



# Recruit Future Champions

Perfecting the Partnership: Part Three

Advancement Forum

# Perfecting the Partnership

## Reimagining the Academy's Role in Advancement Initiatives

### A Three-Part Webconference Series

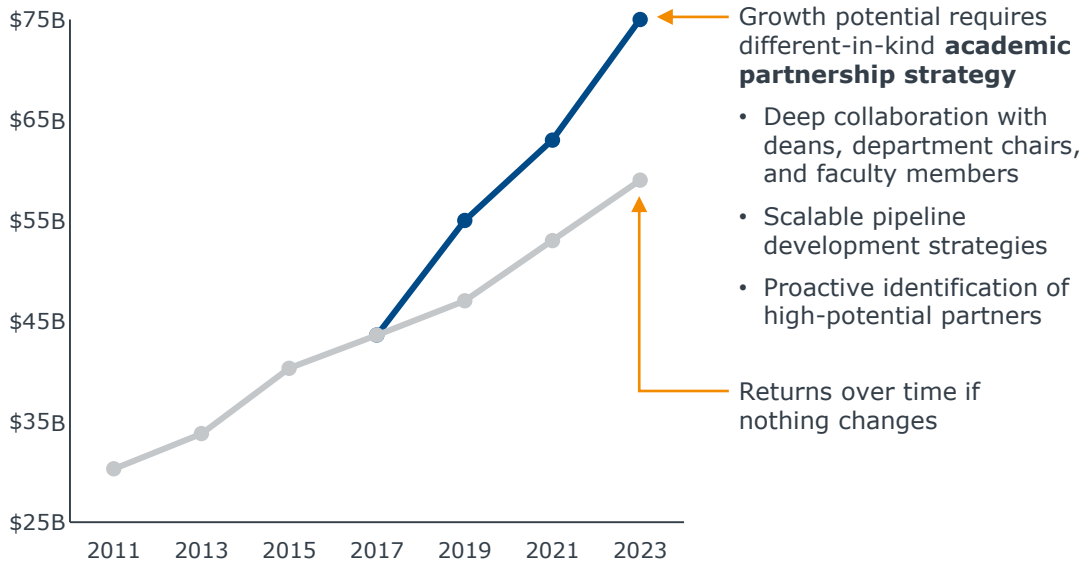


# What Got Us Here... Won't Get Us There

## 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*





# 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, 2007-2017<sup>1</sup>

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.

# 'Make or Break' for Our Development Goals

## Why Advancement Leaders Have Cause for Concern

### Short-Term Consequences

1 Fundraising superstars overstretched



Fundraisers lose exclusive engagement opportunities for new prospects

2 New academic leaders ignore major and principal giving



Units do not reach campaign goals or fund strategic initiatives

3 Donors lose preferred campus partners



Top donors redirect support to organizations where they have deeper connections

# Looking Beyond the Usual Suspects

## Potential Champions Not on Advancement's Radar



### Early-Career Researchers



### Recent Campus Hires



### Popular Adjunct Professors



### Campus Staff Members



### Potential Role

*Excite donors about seed funding for research efforts*

*Provide connections to funders of previous projects*

*Share information on alumni careers and interests*

*Gain access to hard-to-reach local prospects*

# Like Ships Passing in the Night

## A Variety of Reasons for Missed Connections



### Underappreciation of Philanthropy's Role

- Assumption that tuition can fund new programs and initiatives
- Unaware of funding potential offered by major and principal gift donors



### Perception That It Is Someone Else's Job

- Not included in faculty job descriptions or tenure criteria
- Lack of recognition for successful advancement efforts



### More Faculty on Campus Than Ever Before

- Predicted growth in teaching and research positions
- Rise of adjunct faculty who have not traditionally partnered with advancement



### High Churn Rates Among Campus Administrators

- Inability to assume that leaders will be on campus for more than a few years
- Requires rebuilding donor relationships from scratch

# Recruit Future Champions

## Three Steps to Identify and Engage New Academic Partners



### Identify Under-the-Radar Superstars

- Tactic 13: Favorite faculty surveys



### Highlight the Value Proposition

- Tactic 14: Pre-event networking
- Tactic 15: Volunteer reporting incentives



### Make It Easy to Say Yes

- Tactic 16: Social media templates
- Tactic 17: Multidisciplinary faculty showcase
- Tactic 18: Cross-campus project curator



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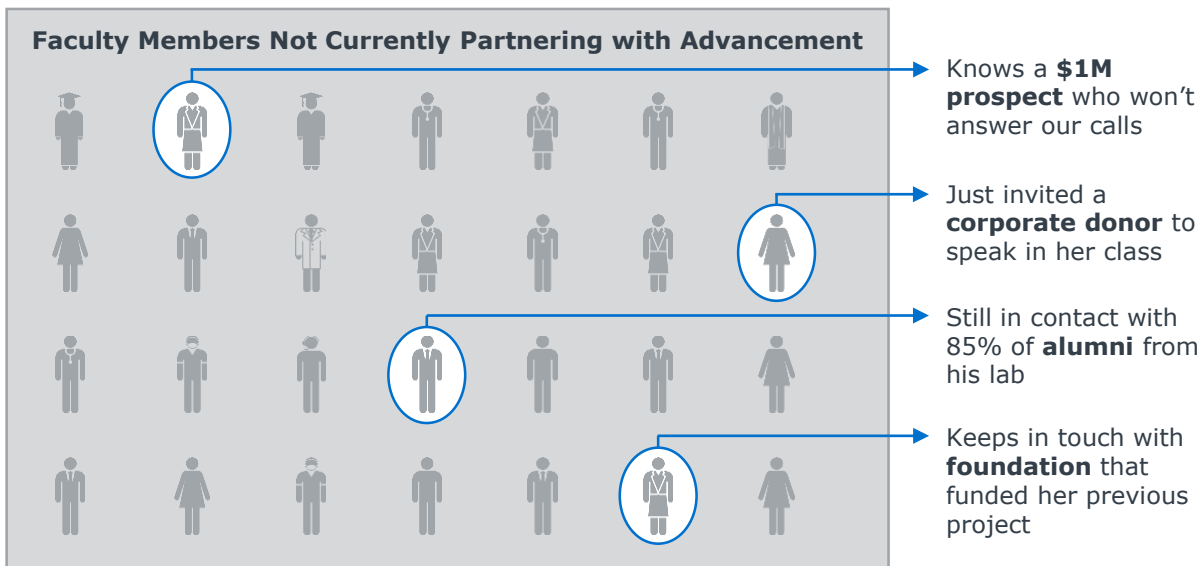
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# Like Finding a Needle in a Haystack

Determining Highest Potential Non-Partners Remains an Elusive Task

## Key Partners Hiding in Plain Sight





# Identifying Fan Favorites on Campus

Students and Alumni Signal Which Academic Would Have Greatest Impact

## When to Ask 'Who Was Your Favorite Professor?'



### Senior Class Gift

*Stonehill College*

- Graduating seniors **present certificates of recognition** to favorite faculty members
- Students' honorees added to CRM

### Graduation

*Centre College*



- Annual ceremony allows students to **honor campus partners** who impacted their college experience
- Photographs used to update alumni records



### Alumni Weekend

*Trinity University*

- Alumni invite **faculty to class year dinners**
- Invitee data collected during event registration

### Giving Tuesday

*Furman University*



- Donors enter drawing to have **coffee delivered to a favorite professor**
- Two winners chosen at random and photos shared on social media

# Collecting Data While It Is Top of Mind

## Stonehill Turns Class Gift Tradition into Faculty Identification Point

### Recognizing Faculty Today



**40%** Student participation rate

**250+** New data points in CRM

### Building a Base of Long-Term Partners

- Immediate Recognition**  
Campus partners receive personalized certificates from students
- In-Person Acknowledgement**  
Students and faculty invited to annual celebration
- Building Goodwill**  
Academic partners develop positive opinions of advancement
- Long-Term Faculty Support**  
Faculty increasingly willing to respond to requests and participate in new advancement initiatives



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# What's in It for Me?

## Doubts Linger About Value of Partnering with Advancement

### Events Hold Little Appeal for Faculty...



#### Distracted from Core Work

*"I could spend that hour doing my own research."*



#### Afraid of the Unknown

*"I'm going to have to ask someone for money."*



#### Unsure of Benefits

*"This is advancement's job. What's in it for me?"*

### ...And Our Invitations Do Little to Convince Otherwise

#### Presenters Needed

You are invited to present at our upcoming campaign roadshow!

Be an advocate for your division while connecting with alumni and friends of the institution.

*Travel to and from the event will be provided.*

Vague expectations

Uninteresting benefits

Unclear time commitment

“We rarely talk about why faculty should want to work with us. If they can see that **there's something in it for them**, they're going to be much more likely to play ball.”

*Mark Begly, Associate Vice President for Development and Campaign Director  
William & Mary*

# The Benefits of a Backstage Pass

## Incorporating Networking Opportunities into Campaign Roadshows

### Florida International University Redesigned Events to Better Support and Encourage Faculty Members

#### Roadshow Participation Elements

- 1 One-on-one **communications training** clarifies expectations
- 2 Pre-event **green room** provides low-pressure space for networking
- 3 On-stage **elevator pitch** reduces need to memorize speaking points
- 4 **Unit booths** allow faculty to have interactive experiences with the audience and provide opportunities for one-on-one conversation

### Participation Incentives Satisfy Faculty Needs



#### Exclusive Networking

Connect with colleagues, and explore potential research collaborations



#### Public Platform

Opportunities to promote faculty's own programs to an audience beyond campus



#### Gratitude and Appreciation

Advancement shows appreciation for time and efforts

# ‘Ghost Volunteers’ Haunt Campus

## Faculty Only See Downsides of Sharing Intel About Prospects on Campus

### Faculty Hold Mission-Critical Information...



Alumni **guest speakers** in classes



Contact them incessantly



Members of **advisory boards and councils**



Ask them to serve on a different board instead



**Sponsors** of conferences and events



Direct future asks to events in other units



Awards and recognition given to **community members**



Destroy relationships by soliciting gifts





# Incentivizing Information Sharing

Partners Motivated to Create a Positive Experience for Campus Visitors

## University of San Diego Rewards Faculty Information with Alumni Gifts



### Invitation

Faculty invite alumni volunteers to campus



### Benefits

Advancement promotes incentives for data sharing



Parking pass



Appreciation gift



### Reporting

Compelling services motivate faculty to use online reporting form

## Leading to Improved Data Sharing Across Campus

**350**

Alumni volunteers discovered during first three years

**32%**

Of annual volunteers discovered through reporting form

**90+**

Unique submissions from across campus

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# So Easy, a Busy Professor Could Do It

Elon's Social Media Templates Make Advancement Accessible to All

## Templates Offer Easy Ways to Engage with Advancement

### Sample Social Media Scripting

It's #ElonDay today! Thank you in advance for giving back to #Elon.

## Faculty Adapt to Their Preferred Style and Timing



### Dr. Rothenberg

Tomorrow is #ElonDay! Thank you in advance for giving back to support students at #Elon.



### AVP Wilson

It's #ElonDay today! Thank you to all of the #Elon alumni and parents giving today.

## Increasing Giving Day Engagement Across the Board

**397%**

Increase in donors,  
2014-2018

**41%**

Increase in average  
gift, 2014-2018

**\$1.8M**

Raised on day of  
giving, 2018



# Putting Faculty Innovation Front and Center

Successful Academic Engagement Focuses on Faculty Skills and Interests

## Carnegie Mellon Makes Participation a Light Lift for Faculty



### Advancement Asks Fit Easily Into Current Schedule

- Brainstorming display
- Bringing materials to exhibition
- Interacting with visitors
- Explaining research



### ... And Avoid Worries About Learning New Skills

- Identifying and qualifying prospects
- Compiling gift proposals
- Developing cultivation strategy
- Negotiating gift agreements



Touchscreen displays



Interactive activities



Faculty presentations



Student performances

# Letting Faculty Do What They Do Best

CMU's Exhibition Allows Academics to Share Work Outside of the Lab

## Attracting the Campus Community

**5,000** Total visitors

**60** Minutes spent in exhibition (on average)

## Driving Faculty Engagement

**100** Faculty members displayed research and innovations

**12+** New University Advancement faculty partners identified for future events

### Jumpstarting Productive Academic Partnerships

“This was **a great way to build up our relationship with faculty.** During our last campaign, faculty referred to it as advancement’s campaign. Now, they’re referring to it as ‘our campaign.’ It’s our community and we all own it.”

*Pam Eager, Senior Associate Vice President  
Carnegie Mellon University*



# Facilitating Collaboration for University Priorities

## Penn State Dedicates Staff to Multidisciplinary Project Fundraising

### Director of Campaign Imperatives Manages Cross-Unit Projects



#### Identify Interdisciplinary Initiatives

Focus on projects that embody campaign and strategic plan visions



#### Create Business Plan

Assess resource needs and develop fundraising plan for private philanthropy



#### Gain Buy-In

Convene teams of diverse stakeholders to drive donor strategy and messaging



#### Fund Project

Articulate compelling case and coordinate fundraising among team of campus partners

### Incentivized to Think Beyond Campus Silos



#### Centrally-Based

Not affiliated with any campus unit or center



#### Birds-Eye View

Explains how gifts contribute to overall university initiatives



#### Communications Expert

Manages expectations among unit-based deans and fundraisers



#### Flexible Thinker

Can identify synergies and shift between projects as needed

# Charting the Path Forward

## EAB Resources for Recruiting Future Champions

### Discussion Questions

- 1 | Which events can we use to collect data on alumni's favorite professors?
- 2 | What unique benefits can we provide to faculty who partner with us?
- 3 | On what occasions should we create social media templates for academic partners?
- 4 | Are campus events a light lift for faculty? How can we make them easy to participate in?
- 5 | Do our staff effectively manage multidisciplinary fundraising projects?

### Next Steps for Implementation

#### *Short-Term*

- Begin tracking professor affinity data
- Ensure that the value of upcoming events is explained to partners

#### *Long-Term*

- Brainstorm new events to promote faculty innovation on campus
- Identify opportunities to leverage faculty social media engagement
- Identify future advancement champions among alumni favorites



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