



# Maximizing Fundraiser Efficiency

Innovations in Major Gift Strategy

Advancement Forum

**We help schools support students from enrollment to graduation and beyond**

➤ **ROOTED IN RESEARCH**

**7,500+** Peer-tested best practices

**500+** Enrollment innovations tested annually

➤ **ADVANTAGE OF SCALE**

**1,700+** Institutions served

**4 M+** Students supported by our SSMS

➤ **WE DELIVER RESULTS**

**95%** Of our partners continue with us year after year, reflecting the goals we **achieve together**

➤ Find and enroll your right-fit students

➤ Support and graduate more students



➤ Prepare your institution for the future



# Advancement Growth Focused on Major Gifts

## Institutions Staffing Up, Starting with Frontline Fundraisers

### Advancement Investments Reach New Highs

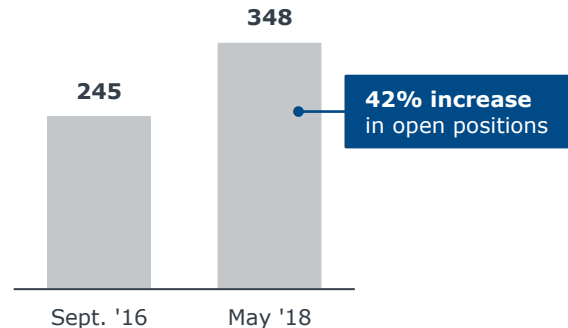
*Advancement Investment and Performance Initiative, FY2016-FY2018 Average*

**10.0%** Increase in **advancement** investment

**15.9%** Increase in **development** investment

### Major Gifts Team Expansion Is Top Priority

*Number of Job Postings for Development Officers at Colleges and Universities*



“I’m hiring three or four **new major gift officers** over the next two years. It’s the top area where we’re staffing up.”

*Vice President of Advancement  
Private Master’s University*

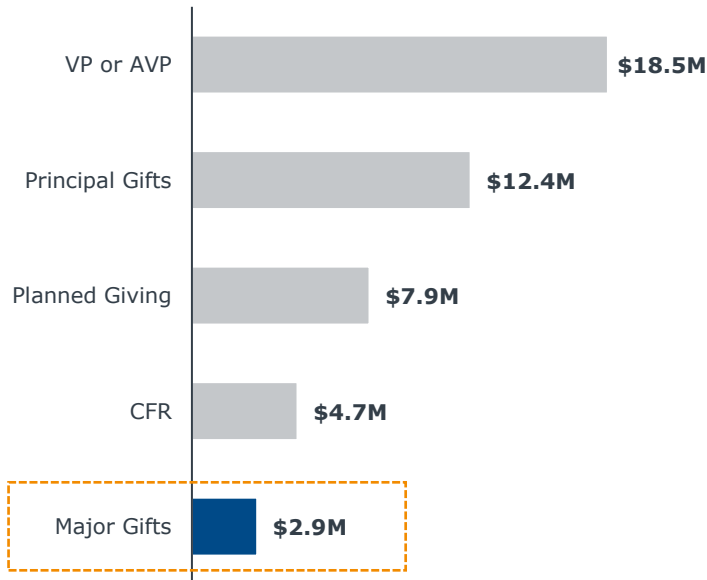


# MGOs: The Lowest-ROI Frontline Investment

## Top Performers Mask Inefficiencies Within Fundraiser Ranks

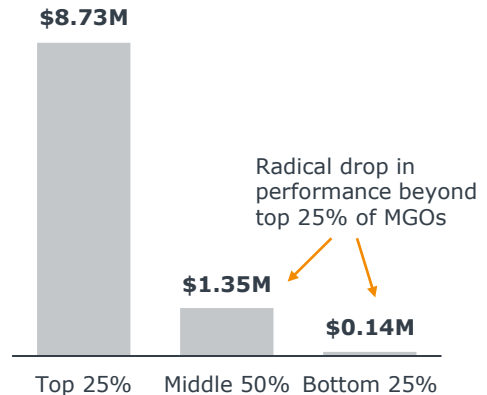
### Major Gift Officers Underperform Compared to Colleagues

Average Fundraising Production by Role, FY2018<sup>1</sup>



### Top Performers Carry the Team

Average MGO Fundraising Production by Quartile, FY2018<sup>2</sup>



# 49%

Of major gift officers raised **less than \$500K** in 2018

1) n=1283

2) n=765



# CAOs' Sights Turn Toward Efficiency

Working Smarter, Not Harder to Increase Major Gift Returns

## Growing Urgency to Address Fundraiser Inefficiencies...

**88%** Of polled CAOs were "interested" or "very interested" in **enhancing fundraiser efficiency**

“We’re **spending more than ever on fundraisers**, but it’s not moving the needle on our goals.”

“Our **ROI should be through the roof**. What’s the point of hiring more fundraisers if they’re not going to bring in enough gifts to justify their salaries?”

## ...Linked to Numerous Concerns



*Why aren't our fundraisers bringing in **more major gifts**?*

- ▶ Inadequate qualification calls
- ▶ Low number of visits
- ▶ Poor prospect coverage
- ▶ Long cultivation timelines
- ▶ Asks below capacity



# Identifying Barriers to Efficiency

## Three Pain Points Limit Majority of Gift Officers

# 1

### **Reinventing the Wheel on Strategy**

Strategy playbook rewritten for every cultivation cycle

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#### *Results*

- Uninteresting cultivation steps
- Customized collateral for one-time use

# 2

### **Lack of Clear Intermediate Goals**

Trial and error used to reach overall performance metrics

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#### *Results*

- Winding path from qualification to gift
- Results hide inefficiencies throughout workflow

# 3

### **Non-Fundraising Activity Creep**

Asks across campus reduce valuable fundraising time

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#### *Results*

- Inadequate time spent on the road
- Academic leaders assign all external-facing tasks to MGOs

## An Acute Need To Increase Productivity

“ I know that not every hire is going to be a superstar... The question on my mind is **how to make everyone on my team more productive**, regardless of where they rank right now.

Even **getting everyone to bring in 5-10% more gifts would have a huge impact on our bottom line** in the next few years.”

*Vice President for Development and Alumni Relations  
Private Research University*

# Maximizing Fundraiser Efficiency



## Roadmap for Our Discussions

1

### Develop Donor Strategy at Scale



- Bring new hires up to speed quickly
- Meet donor demands without excessive customization

2

### Enhance Intermediate Goal Accountability



- Prepare managers for goal-setting conversations
- Leverage data analysis to identify workflow pain points

3

### Realign Time Investments



- Increase ROI of unit-based fundraisers
- Reduce jack-of-all-trades expectations for MGO responsibilities



# Maximizing Fundraiser Efficiency

## Roadmap for Today's Discussion

1

### Develop Donor Strategy at Scale



- Bring new hires up to speed quickly
- Meet donor demands without excessive customization

2

### Enhance Intermediate Goal Accountability



3

### Realign Time Investments



# Donors Demand a Transformative Experience

Impact-Driven Cultivation Now Expected Across the Giving Pyramid

## Donor-Investor Mindset Now Shapes...



Transformative  
impact



Bold  
ideas



Hands-on  
engagement

## ...All Levels of the Giving Pyramid



**Major gifts** require increased customization and lengthy proposals



**Annual giving** responds to donor demand for an “Amazon experience”

## From One-Off Meetings to Experiences at Scale



As our **supporters want to have experiences related to their investment**, gift officers will have to be more involved in planning new kinds of engagement opportunities.

You used to be able to ask a faculty member to join a visit with you. These days, the donor is visiting campus, and they’d like to roll up their sleeves in the lab. **How do we scale that?”**

*Jeff Shilling*

*Associate Vice Chancellor, Philanthropy  
University of California, Santa Cruz*

# Stretching 'Status Quo' Strategy Past Its Limits



## Donor Expectations Complicate Traditional Major Gifts Pursuits

### Donors Expect a Bespoke Process...



*"I expect the giving process to match my interests, mindset, and lifestyle."*



#### **Priorities Just for Me**

*Giving opportunities specially designed around my interests*



#### **Personalized Timeline**

*Processes that move as quickly as I do in business*



#### **On-Demand Reporting**

*Investment-style online portal to monitor my impact*



### ...Misaligned with Current Reality

#### **Gift destination**

- General student support

#### **Timeline**

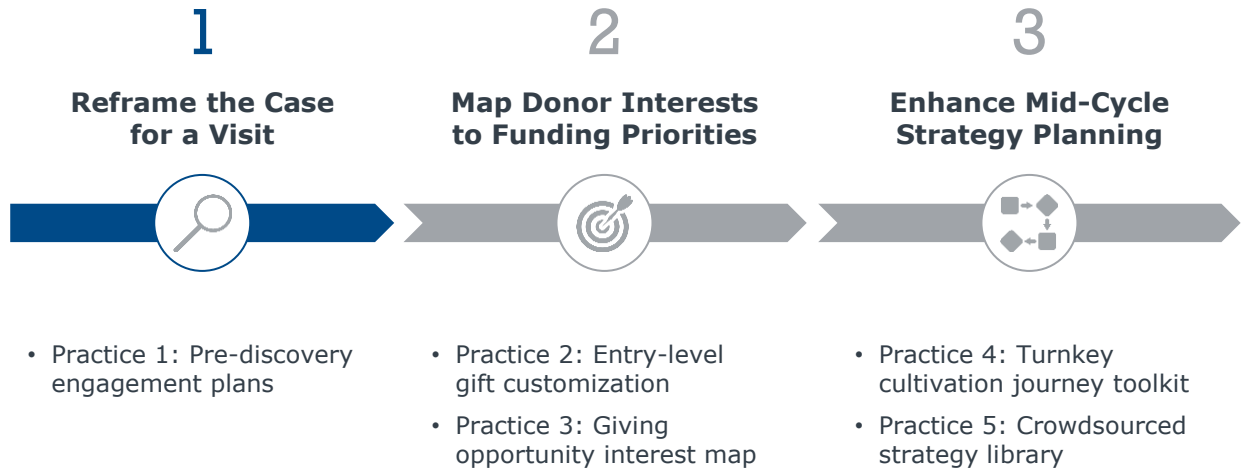
- Two in-person meetings
- One email from the provost
- 18 months until ask date

#### **Stewardship plan**

- Paper impact report sent at end of fiscal year
- Invitation to on-campus luncheon

# Develop Donor Strategy at Scale

## Strategies to Streamline Cultivation Processes



# Challenges Across the Outreach Spectrum

## Getting in the Door with Prospects More Challenging Than Ever

### Picking Up the Phone Is an Endangered Activity



*Which of the following situations make you avoid an incoming phone call?*

1. I know the call will be time-consuming
2. The caller is whiny or needy
3. I am currently attending an event
- 4. The caller wants a favor**
5. I want to avoid verbal confrontation
6. Someone will overhear me
7. I am busy with work responsibilities

### Yet Email Goes Unopened



# 121

Average number of **emails received per day** by office workers

# 20%

Average **open rate** for emails from nonprofits

### And Meetings Have Lost Their Luster



# 25M

**Meetings per day** in the United States

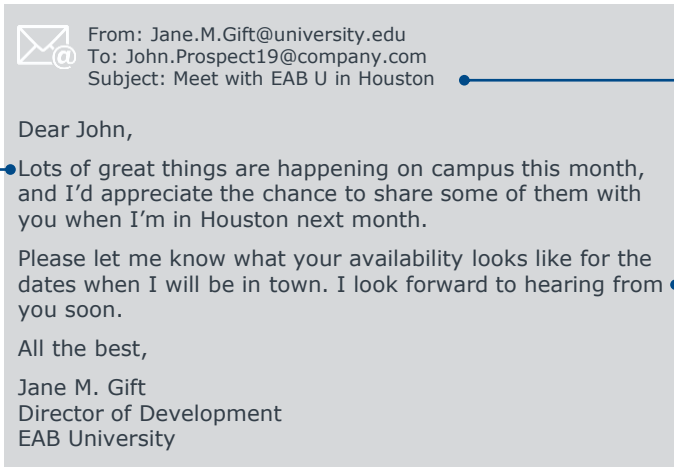
# 67%

Of meetings are **considered failures**

# Struggling to Start the Conversation

'I'll Be in Town' Outreach Gives Prospects Few Reasons to Reply

## An Email Destined for 'Deleted Items'



**Generic subject**

**Vague content**

**Uninteresting next steps**

## Leaving Prospects with Unanswered Questions



*Will this meeting be worth my time?*



*Am I supposed to know who you are?*



*Is this different from the event I was invited to?*

# Giving Prospects a Reason to Respond

## Furman Builds Outreach Strategy Around Prospect Interests

### Pre-Discovery Engagement Plans Catch Prospect Attention

- ✓ Tailgate for former student athletes before rivalry game
- ✓ Student research presentation day on campus
- ✓ Orchestra concert followed by private Q&A session

### Four Key Elements

- 1 Based on **areas of interest**
- 2 Variety of **locations and times**
- 3 Planned by **teams across advancement**
- 4 Connected to scalable **segmentation coding** in database

### Comprehensive Outreach Plan Drives Response Rates



Peer-to-peer  
networking calls



Personalized  
email invitations



Student caller  
follow-up reminders

# Engineering Efficiency into Discovery Outreach



Furman's Engagement Plans Minimize Time Costs, Maximize Returns

## Accelerating Giving Conversations...

“Once we get a foot in the door with these prospects, they will respond to MGOs' outreach. That first positive response helps us **jumpstart the conversation about giving opportunities.**”

*Shon Herrick  
Associate Vice President for Development  
Furman University*

## Benefits for MGOs

- ✓ Clarifies **prospects' interests** upfront
- ✓ Reduces hunting for relevant **engagement events**
- ✓ Opens doors to connect with critical **campus partners**

## ...And Avoiding the Trash Folder

 **49**  
Unresponsive prospects have responded to an **invitation**

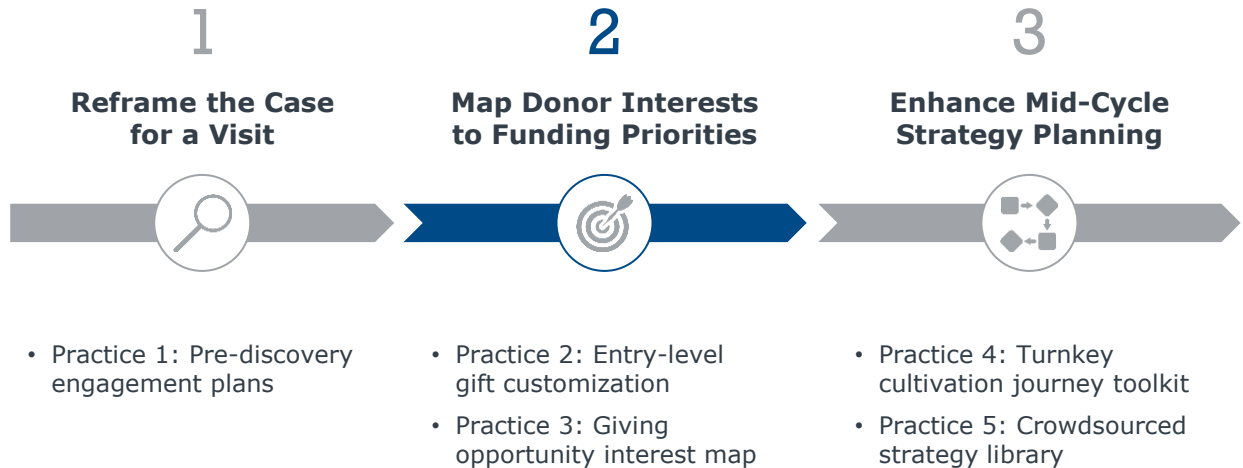
 **36**  
Unresponsive prospects have attended an **event**

 **121**  
Unresponsive prospects made a **gift** in FY18



# Develop Donor Strategy at Scale

## Strategies to Streamline Cultivation Processes



# Struggling to Find a Perfect-Fit Gift Destination

Prospects Don't See Their Passions in the Priorities We Pitch

## Philanthropic Interests Increasingly Diverse



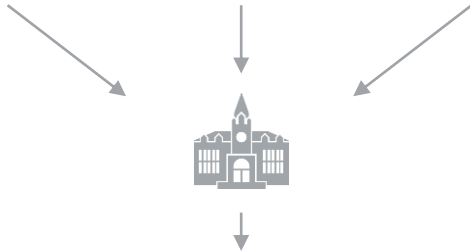
Students from  
my hometown



First-generation  
university students



Left-handed  
soccer players



### Institutional Response

Current use unrestricted scholarships



### MGOs Struggle to Connect the Dots

“We set our fundraising priorities to please everyone, which led to broad buckets that aren’t interesting to donors.

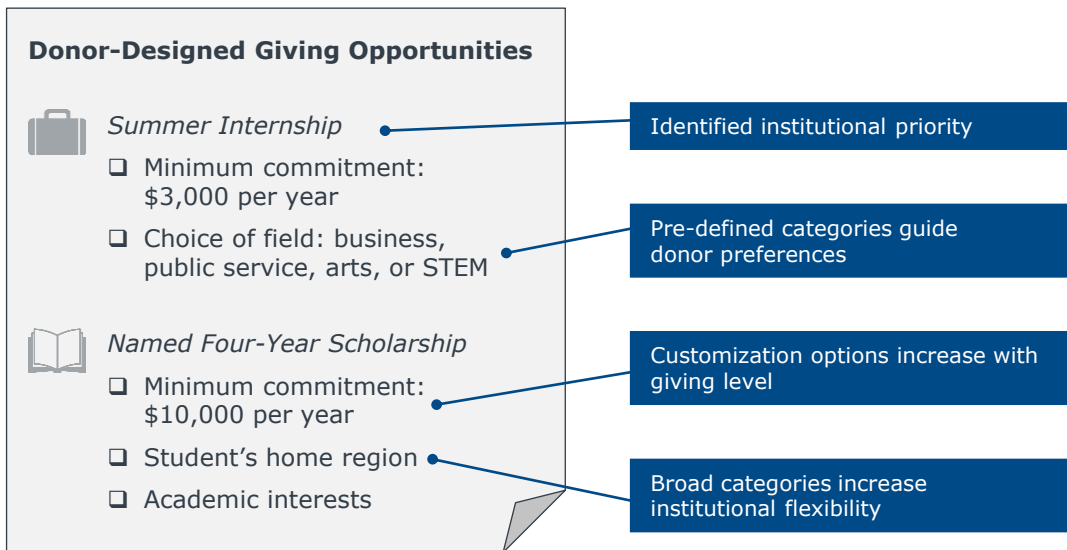
Gift officers are having a hard time convincing our donors that **a broad giving destination will have the impact they are looking for.**”

*Associate Vice President  
for Development  
Public Research University*

# Offering Donors Bounded-Choice Customization

Sewanee, The University of the South Scales Donor-Designated Gifts

## Customized Gifts Designed with Clear Guardrails for Staff



# A Positive Response to Customization at Scale

## Sewanee's MGOs Leverage Gift Options to Engage Overlooked Prospects

### Increased Giving for Institutional Priorities



**\$1.3M+**

Raised for entry-level customized gifts since program launch

### A Critical Tool to Bring Prospects into Major Gifts

“ Too often, gift officers **only pay attention to the prospects who can make six-figure gifts**. They're not working on developing a future pipeline or engaging everyone in their portfolio.

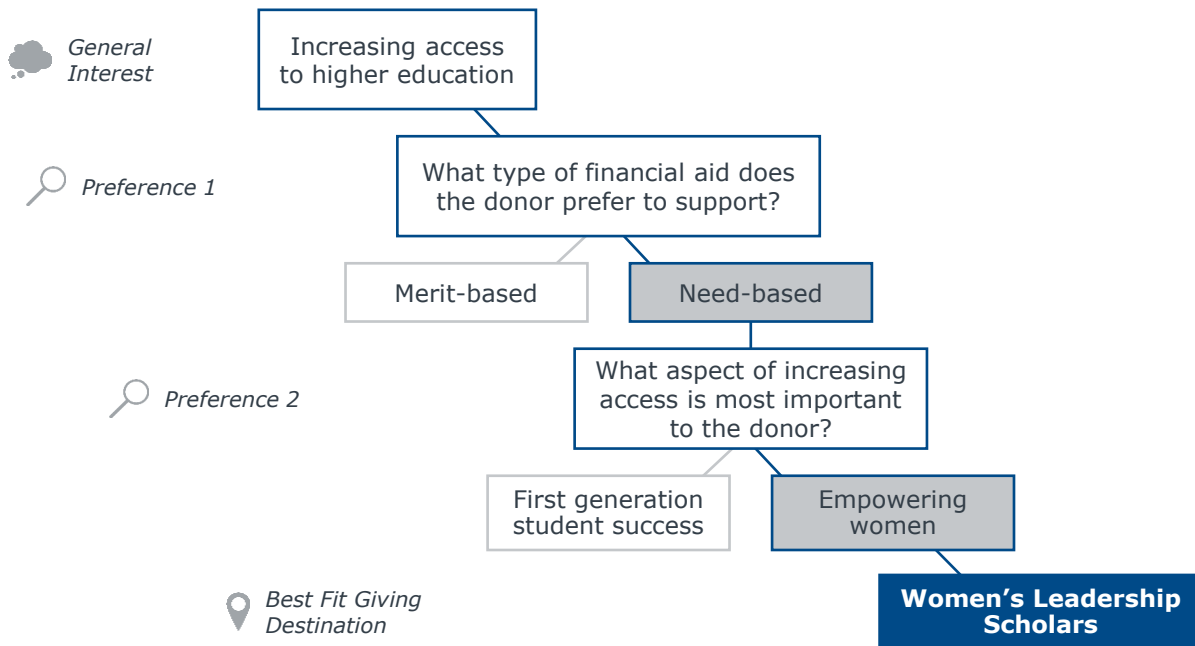
By creating impactful annual giving vehicles, gift officers have **a lively toolbox to engage the mid-major donor**, guiding them to make a multi-year commitment, thereby growing your major giving pipeline of the future.”

*Robert Black  
Associate Vice President for Advancement  
Sewanee, The University of the South*

# A Field Guide to Donor Interests

University of Denver Helps MGOs Connect Passion to Priority

## Interest Map Helps MGOs Connect Unique Interests to Campus Needs



# Making it Easy to Align Interests

## Giving Opportunity Map Focuses Fundraising on Institutional Needs

### MGOs Gain a Critical Tool for Scholarship Funding Conversations



MGOs spend less time  
**hunting for priorities**  
relevant to the donor



Ensures all gifts are  
**feasible to implement**  
and steward



Increases appeal of  
**traditional funding**  
**destinations**



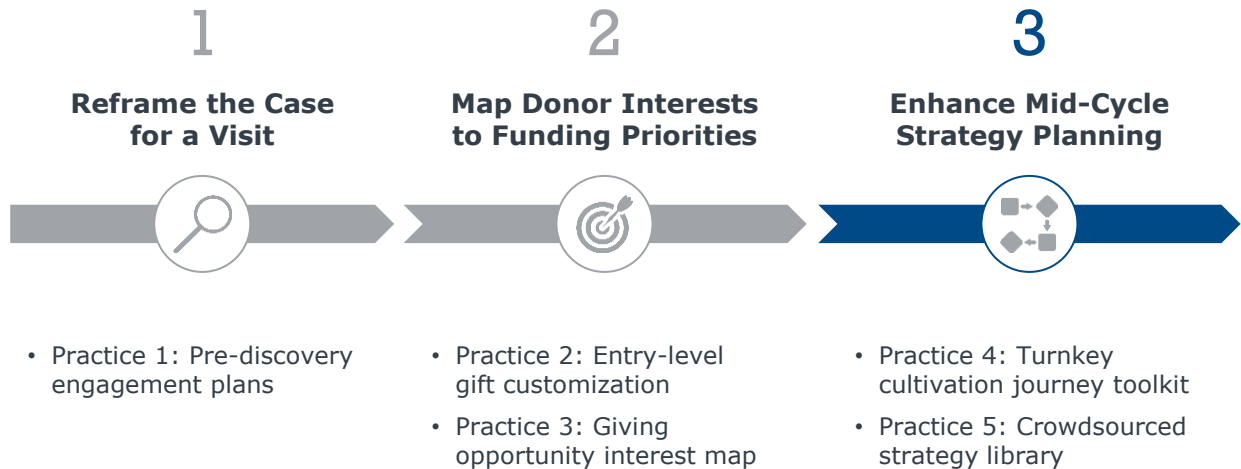
### Meeting Donor Expectations and Institutional Needs

“If scholarships are going to be 50% of our campaign goal, we have to make them relevant to a range of donor interests. These tools help our gift officers hold **conversations based on why donors want to support us** without losing sight of our institutional priorities.”

*Roger Smith*  
*Executive Director of Development*  
*University of Denver*

# Develop Donor Strategy at Scale

## Strategies to Streamline Cultivation Processes



# Losing Momentum After Discovery

## Cultivation Strategies Stagnate En Route to Solicitation

### Strategy Starts Strong, but Lacks Detail After Preliminary Visits

*Jane Q. Smith's Donor Journey*

#### A Promising Launch

*Visits 1 and 2*

- Clear visit **plan and goals**
- Thoughtful questions and **talking points**
- Logical **next steps**

#### An Ever-Delayed Proposal

*Visits 7-9+*

- **Moved back** on a regular basis
- **No urgency** for gift officer or donor

#### The Murky Middle

*Visits 3-6*

- No obvious **reason to meet**
- Visits used to build rapport, **not move strategy forward**





# A Ready-to-Use Prospect Strategy







## Clemson Develops Tools to Remove Questions from Planning Process

### Stage-Specific Resources Get MGOs Up and Running Quickly

#### Donor Cultivation Calendar

- Phase 1: Qualification
- Phase 2: Discovery**
- Phase 3: Cultivation**
- Phase 4: Pre-Solicitation
- Phase 5: Solicitation
- Phase 6: Solicitation Follow-Up
- Phase 7: Stewardship

#### Available Plug-and-Play Resources

-  Critical questions to **guide the conversation**
-  **Agenda-setting questions** to guide strategy
-  **Pivotal moments** to move strategy forward
-  Updated **collateral** and templates
-  Troubleshooting for **tough scenarios**
-  Actionable **next steps**

# The Right Resources at the Right Time

## Clemson's Just-in-Time Tools Take Uncertainty Out of Strategy Prep

### Sample Toolkit Components for Cultivation



#### **Agenda-Setting Questions**

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- Is my plan right for the donor?
- Is my ask at the right level?
- Is now the right time for an ask?
- Do I know what my next steps will be?



#### **Action Steps**

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- Meet with a scholarship recipient
- Visit financial aid office
- Attend donor appreciation event
- Attend day of gratitude



#### **Tough Scenarios**

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- Financial condition impacts ability to give
- Donor writes a check for a different amount than discussed
- Academic leader shares priorities but doesn't mention scholarships

# The End of Strategy from Scratch

## Villanova Systematically Scales Successful Cultivation Plans

### One Successful Strategy...

Title	Date	Description	Step Type
Dinner with Dean	Oct. 2019	If donor is in town, will appreciate the touch point	Leadership Dinner
Building Update	Mar. 2020	Share progress on new pavilion	Impact Update
Student Center Report	May 2021	Send stewardship report for five-year naming anniversary	Stewardship

### ...Applied to Multiple Donors

- 1 Identify strong strategies with **positive results**
- 2 Assemble plans in **strategy development guide**
- 3 **Reuse and adapt** plans to individual donors

### Replicating Success Across the Team

“One of the biggest challenges for MGOs is looking years ahead and finding solutions when a gift is stuck. Through our new process we now have a record of successful strategies. Positive outcomes can be put in the strategy guide and **serve as a resource for other MGOs.**”

*Kevin Noller  
Assistant Vice President of Major Gifts  
Villanova University*

# Setting Strategy with Your Team

## Resources to Develop Donor Strategy at Scale

### Next Steps for Implementation

#### Short-Term

- ▶ Encourage MGOs to share and re-use quality cultivation strategies
- ▶ Edit outreach scripting to increase appeal for new prospects
- ▶ Organize current prospect-friendly collateral to maximize use

#### Long-Term

- ▶ Design giving opportunity interest map for current fundraising priorities
- ▶ Map turnkey donor journey for key fundraising priorities

### Discussion Questions

- 1 | Is our discovery outreach compelling to donors? How can we increase response rates?
- 2 | Are MGOs knowledgeable about giving opportunities on campus? How can we keep staff updated as priorities change?
- 3 | How can we improve the process of matching donor interests to giving opportunities on campus?
- 4 | How much time do MGOs spend creating cultivation plans? What resources would make the process faster?
- 5 | For critical priorities, have we mapped available collateral to each step in the cultivation process?

# Maximizing Fundraiser Efficiency

## Roadmap for Our Discussions

1

### Develop Donor Strategy at Scale



- Bring new hires up to speed quickly
- Meet donor demands without excessive customization

2

### Enhance Intermediate Goal Accountability



- Prepare managers for goal-setting conversations
- Leverage data analysis to identify workflow pain points

**Tuesday, May 19<sup>th</sup>**  
**1:00 to 2:00pm**  
**Eastern**

3

### Realign Time Investments



- Increase ROI of unit-based fundraisers
- Reduce jack-of-all-trades expectations for MGO responsibilities

**Tuesday, June 2<sup>nd</sup>**  
**1:00 to 2:00pm**  
**Eastern**

# Stay Current with EAB's COVID-19 Resource Center

101



[Enrollment](#)

[Student Success](#)

[Advancement](#)

[Operations and Strategy](#)

[Research and Insights](#)

[Events](#)



[Home](#) > [Research](#) > [Support your campus through the coronavirus crisis](#)

## Support your campus through the coronavirus crisis



Share

Support your school through the coronavirus crisis

1. Bookmark these pages for the latest official information about the coronavirus.
2. Use EAB research and resources to support your school's response to coronavirus.
3. Reference peer policies and other guidance when developing response plans.
4. Use these peer examples to help communicate coronavirus information.
5. Read the coronavirus responses from the major education associations.
6. Find Department of Education resources by state.

### 2. Use EAB research and resources to support your school's response to coronavirus

Most of these resources were not created specifically for infectious disease outbreak responses. That said, many of our existing resources can complement, supplement, and inform a variety of crisis response, planning, and mitigation efforts. Explore the three topic areas below.

- NEW Support student success during instructional disruption +
- Provide transparent and timely communication +
- Combat discriminatory responses to the coronavirus outbreak +
- Plan for potential financial and operational impact of the crisis +
- NEW Address basic needs insecurities of impacted students +

Regional and global information hubs, relevant EAB research and resources, and responses from major education associations to help you stay up to date and make informed decisions.

EAB Support your campus through the coronavirus crisis

1. EAB's latest take on the coronavirus crisis and what it means for higher education
2. Use EAB research and resources to support your school's response to coronavirus
3. Bookmark these pages for the latest official information about the coronavirus
4. Reference peer policies and other guidance when developing response plans
5. Use these examples to help communicate coronavirus

### 4. Reference peer policies and other guidance when developing response plans

Remote work policies +	Flashpoints and discrimination responses +
Remote teaching contingency plans +	Support for at-risk populations +
On-campus quarantine and decontamination plans +	Events and large group hosting +
Study abroad and international students +	Long-term planning and contingencies +
Support for students' basic needs +	Spring break policies +

Institution-specific examples of comprehensive websites, direct communication, and social media messaging, as well as sample policies and response plans.



**To Learn More:**  
[eab.com/covid19](https://eab.com/covid19)

## Incentives for Charitable Giving to Offset the Likely Dropoff From Recession

### Recessions Hurt Fundraising

*FY2008-2009 Shift in Donor Behavior*

**12.2%**

decline in total fundraising production

**33%**

decline in the three largest individual gifts at the median institution



#### Consider Communications Plan for New Provisions

- How will you train major gift officers to understand and apply these provisions?
- When and how will you communicate to donors (appropriately) about these tax opportunities?
- For major gift conversations that might come to fruition either this year or next, how can you pull forward by citing these expiring benefits?

### Could CARES Act Provisions Make a Difference?

*Some Help, But Unlikely to Have Dramatic Impact*

New programs apply only to **cash gifts** for **public charities** (not for Supporting Organizations or Donor-Advised funds) and are **temporary in 2020**

- ▶ **For those who do not itemize** (claim the standard deduction): Universal deduction for charitable contributions of up to \$300 from taxpayer's AGI<sup>1</sup>
- ▶ **For those who do itemize**: Can claim deduction for up to 100% of 2020 AGI (instead of typical 60%) and carry forward unused qualified cash deductions for 5 years, subject to normal 60% AGI
- ▶ **For corporations**: Increases current taxable income limit on contributions from 10% to 25% for 2020

Source: PG Calc, [CARES Act Includes Charitable Giving Incentives](#); Penn Wharton, [New Charitable Deduction in the CARES Act: Budgetary and Distributional Analysis](#); [Voluntary Support for Education Survey](#); EAB interviews and analysis.

1) Adjusted gross income



# Most Pressing Concerns Emerging from COVID-19

104

## How EAB Can Support Your Efforts to Navigate the Crisis and Beyond



### Strategy and Organization

- How should we deploy **federal relief** funds for optimal impact?
- How do we address immediate **cost-cutting** needs while preserving strategic options for the future?
- How can we use this **crisis as a catalyst** to prompt difficult decisions (e.g., program review) or enact bold change?
- What **enduring changes** (virtualization, financial fragility, safety-ism) will carry into the post-COVID-19 world, and how can we prepare?



### Undergraduate Recruitment

- How can we adapt our **yield, financial aid, and net tuition revenue** models for COVID-19?
- What **virtual** methods and strategies can we use to effectively **engage prospective students** and their parents?
- How can we convey an authentic, honest, and **meaningful portrayal** of our institution in a **virtual world**?
- How do we **augment our future prospect** pool when Search names are delayed?



### Student Success

- How can we address the **needs of underserved** student populations hurt most by COVID-19?
- How do we **virtually onboard** new students most effectively, so they don't reconsider their decision to attend?
- What do we do now and over the summer to **reenroll our fall class**?
- How do we use the lessons of the spring to **protect course completion** rates in the fall?



### Adult Learners

- What **educational offerings** will adult learners need most **amidst economic uncertainty**?
- What strategies will allow us to **expand** our adult learning efforts **within a cost-constrained** world post-COVID-19?
- How do we improve our **flexible and online delivery capabilities** to meet students where they are?

## Select EAB Resources



EAB's Coronavirus Resource Center on EAB.com



Enrollment Services, Financial Aid Optimization, and Agency Services



Navigate (Student Success Management System)



Adult Learner Recruitment Marketing



Academic Performance Solutions and Education Data Hub



YouVisit Interactive Content and Virtual Tours



Student Success Playbook



Market Responsive Program Design

# Please Reach Out to Continue the Conversation



**R. Fleming Puckett**  
*Senior Director*

[fpuckett@eab.com](mailto:fpuckett@eab.com)

...and register for our upcoming working-group series on the **next phase of COVID-19 responses**, including...

- Hiring and Onboarding Talent While Remote
- Fundraising Priorities and Messaging
- Planning for Summer and Fall 2020

**May 15<sup>th</sup>,  
22<sup>nd</sup>, 26<sup>th</sup>,  
and 27<sup>th</sup>**



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