The Evolving Role of Heads of Faculty in Today's Fundraising

Connecting Across the University for Support and Leadership

Advancement Advisory Services

Academic Expertise & Connections Ideal for Working with Donors

> "Heads are the **best people on campus to articulate the mission and discuss the funding needed** to create and build a compelling vision for an academic programme."
>
> *Director of Development*

Heads are Ideal for Donor Cultivation & Engagement

✔ Heads are **passionate** about unit and school initiatives

✔ Heads are **content experts** & have industry connections

✔ Heads are **involved with Staff** & other academic leaders

Source: Anderson, Lee B., "The Role Academic Heads Play in Public Higher Education Fundraising," *UNF Graduate Theses and Dissertations*, 2021; EAB interviews and analysis.

A Challenging but Critical Relationship

EAB Research on Maximising Advancement & Academic Partnerships

No Shortage of Pain Points

▶ Heads **misunderstand their role** in fundraising

▶ Heads spend time on **low-ROI activities**, such as writing newsletters

▶ Heads create **low-ROI initiatives**

▶ Heads **fear fundraising** & making the ask

▶ Heads use **academic jargon**, which confuses & discourages donors

▶ Heads go "**rogue**" & contact prospects without Advancement's knowledge

▶ Heads **hoard prospects**, preventing other units from benefiting from their philanthropy

EAB Research on Academic Partnerships

Perfecting the Partnership

The Donor Investor Imperative

Source: EAB interviews and analysis.

Evolving Donor Demands of Today

Increasing Pressure for a Steady Stream of Ideas, Connections, & Impact

Top Donor Demands

Ongoing Fresh Ideas	**Increased Expert Involvement**	**Measurable Impact**
Multidisciplinary ideas aimed at **solving real-world problems**	Access to Heads and academic staff that can **bring their own vision to life**	**Results delivered** quickly & regularly
Visionary initiatives that reshape schools or programmes	Regularly **include Heads or Staff** in all gift meetings	Invitations to **witness impact firsthand**

Source: EAB interviews and analysis.

Failing to Meet Donor Expectations Is a Losing Game

If We Don't Adapt, We Risk...

Transformational Gifts

Without new multidisciplinary ideas, donors lose interest in making mega-donations

60% vs. 1%

Of those surveyed who give to education from the UHNWI vs. the average UK population

Major Gifts

Without a steady vision and connections, major donors begin to distrust institutions

438%

Increase in **median** HNW giving (+£4560), 2020-23

189%

Increase in **average** HNW giving (+£29k), 2020-23

Repeat Donors

Without measurable impact, donors will be discouraged from making future donations

38%

Of giving worldwide comes from Ultra High Net Worth Individuals[1]

New Academic Partner Roadblocks Emerge

Heads' Traditional Fundraising Roles Start to Impact Fundraising Efforts

	Ongoing Fresh Ideas	**Increased Expert Involvement**	**Measurable Impact**
Traditional Head Role	Heads are keepers of big ideas	Heads are linchpins of unit fundraising	Heads focus on cultivation

New Academic Partner Roadblocks Emerge

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	Ongoing Fresh Ideas	**Increased Expert Involvement**	**Measurable Impact**
Traditional Head Role	Heads are keepers of big ideas	Heads are linchpins of unit fundraising	Heads focus on cultivation
Top 3 Roadblocks	**1** "Heads won't give us the time for big ideas. They're **maxed out. They have no time**."	**2** "We always have **at least one new Head**. They're retiring and leaving left and right."	**3** "Heads think **donors should just trust them** to use their money wisely."

Evolving the Head Role In Perma-Campaigns

Moving Beyond Current Roadblocks to Reach Fundraising Goals

	Ongoing Fresh Ideas	**Increased Expert Involvement**	**Measurable Impact**
Traditional Head Role	Heads are keepers of big ideas	Heads are linchpins of unit fundraising	Heads focus on cultivation
New Solution	**Expand Multidisciplinary Gift Infrastructure**	**Stabilise Unit Fundraising & Enhance Head Onboarding**	**Increase Heads' Role in Stewardship**

Source: EAB interviews and analysis.

EAB

Expand Multidisciplinary Gift Infrastructure

1

Compelling, Cross-Campus Projects Engage Donor Investors

Advancement Finds Success With Multidisciplinary Initiatives

California Institute of Technology

Resnicks pledged **$750M** for work in physical science, life science, & engineering

University of Oregon

Phil and Penny Knight gave **$500M** for an interdisciplinary science center

Rice University

Welch Foundation pledged **$100M,** for collaborative research in materials science

Swarthmore College

Eugene Lang pledged **$50M** to foster links between engineering & the liberal arts

Learn more about big ideas process from **The Donor Investor Imperative**

Improve Heads' storytelling skills & comfort speaking with donors through **Perfecting the Narrative for Big Ideas**

Source: Williams, Mike, "Largest Gift in Rice History Establishes the Welch Institute." *Rice News*, Sept. 2020; Castillo, Evan, "The Largest Donations to Colleges and Universities." *BestColleges.Com*, Mar. 2024; EAB interviews and analysis.

Big Ideas Lose Priority

Constraints Place Strain on Big Ideas Process

"Heads are often stretched thin, and when faced with competing priorities, **their default is to prioritise initiatives that directly benefit their staff and students** over larger interdisciplinary projects."

Shaun Keister
Vice Chancellor of Development & Alumni Relations, UC Davis

"Discussion around big ideas fall flat around most Heads. We are in a time of tight budgets, and **Heads are focused on making sure their operations can be sustained**, as opposed to working on initiatives that contribute to other units."

VP of Advancement
Canadian University

Without Academic Support, Multidisciplinary Initiatives Struggle

1 Fewer big ideas are created

2 Donors lack access to experts

3 Big ideas lack internal champions

Three Ways to Strengthen Multidisciplinary Fundraising

Cast a Wider Net for Big Idea Creation

Look beyond Heads to elevate Staff, students, or the PVC Academic in generating & selecting big ideas

Eliminate Internal Hurdles & Roadblocks

Reduce need for coordinating with campus stakeholders & fast-track multidisciplinary initiatives

Empower Fundraisers to Champion Big Ideas

Rescope MGO role to facilitate fundraising efforts for multidisciplinary gifts

Source: EAB interviews and analysis.

Three Ways to Strengthen Multidisciplinary Fundraising

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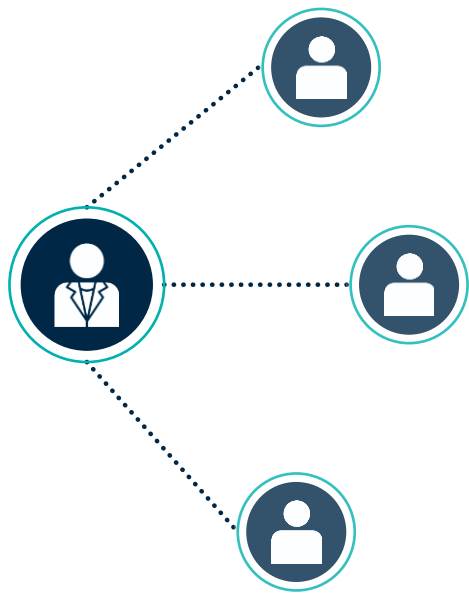**Empower Fundraisers to Champion Big Ideas**

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EAB Big Ideas Presentations Include Head +3

Big Ideas Collaborative Session

- Heads **select three staff** to join advancement training sessions

- **Staff connect with peers across disciplines to brainstorm big ideas** & learn more about the fundraising process

Benefits of Inviting Staff to Collaborate

☑ Staff given a platform to connect with peers from whom they are usually siloed

☑ Staff become better prepared to fundraise amidst leadership transitions

☑ Collaborative sessions generate more innovative multidisciplinary big ideas

Source: EAB interviews and analysis.

Riverstone University's[1] Bold Ideas Initiative Empowers Innovation

Seed Funding Submission & Selection Process

PVC-A calls for idea proposals; **Staff submit transformative ideas**

PVC-A selects bold ideas to receive seed funding to begin projects on ideas donors will find attractive

Criteria for idea selection:

- **Head sign-off** to ensure unit alignment & buy-in
- Must be **multidisciplinary**
- **Clear plan for donor involvement** & needed investment

20

Bold ideas submitted by Staff

Ideas have included multidisciplinary projects on **information integrity**, the **housing crisis**, & **aging**

> "We were having a hard time engaging Heads around big ideas, so we're testing out a seed funding initiative—almost like Shark Tank, but for Staff. It's too early to tell how it will go, but I'm hoping it's motivating."

1) Anonymised institution.

A Cross-Campus Big Ideas Group

University of York Incorporates Multiple Perspectives into Their Efforts

Leveraging Students, Staff, & Other Stakeholders to Source Big Ideas

Academic DVC Selects Participants

- Academic DVC invites campus stakeholders to join steering group, including **senior leadership, academic representatives, & students**

Group Collaborates on Big Ideas

- Group discusses **local market** & which opportunities are **most viable**
- Group generates a **"wish list" of big ideas** for campus to prioritise

Students Provide "Reality Check"

- Students provide invaluable **real-world perspective** that can be used to make compelling cases to donors

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Internal Coordination a Hurdle for Heads

Strenuous Multidisciplinary Gift Process Jeopardises Unit Integrity

Tedious Meeting Coordination

Turning a donor idea into reality often requires multiple meetings with other Heads, Staff, and Gift Officers, which can **take months to coordinate and cause donor relationships to stagnate**

Miscommunication Between Units

Effective communication between departments is challenging, often leading to **misunderstandings, delays, and a lack of cohesive vision for multidisciplinary projects**

Misaligned Goals

If Heads are not present to discuss donors' philanthropic goals, they may **fail to understand the stakes and how to align donor ideas with their work**

Fast-Tracking Big Idea Collaboration

College of Charleston's Real-Time Strategy Sessions

Aligning Cross-Campus Experts for Quick, Coordinated Efforts

MGO · Head · Head · MGO · CAO · Academic Staff · **Donor Strategy Sessions**
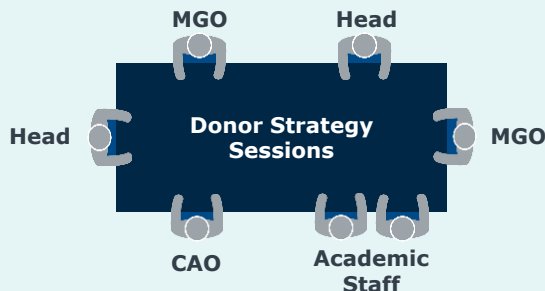
Donor Strategy Sessions

- All campus stakeholders **meet at once**

- Based on donor's interests, **multiple Heads invited** to strategy conversation

- Different **internal stakeholders work together in real time** to determine how the institution can support the donor's vision

Clear Outcomes

- **Decreased time to ask.** Joint session reduces number of meetings needed

- **Strengthens relationships amongst academic leaders** & improves multidisciplinary collaboration

- **Four, seven-figure donations** were given within first several sessions

Source: College of Charleston, SC; EAB interviews and analysis.

Three Ways to Strengthen Multidisciplinary Fundraising

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Empower Fundraisers to Champion Big Ideas

Rescope gift officer role to facilitate fundraising efforts for multidisciplinary gifts

Traditional Approach Leaves Big Ideas With No Internal Owner

Who can champion big ideas?

Heads can no longer champion big ideas due to reduced capacity

Gift officers take on role of big idea champions through structures that maximise their efforts

Staff too "in the weeds" & siloed to champion big ideas

Institutional leadership preoccupied & busy

A Collective Effort

Notre Dame Unit-Based Staff Help Champion Big Ideas Through Pods

Collaborative Pods Unite In-Unit Advancement Staff

Fundraising pods foster formal collaboration among advancement staff from different units, enabling them to **collectively champion big ideas as one team**

Pods enhance multidisciplinary fundraising by:

- ✔ Improving inter-unit relationships through **weekly meetings**

- ✔ Offering a platform for advancement staff to **discuss & broaden ideas**

- ✔ Facilitating the realisation of **donors' multidisciplinary gift concepts**

$100M Mega-gift for poverty initiative supported by staff across campus

VCU Micro-Portfolios Have 1 Big Idea & a Handful of Prospects

Rescope Principal Gift Fundraisers to Focus on Right Ideas

Idea Selection

President selects **top three big ideas** to focus fundraising efforts

Big Idea Allocation

President assigns each idea to a **principal gift fundraiser** as part of a micro-portfolio

Micro-Portfolios

Micro-portfolios consist of only **3-4 individuals or families**

Micro-Portfolios Result in Fundraisers Championing Big Ideas

✔ Enables fundraisers to spend time on **cross-campus coordination**

✔ **Decreases time to solicitation** from 5-10 years to 18 months

$104M Dollars raised for the VCU Stravitz-Sanyal Institute for Liver Disease and Metabolic Health

Expand Multidisciplinary Gift Infrastructure

Questions & Resources for Your Team to Consider

1
- Who are the Staff fundraising champions on our campus?
- How can we better incentivise them to generate big ideas?

2
- Is our PVC-A, DVC, and/or VC bought-into the big ideas process?
- How can we leverage their support to generate big ideas?

3
- Which donors would be open to collaborative strategy sessions?
- How can we support campus stakeholders in aligning initiatives to donor priorities?

4
- How do gift officers contribute to big ideas on our campus?
- What capacity do we have to rescope the gift officer role?

Recommended Advancement Advisory Services Resources

See EAB's Donor Investor Imperative Toolkit for resources on sourcing visionary ideas, communicating impact of big ideas, and perfecting the donor-facing pitch

Stabilise Unit Fundraising & Enhance Head Onboarding

SECTION TWO

2

Donor Relationships Suffer During Vacancies & New Arrivals

Job Postings Increase

+67%

Increase in job postings for academic leads from January 2021 to January 2024

"In the past few years, we've witnessed significant turnover among our academic leads. Currently, only one Head out of our twelve faculties has served for more than seven years. **Most of the others have been newly appointed within the last two to three years."**."

Geoffrey Bartlett, AVP for
Corporate & Foundation Relations
University at Buffalo

Turnover & Vacancies Hit Hard

Fundraising Impacted When Heads Leave & Roles Are Left Vacant

Concerns Around Head Turnover

Donor Concerns...	*Advancement Concerns...*
Donors experience **introduction fatigue** from repeatedly meeting new Heads	Progress on **fundraising conversations paused** or completely lost
As new Heads shift unit vision, donors experience **initiative whiplash**	**Long onboarding** timeline around fundraising culture and working with other Heads
Donors **doubt direction of unit** and are unclear on past gifts and future impact	Uncertainty surrounding **new Heads' fundraising aptitude** and willingness

Source: EAB interviews and analysis.

Two Key To Dos for Advancement Leaders in an Era of Head Turnover

Create Strong Fundraising Plans That Withstand Vacancies

Plug New Heads in Strategically

- ☑ Implement annual fundraising plans to enable interims or new leaders to seamlessly integrate
- ☑ Train advisory boards to maintain unit visioning

- ☑ Prepare Heads for mass engagement with donors
- ☑ Educate Heads on progress toward goals
- ☑ Fast-track advisory board relationship building

Source: EAB interviews and analysis.

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Source: EAB interviews and analysis.

University of Central Florida Creates a Clear Path Forward

Advancement's Role in Annual Plan

✔ Reviews & selects Head-level prospects

✔ Strategises events & activities to engage targeted prospect list

✔ Maps out pipeline activities & calendar

Heads' Role in Annual Plan

✔ Align unit goals

✔ Align unit fundraising priorities

✔ Execute annual plan by attending events & activities planned by advancement

Picking Up Where the Last Head Left Off

Advancement helps Heads understand **planned time commitments** throughout year

Heads given **one-page summary of all proposals**

Advancement **checks-in with Heads quarterly** to assess progress & make adjustments

Advisory Boards Underutilised For Stability

What Advisory Board Members Bring to the Table

Unit Expertise
Volunteers have experience working with the unit, so understand priorities, history, & needs

Business Acumen
Volunteers with business experience have interpersonal skills ideal for donor communication

Strong Affinity
Volunteers are passionate about the unit and strive to keep the unit relevant & thriving

Extensive Connections
Experienced volunteers naturally guide new Heads into the role & can introduce them to donors

Source: EAB interviews and analysis.

Elevate Advisory Board Members' Roles

University of Memphis Trains Advisory Boards to Sustain Unit Vision

"Vision For**UM**" Day for Volunteer Boards

Volunteer advisory boards brought together for a day of workshops & presentations

Sessions on philanthropy, volunteerism, & **best practices for advisory boards**

President announces strategic plan & **board discusses unit visioning** & future plans

Activities for Sustaining Unit Vision

Review unit initiatives & strategies for communicating them to donors

Brainstorm strategies to support donor engagement through campaign

Develop communication plans to mitigate disruption amidst Head transitions

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Source: EAB interviews and analysis.

Key Insights from 60+ Research Calls

Introduce to Donors

- Develop strategic plan to honor departing Head & introduce new Head to donors
- **Pre-announce** new Heads to high-level donors for early insider connection

Build Donor Relationships

- Encourage Heads to build trust & rapport with donors through genuine, transparent communication
- Train Heads on **appropriate etiquette** for donor interactions & ethical fundraising principles

Social Media & Zoom Training

- Train Heads to engage prospects & donors on **social media**
- Share best practices for engaging donors on **Zoom**
- **Review Heads' social media** posts for alignment with university values

Prep Heads for Challenges

- Coach Heads **to handle donor feedback,** inquiries, & objections
  - *How do you plan to make progress with X initiative?*
  - *How will you manage this school without having attended it yourself?*

Building Heads' Confidence with Quick Win Interactions

Two Strategies to Scale Visibility of Heads

CENTRAL MICHIGAN UNIVERSITY

Campus Conversations

Advancement office facilitates virtual conversations monthly with Heads, donors & prospects to discuss specific unit initiatives

550

Donors & prospects have attended live sessions

UNIVERSITY OF MICHIGAN

Pre-Recorded "Visits"

Heads pre-record short video messages speaking directly to prospects about their interests and related giving opportunities on campus

100+

Video "visits" sent to donors

Bring Heads Up To Speed

NC State Uses Curated Dashboard to Focus New Leaders on Key Priorities

A Fundraising Snapshot

- Advancement **curates a high-level data dashboard to emphasise key metrics**, ensuring Heads stay focused on unit fundraising goals

- Advancement provides Heads with a **PDF snapshot** of unit's dashboard monthly

Benefits of Data Dashboard

- Enables **quick onboarding by providing clear KPIs** and guides Heads toward the right conversations with their Chief Development Officers

- Enables Heads to **analyse past fundraising challenges to improve future strategy**

College Fundraising Dashboard

Key Metrics

- Open proposals & asks
- Asks & dollars to close
- Pipeline activities
- Priority funds (selected by Heads)
- Dollars raised by college vs. central team
- Money toward FY goals
- Compares FY fundraising to past year & three-year average

"No Need to Reinvent the Wheel"

University of Miami's Advisory Board Toolkit

Miami's Head's Advisory Committee (DAC) Toolkit

▶ Outlines the **purpose**, **function**, & **ideal composition of a committee** to help Heads select top advisors

▶ Offers **guidance for electing DAC campaign leads** & conducting DAC sessions to represent the unit

▶ Identifies & **explains roles & responsibilities** of each committee member, editable based on the unique needs of each unit

▶ Provides a template for volunteer impact plans, **detailing action steps** for advisors

UNIVERSITY OF MIAMI

DEAN'S ADVISOR COMMITT

TOOLKIT

TABLE OF CONTENTS
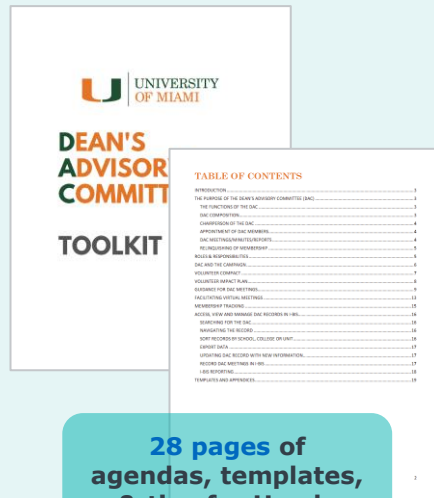
28 pages of agendas, templates, & tips for Heads

Includes Guidance & Templates for Head Success

Guidelines for purpose and composition of Head's advisory committee	*Template for volunteer compact & volunteer impact plan*

THE PURPOSE OF THE DEAN'S ADVISORY COMMITTEE (DAC)

This section is an excerpt from the Provost's DAC Handbook

A University of Miami school or college DAC will advise and guide a dean on major issues, future directions, and fundraising efforts. The DAC will consist of alumni and friends who represent the community with a focus on building awareness, meeting community needs, and attracting resources.

THE FUNCTIONS OF THE DAC

For each DAC, the following general statements apply:

- *Consultative* to the Dean on major decisions
- *Supportive* to the school/college philanthropic efforts
- *Attentive* to established and emerging alumni with affinity to school/college
- *"Friend-raising"* to seek and gain functional and financial support through networks
- *Offer* executive feedback and insight to Dean

DAC COMPOSITION

The DAC must be composed of persons who broadly represent the demographics, including the ethnic and gender diversity of the University of Miami. Members should be knowledgeable about the school/college for which they are providing information and guidance. Members, in addition to being diverse in makeup, should also be diverse in skillset.

- Members should be drawn from both the private and public sectors, with an emphasis on:
    - Major donors to school or college
    - Community (local and national) leaders
    - Industry leaders
    - Academics (deans, chairs)
    - Executives with management experience
    - School/college alumni
    - Diverse membership in skillset and makeup

- Full-time faculty and staff of the respective school/college are not eligible to be members of the Dean's Advisory Committee. The DAC shall have in its membership members of the UM Board of Trustees who meet the above criteria. A trustee proposed for membership on the DAC shall be assigned to serve on the DAC only after the Dean has consulted with the Provost and Chair of the UM Board of Trustees. It would be uncommon for a member of the UM Board of Trustees to serve on more than one DAC.
- A single member of the Dean's Advisory Committee will be elected by the DAC membership to serve on the Academic Review Committee. This individual will act as a liaison between the two bodies,

3

AS A LEADERSHIP VOLUNTEER, I CAN EXPECT THE FOLLOWING FROM THE UNIVERSITY OF MIAMI:

- A suggested volunteer impact plan to engage my talents and interests.
- Regular updates on the progress of fundraising efforts.
- Opportunities to engage with other volunteers.
- Access to University activities that match my interests.
- A collection of readily available tools and resources to aid me in promoting the impact of generosity and in advancing the mission of the University.
- Opportunities for training and education on philanthropy best practices and trends.
- Recognition of my contributions in advancing the University.

Volunteer Signature	Date	University of Miami Signature	Date

| Print Name | | Print Name and Title | |

UNIVERSITY OF MIAMI

VOLUNTEER IMPACT PLAN

PREPARED FOR: [MEMBER'S NAME]

TIME PERIOD: [DATE RANGE]

MY SERVICE TO THE UNIVERSITY

As a volunteer at the University of Miami, I am committed to using my unique talents and interests to further the institution's mission and philanthropic needs. To that end, some of the specific ways I can contribute include:

- ...
- ...
- ...

Questions & Resources for Your Team to Consider

1
- What does our annual planning process consist of? How can we improve it?
- Which activities could make Head transitions more seamless?

2
- In which areas can we better scale Head time?
- What type of training do our Heads need the most?

3
- How can we better utilise data to assess fundraising goals?
- How can we support volunteers in maintaining consistency when Heads transition?

4
- What could we include in a Head advisory committee toolkit?
- How can we better utilise data to assess fundraising goals?

Recommended EAB Resources

Contact your Strategic Leader to learn more & explore the University of Miami's onboarding toolkit

Increase Heads' Role in Stewardship

3

Retention Becomes More Important As Philanthropists Dwindle

With Fewer Donors Giving...

7 percentage pt.

Decline in **UK donors giving since 2017**

We Must Increase Identification, Retention of HNW Donors

56% vs. 1%

The percent of donors giving to education at the HNW level vs. the general UK public

"

"Stewardship goes beyond gratitude - it's about fostering lasting partnerships. We must nurture donor relationships to honor their generosity without exhausting them, **especially since we rely on their continuous support."**

- AVP of Donor Relations

"

Stewardship Takes a Back Seat

> **We've pushed our Heads to focus so much on cultivation that they've completely forgotten about stewardship.** It was great at first, but now we're out of balance and risk losing our top donors."
>
> — AVP of Development

A Fundamental Disconnect

Heads Fail to Understand What Donors Want From Their Gifts

Heads Think Stewardship Is…   **But What Donors Want Is…**

A Procedural, Low-Stakes Practice

"I sent a thank-you & an endowment report, let's find new prospects to solicit."

Measurable Progress

"I want my donations to diversify STEM graduates and the workforce."

Gift Acknowledgement

"I sent a personalised thank-you note to our major gift donor."

Academic Leadership Access

"I want to attend classes by the endowed chair that I funded."

Thanking (But Not Spending)

"I received gift funds for the project, but we'll it use when we're ready."

Gift Budgets & Timelines

"I want updates on how and when my gift funds will be spent this year and next."

Sending Endowment Reports

"I signed off on the endowment report for donors which includes the updated investments, spends, and carry overs."

On-Demand Reports

"I want to see enrollment data for the unit after funding the new programme and bios of my scholarship recipients."

Source: EAB interviews and analysis.

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Source: EAB interviews and analysis.

Universities Are Not Set Up to Retain Next Gen Donors

Current Donors

Millennial & Gen Z Donors

Meaningful Impact
Seek giving opportunities as solutions to real world problems

➡ **Measurable Progress**
Seek quicker turnaround with measured data toward a goal

Endowments & Pledges
Attracted to the long-term impact of endowments & pledges

➡ **Current Use Gifts**
Attracted to the tangible results & ability to address issues in real time

Restricted Support
Trust institutions to allocate funds where most needed

➡ **Specific Person Support**
Trust only specific Staff or programmes to make desired impact

Strengthen Head Stewardship

Demonstrate Impact to Retain and Level-Up Donors

1

Educate Heads on Elevated Stewardship Expectations

- Communicating Outcomes and Impact

- Understanding the Importance of Spending Dollars

2

Focus Heads' Mindshare on Select Donors

- Identifying the Top Donors to Steward

3

Empower Heads to Own Stewardship

- Creating a Stewardship Database

Demonstrate Impact to Retain and Level-Up Donors

1

Educate Heads on Elevated Stewardship Expectations

- Communicating Outcomes and Impact

- Understanding the Importance of Spending

2

Focus Heads' Mindshare on Select Donors

- Identifying the Top Donors to Steward

3

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Leading With Impact

Carnegie Mellon Trains Heads to Tell Compelling Outcome-Based Stories

Goal	Format	Outcome
Heads gain skills to communicate with donors: • Narrowing down unit priorities • Pitching initiatives • **Articulating execution plans** • **Communicating expected results and touchpoints**	Heavy emphasis placed on training Heads during early stages of campaign, with ongoing reviews conducted by AVP for Development **Heads practice** at advancement committee meetings & trustee gatherings	✔ Heads trained to engage in compelling conversations ✔ Heads **better equipped to demonstrate gift impact** both pre- & post-donation

> "There is a prestige when the president talks to a donor about the impact that their gift has made. But really, **only the Head can share the nitty gritty details and color commentary of how a gift has change the lives of those on campus.**"
>
> *Matt Weinstein*
> *AVP for Development*
> *Carnegie Melon University*

3 Primary Reasons Why Funds Languish

Saving for a Rainy Day

"We are seeing Heads and Staff **not feeling obligated to spend operational funds**, **because they want to wait for a rainy day**. But it's pouring out! Our budgets are going to get cut again."

Unaware Funds Exist

"A campus Head called the major gifts team to help fundraise for a $2500 mental health stipend. I asked the central budget office about **their available funds** and it **was $275,000**!"

Complex Gift Constraints

"A former Head **agreed to scholarship funds with hyper-specific identifiers** like financial need, geographic region, grades, etc. They can't find a student to give that scholarship to."

Willamette's Unspent Fund Alerts Raise Awareness & Visibility

Alerting Heads to Unspent Funds

Stewardship officer **pulls data on spending** & flags units with unspent funds

Executive Director emails Head to **alert of outstanding donor funds** that have yet to be spent

Executive Director **meets with Heads monthly** to support and remind Heads to spend funds

Central Support Eases Head Workload

"By meeting regularly with the Heads, we're able to problem-solve and help them stay on top of their role in the fundraising process, which helps **alleviate their workload and strengthen their relationships with donors**. It's worth the time investment."

Karen Shaw, ED of Advancement,
Willamette University

Upskilling In-Unit Staff

York Trains Business Officers to Work with Heads to Plug Gaps

Central Advancement Trains Unit Business Officers on Donations

CAO conducts training sessions with every business leader and/or Head for each academic unit

Sessions explore the intersection of budgets & fundraising. Trainings include:

▶ *Endowment Spending*

▶ *Gift Funds as Budget-Relieving Funds*

Sessions empower Heads to use unspent funds to bolster budgets, building stewardship literacy

Identifying Where Donor Funds Can Fill Budget Gaps

"It's really hard to fundraise for operating funds. Donors want transformative impact. We train business officers on how to use donor scholarship funds to indirectly free up budget for other needs."

Susana Gajic-Bruyea,
Vice President of Advancement,
York University

Demonstrate Impact to Retain and Level-Up Donors

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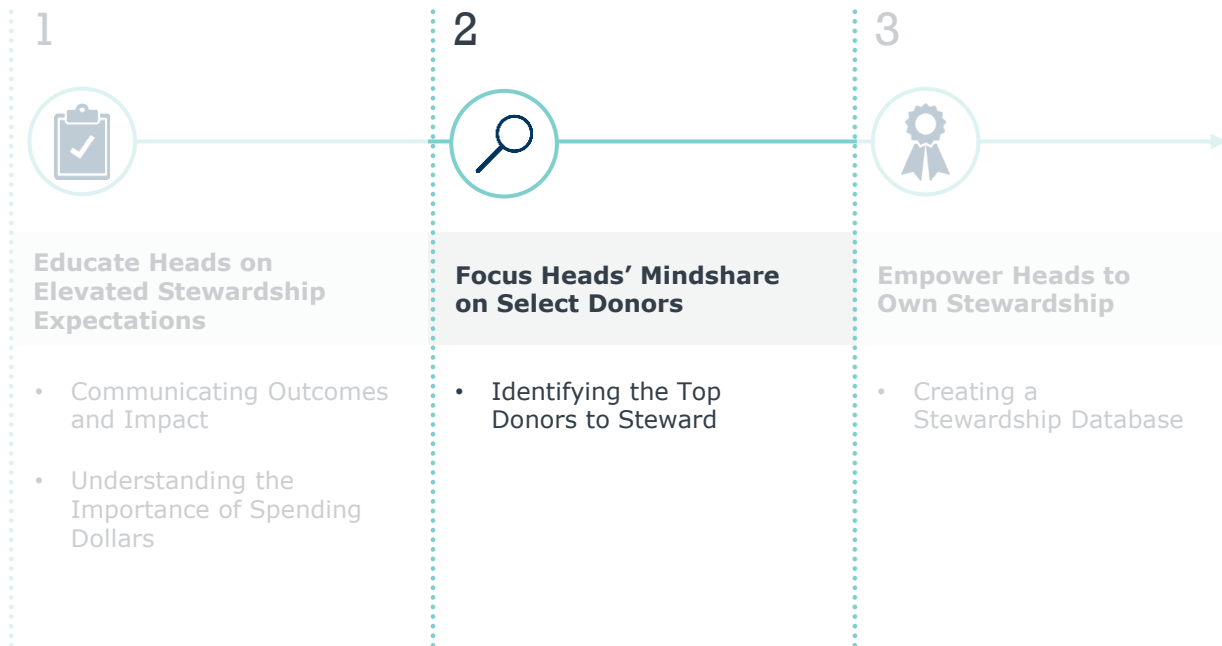
RIT Fundraisers Create a Top 10 List to Direct Heads' Time and Energy

MGOs Partner with Heads to Prioritise Stewardship Activities

Prospects **categorised into four groups**, highlighting the top 10 prospects in each

Prospect Name	Philanthropic Capacity	Prospect Category
Mr. Smith	$5M - $10M	**Top 10 to Steward this FY**
Dr. Bloggs	$10M - $20M	**Top 10 in My Portfolio**
Mr. Doe	$100k - $249k	**Top 10 to Set-Up for Next FY**
Ms. Young	$250k - $499k	**Top 10 on My Radar**

"I bring this grid to every meeting I have with my Head, which is once a month. We discuss all the prospects we're trying to move forward, as well as travel plans and engagement opportunities, like strategic engagements planned for the next quarter. **We figure out how to involve the Head, ensuring we continue building those relationships with existing donors."**

- Liam Welsh, Sr. Director of Advancement, Saunders College of Business, RIT

Strengthen Head Stewardship

Demonstrate Impact to Retain and Level-Up Donors

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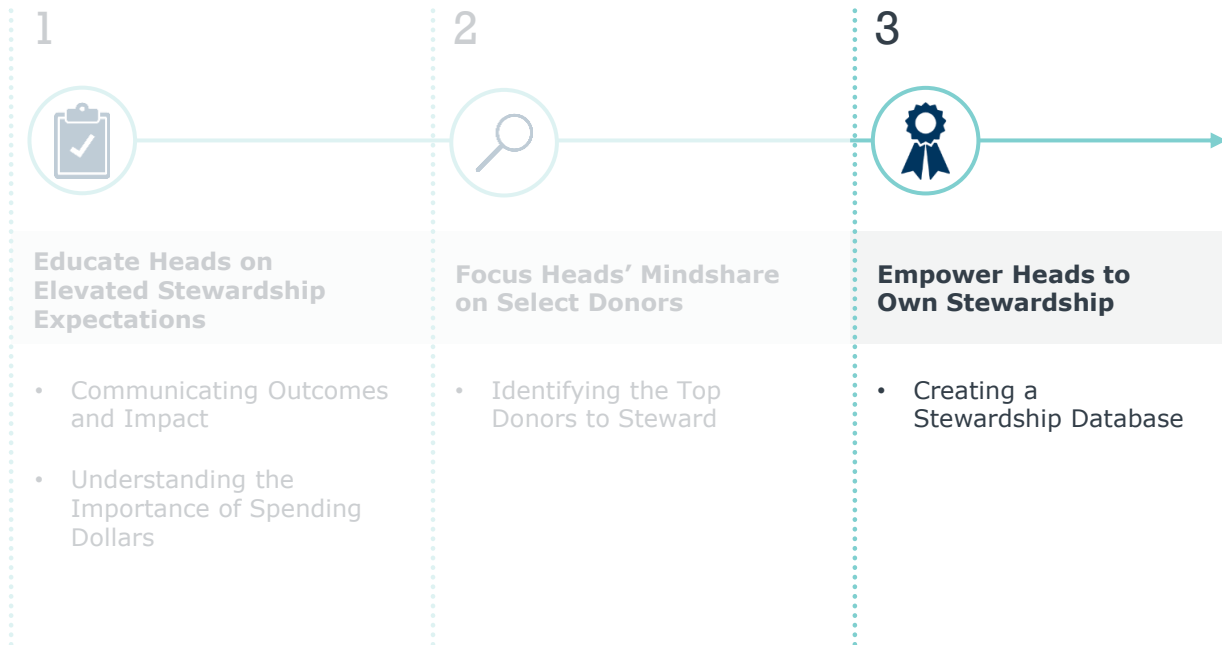
- Creating a Stewardship Database

Penn State Streamlines Data from Across System to Track Donor Impact

A Centralised Gift Database for Effective Donor Stewardship

eSteward is a centralised database integrating data across systems that empowers its users to:

Track stewardship activity

Track endowment & annual account spending

Manage gift acknowledgements

Award scholarships

Data & systems integrated into eSteward
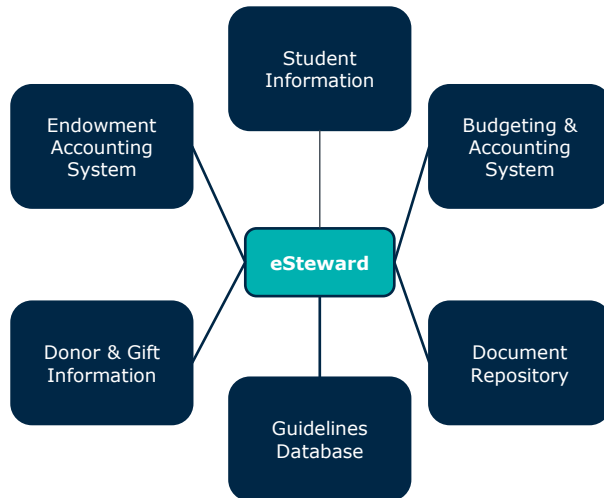
Platform Provides a Complete Overview of Post-Gift Activity

eSteward Tracks Milestones in the Gift Stewardship Process

Short Name	Student ID	Awardee Notified	Thank You Received	Beginning Balance	Investment Returns	Disbursements	Ending Balance
Jane Doe Trustee Scholarship – *College of Engineering*	94438035	☑	No	$500,000	$25,000	$15,000	$510,000
Smith Trustee Scholarship – *College of Engineering*	403353290	☑	Yes	$350,000	$20,000	$10,000	$360,000

Gift Notification
Ensure donors receive a gift receipt within 7 days of gift pledge

Thank-You Status
Determine whether a donor received a thank-you from a student

Spent/Unspent Funds
Monitor how much funds have been spent or how much is left to spent

Stewardship Touchpoints
Track other communications, such as impact reports and spending plans, post-giving

Source: Pennsylvania State University, PA; EAB interviews and analysis.

eSteward Informs Stewardship Strategy & Enhances Donor Engagement

How eSteward Supports Heads

Provides Real-Time Data
Provides up-to-date market/gift value of funds & expenditure

Supports Stewardship Strategy
Through analysis of eSteward data, Heads & fundraisers can shift stewardship strategy to meet goals

Sends Spending Notifications
Alerts users of unspent funds with outstanding inactivity, triggering spending plans

Compares Unit vs. Department
Allows units to understand their contribution to the stewardship plan

Benefits of eSteward for All

Standardises Stewardship
eSteward's unified system ensures a consistent donor experience through standardised practices

Streamlines Data Management
Before eSteward, Penn State managed six isolated databases, complicating information gathering

Enhances Transparency
Donors receive transparent feedback & impact metrics, fostering accountability

Boosts Engagement
Facilitates connections between donors, students, & Staff

Evaluating Stewardship on Your Campus

Questions & Resources for Your Team to Consider

1
- Why do our Heads not spend money? How can we ensure they are spending these funds?
- Do we track stewarding activities & unspent funds? If not, how can we make that happen?

2
- What training exists to support Heads with stewardship?
- How can we help Heads see the connection between stewardship & pipeline building?

3
- What role can central play to support unit stewardship?
- How can we empower & incentivise Heads to steward donors?

4
- Are in-unit business officers bought into spending gift funds?
- How can we educate these leaders to optimise donations?

Recommended Advancement Advisory Services Resources

See EAB's Next Generation of Major Gift Donor infographic to identify major donors & future leaders to effectively target engagement specifically to their needs

Unlocking the Potential of AI in Philanthropy

What Advancement Leaders Need to Know Now

Advancement Advisory Services

AI Breaks the Mold of Technology Adoption

ChatGPT's User Base Grew Faster Than Other Tech Breakthroughs

What is Generative AI?

Latest development in AI that refers to deep-learning models that can **generate high-quality text, images, and other content** based on the data they were trained on.[1]

ChatGPT's Meteoric Adoption Rate Sets Historical Precedent

Time to 100M Users By Technology

ChatGPT
2 months

Facebook
5 years

http: Internet
8 years

Television
38 years

Telephone
75 years

Time to 100 Million Users
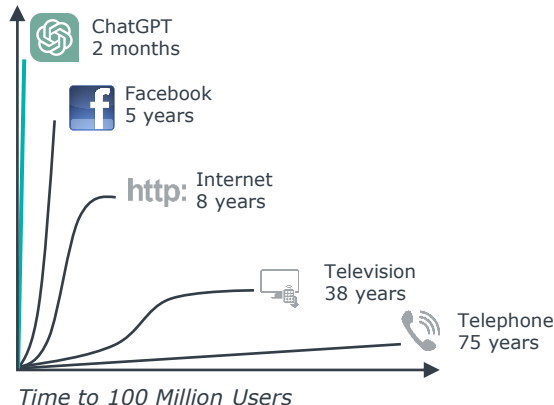
Generative AI Reaches Inflection Point Due to Unique Developments

▶ **Accessible and User-Friendly**

Web-based access allows anyone to use AI via PCs and smartphones. Users can use simple text prompts to deliver commands and process outputs.

▶ **Trained on Vast Knowledge Base**

Models are trained on large sets of data (e.g., books, web texts, and articles from billions of Internet webpages).

▶ **Generates New, Human-Like Content**

Tools can generate new, creative content across domains (e.g., text, images, software) that is often indistinguishable from human outputs.

⑥ OpenAI   ◉ DeepMind   ◉ Stable Diffusion   ✕kool   ◆ DeepL

1) IBM Research definition.

Source: Gerwitz, "How does ChatGPT actually work," *ZDNET,* July 13, 2023; Hu, "ChatGPT sets record for fastest-growing user base – analyst note," *Reuters,* Feb. 2, 2023; EAB interviews and analysis.

Artificial Intelligence (AI):

Machines that can reason and solve problems in human-like ways, mimicking capabilities such as communication and pattern recognition

Generative AI (GenAI):

AI that can predict or "generate" the next word, pixel, etc. in a sequence, creating the capacity to "make" new content

AI Was Already in Our Everyday Lives Before ChatGPT...

Siri uses natural language processing (NLP) and deep learning to understand and respond to voice commands

Waze uses AI to analyse real-time traffic data and optimise route recommendations

Uber uses machine learning, deep learning, and NLP in both internal and external functions

Machine learning powers **TikTok** algorithm, personalising content feeds based on user interactions

...But New AI Tools Unlock Human-Like Outputs

AudioCraft (Meta)
Type: Audio

GitHub Copilot (Microsoft)
Type: Code

Runway ML
Type: Video Creator and Editor

Midjourney
Type: Images

ChatGPT (OpenAI)
Type: Text
By Jan '23, ChatGPT reached 100M users in just two months, the fastest-growing app in history (at the time)

Source: EAB interviews and analysis.

Past Hyped Technologies Have Fizzled Out; What Sets AI Apart?

Forbes
Is Coursera the Beginning of the End for Traditional Higher Education?

December 2012

◉CBS NEWS
Is Competency-Based Learning The Future Of Education?

November 2021

The Economist
AI can transform education for the better

January 2024

January 2019

August 2023

IHE Inside Higher Ed
Why MOOCs Didn't Work, in 3 Data Points

IHE Inside Higher Ed
Interest in Skill-Based Learning Not Keeping Up With Demand

Will AI be Different?

Source: Forbes, Is Coursera the Beginning of the End for Traditional Higher Education?; Inside Higher Ed, Why MOOCs Didn't Work, in 3 Data Points; CBS News, Is Competency-Based Learning The Future Of Education?; Inside Higher Ed, Interest in Skill-Based Learning Not Keeping Up With Demand; The Economist, AI can transform education for the better; EAB interviews and analysis.

Institutions Large and Small Are Betting on AI's Future

Headline Initiatives Proliferate—with Eye-Watering Price Tags

USC University of Southern California

$1B

total investment in AI initiative to include 90 new staff, seven-storey building, and new school

University of BRISTOL

£225M

awarded to University of Bristol by UK government for new AI supercomputer

Western UNIVERSITY · CANADA

CAIO

Western University among institutions hiring AI strategist at the senior management level

...But Even Small Institutions Are Cashing In

GATEWAY TECHNICAL COLLEGE

Gateway and Microsoft partner to train 1000+ employees for new AI-focused datacenter

MOREHOUSE COLLEGE

Morehouse announces plans to begin using AI teaching assistants in 2024-25 academic year

MONTCLAIR STATE UNIVERSITY

Montclair State hires full-time instructor in applied artificial intelligence

Source: Susan D'Agostino, "Colleges Race to Hire and Build Amid AI 'Gold Rush,'" *Inside Higher Ed*, May 19, 2023; Hewlett Packard Enterprise Newsroom, "UK Government invests £225m to create UK's most powerful AI supercomputer with University of Bristol and Hewlett Packard Enterprise," November 1, 2023; Keri Ferguson, "Western appoints Mark Daley as first-ever chief AI officer," *Western News*, September 27, 2023; WGTD 91.1 FM, "Microsoft Partnerships with Gateway, UW-M, Detailed," June 2, 2024; *The Journal of Blacks in Higher Education*, "AI Teaching Assistants Are Coming to Morehouse College," July 12, 2024; Chronicle of Higher Education Jobs, "Assistant or Associate Professor of Applied Artificial Intelligence," July 26, 2024; EAB interviews and analysis.

Waiting Out the Hype Cycle Protects Against Premature Investments

Traditional Hype Cycle

Peak of Inflated Expectations

Practical Application

Innovation Trigger

Trough of Disillusionment
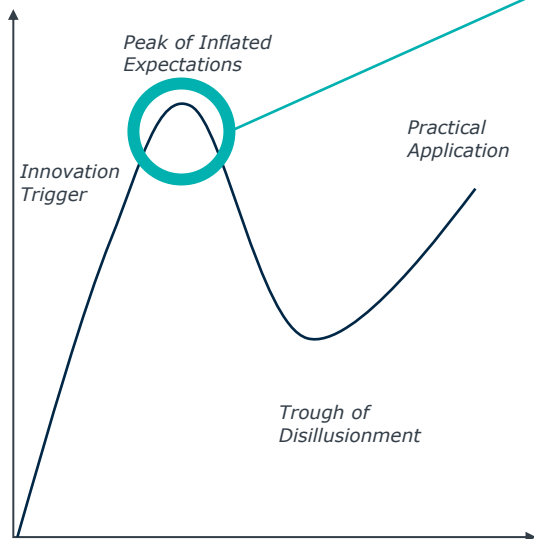
Overheard In Our 100+ Research Interviews on GenAI

"My hunch is that it will be a year until we see the skills that are actually integral for GenAI."

"We had a lot of momentum out the gate. We created new policies and encouraged staff to experiment. But I'm not sure where my institution is going next."

"We are all kind of waiting until some of it gets figured out and then we will decide what to do."

Source: EAB interviews and analysis.

GenAI Brings New Hype Cycle with Each Update to Technology

Microsoft Copilot Launched
GenAI assistant embedded in the Microsoft suite; enhances work on spreadsheets, PowerPoints. Opportunity to teach GenAI for data analysis and presentation.

New Hype Cycle

ChatGPT 3 Released
Capable of responding to prompts with human-like, written answers. Opportunity to teach GenAI basics.

New Hype Cycle

Google Gemini
Contains tools that allow real-time internet data to be fetched for responses. Opportunity to teach GenAI for research design and analysis.

Initial Hype Cycle

**Coming Soon…
Transformation with GPT 5?**

GPT 5 is expected to be able to execute and carry out some tasks independent of human oversight. In one popular example, GenAI booked flights for someone who asked for a travel itinerary.

Stubborn Skeptic	Passive Observer	Curious Examiner	AI Champion
"AI is just the latest overhyped piece of technology."	"AI not my issue; someone should play around with it but it's not my priority."	"I am exploring AI, but I'm not sure what problems it helps me solve yet."	"AI will transform every part of my job in a positive way."

Source: EAB interviews and analysis.

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Where Would You Put Yourself at This Moment?

And We Are Only Getting Started…

While Students and Staff Embrace AI Tools…

86%

Of students use AI to augment learning and studying

69%

Of HE staff reported using generative AI at least once in the past year

80%

Of institutions are not fully meeting students' AI integration expectations[1]

…HE is Still in Phase 1 of AI Adoption

Arizona State University, AI Maturity Model, April 2024

| Phase 1 | Phase 2 | Phase 3 | Phase 4 |
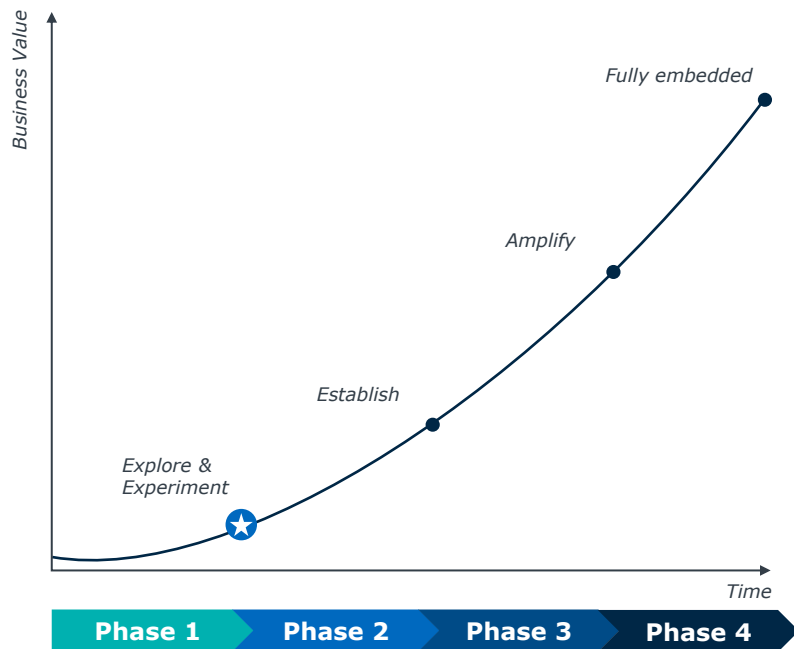
1) Includes integrating AI tools into teaching and learning, student and academic staff training, course topics, or other areas.

Source: ASU + GSV Summit, Is Your Strategy AI-Ready? Tips from ASU on Preparing for a New Normal, 2024; Digital Education Council, "Digital Education Council Global AI Student Survey 2024," August 2, 2024; EAB, Higher Ed Success Staff Survey, 2024; EAB interviews and analysis.

Signals from Students and Employers

Students to Universities: "Get Us Ready for AI Jobs"

81%
of the Class of 2027 say their institution should be preparing them with AI skills

55%
of 2024 graduates say their institutions **did not** prepare them to use AI tools in the workforce

....and Employers Increasingly Signal They're All AI Jobs

2 in 3
business leaders say they wouldn't hire someone without AI skills

1,130%
growth in job postings listing GenAI skills, November 2022-June 2024

Source: Colleen Flaherty, "Survey: How AI Is Impacting Students' Career Choices," *Inside Higher Ed*, January 10, 2024; Cengage Group, *2024 Graduate Employability Report*, July 2024; Microsoft and LinkedIn, *2024 Work Trend Index Annual Report*, May 8, 2024; EAB interviews and analysis.

Undeniable Job Growth

Skyrocketing Demand for Generative AI Skills

Quarterly Growth of Job Postings Containing Generative AI Terms, October 2022 – September 2024
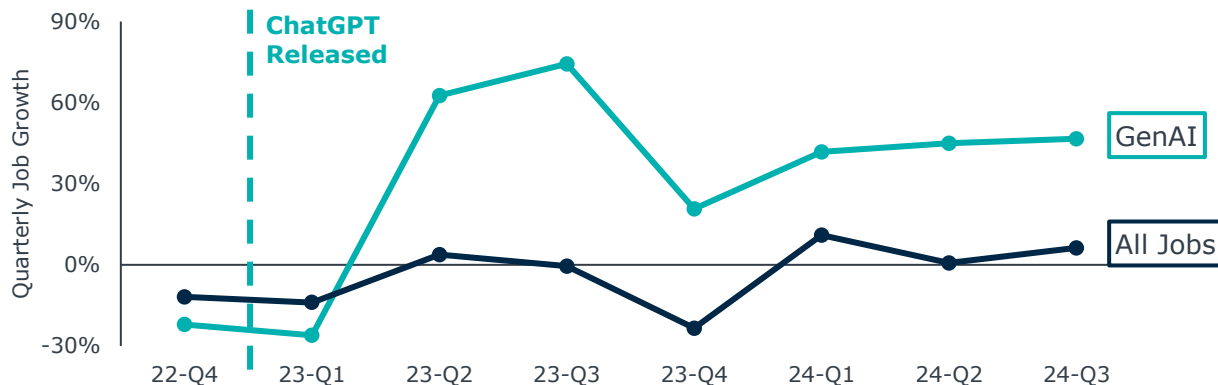
Monumental Growth for GenAI Skills Compared to Past High-Growth Fields

Growth in Monthly Relevant Job Postings as Field Interest Peaked

GenAI, 2024	Fintech, 2022	Smart Manufacturing, 2021
644%	104%	25%
Oct 2022 – Sept 2024	*Jun 2020 – Apr 2022*	*Oct 2019 – Sept 2021*

Teaching AI Not for Tech Fields

95% of AI Workers Will Not Need Technical Training or Expertise

Levels of AI Knowledge by Future Workforce Demand	*Skills Needed*	*Implications for Academic Programmes*
~5% of knowledge-sector jobs will be **advanced level**	▶ **Large language model design**: building new GenAI models ▶ **API manipulation**: the use of application programmeme interfaces for AI models interact with one another	Training already exists in Computer Science department
~25% of knowledge-sector jobs will be **intermediate level**	▶ **Model fine-tuning ability**: Able to select and adjust the right models for the company ▶ **Cross-team collaboration**: Oversee integration into workstreams and employee training	Option to provide additional coursework for students who want to become AI leaders in their field
~70% of knowledge-sector jobs will be **basic level**	▶ **AI Literacy**: Understanding GenAI's abilities and limitations as the technology evolves ▶ **Emotional Intelligence**: Human-to-human interaction to complement GenAI	Ensure all students have these skills; opportunity to provide training for field-specific uses

Source: EAB interviews and analysis.

AI Isn't Coming for (Most) Graduates' Jobs

Few Jobs Untouched by AI, but Most Augmented Rather than Replaced

Automation: when GenAI can perform a task completely without human intervention

Tasks Likely to Be Automated

Data Scientist

- Data entry and checking

- Basic coding tasks

Healthcare Admin

- Appointment scheduling

- Billing and coding

Augmentation: when GenAI works in conjunction with humans to amplify human skills

Tasks Likely to Be Augmented

Data Scientist

- Data decision making

- Results analysis

Healthcare Admin

- Patient care coordination

- Regulatory compliance

WORLD ECONOMIC FORUM

GenAI Exposure and Automation/Augmentation Potential, By Estimated Percentage of Tasks

	Automated	Augmented	Not Exposed
Data Scientist	35%	55%	10%
Healthcare Admin	20%	30%	50%

Legend: ■ Automated ■ Augmented ■ Not Exposed
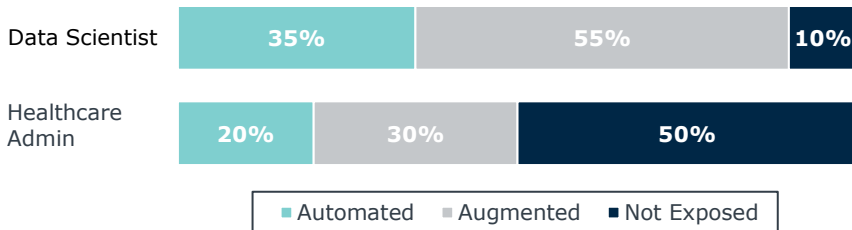
Let's Discuss

How are or how are considering using Generative AI in your personal work? Across your full philanthropy and development remit?

What kind of opportunities do you see for the unit as GenAI becomes embedded in the workplace? Threats?

Understand the Current State of AI in Your Shop

Explore Productivity and Efficiency Gains for Staff

Identify New AI Giving Opportunities

Develop Personalised Communications at Scale

3 To-Dos for CAOs Regardless of Whether You're an AI Skeptic or Champion

Understand Current AI Use

Get a current snapshot of usage and tools amongst staff.

Highlight AI Policy

Ensure widespread awareness of institutional AI policies.

Access Central AI Resources

Tap into existing university training sessions and resources.

UNIVERSITY *of* ROCHESTER

University of Rochester implemented an **internal survey** to understand which tools staff members are already using.

Caltech

Caltech shared **four guiding principles** that all staff should practice when using AI: disclosure, data and information protection, content responsibility, and Caltech's honor code.

HARVARD UNIVERSITY

Harvard University launched the **AI Sandbox pilot programme** to provide campus members an opportunity to experiment with various AI platforms while ensuring data privacy and security.

Key Themes: What roles can AI support? What tasks can it speed up and automate? What types of AI tools are available? Do academic and professional staff know how to maximise productivity gains from AI tools?

Tier 1: Ad-hoc use of public AI tools

Interested academic and professional staff use **public AI tools** for general information-gathering and basic writing support on an **ad-hoc basis.**

Tier 2: Structured assistance for common tasks

Staff have access to **structured AI assistance for common tasks** like budget analysis, drafting emails, etc.

Tier 3: Department or role-specific AI tools

Custom AI solutions are developed or purchased to meet the unique needs of **specific departments or roles**.

Tier 4: AI integration across all workstreams

AI systems are integrated into workstreams in **every department and business unit** across the institution.

Also available on eab.com:
AI Maturity Model

Source: EAB interviews and analysis.

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Generative AI Projected to Augment Majority of Roles

2/3
Of current jobs are exposed to some degree of AI automation

50%
Of current workforce tasks may be automated by 2030

75%
Of companies plan to adopt AI or AI-adapted technologies 2023-2027

Different Classes of AI Tools Promise Compounding Productivity Gains

Publicly accessible AI tools

Staff member uses GPT-4 to generate drafts of emails and project plans

New AI features in university-wide software suites

Research lead uses Microsoft Copilot to visualise data in Excel and create a summary of the data for donor report

Specialised AI solutions

General counsel uses AI assistant to complete contract analysis and surface insights on past gift agreements

Source: J Briggs et al., "The Potentially Large Effects of Artificial Intelligence on Economic Growth", *Goldman Sachs*, March 26, 2023; McKinsey & Company, "The economic potential of generative AI: The next productivity frontier", *McKinsey Digital*, June 14, 2023; World Economic Forum, "Future of Jobs Report", *World Economic Forum*, May 2023; EAB interviews and analysis.

William & Mary Partners with GiveCampus to Save MGO Time

MGO Busy Work

GiveCampus AI Solution

Drafting Emails
Fundraisers spend time writing outreach and follow-up emails

Generates personalised emails for outreach and meeting follow-up, leveraging data from prospect's meeting history and contact reports

Creating Contact Reports
Fundraisers spend time writing well-formatted contact reports

Converts unorganised notes from donor visits into a polished contact report and recommends next steps

Collecting Donor Bios
Fundraisers spend time reading through donor information in CRM

Quickly compiles a bio of a prospective donor based on data culled from previous contact reports and third-party data

The Clever Ways That Partners Are Using AI to Boost Departmental Efficiency

Alumni Relations Staff

Use ChatGPT to generate **personalised messages for alumni event invitations**

- Increase RSVP rates
- Improve engagement

Proposal Writer

Utilise ChatGPT to create **detailed grant proposals** by analysing past successful submissions and current funding trends

- Enhance content
- Boost success rates
- Save time

Marketing Staff

Employ AI to **create campaign videos** for funding initiatives tailored to specific donor demographics

- Drastically cut time and money spent in production to maximise impact

Prospect Research

Leverage ChatGPT to **gather and summarise detailed background information** on potential major donors

- Develop comprehensive donor profiles that include interests, past giving behavior, and potential for future contributions

Source: EAB interviews and analysis.

Share AI Successes and Failures

"If you don't ask people what they are doing with AI, you won't know the full potential of your team. As leaders, **it's our responsibility to inquire, understand, and create an environment where successes and challenges can be shared openly**."

— Chief Advancement Officer

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Universities Are Leveraging AI To Secure Transformational Gifts

TEXAS
The University of Texas at Austin

The University of Texas at Austin received $5 million to launch a new Machine Learning Laboratory. This lab will serve as a collaborative hub for AI research.

Oregon State University

Oregon State University received a $100 million gift, with $50 million dedicated to their Collaborative Innovation Complex. This facility will house a powerful supercomputer and support research in AI.

UNIVERSITY of VIRGINIA

The University of Virginia Darden School of Business received its largest gift in history, over $100 million to fund research and instruction in AI and enhance Darden's leadership in business and technology education.

NYU ABU DHABI

NYU Abu Dhabi secured a significant donation to create the Alan Howard Distinguished Professorship and the Global PhD Fellowship in AI. This funding supports the development of local AI talent and positions NYUAD.

UF | College of Medicine UNIVERSITY of FLORIDA

The **University of Florida** College of Medicine received a transformative gift establishing the Oberndorf College of Medicine AI Prise, supporting medical students working on AI-focused research projects.

Tulane University

Tulane University received a $2 million gift to establish the Mark D. Wheeler Chair in Artificial Intelligence. This endowment will support academic staff research and teaching in AI.

Collaborate With Staff

Facilitate **discussions between advancement officers and academic staff** to learn about AI projects and gain insight for proposals.

Showcase AI Projects

Create case studies and presentations **showcasing successful AI projects** within the institution or at peer universities.

Invite Alumni to Participate

Invite alumni to participate in **AI discussions and initiatives**, as their insights can provide valuable support for potential projects.

Prepare for Difficult Questions

Collaborate with chief technology officer and other academic staff to prepare for difficult questions you may receive from a donor.

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A Personalisation Arms Race for Annual Giving

University of South Carolina Deploys AI for Mass Solicitation

AI-Generated Messaging at USC

Improved Yield and Time Savings

1 High-Volume Giving Day Outreach

- Used ChatGPT to generate messages for high-volume annual Giving Day campaign
- Customised messages based on past donor behavior and written in the voice and tone of the giving team

Highest number of Giving Day donors in 6 years

2K First-time donors

2 Fiscal Year-End Appeals in the Head's Voice

- Composed 392 appeals written in the voice of Heads from 20+ departments
- Team provided ChatGPT examples of previous Head's appeals, fund descriptions, and donor history
- Nearly zero edits needed

392 Letters generated in a few hours

+2 Weeks of staff time saved

Leveraging AI to Help with Qualification

University of Delaware Saves Time and Improves Results

Donor Data Analysis ➡ **AI-Deployed Survey** ➡ **Survey Follow-Up**

40%

Of FY22 major gift donors **were not visited by a gift officer** within the past year

- The University of Delaware uses AI to **deploy a survey mimicking the MGO experience.**
- Survey asks prospects to **score UD as a priority** from 1-4.

100%

Of survey respondents who were contacted **accepted a visit with an MGO**

Survey Sent to High Potential Prospects

- Prospects **rated over one million dollars** and gives a gift or attends an event.
- Prospects who give a **first-time gift above $250.**
- Prospects flagged as high priority by **predictive modeling software**.

Donor Journeys Based on Score

- **16% of high potential prospects completed the survey**, compared to the 10% who respond to MGO outreach.
- Survey respondents receive an **AI-generated follow-up email** from the vice president **based on their score**.
- **MGOs reach out** to prospects who give UD a priority score of 3-4.

Source: EAB interviews and analysis; University of Delaware.

Version2 Brings AI to the Frontlines

Version2 Launches the "World's First Fully Autonomous Frontline Fundraiser"

Mission: Create and accelerate the advancement of autonomous fundraising technology and mimic the cognitive functions of a fundraising staff.

Goal: Autonomously manage a portfolio of donors, similar to the way a traditional fundraiser would.

Process: Narrows donor pool, qualifies donors, builds relationships through personalised touch points, solicits, closes, and executes stewardship without human interaction.
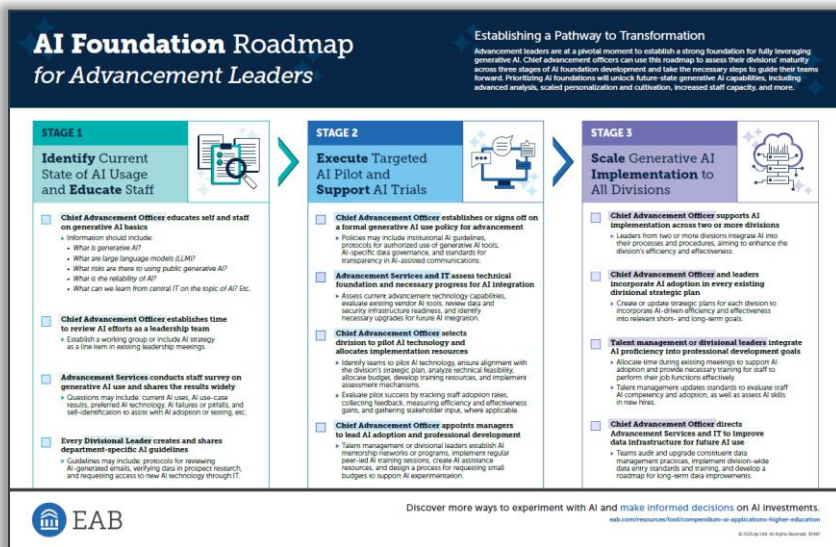
Assess Your Shop's AI Maturity

Infographic Guides Advancement Leaders on Path to Maximising AI

AI Foundation Roadmap for Advancement Leaders

- Detailed steps for each stage of AI implementation

- Clearly defined owners for each step to ensure accountability

- "Clickable" check-boxes to assess progress

AI Foundation Roadmap for Advancement Leaders

Establishing a Pathway to Transformation

Advancement leaders are at a pivotal moment to establish a strong foundation for fully leveraging generative AI. Chief advancement officers can use this roadmap to assess their divisions' maturity across three stages of AI foundation development and take the necessary steps to guide their teams forward. Prioritising AI foundations will unlock future-state advancement AI capabilities, including advanced analysis, scaled personalization and cultivation, increased staff capacity, and more.

STAGE 1

Identify Current State of AI Usage and **Educate** Staff

- **Chief Advancement Officer educates self and staff on generative AI basics**
  - Information should include:
    - What is generative AI?
    - What are large language models (LLM)?
    - What risks are there to using public generative AI?
    - What is the reliability of AI?
    - What can we learn from central IT on the topic of AI? Etc.

- **Chief Advancement Officer establishes time to review AI efforts as a leadership team**
  - Establish a working group or include AI strategy as a line item in existing leadership meetings.

- **Advancement Services conducts staff survey on generative AI use and shares the results widely**
  - Questions may include: current AI uses, AI use-case results, preferred AI technology, AI failures or pitfalls, and self-identification to assist with AI adoption or testing, etc.

- **Every Divisional Leader creates and shares department-specific AI guidelines**
  - Guidelines may include: protocols for reviewing AI-generated emails, verifying data in prospect research, and requesting access to new AI technology through IT.

STAGE 2

Execute Targeted AI Pilot and **Support** AI Trials

- **Chief Advancement Officer establishes or signs off on a formal generative AI use policy for advancement**
  - Policies may include institutional AI guidelines, protocols for authorized use of generative AI tools, AI-specific data governance, and standards for transparency in AI-assisted communications.

- **Advancement Services and IT assess technical foundation and necessary progress for AI integration**
  - Assess current advancement technology capabilities, evaluate existing vendor AI tools, review data and security infrastructure readiness, and identify necessary upgrades for future AI integration.

- **Chief Advancement Officer selects division to pilot AI technology and allocates implementation resources**
  - Identify teams to pilot AI technology, ensure alignment with the division's strategic plan, analyze technical feasibility, allocate budget, develop training resources, and implement assessment mechanisms.
  - Evaluate pilot success by tracking staff adoption rates, collecting feedback, measuring efficiency and effectiveness gains, and gathering stakeholder input, where applicable.

- **Chief Advancement Officer appoints managers to lead AI adoption and professional development**
  - Talent management or divisional leaders establish AI mentorship networks or programs, implement regular peer-led AI training sessions, create AI assistance resources, and design a process for requesting small budgets to support AI experimentation.

STAGE 3

Scale Generative AI **Implementation** to All Divisions

- **Chief Advancement Officer supports AI implementation across two or more divisions**
  - Leaders from two or more divisions integrate AI into their processes and procedures, aiming to enhance the division's efficiency and effectiveness.

- **Chief Advancement Officer and leaders incorporate AI adoption in every existing divisional strategic plan**
  - Create or update strategic plans for each division to incorporate AI-driven efficiency and effectiveness into relevant short- and long-term goals.

- **Talent management or divisional leaders integrate AI proficiency into professional development goals**
  - Allocate time during existing meetings to support AI adoption and provide necessary training for staff to perform their job functions effectively.
  - Talent management updates standards to evaluate staff AI competency and adoption, as well as assess AI skills in new hires.

- **Chief Advancement Officer directs Advancement Services and IT to improve data infrastructure for future AI use**
  - Teams audit and upgrade constituent data management practices, implement division-wide data entry standards and training, and develop a roadmap for long-term data improvements.

Discover more ways to experiment with AI and make informed decisions on AI investments.
eab.com/resources/tool/compendium-ai-applications-higher-education

© EAB

Stage 1

STAGE 1

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Stage 1 Implementation

- › Educate self & staff on generative AI basics

- › Establish time to review AI efforts as a leadership team

- › Conduct staff surveys on AI usage & share results widely

- › Create department specific AI guidelines

Stage 2

STAGE 2

Execute Targeted AI Pilot and **Support** AI Trials

- [ ] **Chief Advancement Officer establishes or signs off on a formal generative AI use policy for advancement**
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Stage 2 Implementation

- › Establish or sign off on formal generative AI use policy

- › Assess technical foundation & necessary progress for AI integration

- › Select division to pilot AI technology and allocate resources

- › Appoint managers to lead AI adoption and professional development

Source: EAB interviews and analysis.

Stage 3

STAGE 3

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  - ▶ Teams audit and upgrade constituent data management practices, implement division-wide data entry standards and training, and develop a roadmap for long-term data improvements.

Stage 3 Implementation

- ❯ Support AI implementation across two or more divisions

- ❯ Incorporate AI adoption into every existing divisional strategic plan

- ❯ Integrate AI proficiency into professional development goals

- ❯ Direct Advancement Services & IT to improve data infrastructure

Data Quality Makes or Breaks AI

> " AI has major potential to transform our advancement shop, but it all depends on the quality of our data. **We need to get our data sorted out first** before we can truly take advantage of what AI has to offer."
>
> — AVP of Advancement Services and Operations

AI Requires Rethinking Tasks, Processes, Roles, and Org Structures

1

Knowledge Capture

Collecting institution-specific proprietary data to train AI

2

Data Management

Ensuring high-quality, integrated, and well-governed data for AI tools to use

3

Age-Old Upskilling

Dedicating time and training academics, professional services staff, and IT staff to learn how to optimise AI tools

4

Cost-Benefit Determination

Providing initial up-front investment in AI tools, which can be costly and requires time to realise ROI[1]

5

Role Transformation

Redesigning roles and processes due to AI augmentation of staff and academic staff tasks and responsibilities

---

1) Return on investment.

Stubborn Skeptic

Passive Observer

Curious Examiner

AI Champion

"AI is just the latest overhyped piece of technology."

"AI not my issue; someone should play around with it but it's not my priority."

"I am exploring AI, but I'm not sure what problems it helps me solve yet."

"AI will transform every part of my job in a positive way."

Has anyone changed where they'd place themselves?

Source: EAB interviews and analysis.

Advancement Leadership and Change Management in Today's Environment

Moving Strategically Through Uncertainty and Financial Pressure

Population Decline Signals Global Transformation

World Population Could Peak by 2055

Global Population and Projections through 2100

- IHME Projection - Main
- UN Projection - Main
- UN Projection - Faster
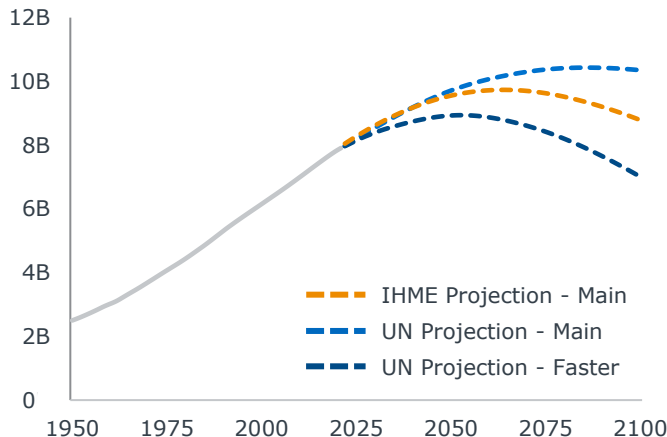
'Most of the world is transitioning into natural population decline. I think it's incredibly hard to think this through and recognise how big a thing it is; **it's extraordinary, we'll have to reorganise societies.'**

Christopher Murray, Director
Institute for Health Metrics and Evaluation

Some Countries Peaking Far Earlier than Global Estimate

2063
5% decline by 2100

2057
6% decline by 2100

2022
49% decline by 2100

2048
32% decline by 2100

2022
26% decline by 2100

2010
54% decline by 2100

Source: Institute for Health Metrics and Evaluation, "Global Fertility, Mortality, Migration, and Population Forecasts 2017-2100," 2020; Department of Economic and Social Affairs Population Division, "World Population Prospects," United Nations, 2022; Human Capital Data Explorer," Wittgenstein Centre, 2018; Silver, Huang, "Key facts about China's declining population," Dec. 5, Pew Research Center2022; EAB interviews and analysis.

In the UK, Short-Term Growth Precedes Steep Decline Through 2100

United Kingdom 15-19-year-old population, IHME Projection
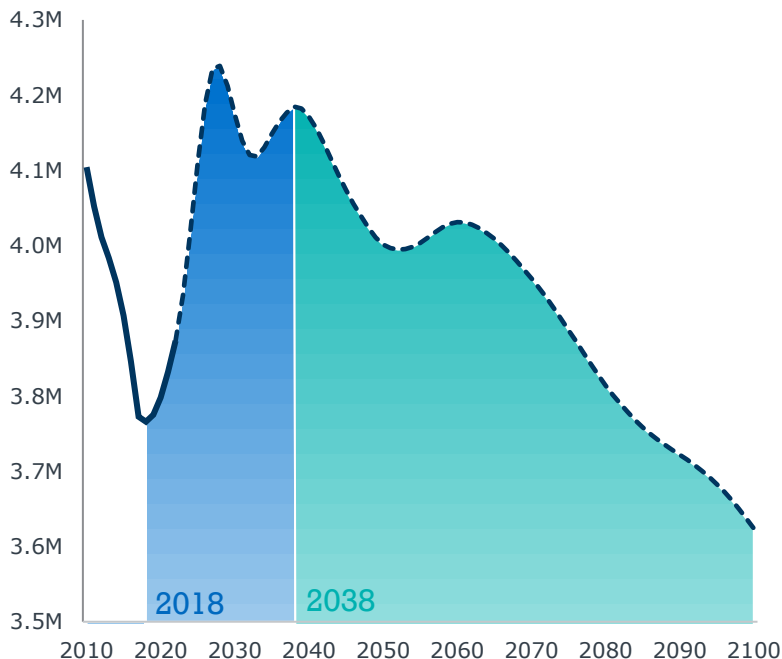
The Student 'Swell'

+11% or +419K

Growth in the 15-19-year-old youth population, 2018-2037

Peak Population

-13% or -561K

Decline in the 15-19-year-old youth population, 2038-2100

Slowing Enrolment Revenues

- **Declining International Enrolments**
  - Changes to visa policies (Can, UK, AUS)
  - Changing student preferences

- **Inability to Raise Tuition Fees**

- **Capped or Declining Home Enrolments**

Rising Costs

- **Rising Operational Costs**
  - Increasing student support needs
  - Rising compliance costs
  - Growing research costs
  - Inflation and energy cost

- **Negotiated Compensation Increases**

- **Rising Pension Costs**

Public Reticence to Support Greater Funding

- **Loss of "social licence"**

- **Concerns about ROI**

- **Lack of Trust**

Canaries in the Coal Mine?

As Financial Pressures Take a Toll...

Percentage of English Universities Reporting an In-Year Deficit

43%

5%

2015-16   2024-25
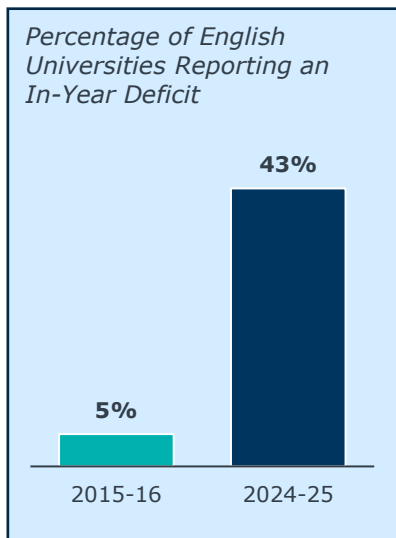
...Institutions Turn to Familiar Cost-Cutting Measures

West Virginia University

- $75M deficit [1]
- Approved plan to cut 28 programs, 143 staff

University of Brighton

- £21.4M deficit [2]
- 103 academic staff redundancies [3]

The University of Manchester

- Over 500 staff redundancies [4]

ACU — Australian Catholic University

- Over 100 jobs cut [5]
- Disbanded philosophy and history institutes

University of East Anglia

- £30M deficit [6]
- Voluntary redundancies
- Removed vacant posts

Victoria University of Wellington — Te Herenga Waka

- $33M deficit [7]
- 140 redundancies [8]
- Six courses discontinued

Queen's University

- $62.8M budget deficit [9]
- Hiring freeze

University of the Highlands and Islands — Oilthigh na Gàidhealtachd agus nan Eilean

- £3M deficit [9]
- Up to 50 jobs cut
- Course cuts planned

Increased Giving Over Time by Fewer People Skews Average Up

65% · 62% · 57% · 59% · 58%

£46 · £54 · £52 · £60 · £65

£10.6 bn · £11.3 bn · £10.7 bn · £12.7 bn · £13.9 bn

2019 · 2020 · 2021 · 2022 · 2023

Donated or sponsored in the last year — Total amount given (billions) — Average monthly donation (mean)
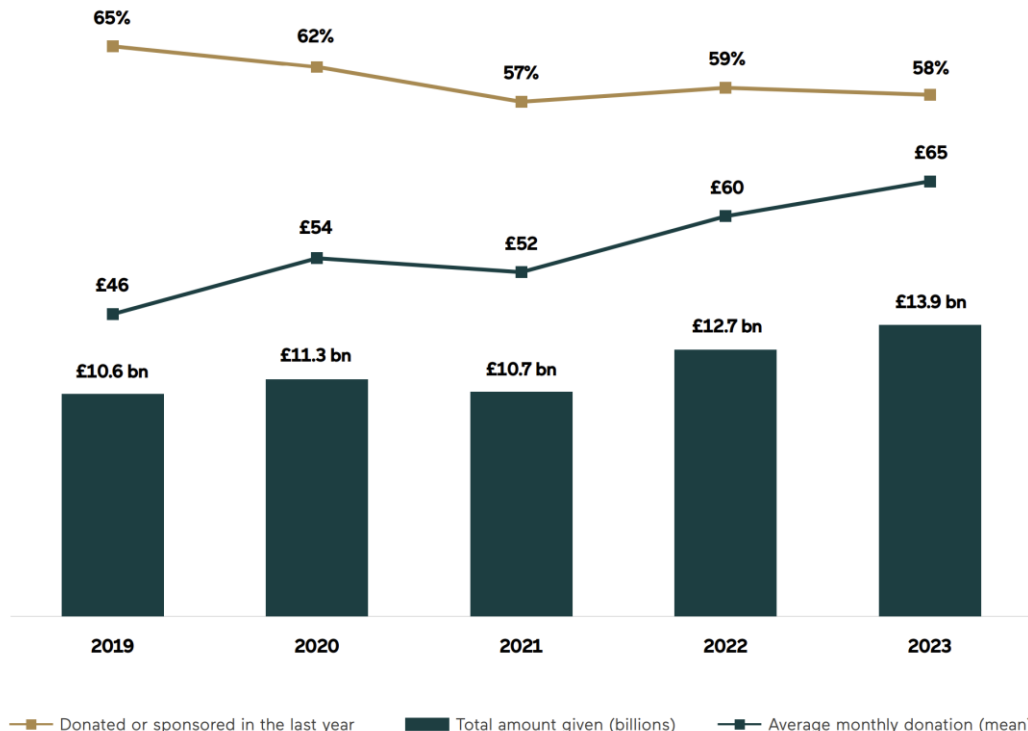
£20

Median donation for 2017-23, Increased to £28/month for 2024 giving.

438%

Increase in **median** HNW giving (+£4560), 2020-23

189%

Increase in **average** HNW giving (+£29k), 2020-23

Source: UK Annual Giving Report, Charities Aid Foundation (2024);
Beacon Collaborative, HNW Giving Report (2023)

High Net Worth Individuals Support Education at Vastly Greater Rates

The General Population
(without HNWI)

~£14bn Total estimated giving by non-HNWI in 2023

High Net Worth Individuals

~£8bn Total estimated giving of HNWI in 2023

13% Or £1.77bn donated to **religious organisations**

10% Or £1.32bn donated to **children and young** people

9% Or £1.25bn donated to **animal welfare**

1% Or £167m donated to **education** in 2023, increased to 4% or £595m in 2024

56%, 60% Gave to **education**

28%, 32% Gave to **healthcare and medical research**

26%, 26% Gave to **arts and culture**

22%, 26% Gave to **Social services**

■ =£1m+   ■ =£30m+

Age and Gender Likely Both Play a Role

Legend:
- ■ All HNW (£1M+)
- ■ UHNW Only (£30M+)

Age	All HNW (£1M+)	UHNW Only (£30M+)
Under 40	6%	2%
40-49	17%	8%
50-59	33%	22%
60-69	27%	35%
70-79	13%	21%
80+	4%	12%
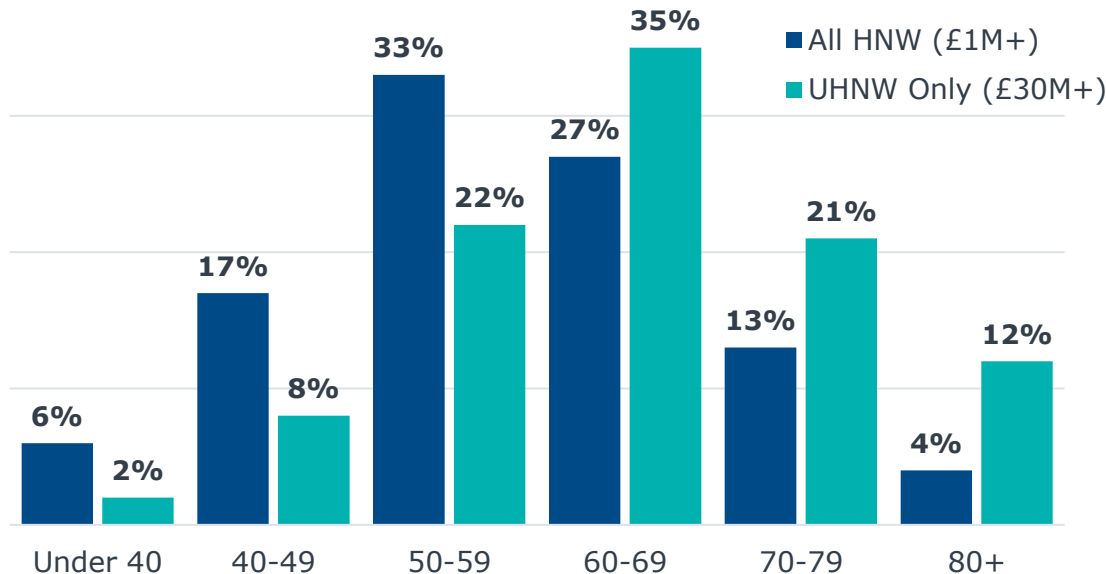
29% Of the most generous[1] donors are women

53% Greater representation than in the general HNW population (19%)

1) High-net-worth individuals who donate the most as a proportion of their wealth

Source: UK Annual Giving Report, Charities Aid Foundation (2024), High Value Giving Report, CAF (2024)

Is It Time to Embrace a 'Less with Less' Mentality?

Pivoting to a Strategic Model that Reflects Changing Market Realities

2000s	2010s	2020s
More with More	**More with Less**	**Less with Less**
• 'If we build it, they will come' mentality fuels growth-minded boom of programmes, facilities, and research expenditures	• Emphasis on efficiency and belt-tightening to keep output constant	• Intentionally decreasing 'productivity' in favour of sustainable operations
• Amenity and experience arms race requires more tech and staff to deliver	• Difficult prioritisation and trade-offs deferred when metrics show incremental improvement	• Budget decisions must reflect market realities of enrolment, funding
• Share-the-wealth budget decisions promote stability in times of growth	• Growing workloads lead to staff burnout, as there's always "more" to do	• Saying 'no' is rewarded
		• Potentially better staff experience; work is scaled to reasonable level

Source: "Survey of College and University Business Officers," *Inside Higher Ed*, 2023; EAB interviews and analysis.

With Many Differing Interests...

Employers
- New technology
- Productivity
- Innovation

Students
- Extracurriculars
- Support
- Disciplines

Donors
- Reputation
- Social issues

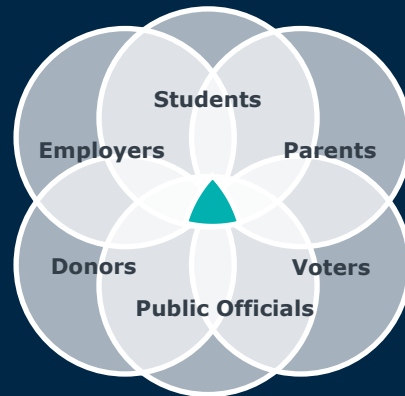**Parents**
- Campus safety
- Affordability
- Well-being

Public Officials
- Voter support
- Regulations & compliance

Voters
- Taxpayer funds
- Community benefits

...Finding the Critical Overlap Seems Impossible

Students
Employers
Parents
Donors
Voters
Public Officials

How Do We Manage the Competing Priorities for Advancement?

Alumni

University Leadership

Heads of Faculty

Donors

Corporate

Trusts and Foundations

Meaningful Engagement – Desire opportunities to stay connected to the university community through events, mentorship, and communications that reflect shared identity and pride.

Continued Learning and Development – Seek access to lifelong learning opportunities, including lectures, webinars, and university resources that support personal and professional growth.

Network Building Among Alumni – Want facilitated connections with fellow alumni for career advancement, community building, and shared interests.

How Do We Manage the Competing Priorities for Advancement?

Alumni

University Leadership

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Trusts and Foundations

Strategic Fundraising Alignment – Expect fundraising priorities to align with institutional goals, such as programme growth, capital projects, or access initiatives.

Data-Driven Reporting – Want clear, timely reporting on progress toward advancement goals and ROI from campaigns.

Reputation and Influence Building – Count on advancement to elevate the university's brand and extend its reach through external relations and donor storytelling.

How Do We Manage the Competing Priorities for Advancement?

Alumni

University Leadership

Heads of Faculty •——

Donors

Corporate

Trusts and Foundations

Unit-Specific Fundraising Support – Expect tailored fundraising strategies for faculty/unit-specific priorities (e.g., programmes, scholarships).

Advancement Partnership – Desire collaboration on donor cultivation and proposal development relevant to their academic mission.

Staff and Student Resource Development – Look to advancement to secure funding for innovative research, student support, and academic initiatives.

How Do We Manage the Competing Priorities for Advancement?

Alumni

University Leadership

Heads of Faculty

Donors ●————————

Corporate

Trusts and Foundations

Impact and Purpose – Want assurance that their gift advances a meaningful cause or initiative, with measurable outcomes.

Personalised Engagement – Expect tailored communications, relationships, and recognition based on their giving history and interests.

Trust and Accountability – Require confidence that the university is a good steward of their philanthropy and follows through on commitments.

How Do We Manage the Competing Priorities for Advancement?

Alumni

University Leadership

Heads of Faculty

Donors

Corporate

Trusts and Foundations

Workforce Pipeline and Talent Access – Seek partnership opportunities that lead to internships, research collaborations, and talent recruitment.

Brand and Strategy Alignment – Expect shared-value initiatives that align with corporate social responsibility or strategic interests.

Visibility and ROI – Desire recognition, branding opportunities, and demonstrable return on partnership or sponsorship investments.

How Do We Manage the Competing Priorities for Advancement?

Alumni

University Leadership

Heads of Faculty

Donors

Corporate

Trusts and Foundations

Mission Alignment – Expect proposals and partnerships to align closely with their philanthropic focus areas and goals.

Programmatic Rigor and Outcomes – Require evidence of strong planning, implementation, and measurable outcomes.

Compliance and Reporting Excellence – Demand professional grant management, timely reporting, and transparent use of funds.

So Where Can We Go From Here?

1 Resilient Leadership in Difficult Times

2 Prioritisation and Cascading Objectives Through Advancement Teams

3 Creating Strong Plans to Bolster First-Time Success

Types of Barriers to Change

Psychological	Cultural	Structural
• *Overreliance on current and internal factors when planning* • *Adherence to widely shared vision despite evidence of untenability* • *Incremental thinking* • *Tendency to default to status quo*	• *Risk aversion* • *Consensus-based agreement* • *Participatory norms and processes* • *Loyalty to academic disciplines over institutions* • *Organisational bureaucracy*	• *Unclear decision rights and responsibilities* • *Insufficient capacity* • *Misaligned incentives* • *Internal silos* • *Legacy units and reporting lines*

What's an example of when you, or a colleague, faced one of these barriers to change?

Types of Barriers to Change

Psychological	Cultural	Structural

Psychological

- *Overreliance on current and internal factors when planning*
- *Adherence to widely shared vision despite evidence of untenability*
- *Incremental thinking*
- *Tendency to default to status quo*

Cultural

- *Risk aversion*
- *Consensus-based agreement*
- *Participatory norms and processes*
- *Loyalty to academic disciplines over institutions*
- *Organisational bureaucracy*

Structural

- *Unclear decision rights and responsibilities*
- *Insufficient capacity*
- *Misaligned incentives*
- *Internal silos*
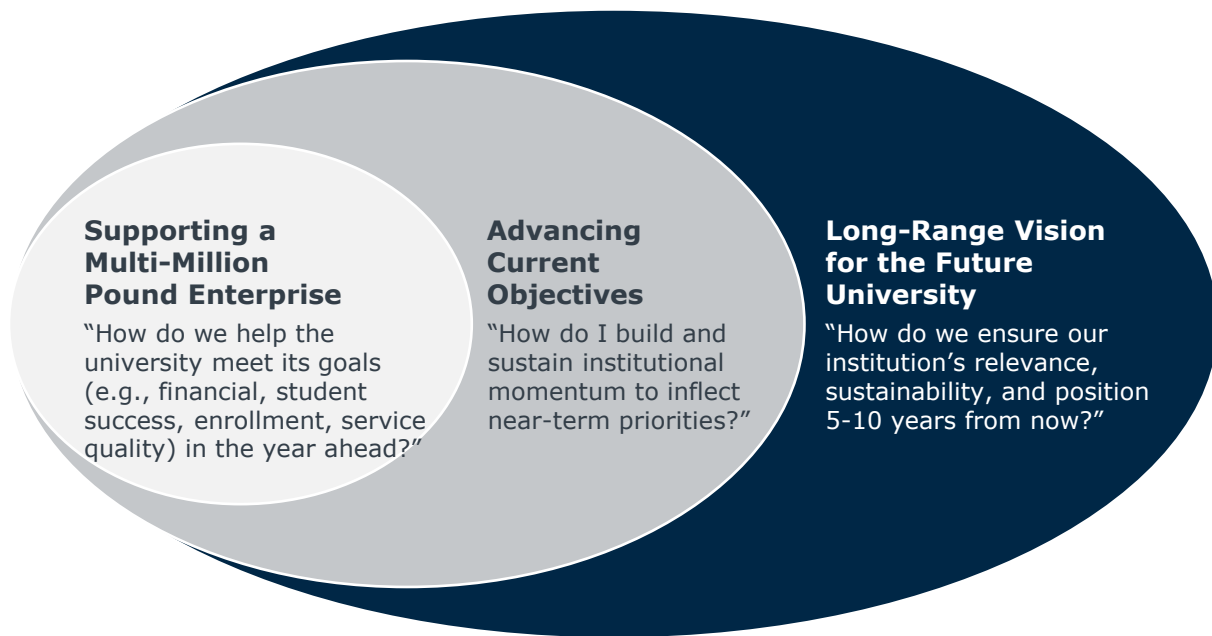- *Legacy units and reporting lines*

Outcomes

1 Deters leaders from initiating change initiatives entirely

2 Stops change initiatives early in their tracks

3 Leads to long-term stall outs and change fatigue

Source: EAB interviews and analysis.

Supporting a Multi-Million Pound Enterprise

"How do we help the university meet its goals (e.g., financial, student success, enrollment, service quality) in the year ahead?"

Advancing Current Objectives

"How do I build and sustain institutional momentum to inflect near-term priorities?"

Long-Range Vision for the Future University

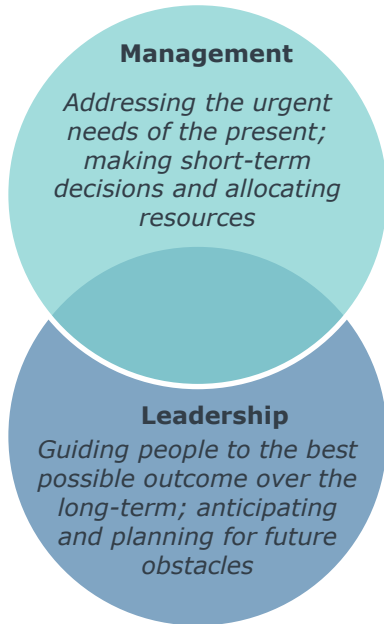"How do we ensure our institution's relevance, sustainability, and position 5-10 years from now?"

"It's taking all of our team's capacity to run the organisation and year-over-year fundraising today, not to mention make progress on a current or upcoming campaign"

"…we know that's not enough, but we haven't had the bandwidth—and don't have enough information and data—for a longer-range vision."
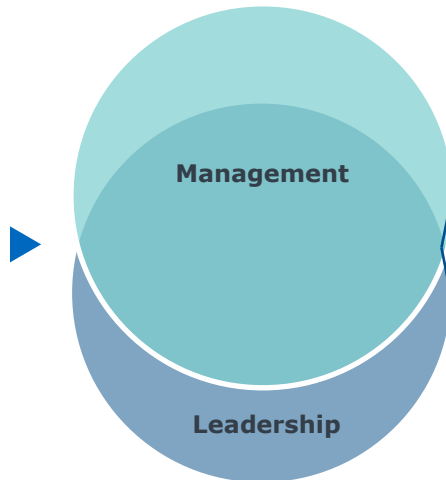
Management Creep During Crisis

Crises Make Managers Out of Leaders, at the Expense of Strategic Growth

**Optimal Division of
Leader Mindshare**

**Leader Mindshare
During a Crisis**

Management

*Addressing the urgent
needs of the present;
making short-term
decisions and allocating
resources*

Leadership

*Guiding people to the best
possible outcome over the
long-term; anticipating
and planning for future
obstacles*

Management

Leadership

**Contributions to
Crisis Management
Creep**

Stakeholder
anxiety

No "playbook"
to reference

Urgency

Crises Lead to Suboptimal Patterns of Cognition

Act on Habit vs. Goals

- Failing to update branding or market approach based on changing donor needs
- Using traditional marketing and outreach practices to expand non-traditional donors

All-or-Nothing Approach

The New York Times

"College Campuses Must Reopen in the Fall. Here's How We Do It"

The Washington Post

"There is No Safe Way to Reopen Colleges This Fall"

**Defensive
"Crisis Thinking"**

Where Would You Situate Yourselves on this Spectrum?

Fully Focused on Annual Needs

Boldly Strategic into the Future

1 2 3 4 5 6 7 8 9 10

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Resilient Leadership in Times of Change

5 Crisis Thinking Patterns: Common Pitfalls to Success

SECTION

1

Isolationism

Thinking Pattern	Doubling down on the instinct to protect what you have and withdraw from the outside environment (e.g., hoarding essential supplies)
Strategic Implications	**Silos get exacerbated** as each unit tries to protect its own interests without considering larger institutional imperatives
Adaptation Strategy	Leverage uncertainty to build a new collaboration infrastructure by appealing to shared goals and a shared identity

How have you seen this in your own work and teams? What have you tried to overcome it?

Loss Aversion

Thinking Pattern	Focusing on what's been lost and how to avoid further loss, versus looking for alternative gains
Strategic Implications	The urge to stymy losses of traditional resources (e.g., traditional student engagement) obscures opportunities for alternatives
Adaptation Strategy	Quantify and communicate the greater loss of not moving forward and broadening the strategic horizon

**How have you seen this in your own work and teams?
What have you tried to overcome it?**

Need for Social Proof

Thinking Pattern — You go first mentality: being unwilling to change behavior until you see others doing so

Strategic Implications — Sector-wide reluctance to announce plans and innovations before others in the industry for fear of being wrong

Adaptation Strategy — Appeal to stakeholders' desire for certainty, especially during volatile periods

How have you seen this in your own work and teams? What have you tried to overcome it?

Irrelevant Urgency

Thinking Pattern : Experiencing loss of control leads to seeking control in other, less important areas

Strategic Implications : Scarce leadership capacity devoted to lower-level operational tasks, not strategy

Adaptation Strategy : Upskill those deeper in the organisation to lead on crisis response; ruthlessly guard strategic time and mindshare

How have you seen this in your own work and teams? What have you tried to overcome it?

Psychic Numbing

Thinking Pattern	Consistent exposure to extreme levels of suffering or difficulty leads to withdrawal and inaction
Strategic Implications	Motivation and engagement wanes over time
Adaptation Strategy	Leverage individual stories and experiences to break through the noise

How have you seen this in your own work and teams? What have you tried to overcome it?

Which Pattern Is Most Pertinent to You?

Crisis Thinking		Adaptive Strategies
Instinct to protect one's own prevails, e.g. hoarding essential supplies	**1** **Isolationism**	Leverage uncertainty to build a new collaboration infrastructure by appealing to shared goals and a shared identity
Focus on what's been lost and how to avoid further loss, vs. looking for alternative gains	**2** **Loss Aversion**	Quantify the greater risk of the status quo; adopt a third-person perspective
You go first: people unwilling to change behavior until they see others doing so	**3** **Need for Social Proof**	Appeal to stakeholders' desire for certainty, especially during volatile periods
Experiencing loss of control leads to seeking control in other, less important areas	**4** **Irrelevant Urgency**	Ruthlessly guard strategic time and mindshare; be sure those truly responsible have necessary skills and information
Consistent exposure to extreme levels of suffering or difficulty leads to withdrawal and inaction	**5** **Psychic Numbing**	Leverage individual stories and experiences to break through the noise

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Prioritisation and Cascading Objectives Through Advancement Teams

Leading Advancement Strategically, Not Just Mindfully

2

Categorising to Inform Time and Resource Investment

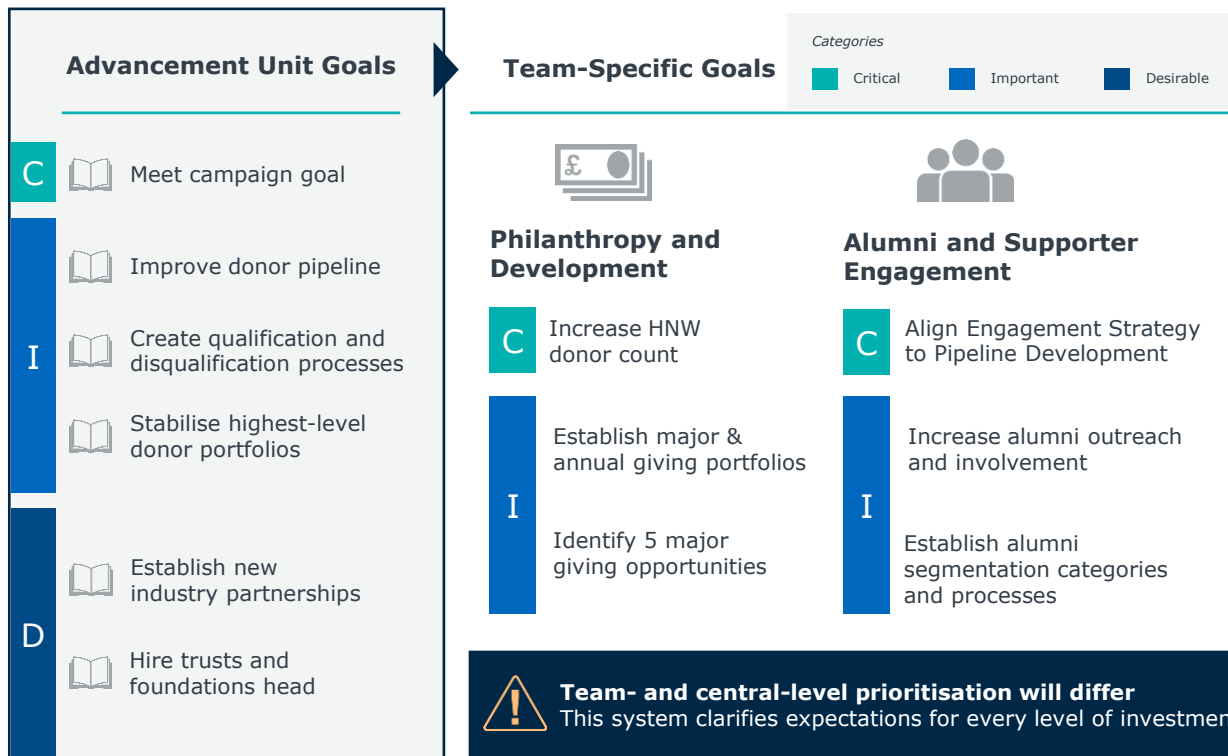## Give Your Team Permission to Say "No"… or at Least "Not For Now"

Categories for Objectives

Variables	**Critical:** The one thing that *must* get done. Senior leader spends time here every day.	**Important:** Dedicated owners assigned and given fixed resources based on projected need.	**Desirable:** Time and resources will be allocated if and when they become available.
Expectations	Fixed	**Best we can achieve**	Fixed
Resources	**First allocation of time and funds**	Fixed	**When can be spared**
Timeline	Fixed	Fixed	**Flexible**
Number of Objectives	1	2–4	Remaining

Source: Lidow, D., *A Better Way to Set Strategic Priorities*, HBR (2017); EAB Interviews and Analysis

Team Leads Work With Directors to Define What Matters Most to their Unit

Advancement Unit Goals

Team-Specific Goals

Categories
- Critical
- Important
- Desirable

C Meet campaign goal

I
- Improve donor pipeline
- Create qualification and disqualification processes
- Stabilise highest-level donor portfolios

D
- Establish new industry partnerships
- Hire trusts and foundations head

Philanthropy and Development

C Increase HNW donor count

I
- Establish major & annual giving portfolios
- Identify 5 major giving opportunities

Alumni and Supporter Engagement

C Align Engagement Strategy to Pipeline Development

I
- Increase alumni outreach and involvement
- Establish alumni segmentation categories and processes

⚠️ **Team- and central-level prioritisation will differ**
This system clarifies expectations for every level of investment

Applying the Planning Matrix Individually, Discussing Together

0 Volunteer as (or assign) note-taker for this exercise. We will be sharing out at the end.

1 **(5-7 minutes)** Individually, to consider the list of priorities in your worksheet (p. 2) and use the prioritisation matrix to identify ONE Critical Priority, 2-4 Important Priorities, and the remaining Desirable Priorities for your advancement unit.

(5 minutes) Write these down on page 3, then discuss the questions in the blue box at your table.

2 **(5-7 minutes)** Identify Critical and Important priorities for your Alumni and Supporter Engagement and Philanthropy and Development teams that align directly back to your unit priorities.

(5 minutes) Write these down on page 4, then discuss the questions in the blue box at your table.

3 **Be ready to discuss your observations and reflections with the full group!**

EAB

Creating Strong Plans to Bolster First-Time Success

Pre-Mortem Analyses

SECTION

3

Imagine Your Strategy Failed.
Now Explain Why.

Strategic Initiative:

Leverage regional donor interests to develop and launch a leadership annual giving (£1-10k) strategy that is both sufficiently personalised and involves donors in meaningful ways.

Reason for Failure	Severity (1-5)	Probability (1-5)	Risk Score (SxP)	Steps to Avoid
We mis-defined "sufficiently personalised" and did not meet donors' expectations	*3*	*3*	*9*	*Use leadership gift officers to source donor needs early and often*
University leadership were too busy to attend the events we planned	*4*	*3*	*12*	*Ensure the event has sufficient involvement and draw to necessitate leader involvement*
We planned an outdoor event, but it's raining	*1*	*5*	*5*	*Find an alternative location, in case of rain*

Imagine Your Strategy Failed.
Now Explain Why.

1 Take 5-10 minutes to consider the context and scenario on page 5 of your workbook and jot down some pre-mortem reasons for failure for increasing mid-level giving at your institution.

2 At your tables, discuss your reasons for failure. What commonalities emerge? What are possible risks you didn't consider – and why do you think that might be?

3 Collectively, identify the reasons for failure with the two highest risk scores (severity x probability) and be ready to report back to the group.