



Meeting Advancement's DEIJ Moment

New Approaches to Fundraising, Engagement, and
Organizational Strategy

The Team Behind the Research:



Maria Morrison

Associate Director

Mmorrison@eab.com



Maggie Everett

Research Analyst

Meverett@eab.com



Jeff Martin

Senior Director

Jmartin@eab.com



Jenna Dell, Ed.D

Director

Jdell@eab.com



Liz Rothenberg, Ph.D

Managing Director

Lrothenberg@eab.com

Diversity, Equity, Inclusion, and Justice

Establishing a Common Ground for Discussion



BIPOC: Black, Indigenous,
and People of Color



Diversity

Representation of all the different characteristics that make one individual or group different from another.



Equity

Evaluating systems and institutions to identify and remove biases in the distribution of opportunities and resources.



Inclusion

Ensuring differences are welcomed, different perspectives are respectfully heard, and every individual feels a sense of belonging.



Justice

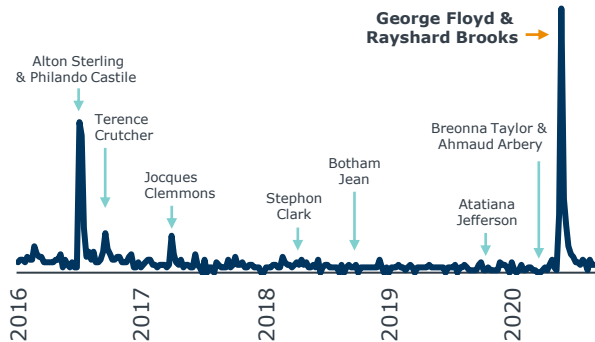
Systematic and proactive reinforcement of public policies, institutional practices, cultural messages, and social norms needed to achieve and sustain equity for all.

This Time, Something's Different

George Floyd's Death Reinvigorates the Civil Rights Movement

Despite Years of Murders, Public Awareness Doesn't Spike Until 2020

Shooting Victims, #blacklivesmatter Searches



Self-Education on Racial Justice Hits an All Time High

NYT Best Sellers, September 2020

- 1 White Fragility
- 2 So You Want to Talk About Race
- 3 Born a Crime
- 4 The Warmth of Other Suns
- 5 Just Mercy

Americans Take to the Streets in Record Numbers

“About 15 million to 26 million people in the United States have participated in demonstrations over the death of George Floyd and others.... These figures would **make the recent protests the largest movement in the country's history.**”

New York Times, July 3, 2020

Sensing Opportunity, Students Demand Change

Campus Protests Aimed at Impacting Policy and Structure

269

Of the 500+ student activism data points were racial justice focused from 2015-2020



Colleges And Universities Are In For A Racial Reckoning



Students Organize For Racial Justice On Campus And Off

A Picture of 2020:

40% of 2020 student activism were focused on racial justice¹

- ▶ **50%** of activism at public universities
- ▶ **33%** of activism at private universities

Common **Racial Justice Demands:**

- Increase faculty and staff of color
- Increase diversity-focused training for faculty, staff and administrators
- Increase funding for black student organizations
- Add a diversity-focused course requirement
- Increase transparency and student representation in university decision-making
- Remove symbols of oppression

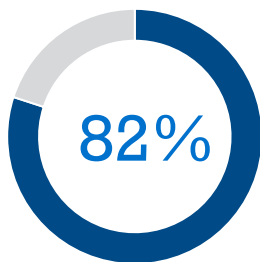
1) Another 40% has targeted universities' responses to COVID-19, and 20% is for miscellaneous causes.

Higher Ed Promises Change—But Is It Enough?



Presidents Speak Up En Masse But Offer Few Concrete Commitments

Presidents Across the Country Release Anti-Racism Statements...



Of institutions released statements after the murder of George Floyd



...But Most Don't Promise Enough to Create Real Change On Campus

61% Of statements **did not include long-term actions**

70% Of statements with action items **did not include measures of success**

67% Of statements **did not include a timeline** for implementing changes



University of Redlands (June 29)

- Direct 14% of career service funding to Black students and alumni
- Establish DEI course for local police



Miami University (September 4)

- Partner with HBCUs and HSIs to offer teach away/study away programs
- Require all students to take a one-credit intergroup dialogue course

The High Price of Structural Change

Immense Cost Pressure Imperils Needed Investments in DEIJ

Transformation Takes Investment...

Removing Financial Barriers for Students



- First-gen student scholarships
- Student emergency aid

Re-envisioning Equitable Pedagogy



- Flipped-classroom renovations
- Bottleneck redesign releases

Diversifying Faculty Ranks



- Professorships in Black studies
- Centers for equity research

Impacting Underserved Communities



- Social innovation seed funding
- Extension program growth

...But Covid Guttled Our Resources

\$7M

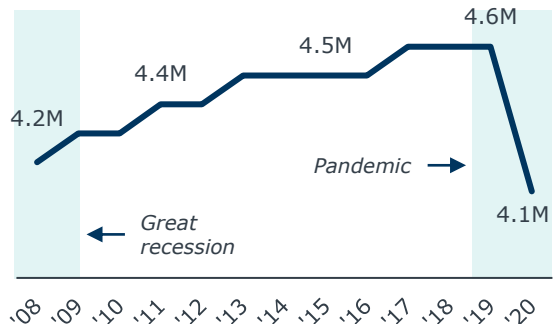
Median emergency cost, April 2020

8.1%+

Drop in first-year enrollment for 2020 academic year

Higher Education Loses 650,000 Jobs During the Pandemic

January 2008-December 2020, USA Jobs



Source: ["Term Enrollment Estimates, Fall 2020"](#), National Student Clearinghouse Research Center; EAB Survey of Colleges and Universities and analysis; Current Employment Statistics Data Series, US Bureau of Labor Statistics as Reported in ["A Brutal Tally: Higher Ed Lost 650,000 Jobs Last Year"](#), *The Chronicle of Higher Education*, Feb 5, 2021; Advancement Forum interviews and analysis.

If Not Us, Then Who?



Advancement Uniquely Positioned to Find Funding for DEI Initiatives

“

[DEI] is a top priority for our president. She's been coming to me more because **the only way we're going to get this done is if we're able to secure philanthropic funding for it.** My team is at the center of it. Our university's success is dependent on advancement's success.

*Vice President for Advancement
Regional Public University*

”

Starting from Behind



Significant Institutional Barriers Have Prevented DEIJ Progress Sooner

DEIJ Fundraising Roadblocks

- ✘ Lack of mandate from institutional leadership
 - ✘ Underdeveloped giving opportunities
 - ✘ Donor hesitation (and hostility) to investing in DEIJ
 - ✘ Legal barriers to diversity-focused scholarships
- ✘ Diversity absent from frontline fundraising teams

“

Donors Begin to Expect Fundraiser Diversity

“Out of our 30 gift officers, none are Black. Only one is Asian-American. Demographically, our student population is now majority-minority. **Donors are starting to notice and ask why our fundraisers don't look like our students.**”

*AVP Development,
Private Research University*

”

Not Advancement's First Foray into DEIJ

A Half-Decade of Activity Across the Industry

Persistent Attention from the Press and Professional Associations



Philanthropic Leadership Shouldn't Still Look Like the **Country-Club Set**



In Philanthropy, **Race Is Still a Factor in Who Gets What**



Diversity, Equity, and Inclusion in Advancement



Building Board Capacity for Justice, Diversity, Equity, and Inclusion



Resources for Chapter Inclusion, Diversity, Equity, and Access Chairs

Major EAB Research Initiatives Focused on DEIJ



The Changing Face of the 21st Century Donor (2016)



Engaging Alumnae, LGBT Alumni, and Alumni of Color (2017)



Building a More Diverse Volunteer Community (2018)



Winning the Future: Recruiting and Retaining Diverse Staff (2020)

Source: Heintz, S., "Philanthropic Leadership Shouldn't Still Look Like the Country-Club Set" Chronicle of Philanthropy, April 16, 2020; Sullivan, P., "In Philanthropy, Race is Still a Factor in Who Gets What, Study Shows" The New York Times, May 1, 2020; Private sector company websites; Advancement Forum interviews and analysis.

Advancement's Transformative Half-Decade



Recent Growth Positions Us to Tackle Perennial DEIJ Challenges

Since 2015, the advancement profession has...

Reinvented Organizational Strategy



Professionalized recruitment and retention processes



Refined roles, responsibilities, and performance indicators



Established data-driven systems for better decision making

Refocused Fundraising on the Major/Principal Gift Pipeline



Created transformative, "big idea" giving opportunities



Developed systems for upskilling staff on complex projects



Mapped donor passions for pipeline efforts

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Advancement will...



Create Diverse, Inclusive Advancement Teams

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Advancement will...



Marshal Resources for DEIJ Initiatives



Create Diverse, Inclusive Advancement Teams

SECTION

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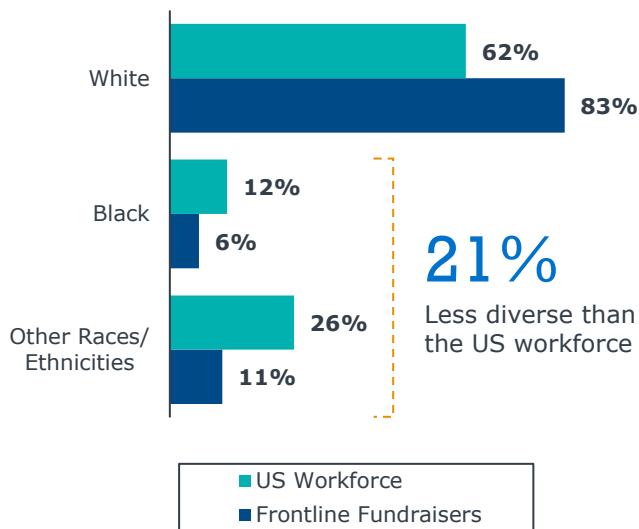
Today's Talent Strategy is Not Enough



Fundraising Lacks BIPOC Talent More Than Other Industries

Front Lines Notably Homogenous

Fundraiser Diversity, 2019



“

“One of our key **priorities is diversifying our advancement team**. It’s challenging, especially in our location. We, like many, are struggling, but we’re dedicated to doing it.”

*Margot Biggin,
Executive Director of
University Advancement
Tufts University*

”

Why Isn't Advancement Diverse?

A Multitude of Barriers and Roadblocks

Contributing Factors to the Lack of BIPOC Staff in Advancement



Why Isn't Advancement Diverse?

Talent Problems Emerge from Every Point in Candidates' Journeys

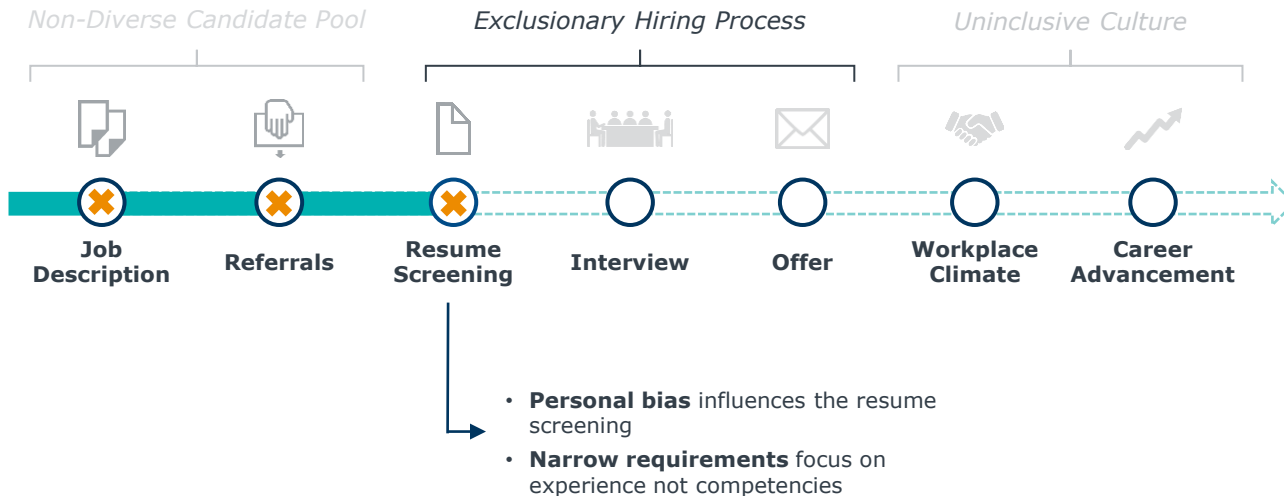
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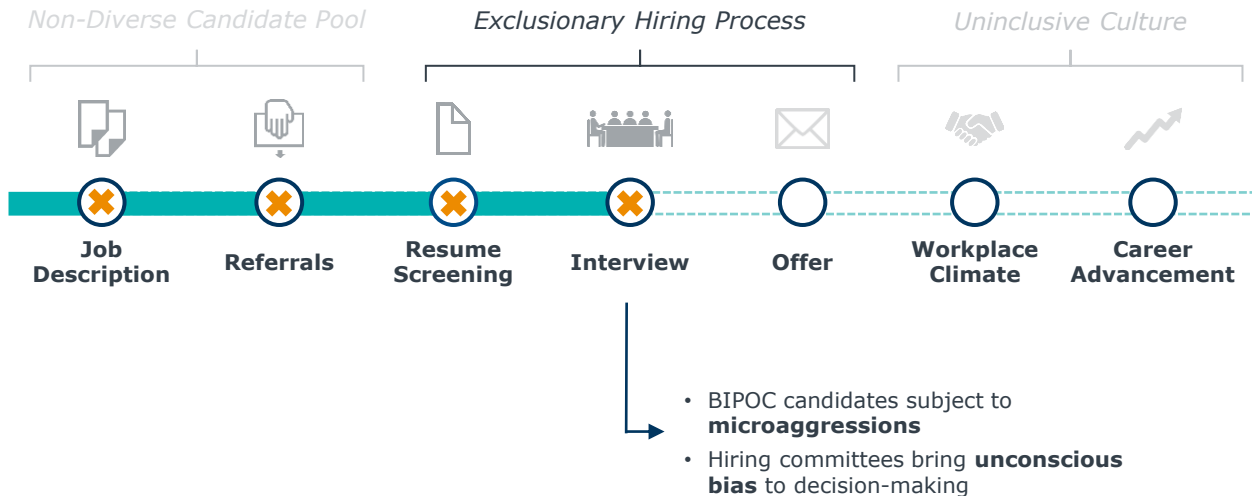
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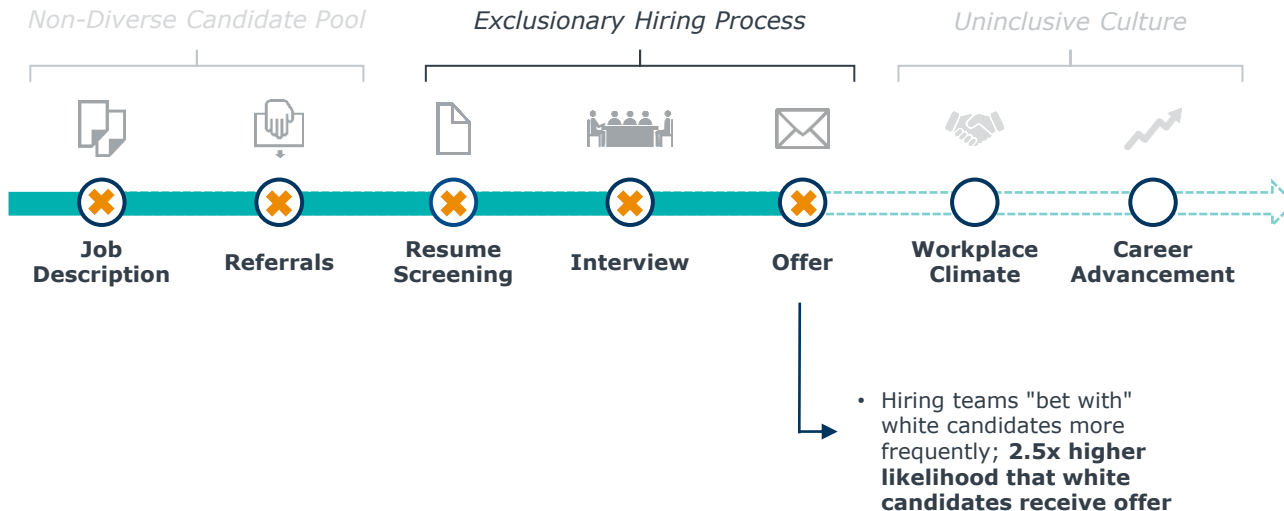
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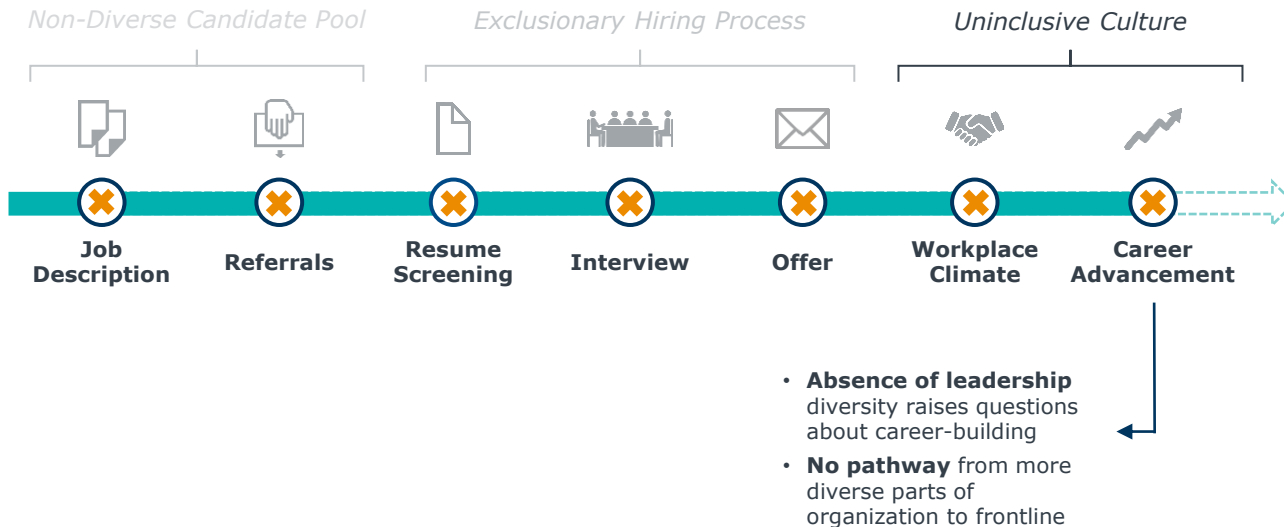
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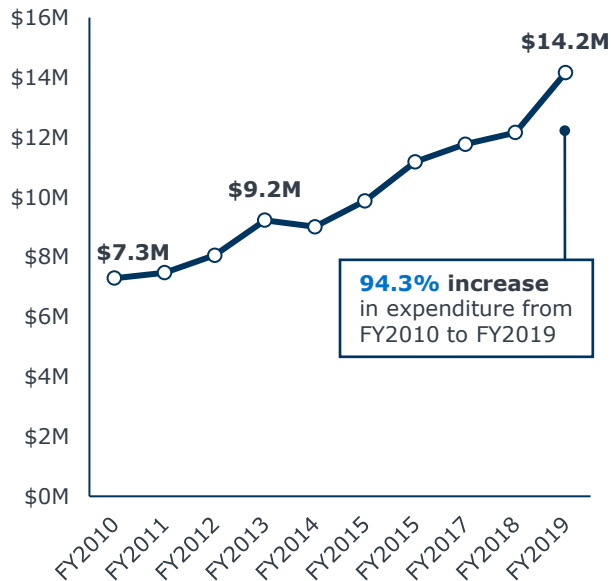


Whirlwind Growth Professionalizes the Industry

As Advancement Scaled Up, Organizations Developed New Competencies

Years of Bigger Budgets...

Average Advancement Expenditure, FY10-FY19



...Led to Strengthened Talent Management Practices



Professionalized Recruitment Practices

- Proactive cultivation of candidates
- Expansive search networks



Comprehensive Performance Metrics

- Fundraiser activity and outcomes metrics
- Organizational efficiency tracking



Systematized Paths to Career Advancement

- High potential talent development programs
- Non-management career ladders



Organizational Strengths

- 1. Professionalized Recruitment Practices**
2. Comprehensive Performance Metrics
3. Systematized Paths to Career Advancement

Proactively Cultivate BIPOC Candidates Before They Apply

The Strategy

- Staff identify, connect with, and build relationships with BIPOC candidates who would not otherwise enter the hiring pipeline
- Hiring managers prioritize out-of-industry candidates to circumvent traditional talent-supply constraints

Applying the Development Playbook to Hiring



Rutgers Cultivates Diverse Transferable-Skill Candidates Like Donors



"I treat recruiting diverse individuals like a donor visit. **I literally copy the development playbook and apply it to diverse prospective candidates.** I go visit them and build a close relationship with them. After I get to know them personally, it's easier to invite them to apply for a job opening that they will be the perfect fit for."

*Tahsin Alam
Vice President, Advancement Solutions and Talent Management
Rutgers University Foundation*



Identify Leads

Build a list of **diverse alumni** living within one hour of campus using LinkedIn and the database



Establish Connection

Proactively engage alumni virtually to assess their interest in a fundraising career



Cultivate Interest

Invite qualified alumni to advancement **staff trainings** and discuss relevant job openings

Moving the Needle on Staff Diversity

Rutgers More than Doubles BIPOC Representation in Advancement

Wide-Spread Efforts to Diversify Pay Off

13%

Of Rutgers Foundation staff were racially diverse in **2015**



29%

Of Rutgers Foundation staff are racially diverse in **2021**

Making It Work on Your Campus



Look for candidates working in professions with high racial diversity



Ensure your interview process evaluates skills, not prior experience



Focus on central advancement roles rather than ones based in academic units

Use EAB's Competency-Based Hiring Toolkit Online [Here](#) ▶





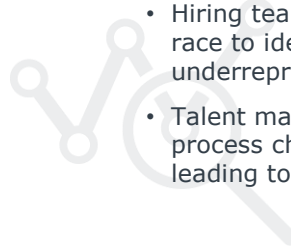
Organizational Strengths

1. Professionalized Recruitment Practices
2. **Comprehensive Performance Metrics**
3. Systematized Paths to Career Advancement

➤ 'Metricize' the Hiring Process to Identify BIPOC Drop-Off Points

The Strategy

- Hiring teams disaggregate recruitment data by race to identify process bottlenecks at which underrepresented candidates get disqualified
- Talent management institutes targeted process changes to counteract the biases leading to lower hire rates



Metric Mania Sweeps Advancement

'What Gets Measured Gets Done' Now Governing Principle in the Industry

Metrics Span the Division



MGO activity and **outcomes metrics**



Multi-year **performance projections**



Alumni **engagement indexes**



AI-enabled prospect prioritization



Organizational **ROI analyses**

“

Performance metrics are very important. Honestly, they're becoming more important within our organization as time goes on. Before, performance management and strategy assessment was more anecdotal. Now, **we are trying to measure everything.**

*Executive Director,
Advancement
Regional Public Institution*

”

Applying Metric Principles to Hiring



University of Oregon's Pipeline KPIs Tackle Systemic Bias in Recruitment

Tracking KPIs Across the Hiring Process to Identify Leaks

Pipeline Points Assessed

- Initial candidate pool
- **Resume screen**
- **First round interview**
- Campus interview
- Job offer

Candidate Information Measured

- ✓ Voluntary Race
- ✓ Veterans Status

Hiring Process Changes To Even the Playing Field

Resume Screen



Uneven number of BIPOC candidates disqualified during resume screen

- ▶ **Expand criteria** for passing candidates to first round interviews
- ▶ Institute **resume double check** process among recruiters

First Round Interview



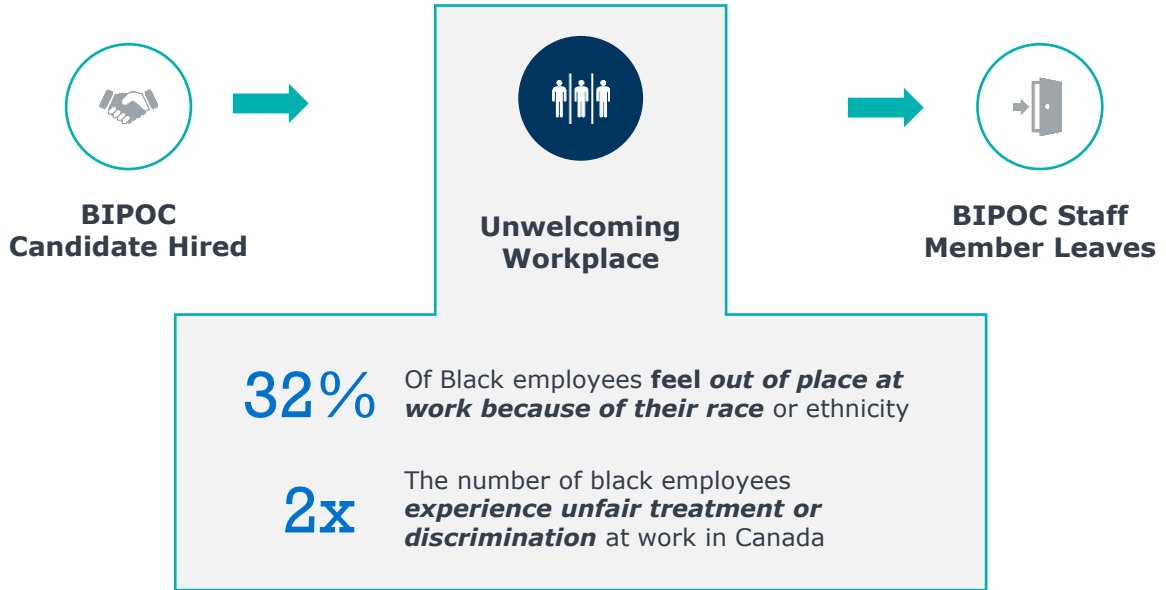
Analysis suggests video interviews for fundraisers create opportunities for bias

- ▶ **Require phone screen** for fundraising candidates rather than offering video options

'The Sieve and the Sand'

Hiring Efforts Go to Waste if Retention Left Unaddressed

Recruitment Gains Offset by BIPOC Attrition





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The Strategy

- Recruitment assesses demographics at each stage of the hiring process and identifies where BIPOC candidates are being disqualified

➤ **Incentivize DEIJ-Focused Professional Development**

The Strategy

- Annual performance reviews for all staff include metrics related to DEI-related professional-development activities
- Long-term career incentives drive active involvement and self-education and help foster an inclusive culture

Incentivize the Change You Want to See in the World

31

Rutgers Implements Individual DEIJ Metric to Foster an Inclusive Culture

Continuum of Systemic Change

Educate the Workforce

Establish Routines

Incorporate Metrics



Of **year-end performance evaluation is tied to DEI** for every employee

Sample Projects

Recommendations help staff determine initiatives to pursue

- DEI Book Club leader
- Present on a documentary
- Volunteering

Role in Career Advancement

Staff work on DEI determines long-term success through:

- Promotion potential
- Opportunity for a raise
- Institutional fit



Organizational Strengths

1. Professionalized Recruitment Practices
2. Comprehensive Performance Metrics
3. **Systematized Paths to Career Advancement**

➤ Create Equitable, Transparent Growth Opportunities

The Strategy

- Cross-departmental mentor relationships bridge the “mentorship gap” for BIPOC staff
- Transparent promotion criteria and open position postings create more pathways for career growth
- DEI committee service rotates so BIPOC staff aren’t overburdened with side-of-desk work

Talent Development Offers Solve for Attrition Woes

Will “Growing Your Own” Replace “Steal a High Performer” in the Near Future?

A Lack of Infrastructure Leads to High Performer Turnover

“

I know of some institutions where every incremental dollar of investment goes to hiring another fundraiser. But **there’s no infrastructure, and it leads to a revolving door of high performers.** Many institutions are now investing in strategic talent management to help professionals understand why staying in one place is valuable for the fundraiser as well as the institution.”

*Peter Hayashida
President, UC Riverside Foundation and
Vice Chancellor, Advancement
University of California, Riverside*

”

Retaining Talent with Professional Development Opportunities



Standardized onboarding



Cross-division education



Division rotation programs



Rising star leadership programs



Mentorship programs

Creating Equitable Growth Opportunities

Status-Quo Systems Unintentionally Benefit the Majority

Overcoming Roadblocks to Diverse Leadership from Within

Lack of mentorship



Support and Mentor Early-Career BIPOC Staff

- Increase access to BIPOC leaders across the institution and alumni body

Unclear promotion expectations



Transparent Promotion Communication

- Staff-wide explanation of promotions and employee progress towards performance goals

Overburdened with side-of-desk tasks



Rotate Taskforce Responsibilities

- Take turns serving on the DEI committee to prevent over-burdening employees

1) Pseudonym

Creating a More Diverse, Equitable Workplace



Which of these is the biggest growth opportunity for your institution?



**Professionalized
Recruitment Practices**



Proactively Cultivate BIPOC
Candidates Before They Apply



**Comprehensive
Performance Metrics**



'Metricize' the Hiring Process to
Identify BIPOC Drop-Off Points

Incentivize DEIJ-Focused
Professional Development



**Systematized Paths to
Career Advancement**



Create Equitable, Transparent
Growth Opportunities

Creating a More Diverse, Equitable Workplace



Identifying Key Takeaways for Advancement Leaders

Discussion Questions

- 1 | How are you working to build a more inclusive staff?
- 2 | What educational opportunities do staff need or want on DEIJ?
- 3 | How does advancement work with HR to implement new recruiting policies?
- 4 | What does your division need to prioritize first, recruitment or retention?
- 5 | What strengths does your division have that can improve staff diversity?

Next Steps to Drive DEIJ Initiatives

Short-Term

- Determine how you can build a more inclusive and welcoming culture
- Assess hiring, promotion, and retention rates for unrepresented staff

Long-Term

- Develop key metrics of success for staff diversity and inclusion
- Map out career opportunities for underrepresented staff



Marshal Resources for DEIJ Initiatives

SECTION

2

Big Gifts Flow to DEIJ Efforts

Unprecedented Philanthropic Push Follows George Floyd's Death

A Dramatic Outpouring of Support for Racial Equity



“Although racial inequality is hardly a new phenomenon, the public reaction to these events does feel bigger... a trend that’s reflected in the **well-documented rapid increase** in related philanthropic giving to racial equity.

*Anna Koob
Candid*

Mega Donations Across the United States

\$200M From Bank of America to minority entrepreneurs and businesses

\$220M From George Soros to vital racial justice organizations making a key difference

\$100M From Michael Jordan to social justice and education access for the Black community

\$1B From American Express to promote racial, ethnic, and gender equity

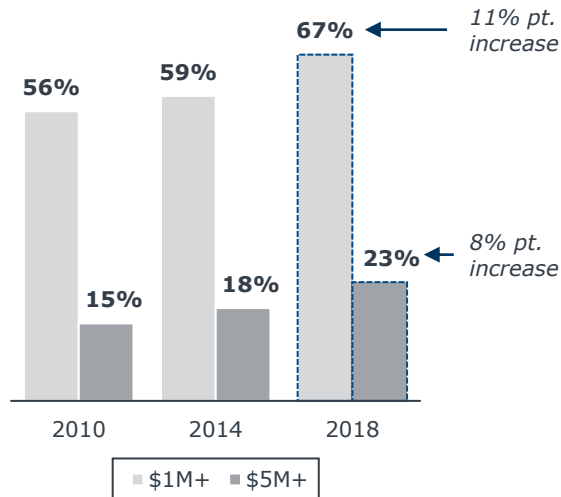
Sources: Koob, A., "Candid's grants data", Candid, July 24, 2020; Shultz, A., "Racial Justice Grants Are Surging, but Donors Seek Advice", Barrons, December 22, 2020; Asymkos, S., "Here are the companies donating to racial justice causes", Yahoo, June 5, 2020; Gaspard, P., "A \$220 Million Investment in Racial Justice", Voices, July 13, 2020; Young, J., "Michael Jordan's brand donates \$100 million to organizations fighting racism against black people", CNBC, June 5, 2020; Advancement Forum interviews and analysis.

Thriving in the Major Gift Era

Post-Recession Pivot to Principal Giving Transformed Our Organizations

The Rise of Principal Gift Donations...

Institutions With at Least One 7-Figure Gift



...Reshapes Advancement's DNA



Intensive Board Management

- Harness feedback and giving for institutional priorities



'Get Smart Fast' Frontline Education

- Build expertise and compelling communication strategies quickly



Laser-Targeted Prospect Identification

- Look beyond loyal alumni for wealthy, mission-aligned philanthropists



Transformative, High-Dollar Giving Opportunities

- Enable donors to change the world through the institution



Fundraising Strengths

- 1. Intensive Board Management**
2. 'Get Smart Fast' Frontline Education
3. Laser-Targeted Prospect Identification
4. Transformative, High-Dollar Giving Opportunities

➤ Bring Diverse Perspectives to Board Decision-Making

The Strategy

- Designated DEIJ chair roles create "lead from within" conditions
- Demographic data-tracking surfaces gaps, allows for targeted recruitment
- Relationship managers for pre-board prospects generate diverse volunteer pipeline

DEIJ Strategy Starts at the Top



Board Diversity Contributes to Institutions' Equity Commitments

Diverse Perspectives Critical in Board Decision-Making

“ How many resources should we put into **diversifying our student body**?

“ Should we start a **new center for racial justice**?

“ How much should we invest in **engaging underserved communities**?

“ What should our **campaign priorities be**?

“ Which of our goals should we most **strongly prioritize**?

A Lack of Diversity at the Top



84% Of members serving on **nonprofit foundations and charities boards are white**

“

“When they do **board nominating, they're nominating their friends.** That's the old way, the question is how you get to the new way, so we become more diverse.”

*VP, University Advancement
Regional Public University*

”

Pathways to Diversifying Our Boards

Three Strategies for Bringing New Perspectives to Volunteer Leadership



Enfranchise Board Members to Lead the Charge

- Add two seats to the board as **dedicated DEI chairs** who focus on making sure decisions support DEI
- Chairs **focus on inclusion of BIPOC volunteers** and increasing board diversity



Assign Weight to Diversity During Board Recruitment

- **Assess demographics** in addition to board readiness of all potential candidates
- Give underrepresented board candidates an **extra point in their readiness assessment**



Invest in Pipeline Relationship Management

- **Dedicate a staff member** to build a diverse volunteer leadership pipeline and develop targeted engagement programming
- Fill **portfolio with annual giving donors** who have shown affinity for future volunteer leadership

Priced Out of Leadership



Board Giving Requirements Prevent Diverse Participation

“

"Emphasis on giving capacity screens out some highly qualified women and people of color as well as lower-income white males. **Taking money out of the board recruitment process would encourage broader socioeconomic diversity**, which is also important to understanding numerous stakeholders: students and their families, employees, and members of surrounding communities."

*Association of Governing Boards
Increasing Diversity on the Boards of Colleges and Universities*

”

Quick Discussion Question



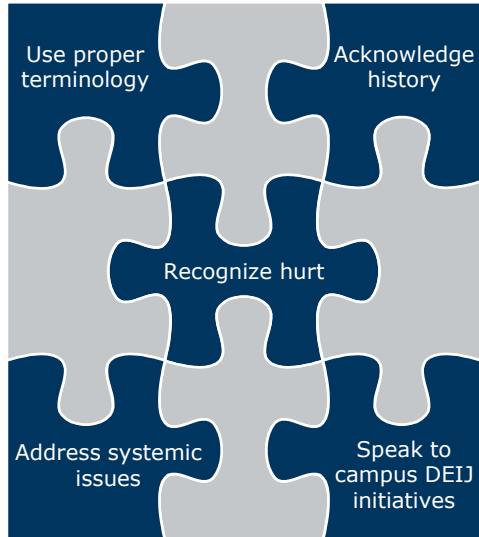
How has your institution approached AGB's recommendation of lowering or removing board giving requirements?



Donors Expect More Around DEIJ

Leaders and Staff Need to Be Prepared to Walk the Walk

Complex Donor Expectations for DEIJ Conversations



Many Campus Stakeholders Need Education, But Two Groups Are Critical



Student callers



Frontline fundraisers



Academic leaders



Board members



Marketing and Communications



Fundraising Strengths

1. Intensive Board Management
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➤ Prepare Donor-Facing Staff to Navigate DEIJ Conversations

The Strategy

- Create centralized documents for gift officers to educate themselves on DEIJ initiatives and external documents for them to use with donors
- Work with academic partners to create compelling narratives for DEIJ efforts

'Just in Time' DEIJ Resources for Staff

Plug-and-Play Tools Help Donor-Facing Staff Navigate Complexity



Customizable Constituent-Facing Presentations



What It Is:

Well-designed, **modularized deck outlining the institution's DEIJ efforts**, customizable to donor interests



Need That It Fills:

Provide **standardized talking points** on wide-ranging initiatives at the university



Who It's For:

Educate external constituents on institutional DEIJ initiatives



HAZEL UNIVERSITY¹

Fundraising Product Quick-Reference Guides



What It Is:

List of presidential DEIJ **goals mapped to fundraising opportunities** and price points



Need That It Fills:

Guide donors to gift designations that match their passion and capacity



Who It's For:

Inform **fundraisers on gift opportunities** available to donors for DEIJ initiatives

1) Pseudonym

Getting Academic Partners Up to Speed



Advancement Fills In the Gaps for Dean Education on DEIJ



Frontline fundraisers are asked to tap into a person's passion. The **dean and unit lead, on the other hand, must be able to effectively communicate the vision and long-term priorities—how and why DEIJ is essential** to the success and future of their unit. It's a very important distinction.

*Director, Diversity, Equity, and Inclusion
Public Research University*



DEIJ Training for Deans



Six weeks, meetings every Friday, with assignments in-between each of the meetings



Case studies highlight when and why donors disengaged in past conversations around DEIJ



Provides language to help academic partners have productive conversations by improving cultural dexterity



Fundraising Strengths

1. Intensive Board Management
2. 'Get Smart Fast' Frontline Education
- 3. Laser-Targeted Prospect Identification**
4. Transformative, High-Dollar Giving Opportunities

➤ Surface Prospects Who Are Passionate About the Cause

The Strategy

- Identify who is interested in DEIJ initiatives using technology and add them to the pipeline of prospective donors
- Find non-traditional donors, like foundations and corporations, that are supporting DEIJ causes in the community

Searching High and Low for DEIJ Donors



Two Main Reasons We Have a Dry Well When It Comes to DEIJ Supporters

We Haven't Asked

Where Are Our DEIJ Supporters?

We Maxed Them Out

“Before the summer of 2020 **we weren't bringing up DEI initiatives to our donors.** So we don't really know how much support for it has grown. We have no comparison to look at.

*Director, Development
Public Research University*

“Right now, **I can't go to our trusted supporters again** for another major gift because we're in a campaign. **I've already maxed them out.**”

*Vice President, Advancement
Private Research University*



What *Isn't* the Reason: They Are Hostile to DEIJ

“Many of our loyal major and principal gift donors are raising their hand to support diversity, equity, inclusion, and justice initiatives. **It's not that they haven't been interested in that work.**”

*Peter Caborn
Associate Vice President, Alumni Affairs and Advancement Services
Wayne State University*

Finding Impassioned Supporters

Oregon State University Deploys an Annual Giving Donor Journey

Using Technology to Find Ready-Made Supporters

1 Emails featuring three DEIJ initiatives sent to **94,000 constituents**



Provide on-campus resources for underrepresented students

- Financial support
- Mentoring
- Academic and personal counseling



Foster an inclusive campus community

- Educational programs
- Cross-cultural conversations
- Safe spaces for students



Enhance diversity programming in colleges and university-wide

- Scholarships for campus diversity leaders
- Recruitment and retention of diverse faculty and staff
- Cultural competency training

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Foster an inclusive campus community



Enhance diversity programming in colleges and university-wide

2 **Clicking on an initiative** drives the constituent to receive additional information and a gift appeal for that specific fund



Finding Impassioned Supporters

Oregon State University Deploys an Annual Giving Donor Journey

Using Technology to Find Ready-Made Supporters

- 1 Emails featuring three DEI initiatives sent to **94,000 constituents**



Provide on-campus resources for underrepresented students



Foster an inclusive campus community



Enhance diversity programming in colleges and university-wide

- 2 **Clicking on an initiative** drives the constituent to receive additional information and a gift appeal



- 3 System sends **automated follow-up emails to engaged alumni** asking for financial support for the specific initiative they selected

The Donor Journey's Pipeline Benefits

OSU's Initiative Surfaces Warm Leads--And Brings Dollars and Mindshare

Major Gift Pipeline Development



- Gather intel on who is **interested in DEIJ and has capacity**
- Help major gift officers start a conversation with a warm lead

Raise Annual Giving Dollars



- **Raise funds** for units working with historically marginalized groups
- **Track affinity data** to influence future annual giving outreach

Boost Awareness of DEIJ Efforts



- **Educate constituents** on institutional DEIJ initiatives and goals
- Find constituents who may want more educational opportunities

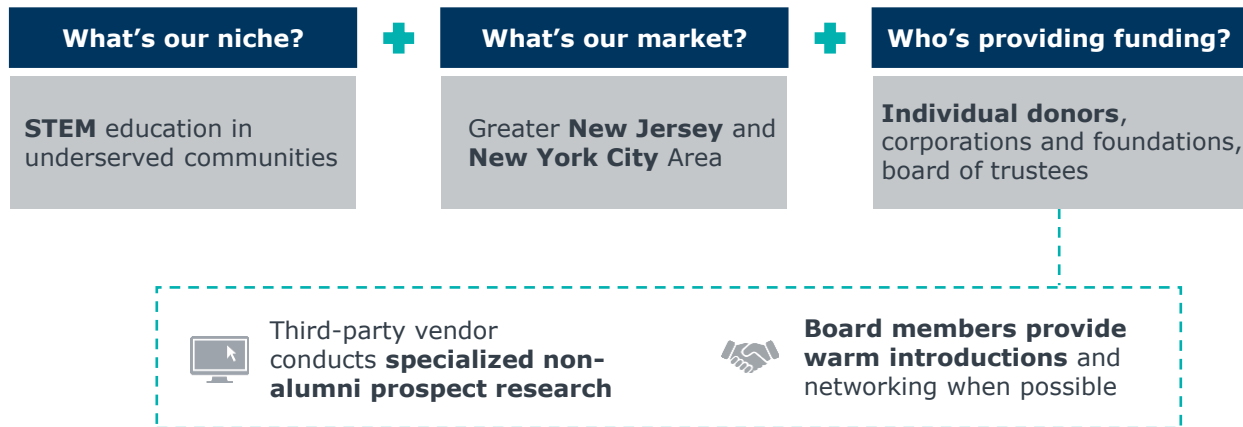
Looking Past the Usual Suspects



Stevens Institute Goes Searching for Mission-Aligned, Unaffiliated Donors

“This is an opportunity to **expand the donor base to non-alumni major donors, corporations, and foundations that care about DEI** initiatives and are looking to partner.”

*Laura Rose, VP Development and Alumni Engagement
Steven's Institute of Technology*





Fundraising Strengths

1. Intensive Board Management
2. 'Get Smart Fast' Frontline Education
3. Laser-Targeted Prospect Identification
- 4. Transformative, High-Dollar Giving Opportunities**

➤ Formulate Ambitious 'Big Idea' Proposals Focused on DEIJ

The Strategy

- Advancement and academic leaders partner to identify transformational, multidisciplinary giving opportunities related to DEIJ
- Fundraising efforts extend beyond scholarships to focus on the factors perpetuating inequity and structural racism both within and beyond the institution

Higher Ed's 'Big Ideas' Moment

'Dream Big' Approach Yields Transformative Mega-Gifts

What Makes for a "Big Idea" in Higher Ed Fundraising?



Transformative Impact

Tackling compelling *societal problems* using niche institutional strengths



Multidisciplinary Breadth

Putting the full weight of institutional expertise behind the *cross-campus idea*



Ultra-High Price Tag

Fundraising at levels that allow for *large-scale*, rather than incremental, change

Big Ideas Embraced by Institutions Across the Country



'Big Ideas' Meets DEIJ Fundraising

Loyola University Sets Out to Identify and Fundraise for a Big DEIJ Idea

A Search for Big DEIJ Ideas

1 Steering Committee

Advancement invites internal participants to join their DEIJ fundraising planning

2 Idea Collection

A two-week submission period gives colleagues time to generate DEIJ big ideas

3 Final Big Idea Selection

Advancement works with donors to test big ideas and make a selection (*forthcoming*)

Key Participants to Include

- VP of Advancement
- Provost
- AVP of Advancement
- Asst. VP for Student Development
- Chief Diversity Officer

Potential Big Ideas at Loyola

- **Increase access** for local students (\$10M)
- **Reduce student debt** for all educational costs (\$25M)
- Fund supplemental learning opportunities for **career readiness** (\$25M)
- **Endow the office of diversity** (\$5M)

Transformative Gifts Reshape Our Institutions

'Big Ideas' DEIJ Efforts Move the Needle on Pinnacle Challenges

Four Initiatives that Go Beyond Scholarships to Address Systemic Issues



Antiracist Research Center

Racial data lab paired with internal policy teams working together to influence systemic racism

▶ **\$10M** from Jack Dorsey



Recruiting Diverse Faculty

Donation to recruit, retain, and enhance faculty diversity and increase student diversity

▶ **\$12M** from Carl V. Granger



Building a Pipeline to College for African American Men

Partnership with local schools to increase graduation rate for African American men starting in 6th grade

▶ **\$6M** anticipated donations



Debt Forgiveness for HBCU Students and Family

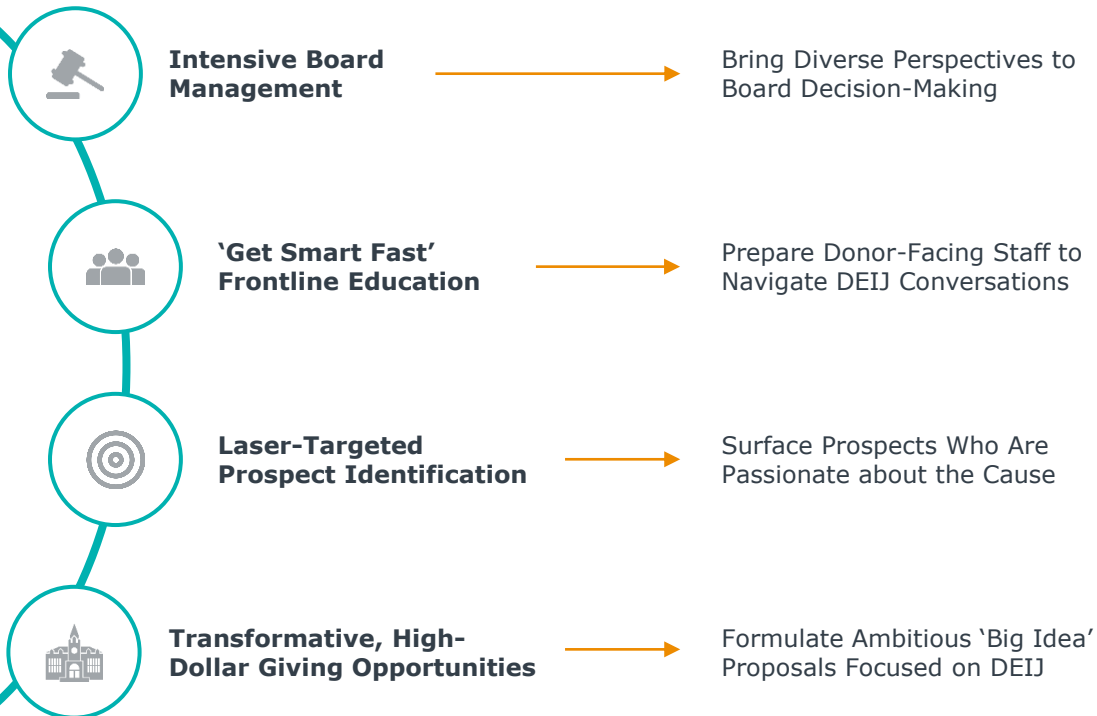
Abolished student debt, a primary barrier to long-term financial equity, for the Class of 2019

▶ **\$34M** from Robert Smith

Marshal Resources for Equity Initiatives



Which of these four is the biggest growth opportunity for your institution?



Marshal Resources for Equity Initiatives



Identifying Key Takeaways for Advancement Leaders

Discussion Questions

- 1 | How are we identifying donors interested in supporting DEIJ initiatives?
- 2 | How are we rebuilding meaningful, long-term relationships with BIPOC alumni?
- 3 | How are we building a diverse pipeline for our boards? What are the barriers?
- 4 | What do campus experts need to prepare them to talk about DEIJ?
- 5 | What measures are appropriate to determine DEIJ success?

Next Steps to Drive Cultivation

Short-Term

- Determine who the DEIJ campus champions are and their responsibilities
- Consider which pre-packaged options will scale easily on campus

Long-Term

- Develop big ideas and implementation plan for transformative change
- Map out lifetime cultivation pathways for young rising stars

Taking the Ideas Back to Campus

Forthcoming Resources to Support Your DEI Journey



Big Ideas DEI Workshop

- Interactive session with an EAB expert to develop transformative DEI initiatives on your campus



Private-Label Research Presentation

- Bring today's research presentation to your campus
- Lay the groundwork for fruitful conversations with your team



Team Strategy-Planning Session

- High level overview of the DEI landscape in higher ed
- Workshop DEI strategies and plan for implementation on campus



Meeting Advancement's DEIJ Moment

New Approaches to Fundraising, Engagement, and
Organizational Strategy

Advancement Forum

Project Director

Maria Morrison

Contributing Consultants

Maggie Everett

Senior Director

Jeff Martin

Managing Director

Liz Rothenberg, PhD

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