

Check out our new landing page, Five ways to get started with your Advancement Forum membership for resources and information to share with your team.
Ensuring Value Across the Year

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Top Five Ways to Make the Most of CAO Roundtables

Network with your executive peers from around the country at the session of your choice

Schedule an EAB expert to facilitate a follow-up virtual session for your group to discuss how to implement the research

Distribute relevant sections of the meeting materials to individuals on your team and plan for the full team to register for research webinars as soon as they’re scheduled

Dedicate a leadership team meeting to discuss those parts of the research most relevant to your organization use our discussion guides to help you

Assign individuals responsibility for developing plans to implement the selected best practices and to track the results

Source: Advancement Forum interviews and analysis.
Register for a Webinar

One-Hour, Interactive Overviews of Our Latest Research

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

Upcoming Advancement Forum Webinars

- The Strategic Alumni Relations Enterprise
  *February 23, 2-3 pm ET*
- Laying the Foundation for Major Gift Officer Performance with Metrics
  *March 8, 2-3 pm ET*
- Creating a Culture of Major Gift Officer Accountability and Informed Decision-Making with Metrics
  *March 31, 2-3 pm ET*

Select Archived Webinars at eab.com

- Hardwiring High-Impact, Mid-Level Stewardship
- Surfacing Untapped Major Gift Capacity
- Competing for Talent
- Applying the New Rules of Engagement to Volunteer Structures

Source: Advancement Forum interviews and analysis.
2016-2017 Research Initiatives

Unparalleled Source of Innovative Strategies and Practices

Member Rated Top Topics Under Consideration

Maximizing Multi-Channel Annual Giving
*Rightsizing Resource Allocation to Strengthen Acquisition and Renewals*

Infusing Sustainability at the Top of the Giving Pyramid
*Designing the Optimal Principal Gifts Strategy*

Enhancing Campus Connectivity
*Building Effective Fundraising Partnerships with Deans, Faculty, and Campus Leaders*

Quantifying Advancement’s Value
*Moving Beyond Alumni Participation Rate as a Measurement of Effectiveness*

Mining Affinity Intelligence
*Strengthening Data Collaboration and Sharing Among Campus Allies*

Save the Date

**Chief Advancement Officer Roundtables**
- July, 26-27, 2016; Washington, DC
- August 4-5, 2016; Washington, DC
- September 7-8, 2016; Washington, DC
- October 18-19, 2016; Santa Monica, CA

**Team Summit**
- November 9-10, 2016; Washington, DC

Source: Advancement Forum interviews and analysis.
Research Immediately Available to Members

Advancement Forum Research Overview

FUNDRAISING INNOVATIONS

Implementing Social Media Fundraising
- Launching high-return 24- or 48-hour online campaign
- Identifying and cultivating online ambassadors

Launching Crowdfunding Initiatives
- Setting up internal processes for project selection and affinity vetting
- Raising funds for faculty research projects via homegrown platforms

Parent Fundraising
- Reorienting parent fundraising toward a major-gift focus
- Arming major gift officers to build competency and skill working with parents

CAMPAIGN STRATEGY

Launching Mini-Campaigns
- A step-by-step playbook
- Fine-tuning key components for shorter time frames and smaller goals

Optimizing the Campaign Pipeline
- Accelerating mid-level donors up the pyramid
- Surfacing untapped major gift capacity

Developing Campaign Infrastructure
- Innovative organizational and funding models
- Hardwiring high-impact stewardship

METRICS AND ACCOUNTABILITY

Making Meaning of Metrics
- Improving institutional effectiveness through data
- Ensuring accurate metrics reports

Advancement by the Numbers
- Maximizing existing resources and increasing efficiency
- Building strategic data into business cases for resource requests

Strategic and Managerial Dashboard Compendium
- Metrics frequently used by peer institutions
- Key performance indicators and how to build your dashboard

Source: Advancement Forum interviews and analysis.
Advancement Forum Research Overview (Cont.)

**STUDENT PHILANTHROPY**

**Revamping Senior Class Gifts**
- Introducing bounded-choice campaigns
- Using senior giving to bridge the gap to young alumni giving initiatives

**Creating a Culture of Giving**
- Engaging first-year students in philanthropy through campus-based competitions
- Launching branded all-student giving campaigns

**Systematizing Data Collection**
- Cost-effective data mining strategies
- Student contact information brainstorming tool

**ALUMNI ENGAGEMENT**

**The Strategic Alumni Relations Enterprise**
- Piloting digital engagement initiatives
- Streamlining information sharing and prioritizing revenue-orientated programming

**Reinventing Alumni Career Services**
- Delivering multimodal career services programming
- Increasing peer-to-peer networking opportunities

**University Alumni Associations**
- Exploring different organizational, governance, and funding structures
- Identifying legacies and improving coordination with Admissions

**TALENT MANAGEMENT**

**Winning the War for Experienced Talent**
- Understanding the four characteristics of exceptional gift officers
- Systematizing vacancy planning and developing candidate-centered recruiting

**Employing Data and Accountability**
- Leverage advancement services to optimize decision making for MGOs.
- Secure investment in MGO goals and expectations from deans.
- Develop a system of true accountability for frontline fundraisers.

**Targeting Professional Development**
- Four characteristics of exceptional gifts officers, profiles multimodal recruiting tactics for identifying “curious chameleons”
- Diagnosing skill gaps and targeting professional development

Source: Advancement Forum interviews and analysis.
Facilitating Service Engagement and Navigation

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### Helping you Get Fullest Value

1. **Single Point of Contact for Help Navigating Resources**
2. **Introduce and Engage Broader Team with Services**
3. **Initiate Facilitated Networking and Schedule Onsite Presentations Including Annual Board Presentation**
4. **Review Utilization and Institutional Priorities with Designee on Campus**
5. **Submit your questions to AskEAB**

Source: Advancement Forum interviews and analysis.
Beyond Services, How Members Use Their Advancement Forum Membership
Forum Research Provides Best-In-Class Solutions to Donor Acquisition

How Members Put One Study to Work

1. Forming Strategic Plans
2. Providing Benchmarks to Support Recommendations
3. Bringing Research to Your Campus
4. Guiding Execution One Tactic at a Time

Source: Advancement Forum interviews and analysis.
Employing Best Practice to Create Strategic Plans
Advancement Forum Data and Research Arm Leaders to Set Strategy

I. COMPETING FOR TALENT

THE MAJOR GIFT OFFICER (MGO)

The major gift officer (MGO) fills one of the most mission-critical roles in today’s advancement shop. Despite the MGO’s importance, qualified candidates are scarce. This situation has led to intense competition between nonprofit institutions for quality fundraisers. Chief Advancement Officers (CAOs) struggle to recruit and retain MGOs in the current market.

Advancement offices must learn to successfully compete for MGO talent if they are going to meet and maintain their fundraising goals.

Explosive Growth in the Nonprofit Sector...

Unfortunately, as universities rely more on MGOs for revenues, the MGOs themselves rely less on universitas for employment. Their job prospects have never been brighter. The number of nonprofit organizations in the United States has nearly doubled in the last 20 years, creating endless opportunities for frontline fundraisers.

These organizations all compete with college and university advancement shops to hire fundraisers, create relationships with donors, and build a fundraising base.

…Intensifies Competition for MGOs

REGISTERED 501(C)(3) ORGANIZATIONS


516,544
NUMBER OF REGISTERED 501(C)(3) ORGANIZATIONS IN 1991

1,081,891
NUMBER OF REGISTERED 501(C)(3) ORGANIZATIONS IN 2012

Missouri S&T Takes EAB Research to Create a Proposal for Increased Investment

The advancement team at Missouri S&T repurposed content from the Competing for Talent study to support their institution-specific appeal for increased resources.

- Language to provide context for the changing fundraising environment
- Data on average MGO characteristics
- Information on alternative industries to demonstrate increasing competition
Advocate for Resources with Benchmarks

Advancement Forum Data Supports Allocations for Implementation

Private Research Institution Uses EAB Resources to Work With HR

- Critical major gift director decides to move to Iowa for family reasons
- AVP uses slides on the cost of turnover from *Competing for Talent* in discussions with HR
- St. Louis AVP turns to EAB research library for resources
- HR extends her an offer to continue her employment as a telecommuting employee

Best Practice Turnover Benchmarks

- **The Impact of the Talent Crunch**
  - Direct and Indirect Costs of Open MOO Positions
  - Sources of Recruiting Costs
    - Marketing and search fees
    - Staff interview time
    - Onboarding costs
    - Lost philanthropic gifts
  - The Grass Isn’t Greener
  - Rural Institutions
    - Struggle to recruit top talent to their institution
  - Urban Institutions
    - Struggle to retain top performers in highly competitive markets

- **Cost Summary**
  - $127,650
  - Direct and indirect costs of finding a replacement fundraiser
  - 117%
  - Cost of staff turnover as a percentage of salary
  - $1M+
  - Estimated loss of gifts across 6 month vacancy and 6 month onboarding

Source: EAB—Advancement Forum interviews and analysis.
Bringing Our Research to Your Campus

Using Your Onsite to Enfranchise Administration and Faculty

Creating Strategy and Action Plans with Key Campus Allies at University of North Dakota

Disruptive Innovations in University Fundraising

1. Social Media Fundraising
2. Personal Fundraising Pages
3. Crowdfunding
4. Donor-Centric Websites
5. Text Giving Alternatives
6. Mobile-Optimized Giving

Onsite Content Selected

Attendees Invited

Onsite Results

Outcomes on Campus

1. Formed a committee of four foundation representatives and four university representatives to discuss and act on onsite ideas.
2. Dedicated 15 minutes in the Deans’ meetings, led by the Provost, to advancement.
4. Developed crowd-funding initiatives for faculty in the school of medicine.
5. Updated advancement website to be mobile friendly.
6. Provost pushed to have ‘Donate Now’ button placed on university’s main webpage.

Source: EAB—Advancement Forum interviews and analysis.
Using One Tactic and Related Tools to Initiate a Strategy

Driving Revenue with One EAB Tactic

Initially, Miami University was hesitant to institute a one day giving campaign.

After seeing Disruptive Innovations in University Fundraising, Miami developed #MoveInMiami, to extraordinary success.

Miami University’s One Day Giving Campaign

- Aligned with students’ first day on campus
- Focus on increasing donor participation
- Live website counting down the 24 hours to give
- Coordinated social media campaign sharing Miami memories on Twitter, Facebook, and Instagram through #MoveInMiami

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<tr>
<td>Total dollars raised</td>
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<td>Number of unique donors</td>
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Source: EAB—Advancement Forum interviews and analysis.
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

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Source: EAB—Advancement Forum interviews and analysis.
Thoughts? Questions? Comments?
E-mail me at: kturcotte@eab.com

Katie Stratton Turcotte
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Advancement Forum