



Who Should Read

Vice President,
Advancement

Associate Vice President,
Development

Director, Major Gifts

Perfecting the Partnership

Reimagining the Academy's Role in
Advancement Initiatives

3 Ways to Use This Study

- Extend the reach of current fundraising superstars to more donors
- Focus academic leaders on major and principal giving efforts
- Identify and engage new advancement partners across campus

Advancement Forum

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Executive Summary

Shifting Views of Advancement Across Campus

Campus partners are often credited as the secret to success in fundraising for academic priorities. They build prospects' enthusiasm, communicate impact to donors, and provide engagement opportunities throughout the year. The efforts of academic leaders, faculty members, and non-academic staff can make the difference between exceeding annual goals and failing to reach them. To beat the competition for major gifts, advancement teams must strengthen current partnerships and engage new champions across campus.

Faculty Traditionally Unenthusiastic About Advancement...

Anonymous Complaints Fill Online Comment Boards



"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."

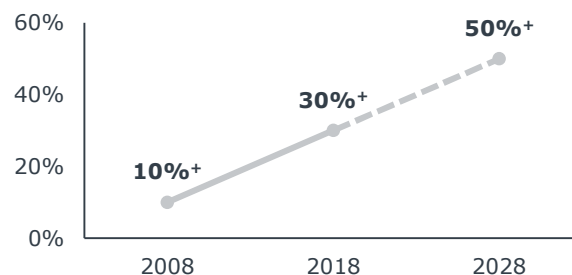
...But Campus Culture is Changing

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



But faculty members have traditionally been hesitant to partner with advancement. Professors and researchers may be concerned about fundraising cutting into their time for teaching and research. They may have heard stories from colleagues about awkward donor conversations or unnecessary travel requests.

The good news is that this culture is changing. In the face of budget pressure and enrollment shortfalls, presidents, provosts, and many deans are coming to see how private philanthropy is necessary for their success and sustainability. They increasingly encourage partners across campus to work with development staff.

Executive Summary (cont.)

Key Partners for Long-Term Success

To continue building momentum with campus stakeholders, advancement teams should focus on three critical opportunities. First, staff should take steps to enable current partners to reach more donors than ever without increasing the time they spend on advancement activities. Second, development staff should help academic leaders understand which development activities to prioritize to have the greatest impact on their unit budgets and priorities. Third, advancement staff should identify and engage new partners on campus to meet the expectations of donors at all levels.



While each section in this publication is designed for a subset of academic partners, the practices contained herein can be implemented with a range of campus stakeholders. Use the diagnostic questions included with each practice and the prioritization guides at the end of each section to decide which ideas to prioritize at your institution.



Introduction

SECTION

1

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

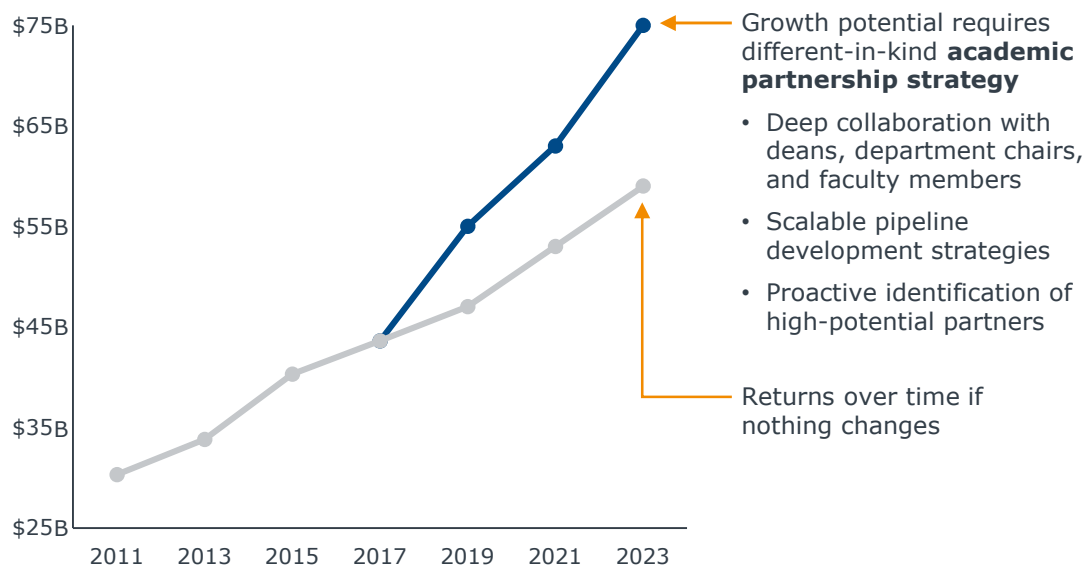
Sustainable Growth Relies on Reimagining Academic Fundraising

Higher education fundraising has experienced historic growth in the past ten years. New campaign strategies and technological innovations have helped institutions reach new records for dollars raised and alumni engaged.

However, colleges and universities face increased competition for major and principal gifts from across the nonprofit sphere. The number of nonprofit organizations in the United States has increased by over 40% since 2006, with many turning their sights to major gifts. Without rethinking advancement strategy, higher education fundraising may stagnate as donors direct their philanthropy elsewhere.

A New Playbook—With Academics at the Center

Estimated increases in Voluntary Support of Education Through 2023, in Billions of Dollars



To continue engaging the institution's best donors and prospects, advancement teams need to rethink their playbooks—starting with how they engage academic partners.

We Know What Today's Donors Want

Donor Expectations Require Renewed Academic Partnerships




Fundraising growth has been led by a group of donors whose priorities differ vastly from previous generations. These top donors are “donor-investors” who want to have a tangible impact on the issues they care about. When deciding which institutions and organizations to support, donor-investors identify ideas that will lead to large-scale impact. They seek close relationships across the organizations they support and often want hands-on engagement opportunities.

To meet these expectations, advancement teams need to work closely with academic partners to identify fundraising priorities and create a seamless cultivation and stewardship experience.

A Long-Term Shift in Donor Mindset



Donors Seek:

-  Transformative impact
-  Deep institutional relationships
-  Hands-on engagement

Academic Partners Provide Critical Information and Engagement

“[Deans] are the ones who can best articulate the mission of a college and what a gift could do to advance it. **And they’re often the ones donors want to meet** to discuss their passion for a specific academic or research program. Some, of course, turn out to be natural fund raisers.”

*Kathryn Masterson
Chronicle of Higher Education*

Spotlight on Today's Top Donors

The Advancement Forum's [Donor Investor Imperative](#) provides additional research and tools for engaging today's top donors, including:

- How to source transformational ideas across campus
- Communicating impact to data-driven investors
- Preparing academic partners to pitch their ideas to potential supporters

Source: Kathryn Masterson, “What Every Dean Needs to Know About Fundraising,” *Chronicle of Higher Education*, June 4, 2017, <https://www.chronicle.com/article/What-Every-Dean-Needs-to-Know/240251>; Advancement Forum interviews and analysis.

“Working with the Academy”

Historically Not Advancement’s Strong Suit

Despite donor demand for engagement with campus stakeholders, advancement has not traditionally had the most positive working relationships with academic partners. Faculty members often report frustration and disillusionment with advancement staff, going as far as blaming fundraisers for creating institutional cultures that don’t care about research and teaching.

Frustration is not limited to academic partners. Advancement leaders have experienced how academic partners can jeopardize donor relationships through uncoordinated communications or inappropriate comments.

Faculty Hostility to Advancement Abounds...

Anonymous Complaints Fill Online Comment Boards



“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

Despite these challenges, academic culture is slowly becoming friendlier to development. College and university presidents increasingly make advancement a top priority as traditional funding sources, like government support and tuition dollars, stagnate or decline. Provosts are under stress due to financial needs.

At the same time, fundraising is becoming a key responsibility for many academic deans. Today's deans often spend upwards of 30% of their time on fundraising. Moving forward, deans are likely to spend greater amounts of time on fundraising in order to reach their unit's financial goals.

Financial Concerns Persist as Revenue Sources Under Growing Pressure



Federal research funding



State support



Enrollment



Meet the Guy Who Turns Off the Lights When a College Closes



Moody's Gives Colleges a Negative Grade

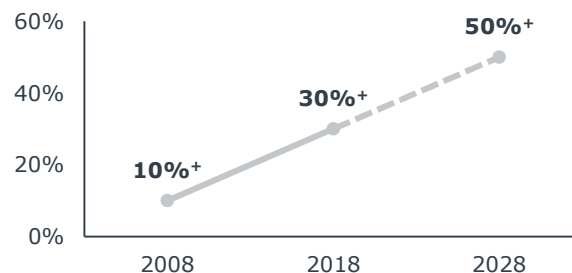
Resulting in Cascading Expectations for Advancement

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



Source: "2018 outlook changed to negative as revenue growth moderates," *Moody's Investors Service*, Dec. 5, 2017, <https://bit.ly/2LmJyJK>; Jeffrey Selinger, Sonny Chheng, 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

In addition to increasing financial pressure, three trends in the academic landscape will require us to rethink how advancement works with academic partners.

First, growth in alumni and donor populations means that more constituents will want to connect with academics than ever. Yet faculty fundraising champions are already stretched too thin to keep up with demand. This will only get worse as donors at lower giving levels grow to expect the same level of engagement with academic partners that is traditionally reserved for principal gifts.

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

Second, the average tenure of academic leaders is on the decline, with most presidents leaving after five years. As a result, the leader who kicks off a campaign is unlikely to be on campus at its close. In the face of leadership turnover, advancement staff must onboard new partners every year while rebuilding trust among donors who held deep connections to former campus leaders.

Finally, impending faculty retirements will jeopardize advancement's ability to engage donors and prospects. Approximately one third of faculty members are approaching retirement age, including some of the best fundraising partners on campus. In the future, advancement will be left with fewer established partners to include in donor cultivation.

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.

'Make or Break' for Our Development Goals




Why Advancement Leaders Have Cause for Concern

If academic partner strategy does not change, advancement teams will jeopardize fundraising goals, alumni engagement, and major gift pipeline development.

In the short term, campus partners will become less willing to contribute to development efforts, including cultivating top donors or participating at campaign events. Academic leaders will focus on fundraising at the bottom of the giving pyramid instead of engaging top donors. Prospective donors may feel less connected to the institution if their preferred faculty members retire or move elsewhere.

Short-Term Consequences

Long-Term Impact

- | | | |
|--|---|---|
| 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 |

If this persists, fundraisers will lack a pipeline of faculty-focused donor cultivation touches that move individuals closer to making a gift. Innovative projects at colleges and universities will go unfunded as donors shift their giving to nonprofit organizations where they have stronger bonds.

To avoid these consequences, advancement teams need new approaches to identify and encourage the next generation of campus fundraising partners.

Perfecting the Partnership

Study Roadmap

To move beyond these challenges, advancement teams need to take the lead in building bridges between development and the academy. Success hinges on three areas: identifying ways to help current partners reach more donors, onboarding new academic leaders to major and principal gifts, and identifying new fundraising superstars on campus.



Source: Advancement Forum interviews and analysis.



Scale Reach of Current Partners

SECTION

2

A Small But Impactful Roster

Fundraising Superstars Critical for Ongoing Success

At most institutions, advancement staff already work with a handful of campus fundraising superstars. Key partners include deans who are willing to join prospect meetings on the road, professors who regularly take donors on tours of their laboratories or research centers, and researchers whose big ideas have become—or could become—campaign priorities.

We already ask these partners to attend campaign events and report on the impact of their work. Development champions can help engage an expanding donor base, and they are a proven draw for alumni and prospects.

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

But these fundraising superstars often provide support to other areas across campus in addition to advancement. They receive requests for support with strategic planning, student recruitment, professional mentorships, and institutional marketing.

Requests from campus leaders mean that academic partners have less time than ever for their core responsibilities. A study at Boise State University found that faculty spend as little as 52% of their time on research and teaching.

Everyone Is Asking for More



Dean: Publications



Enrollment Management: Student recruitment



President: Strategic planning



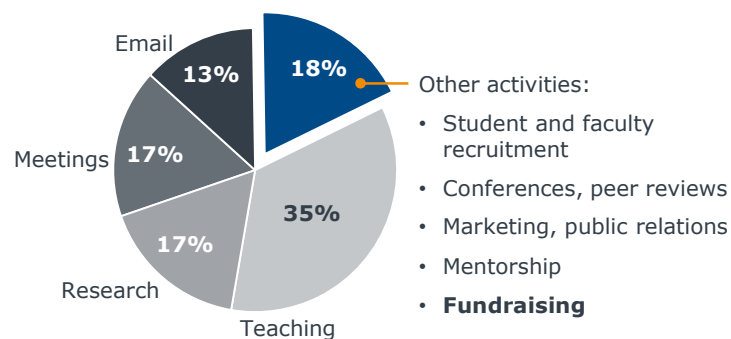
Advancement: Donor engagement and stewardship

“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**

With faculty already working overtime, partnering with advancement has taken a backseat to research and teaching. When invitations to events or donor meetings arrive, campus partners are more likely to respond “no” than “yes.”

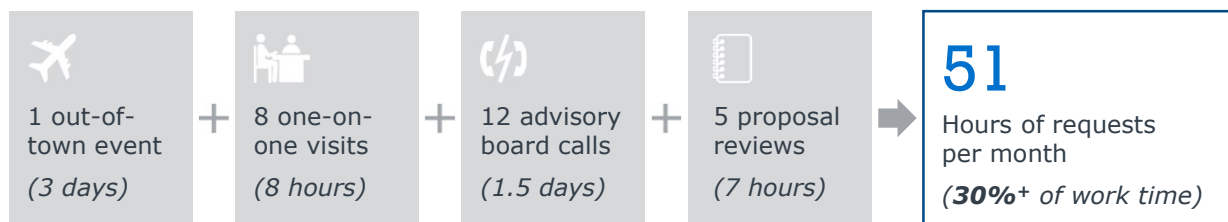
Source: Colleen Flaherty, “So Much to Do, So Little Time,” *Inside Higher Ed*, April 9, 2014, <https://www.insidehighered.com/news/2014/04/09/research-shows-professors-work-long-hours-and-spend-much-day-meetings>; Advancement Forum Interviews and Analysis.

Just One More Item on an Overfilled To-Do List

Advancement Perceived as a Distraction from Core Responsibilities

Instead of making the most of faculty members' limited time, advancement often worsens the problem by asking for help with time- and travel-intensive activities. Speaking at faraway events, attending one-on-one visits, and participating in campaign roadshows adds up to substantial time investments for already-overstretched academic partners. These requests can easily add up to 30% of a dean's work time per month, a challenging commitment if they do not have substantial staff support on campus.

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*

At the same time as advancement is asking for more faculty time, faculty members are under pressure from academic leadership to increase their research output and score well on teaching evaluations. With staff under pressure from all sides, something has to give. If advancement teams cannot prove that they are good stewards of faculty time, campus partners will cut advancement from their priority lists.

Scale Reach of Current Partners

Three Strategies to Increase Impact, Not Time Investment

To counter arguments about administrative overload, advancement staff need to take the lead in helping partners scale their current efforts to reach more donors without investing more time in advancement.

This section will provide best practices for maximizing the value of academic partners' time instead of asking for more.

Digitize One-on-One Interactions



- Practice 1: Virtual Visit (p. 19)

Maximize Value of Group Engagements



- Practice 2: Research Pitch Competition (p. 23)

Raise the Bar for Academic Partner Access



- Practice 3: Academic Priority One-Pagers (p. 27)
- Practice 4: Searchable Resource Hub (p. 32)
- Practice 5: Unit Advocates (p. 34)
- Practice 6: Academic Advancement Directors (p. 40)

Practice 1: Virtual Visit

Digitize One-on-One Interactions

Practice in Brief

Academic leaders film a one- to two-minute message about giving opportunities linked to a prospect's interests or the impact of a donor's giving on campus. Major gift officers present the video during donor visits as an opportunity to hear directly from the academic leader.

Problems Addressed

Academic leaders are often asked to join in-person visits to provide a unique engagement opportunity for donors and prospects. However, deans and other leaders do not have the capacity to travel to all of the visits where their presence is requested. Frontline fundraisers lack alternative means of integrating academic leaders into these one-on-one interactions.

Diagnostic Questions

1. Do deans frequently decline travel requests because their schedules are at capacity for donor visits?

☐ Yes ☐ No

2. Do gift officers need new tools to make in-person visits unique and engaging?

☐ Yes ☐ No

3. Does your campaign plan or annual fundraising goal rely heavily on in-person prospect interactions with academic partners?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to prioritize Virtual Visits for your frontline fundraising teams.

Institution Profiled

University of Michigan

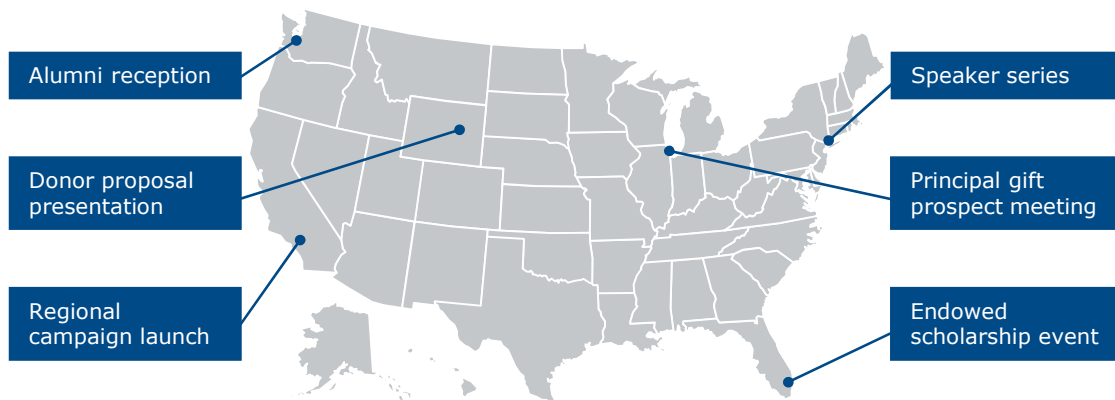
- Institutional control: Public
- Enrollment: 46,002 (29,821 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Midsize City (Ann Arbor, MI)

Trying to Be in Twenty Places at Once

Campaigns Rely on Unrealistic Level of Academic Participation

Campaign strategy often relies on in-person engagements during which campus stakeholders can speak directly to potential supporters. As a result, in-demand campus partners crisscross the country to meet a seemingly infinite list of prospects. Of course, these visits require partners to commit substantial time beyond the visit itself. For each trip, hours are lost in airports, on planes, at hotels, and everywhere in between.

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*

Demand for in-person meetings has increased among donors across the giving pyramid, and partners do not have the capacity to accept all the requests for their time. Yet comprehensive campaigns often rely on strategies that set impossible expectations for academic partner travel, like crisscrossing continents or being in multiple places at once.

From In-Person to Virtual Visits





Michigan Enables Academic Partners to Join Visits Without Leaving Campus

Instead of asking partners to increase their travel time, the University of Michigan created the “Virtual Visit,” which enables academic partners to participate in donor meetings without having to travel.

The Virtual Visit is a pre-recorded one- to two-minute video in which an academic partner speaks directly to a prospect about their interests and related giving opportunities on campus. For academic partners, filming each video requires no more than 20 minutes.




Scalable Videos Feel Highly Personal

Key Script Components



-  “It’s so great to speak with you today, Ms. Smith.”
→ **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

Each Virtual Visit begins and ends with stock footage created by the marketing and communications team. Gift officers are responsible for editing the video’s donor-specific content themselves using basic video editing software.

The Virtual Visit is presented as part of a donor meeting, replacing a campus partner’s in-person explanation of giving opportunities or impact stories. Before the in-person meeting, gift officers download the video onto a tablet or phone, so that it can be played successfully without worrying about wireless connectivity.

High Impact, Light Lift

Virtual Visits Allow Academic Partners to Engage More Donors

The response from donors to Virtual Visits has been overwhelmingly positive. Donors feel like they have received a unique gift from the institution and that they have made a personal connection to an academic leader, despite not meeting them face-to-face.

For campus stakeholders, the videos are a win-win because they make a difference in closing gifts and stewarding donors without requiring substantial time or travel investments.

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.”

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

While the Virtual Visits initially just featured deans, they have been such a hit that the team at Michigan is now videos featuring scholarship recipients, staff members, and academic researchers who can share how specific donors have impacted their experiences on campus.

Practice 2: Research Pitch Competition

Maximize Value of Group Engagements

Practice in Brief

Teams of faculty members pitch future research projects to prospects and answer questions about their work. Participating prospects in the audience vote for their favorite project, and funding is awarded to the teams receiving the most votes.

Problems Addressed

Group cultivation events have uninspiring agendas and few opportunities for prospects to evaluate giving opportunities across campus. Advancement staff seek new ways to connect donors to academic partners at scale.

Diagnostic Questions

1. Have faculty members expressed hesitation about attending cultivation events?

☐ Yes ☐ No

2. Do advancement staff need new in-person cultivation touches for groups of donors with similar areas of interest?

☐ Yes ☐ No

3. Have academic partners expressed interest in finding new ways to promote their work to potential supporters?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to prioritize a Research Pitch Competition to connect faculty members to potential supporters.

Institution Profiled

Georgetown University

- Institutional control: Private
- Enrollment: 19,005 (7,463 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large City (Washington, DC)

‘Oh No, Not Another Advancement Event’

Benefits of Cultivation Events are Unclear to Faculty

Advancement staff often plan group cultivation events to connect prospects to faculty members from across campus. When campus partners agree to attend, they may feel uncomfortable because they do not understand why they were invited, or they might be afraid of saying the wrong thing to a key prospect.

These events rarely leave a positive impression on academic partners, leading to a widespread perception that participating in advancement events is not a good investment of time.

Events Provide Useful Cultivation Touch for MGOs



Bring prospects together in central location



Target group's interests and affinities



Fit clearly into overall cultivation strategy



Allow 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 University Creates Donor Event that Keeps the Focus on Faculty

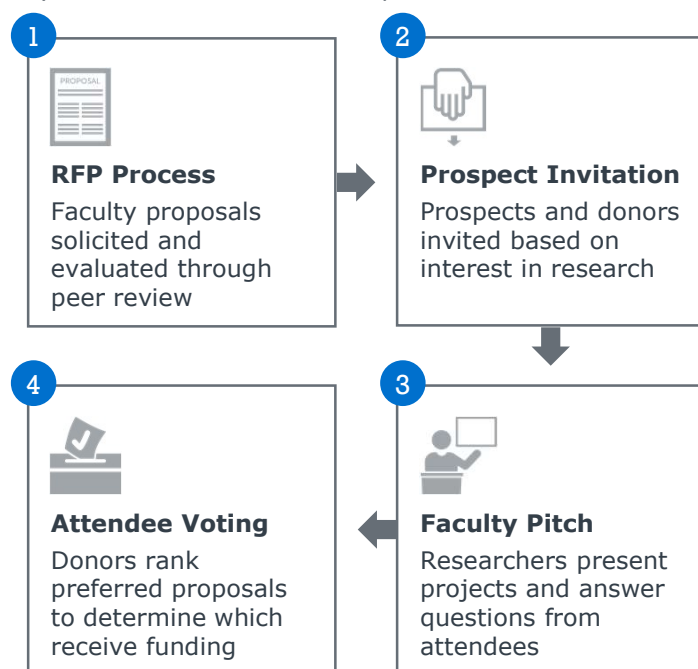
To combat academic partners' negative perceptions of events, Georgetown University created an event that rewards faculty for doing what they do best: explaining their research. Inspired by the television show *Shark Tank*, faculty teams present research ideas to an assembled group of donors, and attendees vote to determine who will receive funding.

Multiple prizes are awarded each year, making the event attractive to faculty members, who only have to spend 15 minutes on stage.


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

The Research Pitch Competition has increased donor engagement across the giving pyramid. A gift of at least \$1,000 is required to attend the event and vote for the winning projects. Gifts over \$10,000 are stewarded with a private lab tour, meeting the researcher, and research briefings with institutional leadership. Over time, donors upgrade their giving to gain additional access to behind-the-scenes experiences.

Impact Far Beyond the Ten-Minute Pitch

Georgetown's Competition Increases Faculty and Donor Engagement

Faculty and donors have embraced the pitch competition. Faculty partners are motivated to participate by the potential seed funding for new projects, and donors love engaging with faculty both during and after the event.

In some cases, event attendees have made additional gifts directly to projects they supported in order to allow the faculty members to make even more progress.

Partners in Research




Awards Drive Faculty Participation

29

Individual grants awarded since inception



Building Ongoing Donor Interest—And Gifts

1,000+

Mailing list members invited to related events

35+

Proposals submitted per year

\$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*

To engage a wider group of donors, Georgetown now allows virtual attendance for out-of-town supporters, including the ability to ask questions and vote for projects. To keep the event exciting in future years, the annual competition will have an overlying theme linking all of the projects to high-interest topics in the news.

Practice 3: Academic Priority One-Pagers

Raise the Bar for Academic Partner Access

Practice in Brief

Advancement staff compile information about academic units or fundraising priorities so that frontline fundraisers have basic information at their fingertips. One-pagers are designed to be donor-facing so they can be used on the road.

Problems Addressed

Advancement staff struggle to find relevant resources about academic priorities, leading them to rely on academic partners whenever they have questions or need additional details. When information is transmitted between the academy and advancement staff, it is not compiled in one location, leading to redundant requests and overwhelmed academic partners.

Diagnostic Questions

1. Do advancement staff members struggle to find information about the units or divisions they support?

☐ Yes ☐ No

2. Do frontline fundraisers frequently ask academic partners to explain their projects and priorities to donors and prospects?

☐ Yes ☐ No

3. Does advancement lack a unified schedule for updating donor-facing collateral?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to create Academic Priority One-Pagers for advancement staff.

Institution Profiled

University of Memphis

- Institutional control: Public
- Enrollment: 21,521 (17,396 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large City (Memphis, TN)



Implementation Resource

See p. 30 for an Academic Priority One-Pager Template.

Why Can't MGOs Answer Technical Questions?

Gift Officers Unprepared to Discuss Projects Independently

Donors frequently ask unpredictable questions about academic priorities when meeting with gift officers. MGOs may lack deep background knowledge of the projects in question, so they send one-off communications to campus partners to gain more information. These emails and phone calls frustrate faculty members, who feel like they are constantly being asked to explain their research.

This is not the fault of advancement staff. They are expected to know about an increasingly large number of projects and priorities across campus.

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*

Additionally, fundraiser evaluation metrics tend to focus on donor-facing activities, like visits and dollars raised, which disincentivizes staff from dedicating time to learning more about academic priorities.

Finally, when gift officers do look for information, they struggle to find resources to answer their questions. Many research projects are not summarized for external audiences until they have been completed—and those descriptions are often aimed at academics. It can feel impossible to find information about ongoing projects or priorities that are being developed.

A 'Cheat Sheet' for Busy Gift Officers

University of Memphis Assembles Critical Information for Advancement Staff

To help fundraisers, especially those on the road, find information about academic activities and unit fundraising priorities without disrupting busy faculty members, the University of Memphis created information "cheat sheets."

Central advancement created a template, and each unit on campus provided information to be included on the one-page document. Each information sheet includes the same details: giving opportunities, impact stories, and context about the unit.

Information Sheets Give MGOs Everything Needed for Donor Conversations



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 allow us to attract, reward and recognize top faculty and have a positive impact on retention.

Content includes:

- | | |
|---|--|
| <input checked="" type="checkbox"/> Unit background information | <input checked="" type="checkbox"/> Strategic goals |
| <input checked="" type="checkbox"/> Funding needs | <input checked="" type="checkbox"/> Case for support |
| <input checked="" type="checkbox"/> Giving opportunities | <input checked="" type="checkbox"/> Impact estimates |

The resulting collateral is designed to be useful for gift officers and prospects. MGOs need less time to get up-to-speed on each unit before going on the road. Prospects can keep relevant one-pagers after a visit to remember what was discussed and consider giving options.

Moving forward, the one-pagers will also be distributed digitally to ensure that information is regularly updated and shared across campus.

Academic Priority One-Pager Template

Use the template on the following page to create collateral about academic priorities for advancement staff and donors. The decision guide below will enable you to determine who will manage the information and keep it updated over time.

Decision Guide to Implement Academic Priority One-Pagers

1. Who will create and maintain the information sheets?

Options include, but are not limited to:

- Marketing and communications
- Corporation and foundation relations
- Major gift officers
- Multidisciplinary project managers

2. How often will the information sheets be updated?

Assign responsibility for updates on a regular schedule:

- Monthly
- Quarterly
- Once per semester

3. Where will the information sheets be stored?

Make sure that information is readily-accessible to advancement staff:

- Online shared drive
- Unit websites
- Paper copies within the advancement office



A sample academic priority one-pager template is on the following page. To create your own one-pager, use the **editable PowerPoint template available at eab.com.**

One-Pager Title

**DELETE AND
PLACE
LOGO HERE**

Tagline or Slogan

Fast Facts

- Dean, department chair, or project lead: XX
- Enrollment: XX
- Campuses served, degrees offered, or other relevant information:
 - XX
 - XX
 - XX

**DELETE AND PLACE
PHOTO/CHART/GRAPH
HERE**

Highlights and News

- Provide background information about the division, department, or priority.
- Note national rankings, local impact, and relevant data.
- For multidisciplinary priorities, describe how the institution is best-placed to have an impact on a given issue.
- Share updates on recent developments, improvements, or strategic goals that may interest donors.

**DELETE AND PLACE
PHOTO/CHART/GRAPH
HERE**

Giving Opportunities and Impact

- Highlight top fundraising priorities and case for support.
- Mention a variety of opportunities to appeal to donors with varied interests relevant to the unit, division, or priority.
- Predict how new programs or facilities will have an impact on students, for the campus, in the community, and/or around the world.

For more information, contact:

Jane Smith
Director of
Development

XXX.XXX.XXXX
contact@yourinstitution.edu
institution.edu/url

Practice 4: Searchable Resource Hub

Raise the Bar for Academic Partner Access

Practice in Brief

Informational resources about giving opportunities are uploaded to a searchable database so that advancement staff can easily find information about projects that are aligned donor interests. Information is organized by type of gift (naming, endowed scholarship, etc.), department, and topic.

Problems Addressed

When frontline fundraisers attempt to match a prospect's interests to giving opportunities on campus, they go directly to academic partners for suggestions. Informational resources are not uniformly shared across advancement functions. Resources that do exist are hard-to-find or ineffectively organized.

Diagnostic Questions

1. Do frontline fundraisers find it challenging to link a prospect's interests to current giving opportunities on campus?

☐ Yes ☐ No

2. Do staff across advancement lack access to information about fundraising priorities?

☐ Yes ☐ No

3. Are current resources dispersed across numerous file structures and organizational systems?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to prioritize a Searchable Resource Hub to connect faculty members to potential supporters.

Institution Profiled

Stonehill College

- Institutional control: Private
- Enrollment: 2,498 (all undergraduate)
- Carnegie classification: Baccalaureate College
- Campus setting: Large Suburb (Easton, MA)





Organized to Easily Find Information

Resource Hub Allows Fundraisers to Search for Key Terms

To help staff quickly link prospect interests to philanthropic priorities, Stonehill College maintains an online database of information about giving opportunities sorted by department, topic, and type of proposal. Fundraisers can search for specific terms or browse the entire database. To avoid overwhelming staff, the database is limited to ten proposals per department.

But a resource hub is only useful if it contains current information. Stonehill's corporate and foundation relations team is responsible for quarterly database updates because much of the information online is based on CFR proposals.

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*

Practice 5: Unit Advocates

Raise the Bar for Academic Partner Access

Practice in Brief

One staff member spends approximately 20% of their time as the dedicated point of contact for an academic unit. Unit Advocates keep their deans focused on top gift prospects, communicate about fundraising priorities to other advancement staff, and serve as gatekeepers between advancement and individual faculty members.

Problems Addressed

Advancement staff will always be faced with questions that are too in-depth or complicated to be answered by an information sheet. At institutions without unit-based fundraisers, gift officers do not know where to direct questions about giving opportunities and impact, so they overwhelm faculty members with requests for information.

Diagnostic Questions

1. Do deans lack dedicated staff to fundraise for their unit?

☐ Yes ☐ No

2. Do campus partners express frustration at the number of requests and questions that come from advancement staff?

☐ Yes ☐ No

3. Are tenured advancement staff looking for new opportunities to work closely with academic leaders?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to pilot a Unit Advocate role for your academic divisions.

Institution Profiled

University of Dayton

- Institutional control: Private
- Enrollment: 10,882 (8,499 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Midsize City (Dayton, OH)

Implementation Resource

See p. 38-39 for the Unit Advocate Implementation Timeline and Metrics Compendium.



A Never-Ending Stream of Questions

Advancement Staff Overwhelm Faculty with Requests for Assistance

The best information sheets cannot anticipate every question that a frontline fundraiser could want to ask an academic partner. Prospects may ask questions that have never been heard before, new projects may require in-depth information, or media requests may need quick responses.

Without a clear gatekeeper, these requests go straight to faculty inboxes and voicemail, leading to frustration across campus. Fundraisers may have to ask questions repeatedly in order to get a clear answer, delaying gift conversations in the process.

Lack of Gatekeeper Leads to Email Overload



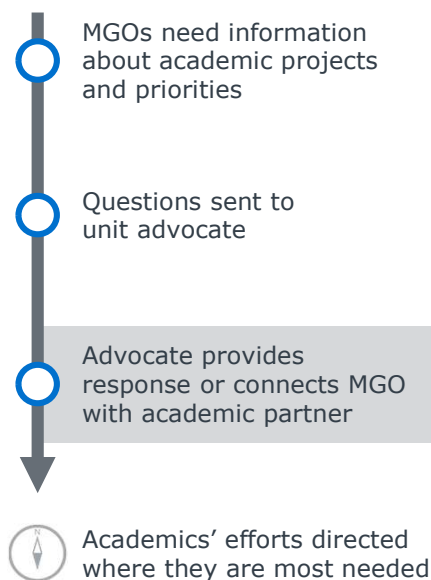
Deputizing Internal Gatekeepers

At University of Dayton, Unit Advocates Manage Requests for Academic Support

To reduce the number of requests that reach academic partners, the University of Dayton has created a role known as the “Unit Advocate.” Advocates are responsible for triaging requests, keeping deans’ fundraising on track, coaching academic partners, and educating advancement staff about the unit’s strategic priorities.

At Dayton, all advancement staff are centrally-based, so unit advocates take responsibility for many tasks that would be assigned to unit-based staff in a more decentralized structure.

Advocates Serve as Unit Point-of-Contact



Role Integrated into Current Responsibilities



The Unit Advocate role becomes part of a staff member’s ongoing responsibilities and is not a full-time position. Advocates generally spend 20-25% of their time on the role, equating to approximately one day per week.

Supporting Deans Without Unit-Based Staff

Unit Advocates Are a Win-Win for Advancement and Academic Leaders

Most of the current Unit Advocates are senior gift officers who have deep knowledge of the units to which they are assigned and who wanted an opportunity to work more closely with deans and other academic staff.

Moving forward, Unit Advocate responsibilities could be leveraged as a professional development opportunity for advancement staff members who are interested in taking a deep dive into an academic unit's fundraising strategy, managing a dean's priorities, and developing relationships with a unit's donors.

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*

Both deans and advancement staff have seen benefits from the Unit Advocates. Advancement staff are better equipped to build prospects' enthusiasm about giving to academic priorities. At the same time, deans feel supported in their own advancement work without needing to budget for their own frontline fundraisers.

Unit Advocate Implementation Timeline

Use the timeline below to establish a part-time Unit Advocate role at your institution. During each phase of the timeline, answer the relevant questions before moving onto the following stage.

Modify the schedule to meet your institutional needs, campaign timeline, or staff capacity.

Implementation Timeline for Unit Advocates



Months 1-3:

Outline **core responsibilities** and **time allocation** for role.

- What responsibilities are currently assigned to deans that should be reallocated to a Unit Advocate?
- Will we have one advocate per academic unit or one advocate shared by multiple units?
- What pushback from the deans should we be prepared to address?
- How will we roll out this role across campus?

Months 4-6

Identify **potential candidates** among current staff.

- In which units will we pilot this role? Which deans would most benefit from additional advancement support?
- How can we promote this role as a unique professional development benefit for advancement staff?
- How will we ask staff to volunteer or express interest in this opportunity?

Months 6-12

Onboard and educate new liaisons about unit priorities.

- Who will be responsible for onboarding advocates to the role?
- Will reporting lines need to change?
- How often will we bring advocates together to gain feedback on their new responsibilities?

Year 2 and Beyond

Consider **expanding beyond academic units** to include interdisciplinary research centers, student affairs, and athletics.

- What lessons did we learn during the first attempt to establish Unit Advocates? How can we improve the role moving forward?
- How did academic leaders react to the advocates?
- How can we leverage Unit Advocates to increase fundraising for our highest-priority initiatives?

Unit Advocate Metrics Compendium

Use the metrics below to evaluate the success of advancement staff who serve as part-time liaisons to academic units ("Unit Advocates"). Metrics can also be used to set performance goals for full-time liaison roles.

Add additional metrics to the list as needed to reflect your goals for academic liaisons. You may want to consider setting both baseline and stretch goals to encourage staff to build their skills.

Responsibility Type	Potential Goals
Understanding Unit Priorities	<ul style="list-style-type: none"> <input type="checkbox"/> Meet with at least one new faculty member per week to learn about their research priorities <input type="checkbox"/> Create at least 10 unit priority information sheets, or one unit-wide information sheet <input type="checkbox"/> Update information sheets quarterly <input type="checkbox"/> Discuss fundraising priorities with the dean at least twice per year
Communicating the Impact of Philanthropy	<ul style="list-style-type: none"> <input type="checkbox"/> Create repository of impact stories and data for each fundraising priority <input type="checkbox"/> Update impact collateral quarterly or as needed <input type="checkbox"/> Edit past collateral to ensure a consistent unit voice across stewardship materials <input type="checkbox"/> Share new information with donor relations and stewardship team on a monthly basis
Liaising with Advancement Staff	<ul style="list-style-type: none"> <input type="checkbox"/> Upload unit information sheets to easily-accessible online location <input type="checkbox"/> Lead annual training sessions on unit priorities <input type="checkbox"/> Answer 6-10 MGO information requests per week <input type="checkbox"/> Edit two relevant gift proposals per week
Managing the Dean's Fundraising	<ul style="list-style-type: none"> <input type="checkbox"/> Conduct quarterly practice sessions so dean gains experience pitching priorities to donors <input type="checkbox"/> Meet with dean annually to set overall fundraising goal and assign tasks to reach it <input type="checkbox"/> Plan quarterly progress updates to keep dean informed about progress to goal <input type="checkbox"/> Hold weekly meetings to set strategy relevant to top 10 donors or prospects for the unit; pull up on progress related to annual plan
Working with Donors and Prospects	<ul style="list-style-type: none"> <input type="checkbox"/> Attend at least one donor visit per month to provide specific information about a project or fundraising priority <input type="checkbox"/> Respond to incoming requests for information from donors about relevant fundraising priorities <input type="checkbox"/> Identify and scope opportunities for donor engagement and volunteering every quarter <input type="checkbox"/> Connect donors to relevant engagement opportunities based on their interests

Practice 6: Academic Advancement Director

Raise the Bar for Academic Partner Access

Practice in Brief

Full-time staff support each academic unit's fundraising priorities. They are hired with a communications and branding skillset in mind, and do not have prospect portfolios or fundraising goals. The Academic Advancement Director for each academic unit develops deep expertise in the unit's priorities to educate advancement staff and support multidisciplinary proposals.

Problems Addressed

Centrally based fundraisers struggle to keep track of fundraising projects within disparate academic units, and they don't know where to turn when they have questions. Deans lack a single source of accountability for managing the proposal pipeline, creating collateral, and promoting current priorities to internal and external stakeholders.

Diagnostic Questions

1. Does donor-facing collateral from academic units currently lack a unified voice and style?
☐ Yes ☐ No
2. Do academic units need dedicated staff to translate research innovations into donor-friendly language?
☐ Yes ☐ No
3. Do multidisciplinary gift conversations fail due to a lack of coordination among advancement staff?
☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to establish Academic Advancement Director roles at your institution.

Institution Profiled

University of Notre Dame

- Institutional control: Private
- Enrollment: 12,467 (8,576 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large Suburb (Notre Dame, IN)

Meet the Academic Advancement Director

Dedicated to Communicating to Internal and External Stakeholders

The University of Notre Dame has created a full-time role to manage advancement requests and to educate staff about academic fundraising priorities. Academic Advancement Directors (AADs) are hired for their communications and project management skills, and they do not have fundraising goals.

AADs are expected to support fundraising efforts through proposal management, multidisciplinary collaboration, and participating in donor visits where subject matter expertise is needed. They are also expected to present their unit's fundraising priorities to advancement staff on an annual basis.

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

The AAD role allows frontline fundraisers, who are regionally assigned, to remain generalists who can talk across the institution, while AADs serve as unit experts with deep knowledge of current projects and priorities. As a result, Notre Dame has experienced an overall increase in academic fundraising without hiring more gift officers.

Institutions that would like to test out an AAD-style role should consider hiring subject matter experts for individual campaign priorities, multidisciplinary centers, or other areas on campus where frontline fundraisers need expert support on a regular basis.

Charting the Path Forward

Scale the Reach of Current Partners

To help current fundraising partners reach more donors within their limited available time, consider the next steps and discussion questions below.

These resources will enable your team and relevant campus stakeholders to determine current strengths and areas for improvement. After doing so, use the prioritization guide on the following pages to identify which practices to implement.

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

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?

Prioritization Guide

Speeding Implementation and Ensuring Follow-Through

Instructions:

Based on your institution's goals and available resources, use the chart below to map out which of the practices profiled in this section you would like to prioritize. Use this document to assess viability and determine next steps.

Practice	My Institution Should Prioritize This Practice	Notes and Next Steps
Virtual Visit <i>University of Michigan</i> Major gift officers and academic partners create personalized video messages for top prospects and donors.	1 2 3 4 5 <i>Disagree</i> <i>Agree</i>	
Research Pitch Competition <i>Georgetown University</i> Faculty members pitch research projects to a group of donors, who vote for which project(s) will be funded through philanthropy.	1 2 3 4 5	
Academic Priority One-Pagers <i>University of Memphis</i> Advancement staff produces collateral that highlights unit fundraising priorities for frontline fundraisers and donors.	1 2 3 4 5	
Searchable Resource Hub <i>Stonehill College</i> Online library stores and organizes informational materials for easy access by advancement staff.	1 2 3 4 5	

Prioritization Guide (cont.)

Speeding Implementation and Ensuring Follow-Through

Practice	My Institution Should Prioritize This Practice	Notes and Next Steps
Unit Advocates <i>University of Dayton</i> Central advancement staff spend part of their time as the dedicated liaison between advancement and an academic unit.	<div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> </div> <div> <div>Disagree</div> <div>Agree</div> </div>	
Academic Advancement Directors <i>University of Notre Dame</i> Unit-based staff roles dedicated to communicating academic priorities to frontline fundraisers and prospective donors.	<div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> </div>	



Guide New Partners to High-Return Activities

SECTION

3

The Next Generation of Academic Leaders

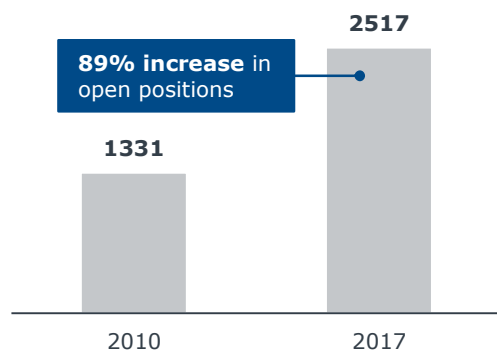
Understand Fundraising Is An Important Part of the Job

The role of a dean has changed considerably over time. In the past, deans were hired as the chief academic officer for their unit or college with few additional responsibilities. Today's deans, in contrast, are responsible for budget management, staffing, external relations, and fundraising.

Fundraising-focused deans are growing in number. As dean turnover increases, institutions have had numerous opportunities to identify leaders who can adapt to the new expectations for the role—including an enthusiasm for partnering with development.

Recruitment of New Deans on the Rise

*Job Postings for Academic Deans
in the United States*



“Deans hired in the past few years at Elon understand that **fundraising is a key part of their job**. Before that, deans received the message that fundraising was not something they needed to worry about”

*James Piatt,
Vice President for University Advancement
Elon University*



Role Description: Dean, College of Arts & Sciences

Responsibilities include:

- Develop and diversify revenue streams
- Serve as chief fundraiser for the school
- Oversee marketing and public relations efforts
- Meet specified campaign goal

Desired Qualifications:

- Strong management and financial skills
- Demonstrated fundraising experience
- Ability to lead conversations with donors and strategic external partners

Although expectations for deans' fundraising have grown, new deans often lack the support and guidance necessary for success. In most cases, deans' job descriptions vaguely describe fundraising, alumni engagement, and campaign success, but they rarely provide deans with explicit instructions on how to spend their development time or which activities to prioritize.

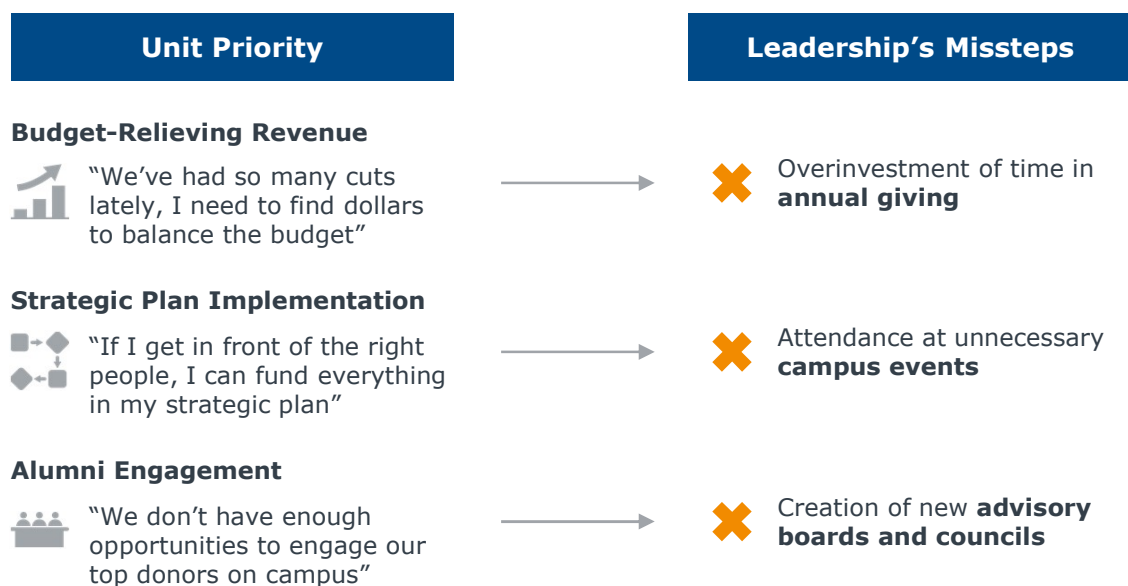
As a result of this lack of clarity and guidance, new academic leaders are frequently overwhelmed by their fundraising responsibilities.

Enthusiasm Abounds, But Game Plan Is Unclear

Mandate to 'Do Fundraising' Leads to Wasted Time and Efforts

New deans are often left to their own devices to determine which advancement activities to pursue and which to ignore. This often leads to decisions that are well-intentioned but may not focus on the opportunities with the highest return on investment.

In many cases, deans correctly identify advancement goals but attempt to meet them with low-value activities. For example, deans may seek to fill budget gaps by focusing on unrestricted annual giving. Alternatively, they may plan to attend low-value events in order to identify new prospects. Deans often consider creating new volunteer advisory boards without evaluating the success or failure of previously-existing volunteer groups.



Deans' decisions require unit-based advancement staff to spend substantial time on priorities unrelated to major and principal giving, preventing MGOs from reaching dollar goals over time. Furthermore, unnecessary activities fill time on deans' calendars that should be spent with the prospects whose philanthropy can transform their units.

Failing to Fill Knowledge Gaps

Status Quo Onboarding Rarely Meets Needs of New Academic Leaders

Onboarding is often advancement's first opportunity to encourage deans to spend their fundraising time wisely, but development leaders frequently fail to provide deans with the right information in the right format.

The onboarding agenda often starts with advancement conferences or on-campus workshops aimed at academic audiences. In-person sessions often provide substantial amounts of new information with few opportunities to reinforce the message or practice new skills after the sessions end.

Approach #1:

One-Size-Fits-All Training Quickly Forgotten



*External conferences,
consultant-led workshops*

- **Information overload** limits long-term retention
- Not tied to **on-the-job learning** opportunities



It's **not worth the cost** to have our deans commiserate with other deans on what they don't like about their development shops."

*Vice President for Development
Private Baccalaureate College*

Approach #2:

Role-Specific Preparation Rarely Clarifies Next Steps



*Portfolio reviews,
donor listening tours*

- Knowledge gained **not linked to clear tasks** and activities
- Few **accountability measures** to ensure follow through



We offer professional development for deans, but it doesn't evolve over time. After a while, **it all starts to sound the same.**"

*Vice President for University Advancement
Public Research University*

In addition to one-size-fits-all conferences, unit-based fundraisers often create customized onboarding plans, relying on portfolio reviews and donor listening tours to bring deans up to speed. Similarly to group onboarding sessions, one-on-one activities are rarely linked to clear follow-up steps for academic leaders.

The wealth of information provided during onboarding gives deans a theoretical understanding of advancement structure and strategy. But new academic leaders receive little training related to their specific responsibilities to work with prospects and donors.

Guide New Partners to High Return Activities

Ensuring Success for Academic Leaders

To help new academic leaders meet their fundraising goals, advancement staff should guide academic leaders to focus on the highest-impact activities, both during onboarding and throughout a leader's tenure.

First, advancement staff need to reinforce the impact and importance of major and principal gifts so deans focus on the top donors and prospects. Second, advancement must make sure that all partners have realistic expectations for what philanthropy can and cannot achieve. Finally, if deans struggle to set strategic priorities, advancement staff should create space for long-term visioning, resulting in stronger fundraising priorities both in and outside of the campaign lifecycle.



Reinforce Impact of Major Gifts

- Practice 7: MGO Metrics Updates (p. 50)
- Practice 8: Individualized Activity Plans (p. 53)



Rightsize Philanthropy Expectations

- Practice 9: Mini Feasibility Assessments (p. 58)



Create Space for Long-Term Visioning

- Practice 10: Strategy White Papers (p. 64)
- Practice 11: Visioning Walking Tour (p. 68)

Practice 7: MGO Metrics Updates

Reinforce Impact of Major Gifts

Practice in Brief

Academic leaders receive a weekly email recognizing the week's top gift officers in terms of donors visited, asks made, and dollars raised. The email consistently reminds academic leaders about the activities that enable their staff to raise the most money.

Problems Addressed

Deans distract their frontline fundraisers from major and principal gifts by asking them to support relatively low-ROI activities, such as annual giving and alumni relations efforts. Central advancement staff lack the means to reinforce the institution's fundraising priorities to deans and other managers of frontline fundraisers.

Diagnostic Questions

1. Do deans regularly ask frontline fundraisers to work on projects outside of major and principal gifts?

☐ Yes ☐ No

2. Do gift officers struggle to communicate their time management priorities to deans and other academic leaders?

☐ Yes ☐ No

3. Are academic units underperforming in major giving because staff are focused on other priorities?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to prioritize MGO Metrics Updates at your institution.

Institution Profiled

Clemson University

- Institutional control: Public
- Enrollment: 24,387 (19,402 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large Suburb (Clemson, SC)

Losing Sight of What's Important

Deans Distract Staff with Low-ROI Activities

When deans shift their focus away from major and principal gifts, they often distract frontline fundraisers from the activities that move them closer to their goals. Well-intentioned deans often turn to their fundraisers for assistance with events, advisory boards, speechwriting, and annual giving projects.

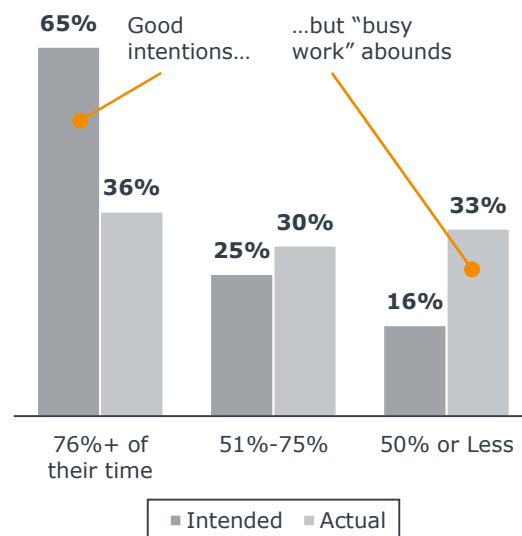
As a result, major gift officers spend far less of their time fundraising than they would like. They raise fewer major and principal gifts than would be possible if they were more focused on their top prospects.

Deans Ask MGOs to Do More than Ever



...Taking Time Away from Major Gifts

MGOs' Intended and Actual Time Dedicated to Frontline Fundraising, 2014



A Weekly Reminder of What Works

Clemson's Nudge Emails Emphasize High Impact Activities

To keep academic leaders and frontline fundraisers focused on core fundraising activities, Clemson University has developed a weekly email nudge that calls out fundraisers who have been most successful at their core metrics: visits, asks, and gifts closed. Every Friday, recipients receive an email titled "What have you done for D.A.D. today?"

D.A.D stands for donors visited, asks made, and dollars closed—a concise summary of where gift officers should be focusing their time. Each week's email features the top scorer in each category across the university.

Emails Distill Development into Three Metrics...

What have you done for D.A.D. today?

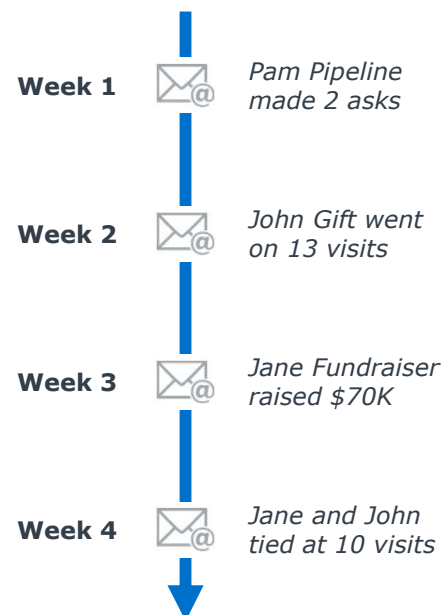
TGiF

DAD Results for the week of October 3-9:

	Individual	University Total
D = Donors Visited	Jane Fundraiser, 11 visits	37 visits
A = Asks Made	John Gift, 1 ask	1 ask
D = Dollars Closed	Pam Pipeline, \$55K in gifts and pledges	\$90K in gifts and pledges

- Same metrics featured every week
- Deans want their DOs to rank highly, let them focus attention here

...And Reinforce What Works, Week In and Week Out



For deans, receiving the MGO Metrics Update email every week reinforces which activities are most important for major gift officers. They seek to maximize performance on core metrics, and in so doing, they reduce their requests for gift officers to spend their time on activities unrelated to donor cultivation.

Practice 8: Individualized Activity Plans

Reinforce Impact of Major Gifts

Practice in Brief

Frontline fundraisers create annual to-do lists for academic leaders to complete, featuring specific activities and timelines. Tasks are customized to emphasize a dean's strengths, unit goals, and professional development needs. Plans keep all stakeholders on the same page about which activities to prioritize.

Problems Addressed

Academic leaders may not understand which activities to prioritize in order to reach annual fundraising goals. Fundraising metrics for deans often lead deans to focus only on what is measured, and they ignore other advancement tasks or priorities. Alternatively, deans may lack formal fundraising metrics, leading to confusion across campus regarding which activities deans should and should not undertake.

Diagnostic Questions

1. Do deans neglect important but amorphous advancement activities (setting long-term strategy, consulting on proposals, etc.) in favor of quickly-completed tasks (thank you letters, campus tours, etc.)?
☐ Yes ☐ No
2. Do fundraisers need help keeping deans focused on engaging their top ten or twenty prospects?
☐ Yes ☐ No
3. Does your provost want to see clear plans for how deans will work with advancement staff to reach annual targets?
☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to create Individualized Activity Plans for deans and other academic leaders.

Institution Profiled

University of Oregon

- Institutional control: Public
- Enrollment: 22,887 (19,340 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Midsize City (Eugene, OR)

Implementation Resource

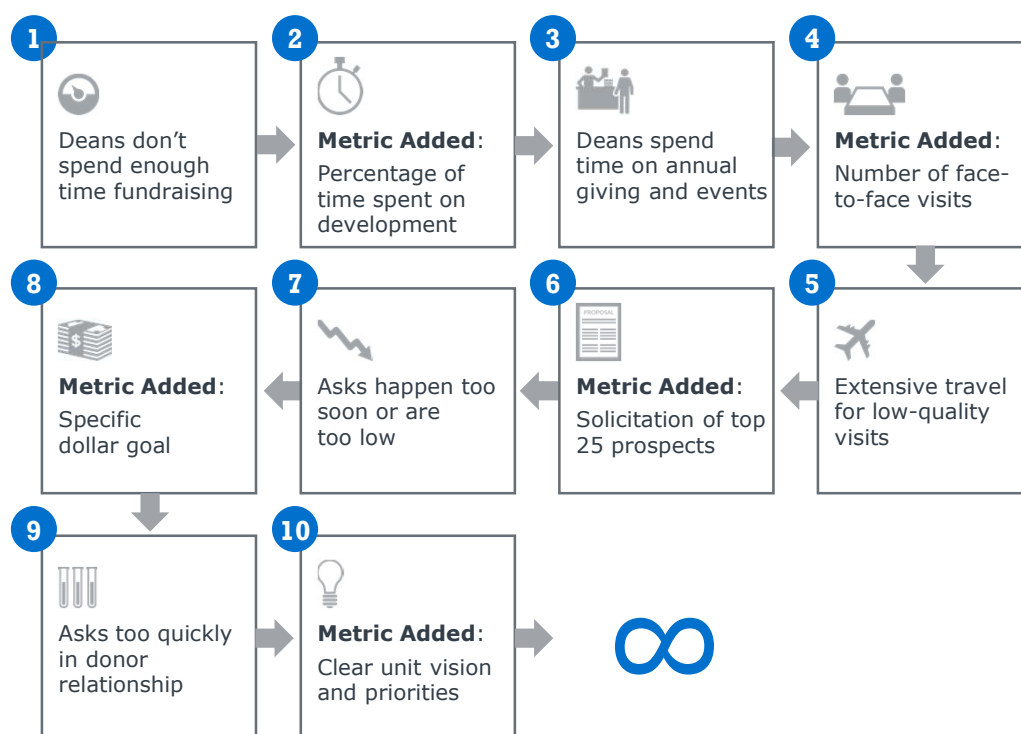
See p. 56 for an Individualized Activity Plan Template.



‘Can’t We Just Incentivize the Right Activities?’

Advancement Metrics for Deans Lead to Unintended Consequences

Some colleges and universities have implemented development metrics for deans, but one-size-fits-all performance goals do not lead to peak performance across the board. While quantitative metrics can serve as a useful reminder of which activities to prioritize, they can also lead to unintended consequences, like deans ignoring development tasks that are not measured by the metrics.



When deans ignore key activities, provosts and chief advancement officers may add additional metrics to ensure that time is allocated to them. Increasing the number of metrics leads to a cycle where new metrics are constantly added to an ever-longer set of performance goals. Eventually, the metrics list becomes too long to be a realistic set of expectations and neglects advancement tasks that are difficult to quantify, such as setting strategy and crafting a vision for the unit that will resonate with donors.

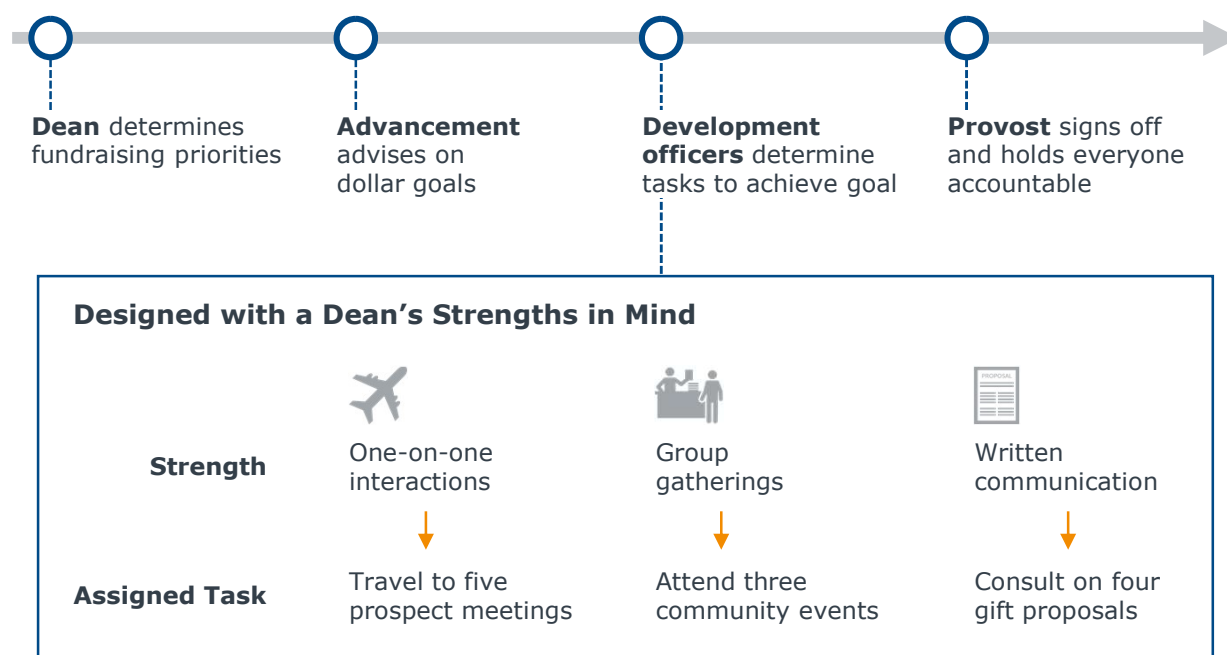
Moving Beyond Metrics Mayhem

University of Oregon Breaks Goals into Discrete, Personalized Tasks

The University of Oregon has moved away from static, one-size-fits-all fundraising metrics for deans in an effort to prevent deans from going on numerous low-quality visits (counted in their metrics) while avoiding important tasks that were not included in the metrics list.

Instead of handing deans a lengthy list of performance goals and expecting them to excel at every one, development officers design customized task lists for their deans every year. The chief advancement officer and provost sign off on the plan to keep everyone on the same page and to show deans that these activities are a key priority.

Activity Plans Focus on Concrete Next Steps



The Individualized Activity Plans allow each dean to have fundraising goals that are clearly articulated and matched to their strengths and professional development goals. A dean who excels at in-person donor interactions may be asked to attend more events and visits than a dean who prefers written communication. As a result, deans and their development officers have a shared understanding of where academic leaders are positioned to have the greatest impact on development.

Individualized Activity Plan Template

Use the template on the following page and the implementation steps outlined below to create an annual plan for how deans or other campus leaders will be involved in advancement efforts. Plans should help leaders focus on the right activities, meet annual targets and campaign goals, and build their advancement skills.

Remember to build each leader's plan around their strengths and interests, which may differ across campus.

Implementation Steps for Individualized Activity Plans

1. Set goals with the dean or academic leader.
 - This year's total dollar goal and fundraising priorities
 - Campaign milestones to reach
 - Strengths to build over time
2. Schedule activities to reach overall goals.
 - Travel commitments
 - Critical donor outreach
 - Target deadlines for proposals and solicitations involving academic leader input
3. Discuss the plan with the academic leader.
 - Do the goals and activities seem feasible as scheduled?
 - What accountability measures would be most helpful to ensure that everyone stays on schedule?
 - How often should we meet to review progress and update the plan?
4. Optional: send plan to provost and/or chief advancement officer for sign off.

A sample individualized activity plan template is on the following page. To create your own annual activity plan, use the **editable PowerPoint template available at eab.com**.



Individualized Advancement Plan for: [Name]

Helping You Reach Your Goals in [year]

✓

[Year] Goals in Brief

• Total fundraising: \$XYZ

– Priority 1

– Priority 2

– Priority 3

• Solicit top five donors: [list donors here]

• List additional goal here

Activities to Achieve Goals

Time Period <i>Edit as needed based on fiscal year or campaign timeline</i>	Activities <i>Prioritize specific, achievable tasks, or break larger projects into smaller items to be completed over time</i>
July-September	<div><div></div><div></div><div></div><div></div><div></div></div>
October-December	<div><div></div><div></div><div></div><div></div><div></div></div>
January-March	<div><div></div><div></div><div></div><div></div><div></div></div>
April-June	<div><div></div><div></div><div></div><div></div><div></div></div>

Practice 9: Mini Feasibility Assessments

Rightsize Philanthropy Expectations

Practice in Brief

When deans propose new fundraising priorities, advancement staff determine whether there are enough prospects with capacity to support the ideas. Ideas only become advancement priorities if an adequate pool of likely prospects already exists.

Problems Addressed

Academic leaders propose new ideas to advancement without understanding in advance whether they are viable for fundraising. Advancement staff struggle to make a data-driven case for what will or will not become a fundraising priority.

Diagnostic Questions

1. Do deans regularly bring new fundraising ideas to advancement under the assumption that strategy can suddenly be shifted?
☐ Yes ☐ No
2. Do advancement staff lack the tools necessary to make data-driven cases for declining to prioritize new ideas over current fundraising priorities?
☐ Yes ☐ No
3. Do deans' fundraising priorities often fail to appeal to donors?
☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to conduct Mini Feasibility Assessments to rightsize expectations for philanthropy among deans and academic leaders.

Institutions Profiled

Bucknell University

- Institutional control: Private
- Enrollment: 3,678 (3,611 undergraduate)
- Carnegie classification: Baccalaureate College
- Campus setting: Distant Town (Lewisburg, PA)

University of Rochester

- Institutional control: Private
- Enrollment: 11,648 (6,546 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Midsize City (Rochester, NY)

Implementation Resource

See p. 66 for a Mini Feasibility Assessment Decision Tree.

‘Please Raise Money for More Copy Paper’

Misperceptions of Advancement’s Potential Lead to Unrealistic Expectations

Advancement teams cannot succeed if fundraising priorities lack donor appeal, but new academic leaders may believe that all their ideas are equally interesting to supporters. Deans often reach out to gift officers whenever a need arises on the assumption that funds can be raised for whatever priority they choose within a relatively short timeframe. As a result, a unit’s giving priorities may shift regularly and lack alignment with pre-existing strategic plans, campaign goals, or donor interests.

Academic Leaders Unaware of Advancement’s Limits

Lack of Donor Appeal



Assumption that any project can be funded in spite of:

- Donor interests and affinity
- Institutional history of similar projects

Impossible Timeline to Gift



Expectation that funds will be available regardless of:

- Donor cultivation cycle
- Prospect and donor capacity
- Other projects in pipeline

Misalignment with Strategic Plan



Presentation of new projects despite:

- Strategic planning timelines
- Ongoing advancement priorities

Misunderstanding Leads to Flurry of Small Asks

“Academic partners ask us to fund their needs all the time. What we need to help them understand is that advancement’s role is to achieve strategic objectives, **not to get small projects done.**”

*Shawn Lyons, Vice President for Development and Alumni Engagement
Centre College*

In this environment, advancement staff struggle to explain what philanthropy can and cannot make possible. If advancement does not rightsize expectations, academic leaders will continue to make funding requests that are out of step with overall institutional strategy.

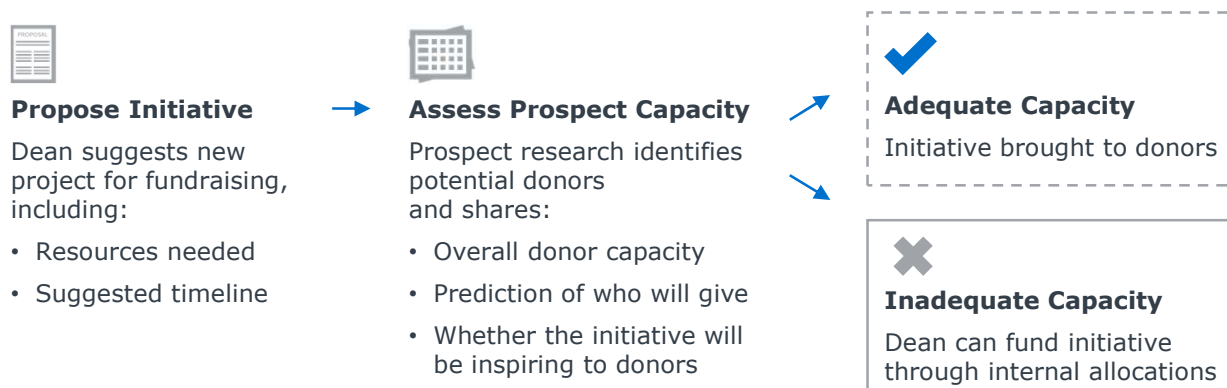
A Reality Check for New Initiatives

Bucknell Shows Academic Leaders What Philanthropy Can and Cannot Do

To help academic leaders determine if their ideas would be viable for fundraising, Bucknell University conducts Mini Feasibility Assessments before any project becomes an advancement priority.

When an academic leader proposes a new initiative, prospect research staff assess the current prospect pool to determine if there is an adequate number of potential supporters. If enough prospect capacity exists, the idea is shared with fundraisers. If not, deans are asked to fund the project through their own budgets.

Prospect Pool Determines Whether Advancement Gets Involved



Deans Refocus on Alternative Funding Sources

“We want our deans and other leaders to have ambitious visions. We have a responsibility, however, to the University and its stakeholders to make sure we use our resources wisely. Therefore for some initiatives, small or large, we challenge deans to **think about what other funding options they have, including existing resources or campus partners**. We always want fundraising to be part of the solution, but sometimes it shouldn't be the only solution.”

*Scott Rosevear, Vice President for University Advancement
Bucknell University*

In addition to elevating the highest-priority projects to advancement, the Mini Feasibility Assessments have shown deans that fundraising should be part of a holistic funding plan for their unit rather than the sole source of funds. Academic leaders may need to sunset one program to start another, match donor funds, or reallocate institutional funding to get their ideas off the ground.

Scoping the Dean's Involvement Early On

Rochester Uses Data to Estimate Number of Donors Deans Must Engage

Taking the Mini Feasibility Assessment one step further, the University of Rochester determines whether deans are prepared to invest their own time in getting new funding priorities off the ground.

When deans share new ideas with advancement, staff create a gift table that shows potential timelines for funding and how many donor engagements will be required for success. For the project to become an advancement priority, the dean has to accept the timeline and be willing to meet with the requisite number of donors.

Advancement Staff Use Past Results to Assess Feasibility of New Ideas

Sample Proposal: Laser Lab

Funding Needed: \$10M

If this many donors support the project...	At this giving level...	It will be fully funded in:
One donor	\$10M per donor	5 years
10 donors	\$1M per donor	4 years
25 donors	\$400K per donor	2 years
100 donors	\$100K per donor	1.5 years

Results Predict Where Deans Need to Engage:

- How many prospects will I need to meet?
- What size gifts are we predicting?
- How long will it take to fund the project?

If deans are unsatisfied with the timing or unwilling to commit time to the effort, the new idea does not become a fundraising priority. Alternatively, if deans do accept the data, projects move onto the next step in the feasibility assessment process.

Donors Have the Final Say

Potential Prospects Share Opinions on Projects Before Fundraising Starts

Even if a dean at the University of Rochester commits time to advancement, their ideas must appeal to donors before they can become fundraising priorities.

Advancement staff pitch the project to a small group of prospects with affinity for the topic. If the pitch is positively received or if prospects offer support upfront, the project becomes a fundraising priority. But if donors are unenthusiastic, deans are asked to reconsider their funding plans.

Donor Opinion the Final Step in Feasibility Assessment



Making Collective Decisions Around Prioritization of Needs and Feasibility of Success

"Strategic priorities from deans are embraced by Advancement. Collective discussions would also include a qualitative and quantitative review of data, prospect pool, discussion stages and gift tables. **This facilitates a thorough review, leading to collective planning and shared success among stakeholders.**"

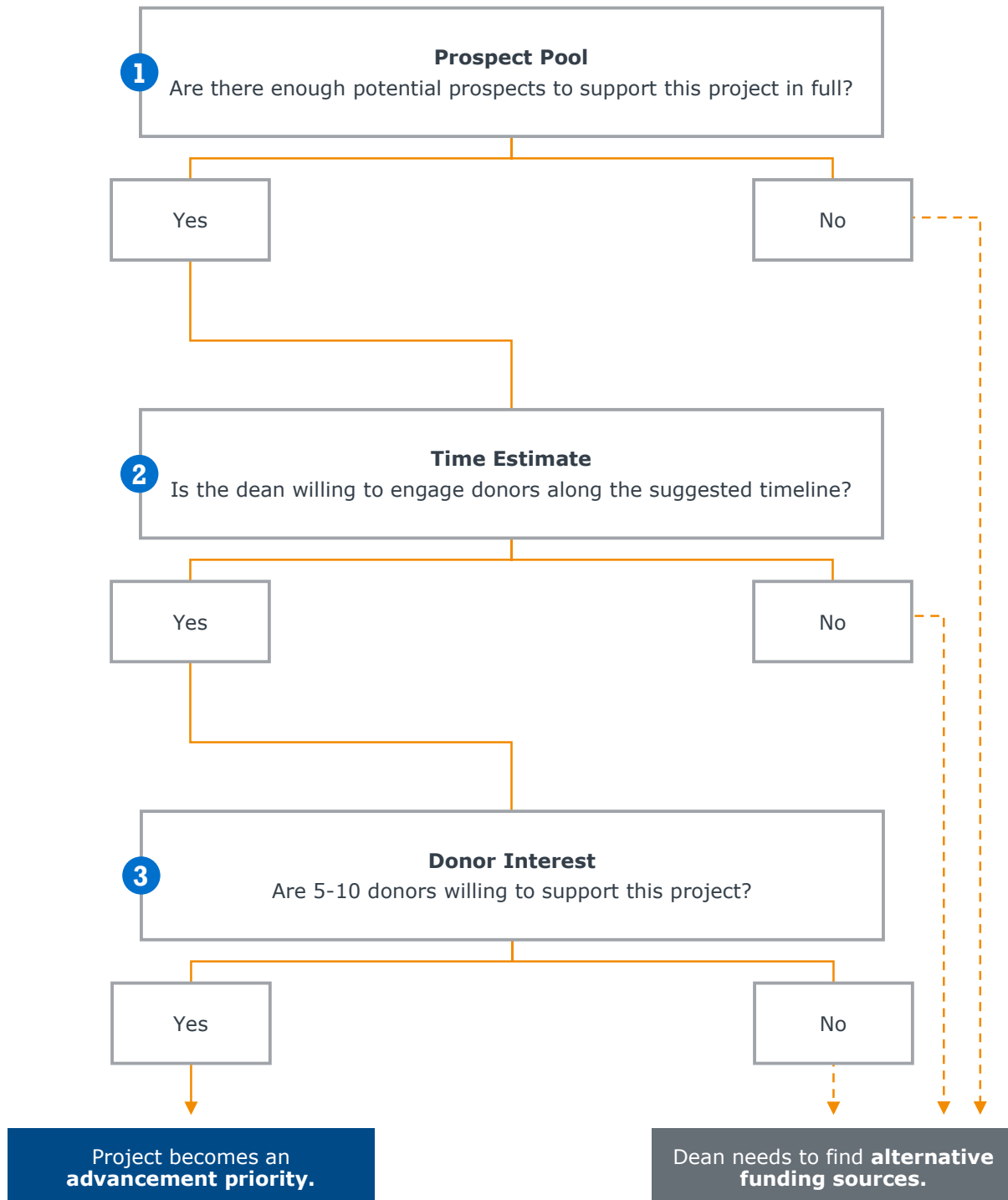
Jason Gray,
Associate Vice President of
University Advancement
College of Arts, Sciences, and Engineering,
University of Rochester

The donor response to the pitch is the deciding factor about what becomes a fundraising priority. Deans gain an understanding of how donor preferences shape potential fundraising success, while advancement gathers information that helps them make the case for what should become a priority.

Mini Feasibility Assessment Decision Tree

Use the following decision tree to communicate the results of a Mini Feasibility Assessment to campus stakeholders who have presented new fundraising ideas to advancement. Use the tree to show progress during the assessment itself, or to explain the rationale for not adopting a new fundraising priority.

Note: the decision tree assumes that faculty members' ideas have been approved by the relevant dean before being shared with advancement.



Practice 10: Strategy White Papers

Create Space for Long-Term Visioning

Practice in Brief

Advancement staff add structure to strategic planning by asking deans four short questions about their vision for their unit. Deans answer the questions and provide additional context to advancement staff about why fundraising is necessary to achieve their goals. Marketing and communications turns the deans' answers into collateral to educate stakeholders, including external constituents, about the unit vision and fundraising priorities.

Problems Addressed

Deans struggle to articulate a vision for their unit. Advancement staff do not have a clear understanding of a dean's needs and fundraising priorities. Donors want to support an ambitious vision, requiring advancement staff to have greater knowledge of a dean's long-term goals.

Diagnostic Questions

1. Do deans struggle to outline a medium- or long-term vision for their unit or division?

☐ Yes ☐ No

2. Are deans' fundraising priorities focused on immediate needs or capital projects?

☐ Yes ☐ No

3. Do fundraisers and other advancement staff need more information than they currently receive about deans' priorities and relevant giving opportunities?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to prioritize implementation of Strategy White Papers at your institution.

Institution Profiled

Boise State University

- Institutional control: Public
- Enrollment: 24,121 (20,744 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Midsize City (Boise, ID)



Implementation Resource

See p. 70 for a Unit Vision Discussion Guide.

‘What’s the Future of Your Department?’

Great Ideas Rarely Captured and Shared with Donors

Beyond managing projects and programs, deans are expected to craft the strategic vision for their unit. Yet they frequently suffer from visioning fatigue. Deans are constantly asked for new ideas during strategic planning, campaign goal setting, and institutional marketing efforts, making the visioning process unappealing and time-consuming. Additionally, visioning is often presented as a high-pressure task, so it becomes a stressor, instead of an opportunity for blue-sky thinking.

Struggling to Keep Track of Unit Visions

“Our deans have great ideas. But they’re doing so many things at once—they only write them down when they have to. The best ideas **never get put on paper**, so we forget them, and they never get shown to donors.

*Associate Vice President,
Development
Public Research University*

Visioning Not an Easy Task for Academic Leaders



Perceived as difficult, time-consuming



Can’t solve short-term budget woes



No clear deadline or process

As a result, it’s becoming harder to get academic leaders to put their vision into words. Instead of visioning, deans prioritize tasks that can be quickly checked off from their to-do lists or that seem urgent. Visioning is relegated to the limited free time they have or doesn’t happen at all, leaving advancement staff with little information to excite donors about the unit’s future.

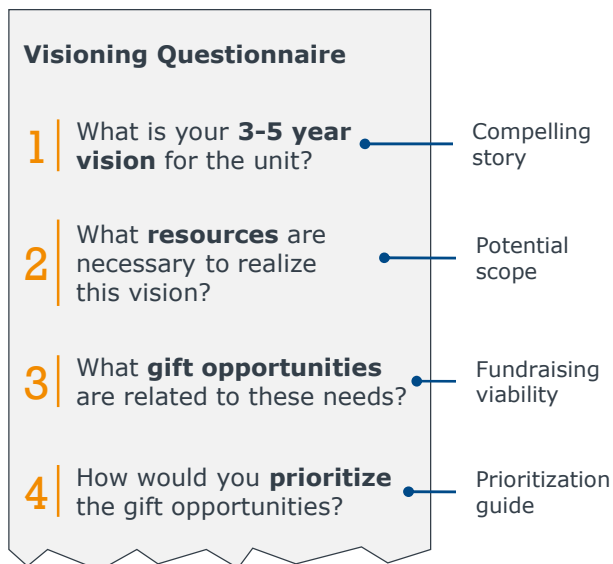
An Easy Template for Busy Academics

Boise State University Turns Visioning into Time-Limited, Achievable Task

Staff at Boise State University realized that deans needed more direction when asked for a vision statement, so they created a list of four questions that all deans were asked to answer. The questions require thinking beyond day-to-day needs and are broad enough to be relevant for all campus units.

In many cases, communications staff walked deans through the questions in person so that they could ask clarifying questions during the conversation. Deans' answers were turned into white papers about each unit's giving opportunities.

Deans' Task: Answer Four Questions



Advancement Takes It from There



Turning Visions into Gifts

9 White papers created

\$70M Raised to support priorities

The resulting Strategy White Papers allow all advancement staff to understand each unit's strategic priorities. With this information in hand, gift officers can knowledgeably present fundraising opportunities to interested donors.

Unit Vision Discussion Guide

Use the following questions to hold conversations with campus stakeholders about future directions for their unit or division. Answers to the questions can be used to set fundraising priorities, kickstart strategic planning processes, or create donor-facing collateral. Adapt the questions to your team's needs and fundraising strategy.

To maximize stakeholder comfort with visioning, hold the conversation in their office or another familiar setting.

Discussion Guide

1. Introduction

- Thank the campus partner for meeting.
- Explain the purpose of the conversation and potential follow-up steps that may be necessary.

2. Future Course and Strategy

- What is your three-to-five year vision for the unit? In an ideal scenario, what would you like to see implemented, created, or built?
- Why do you want these changes to occur? What is the overall goal?
- What strengths would you like to emphasize moving forward? What areas of pre-eminence could become strengths in the future? What programs would you like to be known for? Why?
- How will this affect the student experience?

3. Necessary Resources

- How will your current facilities need to change or adapt in order to reach your goals? Will new facilities be needed? What would they make possible that you would otherwise be unable to accomplish?
- Will additional faculty lines be needed? How will we need to support researchers in order to make this happen? What additional staffing changes will be necessary?
- Are you willing to commit internal funds to any of these efforts? If so, what specific commitments are you willing to make, assuming that budgets remain stable?

4. Giving Opportunities

- What parts of this vision will be most appealing to donors? What will be least appealing?
- Can you think of any current supporters who would be interested in funding these new initiatives?
- If a donor gave you \$100,000 to fund this vision, what investments would you make first? What if you had \$1 million?

5. Fundraising Priorities

- Which of these items are most important for achieving your vision? Why?
- If we started raising funds for this vision tomorrow, what opportunities (large and small) would you want us to start with?
- Of all of your ideas, what are the top three to five biggest priorities?

6. Conclusion

- Reiterate thanks to the partner for investing their time in the conversation.
- Share an interesting story or fact from the conversation that was particularly compelling.
- Express how donors will be excited to support this vision based on the information shared.

Practice 11: Visioning Walking Tour

Create Space for Long-Term Visioning

Practice in Brief

A dean or other academic leader takes advancement staff on a walkthrough of their unit's building to indicate which facilities that could be updated if donor support were found. The dean tells the story behind their needs, painting a picture of how they fit together into a long-term vision. Information from the walking tour forms the base of the unit's philanthropic priorities.

Problems Addressed

Academic leaders are often asked to create a vision for their units that donors can support, but they struggle to think big, resulting in visions focused on capital needs with few linking narratives. Advancement staff need additional details to make fundraising priorities more interesting for donors.

Diagnostic Questions

1. When asked about their fundraising priorities, do deans focus on current capital needs instead of long-term goals and strategy?

☐ Yes ☐ No

2. Do deans struggle to articulate how their fundraising priorities fit together into a compelling narrative?

☐ Yes ☐ No

3. Do advancement staff need additional opportunities to gain insight into a dean's thought process, motivation, and priorities?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to consider asking deans or other academic leaders to participate in Visioning Walking Tours.

Institution Profiled

Queens University of Charlotte

- Institutional control: Private
- Enrollment: 2,507 (1,719 undergraduate)
- Carnegie classification: Master's University
- Campus setting: Large City (Charlotte, NC)

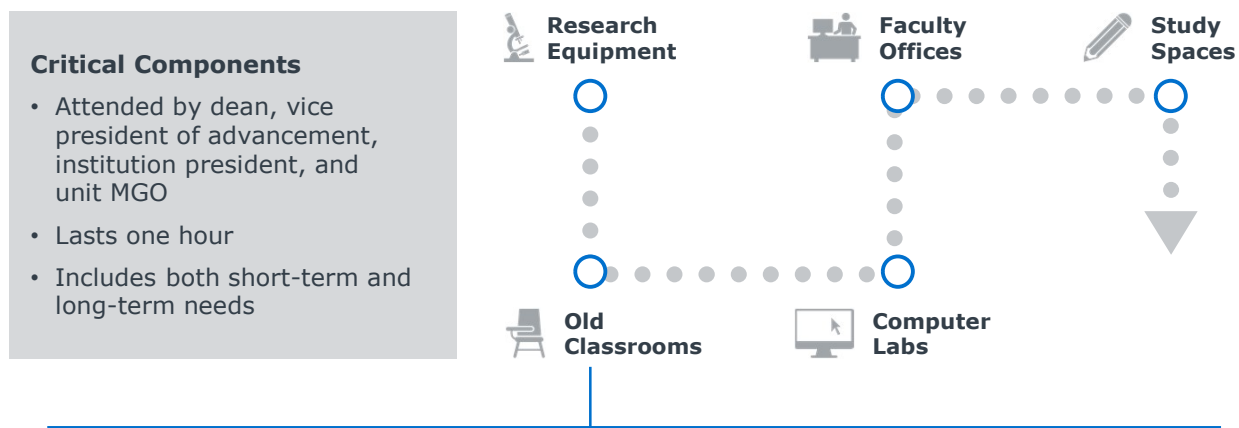
Walk Me Through Your Vision

Group Tour Lets Dean Share Ideas Without Putting Pen to Paper

Instead of writing goals on paper, deans at Queens University of Charlotte share their long-term visions with advancement staff during building walkthroughs.

Over the course of one hour, the dean and advancement staff walk to key sites in the building. At each stop, deans explain how the spaces need to be modified to meet current students' needs. The tour group can ask for stories about how this improvement fits into a larger narrative about the unit's future.

Stops on Walking Tour Allow Academic Partners to Describe Their Units' Needs



Dean Paints an Off-the-Cuff Vision

Where We Are

"All of our students take at least one class here"

What's the Challenge

"We can't teach flipped courses with this set-up"

What We Need

"Flexible seating options and another projector"

What's My Vision

"Our unit will use the latest teaching techniques"

Turning the Tour into a Case for Support

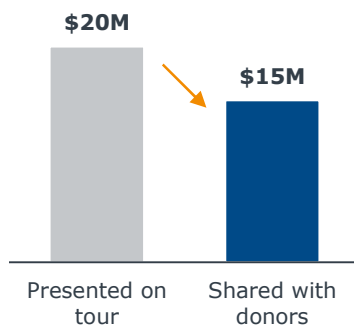
Advancement Staff Determine Realistic Philanthropic Priorities

In one example, a Visioning Walking Tour at Queens surfaced \$20 million in unit funding priorities that had not previously been articulated. Advancement identified the opportunities that were most likely to resonate with donors and turned them into formalized fundraising priorities.

After each walking tour, advancement staff have more insight into a dean's future goals and what it will take to make them real. Additionally, deans gain comfort presenting a vision to other campus stakeholders, useful practice for future donor interactions.

Transforming the Wish List into Advancement's Next Steps

Total Value of Deans' Articulated Needs



“When we cut down the list, we could have a conversation with the dean about what he could do with other funding sources to make these ideas a reality, and it gave us **a clear direction moving forward.**”

*James Bullock,
Vice President for University Advancement
Queens University of Charlotte*

A Win-Win for Advancement and the Academy



Insight into Unit's Future

Advancement can build enthusiasm among donors and prospects



Comfort with Visioning Process

Academic leaders willing to participate in similar activities in the future

Charting the Path Forward

EAB Resources to Guide Partners to High-Return Activities

To help new academic leaders make strategic decisions about their fundraising, consider the next steps and discussion questions below.

These resources will enable your team and relevant campus stakeholders to determine current strengths and areas for improvement. After doing so, use the prioritization guide on the following pages to identify which practices to implement.

Next Steps for Implementation

Short-Term

- ☒ Turn unit visioning into a clearly-defined, time-limited activity
- ☒ Prioritize specific development tasks for new partners

Long-Term

- ☒ Tailor onboarding to needs of new academic leaders
- ☒ Implement accountability measures to stay focused on top prospects
- ☒ Ensure that resource planning relies on all potential sources of funding

Discussion Questions

- 1** | How effectively do we onboard new leaders to advancement?
- 2** | Are academic leaders focusing on major and principal gifts? Are they distracted by any other activities?
- 3** | Do current leaders over-rely on philanthropy to meet their budget needs?
- 4** | Do any leaders struggle to express a vision for their unit? How can we help them create one?
- 5** | How can we hold everyone accountable for advancement activities and goals?

Prioritization Guide

Speeding Implementation and Ensuring Follow-Through

Instructions:

Based on your institution's goals and available resources, use the chart below to map out which of the practices profiled in this section you would like to prioritize. Use this document to assess viability and determine next steps.

Practice	My Institution Should Prioritize This Practice	Notes and Next Steps
MGO Metrics Updates <i>Clemson University</i> Weekly emails keep deans focused on high-return activities, discouraging them from distracting frontline fundraisers with other activities.	1 2 3 4 5 <i>Disagree</i> <i>Agree</i>	
Individualized Activity Plans <i>University of Oregon</i> Advancement staff create individualized annual plans for academic partners focusing on concrete, feasible tasks.	1 2 3 4 5	
Mini Feasibility Assessments <i>Bucknell University, University of Rochester</i> Communicate whether a dean's priorities can be funded through philanthropy using prospect capacity data and donor opinion assessments.	1 2 3 4 5	
Strategy White Papers <i>Boise State University</i> Ask a series of simple questions to turn academic visioning into a structured, time-limited task.	1 2 3 4 5	

Prioritization Guide (cont.)

Speeding Implementation and Ensuring Follow-Through

Practice	My Institution Should Prioritize This Practice	Notes and Next Steps
<p>Visioning Walking Tour</p> <p><i>Queens University of Charlotte</i></p> <p>Deans share the story of their unit priorities and vision through an in-person building walkthrough.</p>	<div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> </div> <div> <div>Disagree</div> <div>Agree</div> </div>	



Recruit Future Champions

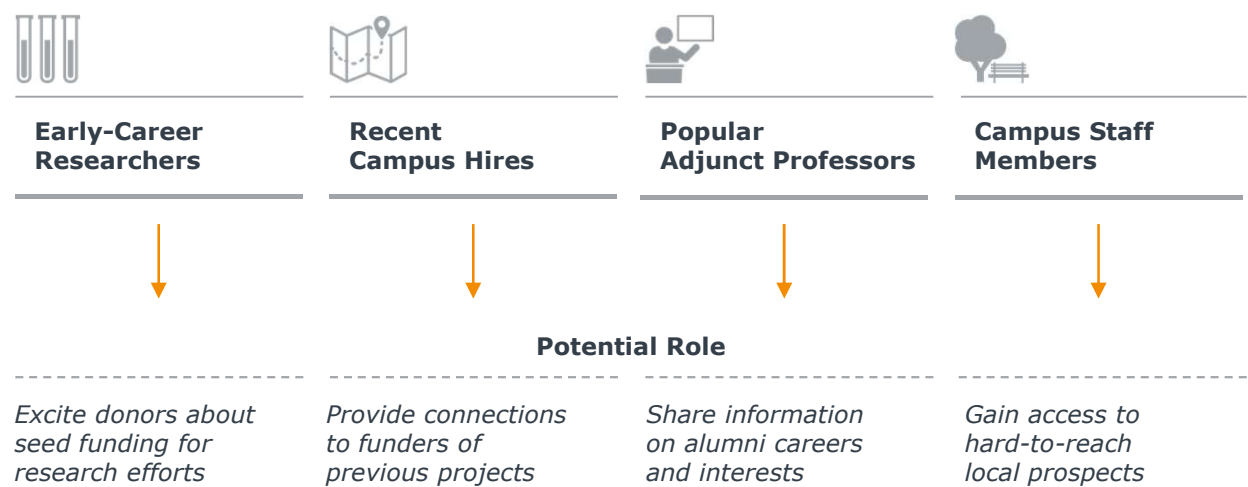
SECTION

4

Looking Beyond the Usual Suspects

Potential Champions Not on Advancement's Radar

Beyond working with academic leaders, advancement needs to identify the potential partners across campus who will resonate with alumni and other constituents. Many of these individuals are popular among alumni but unknown to development staff, including early-career faculty who may one day become fundraising superstars and adjunct professors who work frequently with undergraduate students. Alumni may also feel a high degree of affinity for non-academic staff from a variety of departments, especially student affairs and athletics.



Source: Advancement Forum interviews and analysis.

Like Ships Passing in the Night

A Variety of Reasons for Missed Connections

These potential partners do not currently participate in advancement initiatives for a number of reasons. First, they may not appreciate philanthropy's importance, or they may be unaware of their own role in engaging alumni.

Second, a perception may exist on campus that advancement is not a part of faculty and staff members' jobs, so few partners volunteer to work with us.



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

Additionally, there are more faculty on campus than ever, increasing the difficulty for advancement staff of proactively identifying champions. Plus, growth in the number of adjunct faculty members requires staff to constantly keep track of new partners.

Finally, high rates of turnover among deans and other administrators mean that advancement staff may not have time to find new partners because they are so busy onboarding new leaders and rebuilding donor confidence.

Recruit Future Champions

Three Steps to Identify and Engage New Academic Partners

Instead of assuming that the best advancement partners will volunteer to work with us, advancement staff need to take the lead in identifying and engaging partners across campus.

After finding champions on campus, advancement must highlight the benefits of working as a partner, so that campus stakeholders understand how a small investment of their time will reap rewards both for themselves and for their alumni.

Finally, advancement staff should make participation as easy as possible so that campus constituents are enthusiastic about the possibilities offered on future occasions.



Identify Under-the-Radar Superstars

- Practice 12: Favorite Faculty Surveys (p. 78)



Highlight the Value Proposition

- Practice 13: Pre-event Networking (p. 82)
- Practice 14: Volunteer Reporting Incentives (p. 86)



Make It Easy to Say Yes

- Practice 15: Social Media Templates (p. 90)
- Practice 16: Multidisciplinary Faculty Showcase (p. 92)
- Practice 17: Cross-Campus Project Curator (p. 95)

Practice 12: Favorite Faculty Surveys

Identify Under-the-Radar Superstars

Practice in Brief

Current students and/or alumni are asked to name one or more of their favorite professors or staff members. Nominees are coded in alumni records in the CRM to facilitate future affinity-based outreach.

Problems Addressed

Advancement doesn't know which campus stakeholders are popular among alumni, so they don't invite the most popular faculty and staff members to events on campus or on the road. Alumni data records do not include professor/staff member affinity information, making it challenging to conduct affinity-based outreach related to campus personnel.

Diagnostic Questions

1. Does advancement need a means to collect data on current students' and alumni's favorite campus partners?

☐ Yes ☐ No

2. Could a "favorite professor" question be easily added to event registration forms?

☐ Yes ☐ No

3. Can you easily add alumni's favorite professors or staff members to records in the CRM?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to prioritize Favorite Faculty Surveys.

Institutions Profiled

Stonehill College

- Institutional control: Private
- Enrollment: 2,498 (all undergraduate)
- Carnegie classification: Baccalaureate College
- Campus setting: Large Suburb (Easton, MA)

Trinity University

- Institutional control: Private
- Enrollment: 2,571 (2,395 undergraduate)
- Carnegie classification: Master's University
- Campus setting: Large City (San Antonio, TX)

Centre College

- Institutional control: Private
- Enrollment: 1,450 (all undergraduate)
- Carnegie classification: Baccalaureate College
- Campus setting: Distant Town (Danville, KY)

Furman University

- Institutional control: Private
- Enrollment: 2,949 (2,734 undergraduate)
- Carnegie classification: Baccalaureate College
- Campus setting: Large Suburb (Greenville, SC)

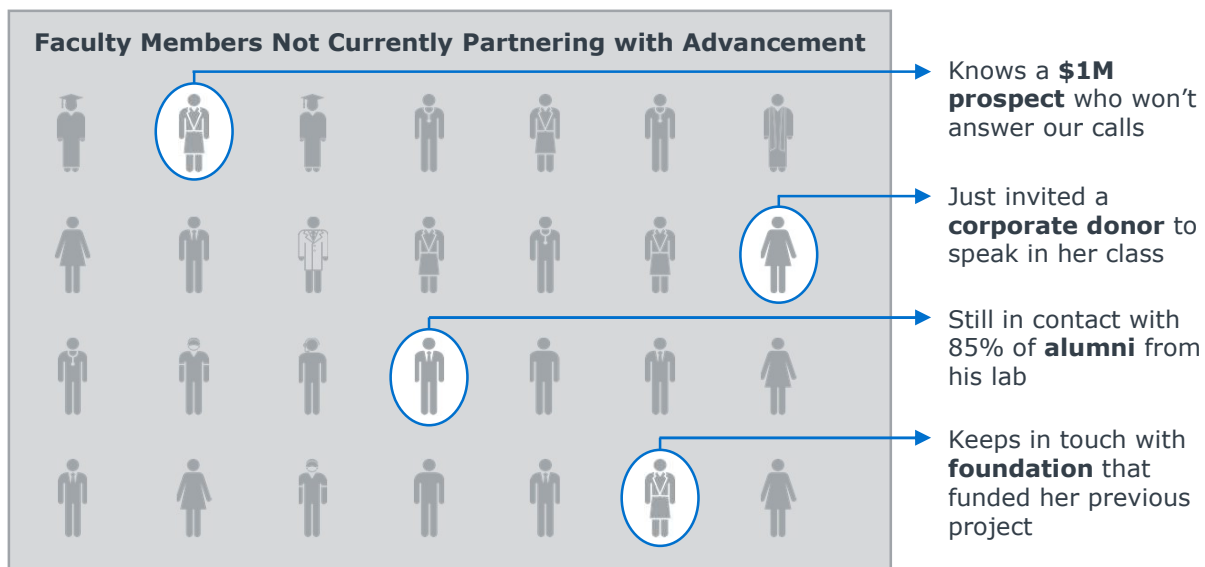
Like Finding a Needle in a Haystack

Determining Highest Potential Non-Partners Remains an Elusive Task

Partners across campus often stay in touch with alumni, connect with corporations, and receive foundation support, all without advancement's knowledge. These campus stakeholders may not even be aware that advancement could support their efforts.

In other cases, campus partners may hold critical prospect information that could quickly advance major gift strategy, but they are unwilling to share it. Potential partners may be afraid that fundraisers will harass their alumni and community contacts, jeopardizing future engagement or financial support from them.

Key Partners Hiding in Plain Sight



Identifying Fan Favorites on Campus

Students and Alumni Signal Which Partners Would Have the Greatest Impact

Alumni are more willing to attend events and give back to their alma mater if there is a clear connection to a professor or staff member with whom they interacted during their time as a student. Yet advancement staff often lack mechanisms for determining who was popular and should therefore be invited to more events and donor activities.

The colleges and universities listed here have implemented processes to collect favorite professor data. Advancement services teams now add it to alumni records in the CRM, and alumni relations staff invite professors to events where alumni will be excited to see them.

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

To collect this data, institutions have added questions to existing event registration forms or recorded information from annual traditions. In all cases, capturing academic affinity information does not require creating new or separate channels for information reporting.

Collecting Data While It Is Top of Mind

Stonehill College Turns Class Gift Tradition into Faculty Identification Point

At Stonehill College, data about critical campus partners is collected during the weekend before graduation. Every year, graduating students can choose a faculty or staff member to honor. Advancement codes who each student chooses in the CRM so that it can be used as part of future affinity-based asks and engagement opportunities.

Recognizing Campus Partners Today



40% Student participation rate

250+ New data points in CRM

Building a Base of Long-Term Partners



Approximately 40% of students choose an honoree each year, giving advancement staff a new perspective on whom to engage across campus, including some partners who had not previously been identified.

For faculty, the honors build goodwill with advancement over time, increasing the chances that they will be willing to participate in future activities.

Practice 13: Pre-Event Networking

Highlight the Value Proposition

Practice in Brief

Before a campaign roadshow or other off-campus event, faculty participants are invited to a dedicated space for relaxing, warming up, and meeting other participants. This exclusive networking opportunity is promoted when the event planning team looks for volunteers, so that faculty members have clear incentives for participation.

Problems Addressed

Advancement events are unappealing for academic partners because they include few obvious benefits. Event planning staff struggle to identify enthusiastic volunteers who are willing to travel to support advancement efforts.

Diagnostic Questions

1. Are faculty members unenthusiastic about participating in off-campus advancement events?
☐ Yes ☐ No
2. Are you currently planning or conducting a campaign that will require faculty participation in showcases or roadshows?
☐ Yes ☐ No
3. Have donors shared that they would prefer to attend events that focus on academic partners and/or other campus constituents?
☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to include Pre-Event Networking for academic partners into current and future roadshows and other events.

Institution Profiled

Florida International University

- Institutional control: Public
- Enrollment: 56,718 (47,629 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large City (Miami, FL)

Implementation Resource

See p. 88 for a Campus Partner Stewardship Tracker.



What's in It for Me?

Doubts Linger About Value of Partnering with Advancement

Knowing which faculty to invite to events does not mean that campus partners will agree to attend. Academic partners often view advancement events as a distraction from their research and teaching. New partners may be uncomfortable meeting donors or may not understand how event attendance could benefit them personally.

Advancement's invitations rarely address these concerns. Calls for volunteers and public invitations often broadly outline the event, with few details about what faculty are expected to contribute, how much preparation is involved, or the required time commitment.

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

To build excitement for supporting campaign events on the road, Florida International University created a unique set of benefits to make event attendance appealing to faculty champions.

Before every roadshow, faculty are invited to an exclusive “green room,” where they can network with other faculty participants, including colleagues they would never meet through other channels. Roadshow invitations also clarify that faculty will have a unique public platform to promote their programs to potential supporters.

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

To acknowledge the time and efforts of faculty volunteers, stewardship for faculty participants is more substantial than during previous campaigns. Faculty participants receive thank you notes, recognition from their deans, and other gifts to show how much advancement appreciates their contributions to the event.

Designing new faculty benefits for roadshow participation has increased enthusiasm on campus for working with advancement and traveling to meet with alumni and prospective donors.

Campus Partner Stewardship Tracker

Campus stakeholders often feel that their efforts to work with advancement go unrecognized, which discourages them from participating in future initiatives. To ensure that partners are stewarded over time, advancement teams need to proactively plan stewardship touches throughout the year.

Use the chart below to keep track of which campus partners have worked with advancement and to plan recognition for their efforts. Stewardship can include gifts, thank you notes, recognition by name at events or in publications, and/or photo opportunities with the campus mascot. As with donors, brainstorm stewardship touches that will be meaningful for the partners involved.

Campus Partner	Advancement Engagement <i>Dates, event names, and other relevant information</i>	Stewardship Plan <i>Recognition opportunities, deadlines, and staff assignments</i>	Stewardship Completed <i>Check when complete</i>

Practice 14: Volunteer Reporting Incentives

Highlight the Value Proposition

Practice in Brief

When faculty members invite an alum or other volunteer to campus, they are asked to share information about the volunteer opportunity through an online form. As an incentive for sharing information, advancement provides the faculty member's volunteer with a parking pass, thank-you gifts, and stewardship following the engagement.

Problems Addressed

Academic partners invite volunteers to campus without informing development or alumni relations teams. This results in missed opportunities to schedule donor visits on campus, and advancement cannot recognize the volunteer engagement during stewardship.

Diagnostic Questions

1. Do academic partners often invite alumni, community members, or prospective donors to campus?

☐ Yes ☐ No

2. Do on-campus volunteers frequently go unmentioned to advancement staff?

☐ Yes ☐ No

3. Are you aware of donors and prospects whose volunteering has gone un-stewarded because advancement was unaware that it took place?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to prioritize implementing Volunteer Reporting Incentives at your institution.

Institution Profiled

University of San Diego

- Institutional control: Private
- Enrollment: 8,905 (5,774 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large City (San Diego, CA)

'Ghost Volunteers' Haunt Campus

Faculty Only See Downsides of Sharing Intel About Prospects on Campus

Campus partners rarely inform advancement when there are prospects volunteering on campus because they do not understand how it will benefit their alumni or community connections. As a result, "ghost volunteers" contribute their time and talents on campus without advancement's knowledge. Activities like mentoring students and speaking in classes are not added to donor records and are not stewarded.

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

In many cases, campus partners withhold this information out of concern about what advancement will do with it. They may fear that major gift officers will contact the alum incessantly or that the individual's philanthropic support will go elsewhere on campus if advancement gets involved.

Finally, faculty do not want their best volunteers to be encouraged to spend their limited free time supporting other units on campus.

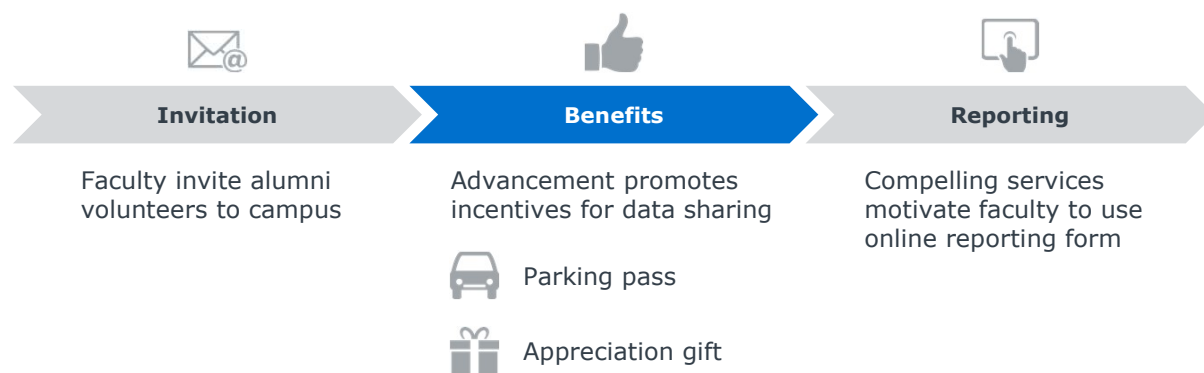
Incentivizing Information Sharing

Partners Motivated to Create a Positive Experience for Campus Visitors

To move beyond faculty concerns, the University of San Diego promotes the benefits to faculty of sharing information about when alumni are volunteering on campus. By using an online form to report when alumni volunteers, faculty members unlock access to a suite of resources, including parking passes, appreciation gifts, and ongoing stewardship through the advancement office.

With this information in hand, advancement staff can schedule other meetings with the volunteer when they are already on campus. Moving forward, gift officers can look for additional engagement opportunities on the same topic and/or with the same faculty member.

University of San Diego Rewards Faculty Information with Alumni Gifts



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

Source: Advancement Forum interviews and analysis.

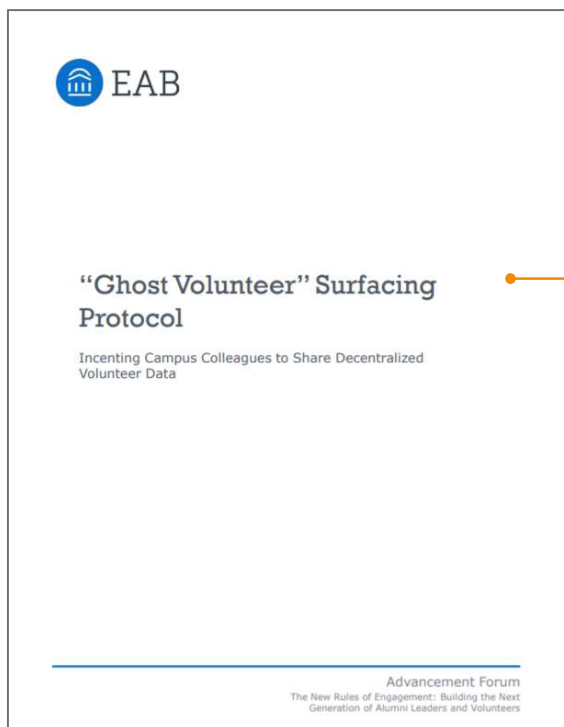
“Ghost Volunteer” Surfacing Protocol

Additional Resources to Identify Volunteers Across Campus

The Advancement Forum has developed a suite of resources to facilitate information sharing across campus to ensure that volunteers receive recognition for their time and efforts.

The “Ghost Volunteer” Surfacing Protocol Practice Brief includes tools to position alumni relations staff as a valuable resource to campus departments, leading to increased sharing of volunteer information and better campus experiences for alumni volunteers

Tools to Facilitate Implementation at Your Institution



The image shows the cover of a document titled “Ghost Volunteer” Surfacing Protocol. At the top left is the EAB logo. The title is in a large, bold font. Below the title is the subtitle “Inciting Campus Colleagues to Share Decentralized Volunteer Data”. At the bottom, it says “Advancement Forum” and “The New Rules of Engagement: Building the Next Generation of Alumni Leaders and Volunteers”. An orange line points from the title to a box on the right.

Practice brief includes:

- Volunteer engagement reporting form template
- Sample reminder email
- Key considerations for implementation success

Download the “Ghost Volunteer” Surfacing Protocol Practice Brief:
<https://eab.com/wp-content/uploads/2019/07/Ghost-Volunteer-Surfacing.pdf>

Practice 15: Social Media Templates

Make It Easy to Say Yes

Practice in Brief

Advancement staff draft social media posts for faculty members to share on days of giving and during other philanthropy events. Academic partners are invited to edit them and share with their networks at any time throughout the day.

Problems Addressed

Some faculty members would like to participate in advancement initiatives but cannot fit travel or social events into their calendars. Despite their broad appeal among donors and other constituents, they have few avenues for participating in engagement and cultivation.

Diagnostic Questions

1. Do you hold an annual giving day or other short-term fundraising campaign?

☐ Yes ☐ No

2. Would you like academic partners to promote philanthropy to their online networks?

☐ Yes ☐ No

3. Do advancement staff need engagement opportunities for faculty volunteers who cannot travel or attend events in-person?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to prioritize creating Social Media Templates for academic partners and other campus constituents.

Institution Profiled

Elon University

- Institutional control: Private
- Enrollment: 6,791 (6,045 undergraduate)
- Carnegie classification: Master's University
- Campus setting: Midsize Suburb (Elon, NC)

So Easy, a Busy Professor Could Do It

Elon's Social Media Templates Make Advancement Accessible to All

Some academic partners are interested in supporting advancement but do not have time to attend an event or host alumni volunteers in their classes. To make participation as easy as possible, Elon University created Social Media Templates for campus partners to use on days of giving and other key dates throughout the year.

Sample social media posts are distributed to campus partners, who are welcome to edit the templates based on their subject matter expertise and writing style.

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

Social media templates have proven to be a low-cost, high-return alumni engagement mechanism, and they help advancement to identify faculty members with substantial social media presences. In one case, staff at Elon discovered that one professor had over 3,000 Twitter followers, but they had never asked her to engage those followers on social media. Moving forward, advancement may design more targeted online engagement strategies centered around these campus partners.

Practice 16: Multidisciplinary Faculty Showcase

Make It Easy to Say Yes

Practice in Brief

Faculty members present their research to alumni, current students, and community members during a large-scale event on campus. This event serves as a low-stakes introduction to working with advancement and builds enthusiasm for partnering again.

Problems Addressed

Academic partners think that working with advancement will be difficult or require learning new skills, making them hesitant to participate in donor events. Advancement struggles to determine in advance which partners will be most successful on the road.

Diagnostic Questions

1. Do academic partners worry about failing at advancement events or having to learn new skills in order to succeed?

☐ Yes ☐ No

2. Are you interested in finding new ways to introduce faculty members and/or postdoctoral fellows to working with advancement?

☐ Yes ☐ No

3. Do you need ways to determine in advance which faculty members will succeed at campaign events on the road?

☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to consider holding a Multidisciplinary Faculty Showcase at your institution.

Institution Profiled

Carnegie Mellon University

- Institutional control: Private
- Enrollment: 13,869 (6,533 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large City (Pittsburgh, PA)

Putting Faculty Innovation Front and Center

Successful Academic Engagement Focuses on Faculty Skills and Interests

Faculty members are most likely to support advancement events that make use of their key skills: explaining their research and demonstrating its impact.

Carnegie Mellon University recently held an event called the Founders' Expo that allowed faculty to support advancement without needing to learn new skills. During homecoming weekend, faculty and graduate students hosted interactive displays about their latest research on topics ranging from robot soccer to 3-D printing. Event staff took responsibility for set-up and turning each topic into an interactive display so that faculty simply had to attend and engage visitors.

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

Advancement staff made sure that there were displays representing a wide range of academic interests, and each academic dean nominated at least one faculty research team to participate. The event space was organized by theme instead of by academic division, which created an exciting experience for visitors.

Letting Faculty Do What They Do Best

Carnegie Mellon’s Exhibition Allows Academics to Share Work Outside of the Lab

The Founder’s Expo surpassed expectations for the number of individual visitors, and advancement staff were impressed by how long individuals spent interacting with the displays. Faculty saw how working with advancement can be low-stress and enjoyable. Plus, the event helped advancement staff identify which faculty should be asked to participate in future campaign events.

The on-campus event was so popular that staff are bringing it to locations around the world. Faculty have volunteered to travel for the occasion because they enjoyed participating on campus. Additionally, faculty members have been more willing to partner with advancement after seeing that the focus of their efforts will stay on their research projects.

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*



Practice 17: Cross-Campus Project Curator

Make It Easy to Say Yes

Practice in Brief

A full-time staff member coordinates multidisciplinary fundraising projects, from idea development to donor identification and implementation of new initiatives. They keep projects on track and ensure that all relevant campus partners are part of the conversation.

Problems Addressed

Deans and faculty members are unwilling to work together on multi-unit or multidisciplinary fundraising projects because they do not want to be blamed if the projects fail. Unit-based advancement staff are afraid of losing gifts to other units, which prevents them from effectively raising money together.

Diagnostic Questions

1. Does your team struggle to raise money for multidisciplinary projects or campaign priorities?
☐ Yes ☐ No
2. Are you concerned about implementation challenges stemming from multidisciplinary gifts?
☐ Yes ☐ No
3. Do your current campaign priorities focus on cross-campus initiatives or multidisciplinary "big ideas?"
☐ Yes ☐ No

If you answered "Yes" more times than "No," you may wish to consider hiring a Cross-Campus Project Curator to manage multidisciplinary fundraising projects.

Institution Profiled

Pennsylvania State University

- Institutional control: Public
- Enrollment: 47,119 (40,835 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Small City (University Park, PA)

Facilitating Collaboration for University Priorities

Penn State University Dedicated Staff to Multidisciplinary Project Fundraising

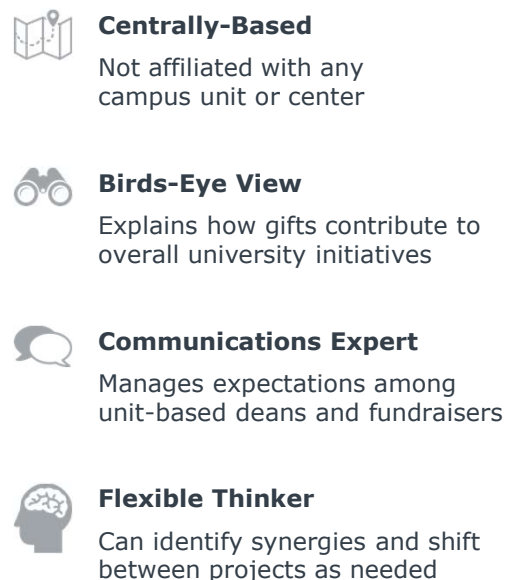
The success of multidisciplinary gifts often relies on partners across campus, but few academic leaders want to manage them. Advancement can make these projects as easy as possible by managing the complex moving parts behind them.

Pennsylvania State University (Penn State) created a full-time advancement role, the Director of Campaign Imperatives, dedicated to managing these projects from start to finish. Responsibilities include managing communication to all stakeholders, gaining buy-in for new ideas on campus, and ensuring that donor funds are managed properly.

Director of Campaign Imperatives Manages Cross-Unit Projects



Incentivized to Think Beyond Campus Silos



The Director of Campaign Imperatives serves as a neutral convener who brings academic leaders together when their work (or a potential gift) crosses disciplinary lines. When hiring for the role, Penn State has made an effort to focus on candidates who do not already have connections to specific academic units. The first Director had a broad background in corporation and foundation relations, and future hires are likely to have experience in donor relations, communications, or planned giving.

For faculty and academic leadership, getting involved with advancement now has few drawbacks since there is someone else to manage complex conversations over time.

Charting the Path Forward

EAB Resources to Recruit Future Champions

To identify and engage more fundraising partners on campus, consider the next steps and discussion questions below.

These resources will enable your team and relevant campus stakeholders to determine current strengths and areas for improvement. After doing so, use the prioritization guide on the following pages to identify which practices to implement.

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

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?

Prioritization Guide

Speeding Implementation and Ensuring Follow-Through

Instructions:

Based on your institution's goals and available resources, use the chart below to map out which of the practices profiled in this section you would like to prioritize. Use this document to assess viability and determine next steps.

Practice	My Institution Should Prioritize This Practice	Notes and Next Steps
Favorite Faculty Surveys <i>Stonehill College, Centre College, Trinity University, Furman University</i> Advancement provides opportunities for students and alumni to signal their affinity to academic partners on campus.	1 2 3 4 5 <i>Disagree</i> <i>Agree</i>	
Pre-event Networking <i>Florida International University</i> Advancement invites faculty to exclusive events as an incentive to participate in off-campus campaign events.	1 2 3 4 5	
Volunteer Reporting Incentives <i>University of San Diego</i> Online forms enable faculty to inform advancement when alumni are scheduled to visit campus.	1 2 3 4 5	
Social Media Templates <i>Elon University</i> Templates provide an accessible, ready-made platform for faculty to participate in advancement initiatives.	1 2 3 4 5	

Prioritization Guide (cont.)

Speeding Implementation and Ensuring Follow-Through

Practice	My Institution Should Prioritize This Practice	Notes and Next Steps
Multidisciplinary Faculty Showcase <i>Carnegie Mellon University</i> Academic partners present research to alumni in a low-pressure, interactive atmosphere.	1 2 3 4 5 <i>Disagree</i> <i>Agree</i>	
Cross-Campus Project Curator <i>Pennsylvania State University</i> Full-time staff role dedicated to identifying and managing development and implementation of interdisciplinary initiatives.	1 2 3 4 5	



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