



Scale Reach of Current Partners

Perfecting the Partnership: Part One

Advancement Forum

Perfecting the Partnership

Reimagining the Academy's Role in Advancement Initiatives

A Three-Part Webconference Series

1

Scale Reach of Current Partners



- Current deans and department chairs
- Existing faculty fundraising partners

2

Guide New Partners to High-Return Activities



- New-to-role deans and department chairs
- New-to-institution deans and department chairs

3

Recruit Future Champions



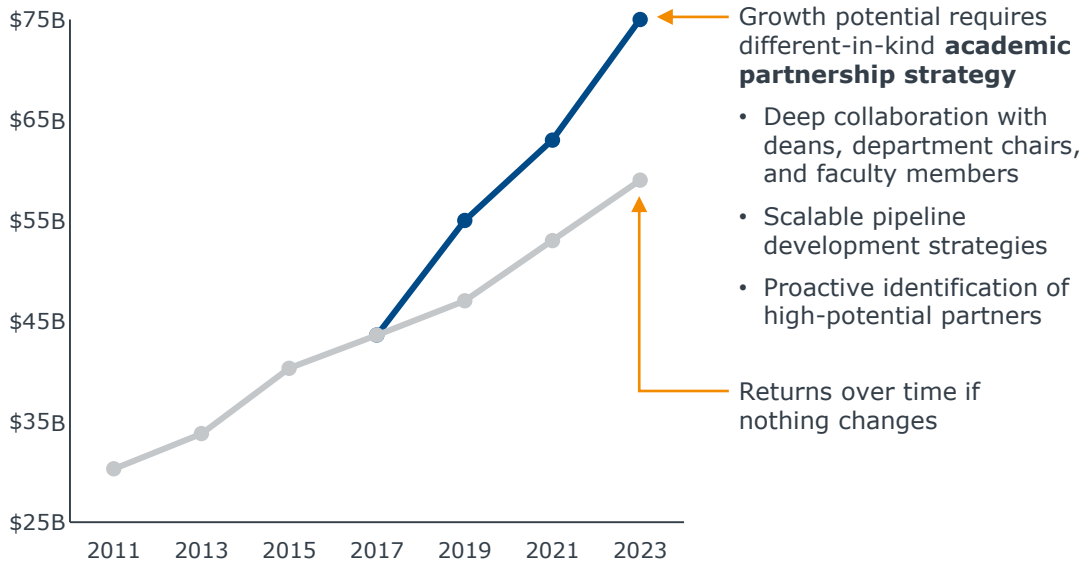
- Faculty members who have not yet partnered with advancement
- Stakeholders outside of academic departments

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





“Working with the Academy”

Historically Not Advancement’s Strong Suit


Faculty Hostility to Advancement Abounds...


 “Your job is to find enough dollars to fill the gap created by the states' abandonment of higher education... And at that job, **you have been failing miserably.**”

 “Why don't you **try to learn a bit about what we do?** Why don't you come visit the adjunct offices that house 50 faculty members and contain four desks, one phone, and no computer?”


 “**I'm not helping them raise money.** I have teaching and research to do, which I care about even if the administration doesn't.”

...And Advancement Has a Plethora of Horror Stories

 Asking **inappropriate questions** at in-person meetings

 **Contacting donors** without informing advancement

 Having **internal arguments** about prospect assignments

 Making **multiple asks** of the same corporate partner

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

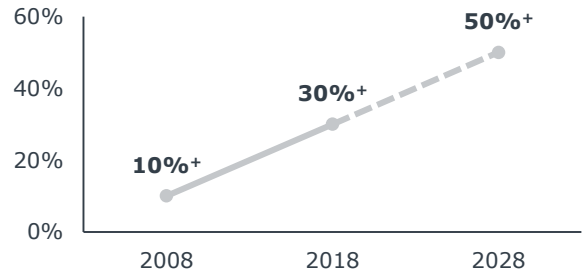
Resulting in Cascading Expectations for Advancement

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.

A Small But Impactful Roster

Fundraising Superstars Critical for Ongoing Success

Handful of Current Partners Easily Identified on Campus...

- ✓ Gift officers' top travel partners
- ✓ Frequent media contributors
- ✓ Prestigious grant recipients
- ✓ Teaching award winners

...And Provide Unparalleled Support to Advancement Staff



Conducting lab tours



Presenting at campaign events



Generating big ideas



Reporting impact

A Proven Draw

“There are faculty members I can mention, and **250 people will instantly show up** at a party to see them.”

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



Pulled in Many Directions


Academics' Time Stretched Thin Between Current Responsibilities

Everyone Is Asking for More

 **Dean:** Publications

 **Enrollment Management:** Student recruitment

 **President:** Strategic planning

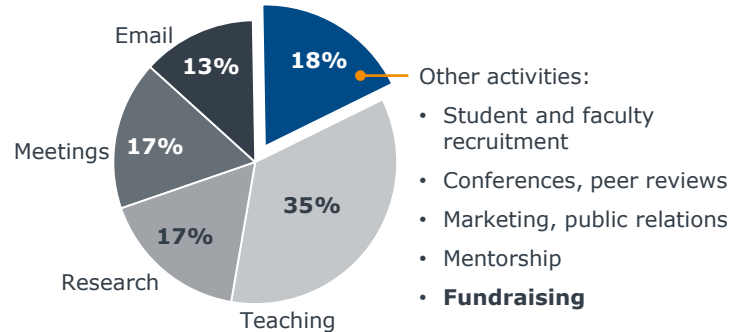
 **Advancement:** Donor engagement and stewardship

“Academic partners feel like more and more has been added to their plates over the years, and **nothing has been taken away.**”

*DeAnna Zink,
Chief Executive Officer,
UND Alumni Association and Foundation
University of North Dakota*

Yet Faculty Members Already Working Overtime

Academics' Weekly Time Allocation



61

Average number of **hours faculty work** per week

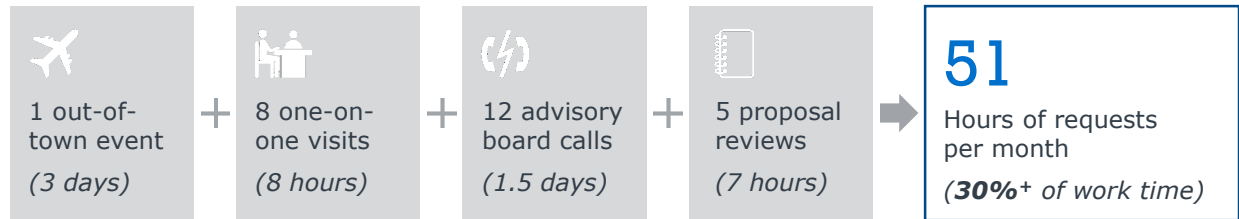
16%

Of faculty work time takes place **on weekends**

Just One More Item on the To-Do List

Advancement Perceived as a Distraction from Core Responsibilities

Advancement Requests Are Time and Travel Intensive



A Push to Cut “Administrative Load”

“As budget structures change, the financial pressure on institutions is increasingly felt and is very present to our faculty members. At the same time, there’s more pressure to be better teachers. And there’s no relief from research and tenure expectations. It’s no surprise that there’s constant discussion about **minimizing their administrative load, including advancement work.**”

*Mike den Haan,
Vice President for Advancement and Alumni Relations
Simon Fraser University*

Scale Reach of Current Partners

Three Strategies to Increase Impact, Not Time Investment

Digitize One-on-One Interactions



- Tactic 1: Virtual visit

Maximize Value of Group Engagements



- Tactic 2: Research pitch competition

Raise the Bar for Academic Partner Access



- Tactic 3: Academic priority information sheets
- Tactic 4: Searchable resource hub
- Tactic 5: Unit advocates
- Tactic 6: Academic advancement directors

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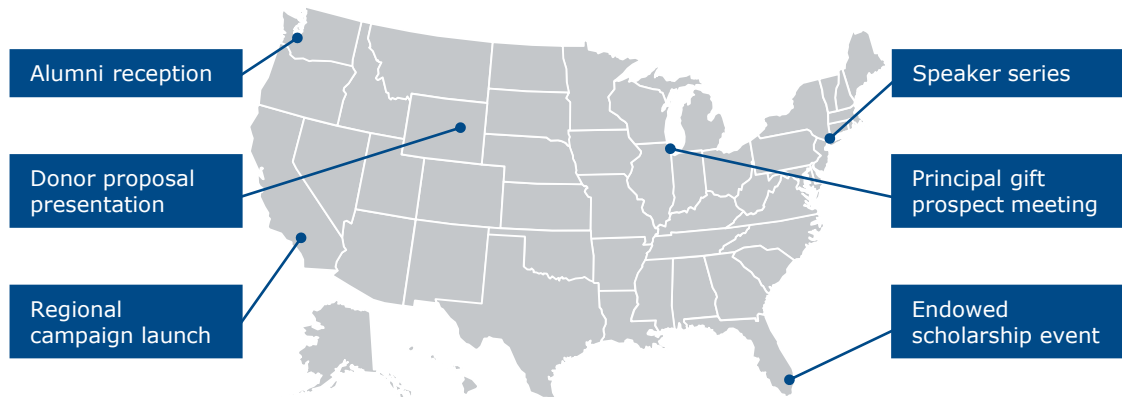


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Trying to Be in Twenty Places at Once

Campaigns Rely on Unrealistic Level of Academic Participation

Emphasis on In-Person Visits Limits Partner Capacity



“During campaign planning, we took a look at where we needed academic leaders to be. The sum total of our analysis was that **we needed our deans in 20 places at once.**”





John Balbach, Executive Director of Advancement, Engineering University of Michigan

From In-Person to Virtual Visits

Michigan Enables Academic Partners to Join Visits Without Leaving Campus




Scalable Videos Feel Highly Personal

Key Script Components



-  "It's so great to speak with you today, Mr. Martin."
↳ **Customized welcome message**
-  "I'm sorry that I wasn't able to join the meeting today."
↳ **Acknowledgement of visit**
-  "I'm excited to share that we started a scholarship program for first generation engineers."
↳ **Link to donor interests**
-  "I'd love to show you around our new building the next time you're on campus."
↳ **Call to action**

Recording from the Comfort of Campus

Advancement Staff Tasks

-  Personalize Script
-  Plan filming session
-  Edit video recording

Academic Partners' Responsibilities

-  Practice video script before filming
-  Present talking points on-camera

High Impact, Light Lift

Virtual Visits Allow Academic Partners to Engage More Donors

An Easy Format for Academic Involvement

100+ Visits created

20 Minutes required for filming

1-2 Minutes of content in final video

Driving Progress on Campaign Goals

↓ Decreased **time to close** gifts

↓ Decreased academic **travel time** and costs

↑ Increased **donor enthusiasm** and engagement

Technology Creates Human Connection

“The **new technology alone is not the magic. It’s the personalized experience**, and it leads to the same behaviors that come from an in-person interaction. Some donors sent us thank you notes as though they had received a gift.”

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‘Oh No, Not Another Advancement Event’

Benefits of Cultivation Events Are Unclear to Faculty

Events Provide Useful Cultivation Touch for MGOs



Brings prospects together in central location



Targets group’s interests and affinities



Fit clearly into overall cultivation strategy



Allows time to coach partners in role and expectations

...But Negative Perception Inhibits Faculty Participation

“I’m going to be stuck in a room of people who don’t care about what I have to say.”

“Someone is going to tell me how to do my research.”

“This doesn’t benefit me—advancement just wants another person in the room.”

“I’m afraid of failing in front of my colleagues and donors.”

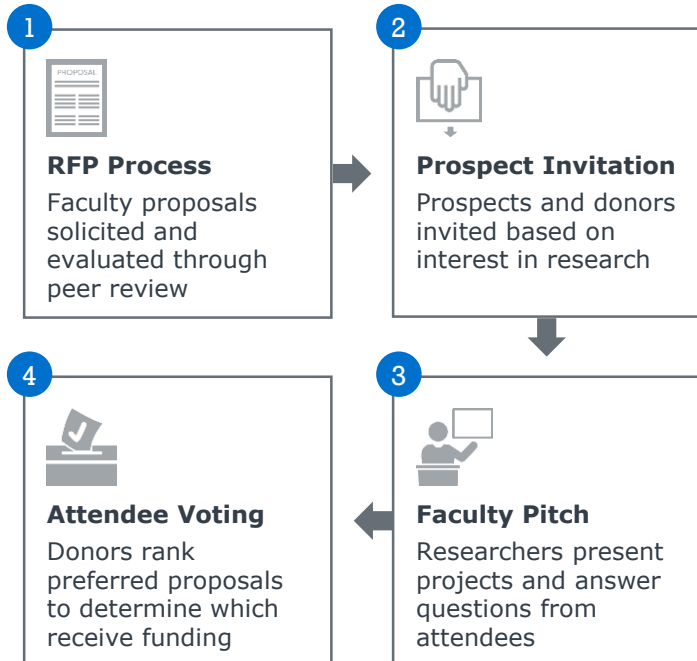
'Shark Tank' Comes to Campus

Georgetown Creates Donor Event that Keeps the Focus on Faculty

Donors Award Research Grant to Best Faculty Pitch

Partners in Research


Key Elements of the Pitch Competition



Event Logistics

 **Five faculty teams** selected to pitch

 **Dedicated coaching** for new presenters

 Pitches last **10 minutes**

 **Five minutes** for donor question-and-answer session

 **\$100K**
Research grant awarded to most popular pitch

Impact Far Beyond the Ten-Minute Pitch

Georgetown's Competition Increases Faculty and Donor Engagement

Partners in Research 



Awards Drive Faculty Participation

29 Individual grants awarded since inception

35⁺ Proposals submitted per year



Building Ongoing Donor Interest—And Gifts

1,000⁺ Mailing list members invited to related events

\$1.2M⁺ Raised for pilot research projects



Hands-On Involvement Leads to Investment

“Donors are invested in this process and in seeing faculty succeed. They read the abstracts in advance, and they connect the projects to their personal interests. They ask such educated questions, and they’re rooting for the researchers.”

*Rosemarie Martini, Associate Director of Development
Georgetown University*

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Why Can't MGOs Answer Technical Questions?

Gift Officers Unprepared to Discuss Projects Independently

Unwieldy Array of Information

- Too many current projects to build baseline knowledge
- Projects constantly evolving



Metrics Don't Reward Deep Expertise

- Unclear ROI compared to visits and discovery calls
- Lack of confidence in ability to discuss academic projects



Hard to Find Resources to Get Smart Quickly

- Research previews rarely publicly available
- Few translations for non-experts



Resulting in Too Many Faculty Questions

“Our development officers’ knowledge is a mile wide and an inch deep. When they don’t know the answer to a donor’s question, they just hop on the phone with a faculty member. Our faculty get frustrated that my staff is constantly asking them for help.”

*Vice President for Development and Alumni Relations
Private Bachelor’s College*

A 'Cheat Sheet' for Busy Gift Officers

Memphis Assembles Critical Information for Advancement Staff

Information Sheets Give MGOs Everything Needed for Donor Conversations

LOEWENBERG COLLEGE OF NURSING

Fast Facts


Dean: Dr. Lin Zhan
 Enrollment: Over 1000 students— 823 undergraduate; 278 graduate students
 Degrees offered on the Memphis and UofM Lembooth campuses:
 - Bachelors in Nursing (BSN)
 - Executive Leadership MSN (graduate level)
 - Family Nurse Practitioner - FNP (graduate level)

College News & Highlights

- Our BSN graduates' NCLEX pass rates are at and above 90%. The College's six-year graduation rate is 89%, the highest of any college at the University of Memphis.
- The UofM Board of Trustees recently approved a Doctorate of Nursing Practice program.
- US News World Report recognized LCON as #15 for best online graduate nursing programs.
- The Executive MSN Program is in the Top 30 nationally and received recognition from the American Organization of Nurse Executives.
- Our RN-BSN program is ranked 12th in the nation.
- LCON received the 2017 Health Professions Higher Education Excellence in Diversity (HEED) Award from AOAHH into Diversity magazine.
- LCON celebrated 50 years in 2017.

Giving Opportunities and Impact

- Securing scholarship funds for students is a top priority for LCON. The average UofM nursing student graduates with \$20,300 of debt. It is our goal to provide scholarship support to 80% of our students by 2021.
- Endowed professorships allows us to attract, reward and recognize top faculty and have a positive impact on retention.
- Naming opportunities are available in our new state-of-the-art virtual simulation spaces which introduces students to operating room procedures and experiences. The spaces also provide additional opportunities to partner with local hospitals to train operating room nursing units.



THE UNIVERSITY OF MEMPHIS | Driven by doing.
 Loewenberg College of Nursing

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Content includes:

- Unit background information
- Strategic goals
- Funding needs
- Case for support
- Giving opportunities
- Impact estimates

Organized to Easily Find Information

At Stonehill College, Online Access Drives Resource Hub Utilization

Thematic Organization Allows Fundraisers to Find Information On-the-Go

Proposal Type	Department	Topic
 Endowed scholarships	 Capital projects	 Foundation grants
		 Corporate gifts



Maintained on shared-access drive



10 files per unit available



Updated regularly

Keeping Everyone on the Same Page

“Everyone has to be on the same page about how they talk about the institution. We’re trying to break down siloes so that our **fundraisers know what’s happening across campus** and which resources are available.”

*Marie Kelly, Director of Corporate, Foundation, and Donor Relations
Stonehill College*

A Never-Ending Stream of Questions

Advancement Staff Overwhelm Faculty with Requests for Assistance

Lack of Gatekeeper Leads to Email Overload

“ I know you just started this project, but what will the **final results** be?

“ I have a donor who is interested in space travel. What are the **giving opportunities**?

“ Can you send me a few bullet points about your last three years of **field research**?

“ Can I interview you for a feature in the **alumni magazine**?

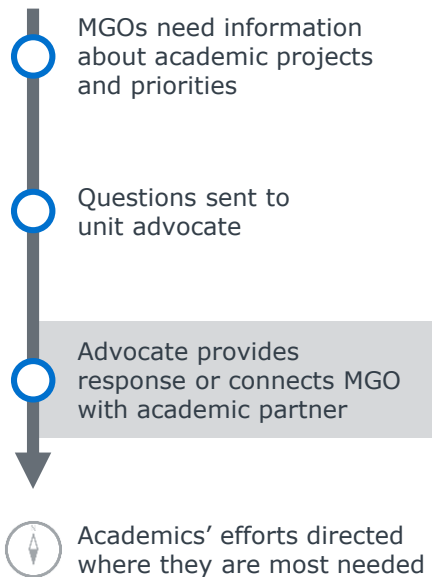


Frustrated Academic Partners

Deputizing Internal Gatekeepers

At Dayton, Unit Advocates Manage Requests for Academic Support

Advocates Serve as Unit Point-of-Contact



Role Integrated into Current Responsibilities



20% Advocate Responsibilities

- Manage dean's advancement activities
- Identify giving opportunities
- Relay project updates to advancement staff
- Maintain online resource hub

Supporting Deans Without Unit-Based Staff

Advocates Benefit Both Academic Leaders and Advancement Staff

▶ An Ideal Stretch Role for Experienced Staff



Working knowledge of unit priorities



Connections to current faculty and staff



Experience working with academic leadership



Appreciated by Both Deans and Fundraisers

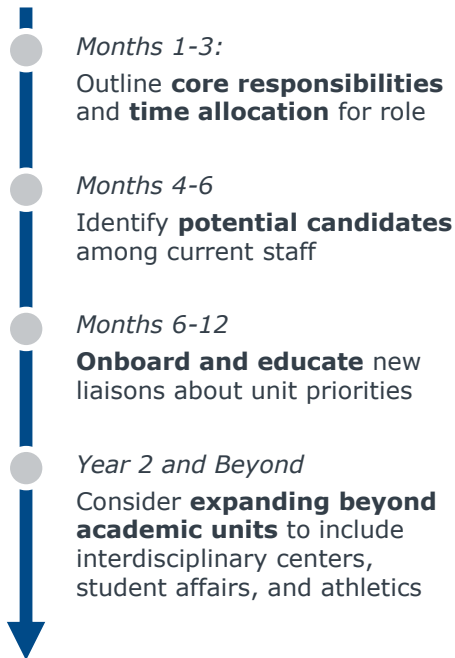
“Our frontline fundraisers are getting information on a more consistent basis, which helps them provide more insightful details to their prospects. And we can **support the dean without having a dedicated staff member** in each unit.”

*Kim Longo,
Executive Director of Major Gifts
University of Dayton*

Making It Work on Your Campus

Playbook for Establishing a Unit Advocate Initiative

Key Steps for Implementation



Potential Metrics to Measure Success

Responsibility Type	Goals
Understanding Unit Priorities	<ul style="list-style-type: none"> <input type="checkbox"/> Meet with at least one new faculty member per week <input type="checkbox"/> Create at least 10 unit priority information sheets <input type="checkbox"/> Hold two strategic priority discussions with the dean per year
Liaising with Advancement Staff	<ul style="list-style-type: none"> <input type="checkbox"/> Maintain online resource hub; update monthly <input type="checkbox"/> Lead quarterly training sessions on unit priorities <input type="checkbox"/> Answer 6-10 MGO information requests per week
Managing the Dean's Fundraising	<ul style="list-style-type: none"> <input type="checkbox"/> Organize one in-person visit per month <input type="checkbox"/> Meet annual fundraising goal for unit <input type="checkbox"/> Hold weekly meetings to set strategy and assign tasks

Meet the Academic Advancement Director

At Notre Dame, Dedicated Staff Connect Advancement to the Academy

Dedicated Role Increases Academic Fundraising Returns

Job Description: Academic Advancement Director

Core Responsibilities

- Understand and communicate dean's priorities
- Develop gift proposals
- Maintain consistent voice of unit leadership

Key Skills for Success

- Translate academic rhetoric for non-experts
- Inspire and inform frontline fundraisers
- Understand and show impact of philanthropy

Without Duplicating MGO Efforts



No Prospect Portfolio

Focus on communicating academic information to frontline fundraisers



Subject Matter Expertise

Time to develop fluency in one unit, then promote it to donors



Brand Management

Packages donor-friendly messaging for fundraisers to promote



Multidisciplinary Coordination

Work with other AADs to support transformational gift conversations



Constituent Relations

Answer hard questions from dean, faculty, staff, and donors

Charting the Path Forward

EAB Resources for Scaling the Reach of Current Partners

Discussion Questions

- 1 | With which academic fundraising superstars do we partner most often?
- 2 | What technology could we use to help our partners reach more donors?
- 3 | Do donor events allow academic partners to highlight their unique research and interests?
- 4 | How do we manage the flow of information from academic partners to advancement staff?
- 5 | What resources are available to keep advancement staff informed about academic priorities?

Next Steps for Implementation

Short-Term

- Ensure that current partners' travel commitments are used effectively
- Assemble existing information about academic priorities in one location
- Coach academic partners before cultivation events

Long-Term

- Assign responsibility for triaging requests and questions for partners
- Explore technological solutions to reduce partner travel time



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