ADVANCEMENT

Our partners needed a way to visualize advancement data in order to understand what was motivating people to give and to plan effective giving strategies. Edify Accelerator packages take advantage of the data organization and flexibility provided by Edify's data model, helping schools go deep into topical areas of analysis and allowing leaders across the campus to find answers to their specific questions. The Advancement Accelerator gives your Major Gift Officers, VPs of Advancement, Stewardship, and Donor Relations, Director of Advancement Services, and other development staff the ability to identify insights over time and across demographics and prioritize areas of focus. This is enabled by a seamless flow of aggregated advancement data into one validated, governed workspace to help you and your team make effective and informed decisions.

Paint the big picture

Illustrate a high-level view of pledges and giving and how they have changed over time

Identify new opportunities

Use validated data and interactive maps to build consensus on advancement strategy decisions

Narrow in on trends

Surface current and historical giving trends to better understand what motivates your constituents to give

How Edify Accelerates Insight to Action

BRING DATA TOGETHER	CREATE A CULTURE OF DATA CONFIDENCE	DRIVE INSIGHT ACROSS STAKEHOLDERS
Incorporate data elements from multiple sources e.g., SIS, Advancement CRM, EMSI, and Career Services Data	Govern all aspects of advancement data to keep a single source of truth Utilize EAB best practice definitions to organize data from multiple sources	Allow users to further investigate advancement strategy based on recommended research Aggregate data across departments into a unified workspace

MOVE AT THE SPEED OF CONVERSATION

The data is displayed in templatized, customizable dashboards designed to delve deeper in the moment. For example, use the dashboards to enable your staff to identify most productive giving demographics or track and compare giving by different constituencies over time.

Customizable Dashboards to Make Sense of Your Data

The insights and KPIs highlighted in the dashboards below incorporate data from various sources, including SIS, Advancement CRM, EMSI, and Career Services Data.


OVERALL GIVING

- View a snapshot of overall giving trends to understand who is making pledges and donations

- Analyze annual giving by constituent category and giving by alum decade over time


EXPLORE COHORT POPULATION

- Break down gifts by different types of donor profiles to understand motivators for each group to give

- View gifts by alum decade, designation category, constituent count, giving society category, and years since previous gift
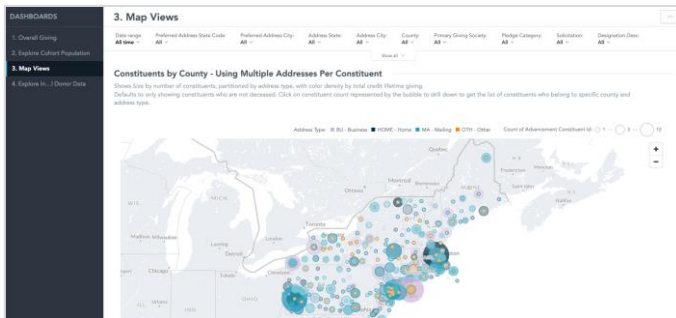
MAP VIEWS

- Visualize constituencies by geographical location and view details such as total lifetime credited giving amount by county, zip code, etc.

- Filter results by state, city, and county to view who your team should reach out to while on the road or who should receive a thoughtful campaign based on geographic-specific current events
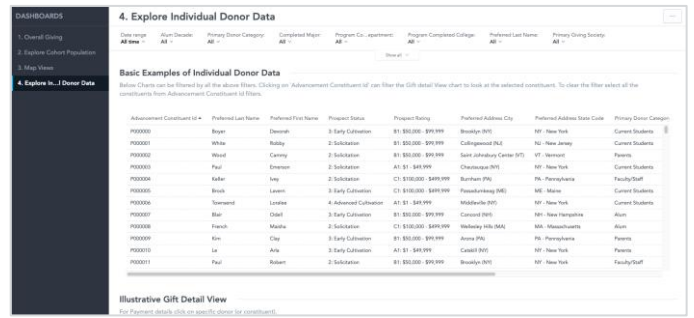
EXPLORE INDIVIDUAL DONOR DATA

- Drill into donor data and gift details to operationalize giving campaigns

- Filter by date range, alum decade, primary donor category, etc.

Please note, we are dedicated to deliver these dashboards based on any required source data and are very flexible. Metrics used in the dashboards are equally flexible and can be changed on demand by your team or in partnership with your EAB service team.

Source: Edify.

Analytics for Stakeholders Across Campus

Every Edify workspace is designed to answer a common set of business questions that higher education leaders face. The Advancement Accelerator includes advancement related data sliced and diced into different views, such as by alum decade and year, enabling users to identify opportunities to reach more prospects, retain current donors, and expand advancement efforts to inform cross-campus strategy.

Advancement, Development, and Alumni Relations

Questions

- What data do we have to connect the dots between a potential donor's current life and their time on campus?
- How does giving compare year-to-year across different alum decades?
- How many alum consistently give to the institution every year?
- How many alum are currently being cultivated as donors and at what stage, such as early or advanced cultivation?

Potential Actions

- Identify trends in giving across alum groups and prioritize the highest donating alum groups.
- Craft campaigns that maximize philanthropic giving and grow alumni affinity.

Marketing and Communications

Questions

- Geographically, where do most of our donors live and what kinds of marketing and communications were deployed there?
- How do giving trends compare across alum groups, and what marketing did each group receive?
- Which donors have not fulfilled their pledge amounts and could benefit from a few nudges?

Potential Actions

- Understand how effective marketing tactics were regionally and target high donor regions.
- Hone advancement strategies to meet higher expectations of customized outreach, like personalized e-mails, to recapture lapsed donors and acquire new donors.

Finance and Administration

Questions

- What was the total amount of donations received annually over the last five years?
- What is the total lifetime giving amount for each alum decade since the 1960s and how did they affect our revenues?
- Has giving decreased over the last few years, meaning less reliable revenue?

Potential Actions

- Report advancement revenue to the Board.
- Identify how much revenue is typically generated from advancement efforts and apply findings to the budget.

Interested in Learning More?

Contact your Strategic Leader or edifypartnersuccess@eab.com.

Source: Edify.