

TOOLKIT

Assessing Your Current Engagement Strategies

Self-Audit and Discussion Guide for Annual Giving Strategies Towards Four Key Audiences:

- ▶ **Alumni**
- ▶ **Parents**
- ▶ **Community Members**
- ▶ **Faculty and Staff**

Overview and How to Use This Resource

In the world of higher education, fostering a thriving and sustainable advancement program demands more than a one-size-fits-all approach. A successful advancement program hinges on an annual giving strategy that engages a diverse portfolio of supporters, and builds meaningful relationships with each segment. From dedicated alumni to supportive parents, engaged community members to devoted faculty and staff, each group plays a pivotal role in shaping your institution's success.

This toolkit is your guide to assess and enhance your strategies with these vital constituents. By delving into their unique needs and preferences, you can forge stronger connections and foster lasting engagement.



Engagement Strategies Assessment (pg. 3 – 8)

To begin, evaluate your current approach to engaging four key audiences in your annual giving program using the Engagement Strategies Assessment. As you navigate through this section, you will gain a better understanding of the effectiveness of your current strategies and identify areas for improvement.



Alumni

pg. 3 - 4



Parents

pg. 5 - 6



Community Members

pg. 7



Faculty and Staff

pg. 8



Scores and Discussion Guide (pg. 9 - 11)

Once you have completed an assessment for each audience, use this section to record all your scores in one place. Then, use the discussion guide to identify areas of improvement and opportunities to optimize your efforts. Finally, think through how your team could enhance your engagement strategies. You can use this individually or as a guide to engage in meaningful conversations with your team.



Want to speak with an annual giving expert?

Email us at eabadvmrktngcommu@eab.com

Engagement Strategies Assessment

Alumni

Alumni are the backbone of any institution, representing a rich tapestry of experiences and a profound connection to your school's legacy.

Indicate how well or often you are currently implementing each of the tactics or strategies below by marking a box to the left.

- ☐ Yes
☐ Partially
☐ No

We use an omni-channel approach to our alumni strategy; including a mix of digital and traditional communication methods.

- ☐ Yes
☐ Partially
☐ No

We maintain an active and engaging presence on social media platforms commonly used by our alumni.

- ☐ Yes
☐ Partially
☐ No

Our institution deploys targeted digital advertising campaigns to reach alumni.

- ☐ Yes
☐ Partially
☐ No

We maintain active engagement with alumni through traditional communication methods, such as direct mail and print publications.

- ☐ Yes
☐ Partially
☐ No

Our website is designed to provide alumni with easy access to relevant information, events, and ways to engage.

- ☐ Yes
☐ Partially
☐ No

Our alumni communications emphasize the significant impact and value of their contributions to our institution and the broader community.

- ☐ Yes
☐ Partially
☐ No

We use available data to personalize communication campaigns for alumni, tailoring content to their interests and behaviors.

- ☐ Yes
☐ Partially
☐ No

Alumni receive personalized recommendations for events and engagement opportunities based on their past interactions with our institution.

Engagement Strategies Assessment

Alumni

- ☐ Yes
☐ Partially
☐ No

Our institution initiates alumni engagement shortly after graduation, offering opportunities for recent graduates to stay connected.

- ☐ Yes
☐ Partially
☐ No

We strategically plan engagement activities around key milestones in alumni lives, such as career advancements, reunions, and significant life events.

- ☐ Yes
☐ Partially
☐ No

Our institution maintains consistent communication with alumni throughout the year, keeping them informed and engaged.

- ☐ Yes
☐ Partially
☐ No

We have a systematic approach for re-engaging alumni who may have become less active over time.

- ☐ Yes
☐ Partially
☐ No

We offer diverse opportunities for alumni to engage with the institution, both through monetary contributions and non-monetary involvement.

- ☐ Yes
☐ Partially
☐ No

Our institution proactively seeks alumni feedback through surveys and feedback mechanisms to continually improve engagement strategies.

Record Your Engagement Score

Tally up your marks for each answer here. You will also record these on **page 9**. Then as a basis for discussion on **page 10**.

YES

PARTIALLY

NO

Engagement Strategies Assessment

Parents

Parents of alumni bring a unique perspective and valuable support to your institution's mission, often with a deep sense of pride in their child's alma mater.

Indicate how well or often you are currently implementing each of the tactics or strategies below by marking a box to the left.

- ☐ Yes
☐ Partially
☐ No

We have a comprehensive parent engagement strategy in place.

- ☐ Yes
☐ Partially
☐ No

Our institution effectively communicates the impact of parental contributions on the student experience.

- ☐ Yes
☐ Partially
☐ No

Our institution establishes a connection early on with parents, beginning with when their child starts showing interest in enrolling at our institution.

- ☐ Yes
☐ Partially
☐ No

Our institution offers a range of giving levels that accommodate various parent budgets.

- ☐ Yes
☐ Partially
☐ No

We offer parents opportunities to provide input on the areas of the institution they are most passionate about supporting, and we use this information to tailor our fundraising appeals.

- ☐ Yes
☐ Partially
☐ No

We use enrollment and other institutional data to understand donor behavior, interests, and motivating factors.

- ☐ Yes
☐ Partially
☐ No

We access data from other departments at our institution to gain the insights we need to personalize communications to parents.

- ☐ Yes
☐ Partially
☐ No

We personalize our communications to parents based on their unique interests and connection to the institution.

Engagement Strategies Assessment

Parents

- ☐ Yes
☐ Partially
☐ No

We offer parents the option to receive updates and engagement opportunities through their preferred communication methods, such as emails, newsletters, and social media.

- ☐ Yes
☐ Partially
☐ No

We provide multiple opportunities for parents to get involved beyond financial contributions.

- ☐ Yes
☐ Partially
☐ No

We have a documented plan for nurturing long-term relationships with parents.

- ☐ Yes
☐ Partially
☐ No

We have a segmented strategy approach for parent giving depending on where they are in their student's academic journey (currently enrolled, within 3 years of graduation, over 5 years after graduation, etc.).

- ☐ Yes
☐ Partially
☐ No

We strategically time our solicitations to align with key moments in the parent's relationship with the institution.

- ☐ Yes
☐ Partially
☐ No

We have a defined pathway for transitioning parents from one-time donors to multi-year supporters.

Record Your Engagement Score

Tally up your marks for each answer here. You will also record these on **page 9**. Then as a basis for discussion on **page 10**.

YES

PARTIALLY

NO

Engagement Strategies Assessment

Community Members

Engaging with community members fosters goodwill, support, and connections that can benefit both your institution and community.

Indicate how well or often you are currently implementing each of the tactics or strategies below by marking a box to the left.

- ☐ Yes
☐ Partially
☐ No

We have a dedicated strategy for engaging community members in our annual giving program; including a mix of digital and traditional communication methods.

- ☐ Yes
☐ Partially
☐ No

We develop annual giving campaigns around something our institution can directly provide to the community OR around a mission-based affinity that our institution supports.

- ☐ Yes
☐ Partially
☐ No

Communications emphasize how community members can play an active role in driving positive change in our institution and local community.

- ☐ Yes
☐ Partially
☐ No

We consistently offer diverse engagement opportunities for community members throughout the year, fostering their ongoing involvement through monetary and non-monetary avenues.

- ☐ Yes
☐ Partially
☐ No

We have community member insights and data readily available to us to use in campaign personalization efforts.

- ☐ Yes
☐ Partially
☐ No

After community members participate in events, activities, or appeals, we follow up with communications and opportunities to keep them engaged.

Record Your Engagement Score

Tally up your marks for each answer here. You will also record these on **page 9**. Then as a basis for discussion on **page 10**.

YES

PARTIALLY

NO

Engagement Strategies Assessment

Faculty and Staff

Faculty and staff are crucial stakeholders who contribute their expertise and passion for your institution every single day.

Indicate how well or often you are currently implementing each of the tactics or strategies below by marking a box to the left.

- ☐ Yes
☐ Partially
☐ No

We run a dedicated annual giving program directed towards faculty and staff.

- ☐ Yes
☐ Partially
☐ No

Communications towards faculty and staff are transparent, timely, relevant, and attune to the current landscape of our institution when asking them to give.

- ☐ Yes
☐ Partially
☐ No

Communications regarding annual giving are delivered through channels that are both convenient and accessible to faculty and staff, such as internal newsletters, staff meetings, and academic department platforms.

- ☐ Yes
☐ Partially
☐ No

We provide flexible giving options for faculty and staff, including payroll deductions, one-time gifts, etc.

- ☐ Yes
☐ Partially
☐ No

We tailor our annual giving communications to faculty and staff, acknowledging their vital role in our institution's success and providing opportunities for them to contribute to areas meaningful to them.

- ☐ Yes
☐ Partially
☐ No

We have a formal recognition program in place to acknowledge faculty and staff contributions to our institution's success.

Record Your Engagement Score

*Tally up your marks for each answer here. You will also record these on **page 9**. Then as a basis for discussion on **page 10**.*

YES

PARTIALLY

NO

Engagement Scores

Collect and record your engagement scores for each of the four key audiences below. This step will serve as a valuable reference point as you progress through the discussion guide on the following page.

Alumni (14 total tallies)

YES

PARTIALLY

NO



Parents (14 total tallies)

YES

PARTIALLY

NO



Community Members (6 total tallies)

YES

PARTIALLY

NO



Faculty and Staff (6 total tallies)

YES

PARTIALLY

NO



Before moving on to the discussion guide, take a moment to reflect on your engagement scores. What stands out most to you? Are there any outcomes that surprise you? What insights can you draw from them?

Discussion Guide

This guide will help you reflect on your current strategies, pinpoint areas for improvement, and identify opportunities for optimization. It's a crucial part of enhancing your engagement efforts effectively.

COMMUNICATIONS & CHANNELS



- ▶ Reflect on your current communication methods for all four audiences. What channels have been most effective in engaging each audience, and which ones could you utilize better?
- ▶ How well does your current content resonate with each audience? What strategies can be implemented to ensure that your communications are both engaging and relevant to their unique interests and needs?
- ▶ Given the diverse preferences of your audiences, how can you adapt your channel strategies to meet their specific communication preferences and behaviors?
- ▶ Review your timeline of engagement touchpoints with all four audiences throughout the year. Are there gaps or opportunities for more consistent communication, and what key milestones or initiatives could be integrated to enhance engagement?

PERSONALIZATION



- ▶ Discuss the level of personalization in your current strategies. How can you further tailor your communications and interactions to create a more individualized experience for each audience?
- ▶ Explore the impact of personalization on audience engagement. Have you observed changes in donor behavior or increased engagement as a result of personalized campaigns?
- ▶ What obstacles or limitations do you encounter when trying to create personalized experiences? Discuss potential solutions and strategies to overcome these challenges.

Discussion Guide

DATA & ANALYTICS



- ▶ Reflect on your institution's current use of data in your engagement strategies. How are you leveraging data to tailor your communications and interactions for different audience segments?
- ▶ Discuss your institution's approach to tracking engagement analytics and measuring success. How well are you currently utilizing these insights to optimize your strategies and improve engagement outcomes?
- ▶ Think about your institution's data management practices. Are there any gaps or challenges in data collection, storage, or integration that may be hindering your ability to harness the full potential of data-driven strategies for engagement?

STRATEGY



- ▶ As you review your assessment scores for each audience, what patterns or trends do you notice? Are there particular areas where you excel or areas that may need improvement?
- ▶ How do the results align with your institution's overall engagement goals and priorities? Are there specific audiences that need immediate attention based on your goals?
- ▶ Consider the capacity of your staff to execute your engagement strategies effectively. Are there any resource constraints or limitations in-house that may impact your ability to implement your strategies optimally? Are there specific areas where external vendor support could be beneficial?

Advancement Marketing Services

What worked 10 years ago is no longer effective for engaging your alumni and donor base. Annual giving, when deployed well, can be an invaluable asset to the health of your advancement strategy and can deliver both immediate and long-term benefits to your institution. Partner with EAB's Advancement Marketing Services and let us help you reach new heights and expand your revenue generation.

To learn more, visit eab.com/products/advancement-marketing-services or email eabadvmrktngcommu@eab.com



202-747-1000 | eab.com

 @eab  @eab_  @WeAreEAB  @eab.life

ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.