



Advancement at a Turning Point

Roundtable Conversation with Coast-to-Coast Institutions

Advancement Advisory Services

The Changing Fundraising Landscape



Giving Totals Remain Strong, But Dollars Are Increasingly Concentrated

**\$592.5
Billion**

**Total U.S. Charitable
Giving (2024)**

Charitable giving in the U.S. remains historically strong with an increase of 3.3% when adjusted for inflation

**\$61.5
Billion**

**Higher Education
Fundraising (2024)**

Philanthropy to colleges and universities grew modestly by 3% when adjusted for inflation

**\$11.7B in megagifts
in 2024**



A growing share of giving comes from very large gifts, while participation from smaller donors continues to fall.

**66% of giving is from
individual donors**



Individuals remain the backbone of philanthropy, though dollars are increasingly concentrated in megagifts.

**7% decline in individual
donor counts**



Even as dollars rise, donor counts are shrinking — putting more pressure on pipeline development.



Politics, Policy, and Perception

TOPIC

1

What's Changed?



A Decade's Worth of Disruption in Just Nine Months



Student Loans & Aid

- Grad PLUS eliminated
- Parent PLUS capped
- New student loan conditions
- Hardship provisions removed
- "Workforce Pell" created



Immigration & Intl Enrollment

- Social media screening for visas
- 6000+ student visas revoked
- ICE raids now allowed on campuses
- Some local police deputized as immigration agents



Research Funding

- 4000+ research grants cancelled
- 15% cap on F&A attempted by four agencies
- Forward funding policy at NIH
- Political appointees reviewing grant applications



Accreditation & Accountability

- Accreditation transition streamlined
- Program-level earnings accountability tests



Campus Culture & Climate

- Race-based practices labelled as illegal DEI
- Anti-Semitism task force formed
- 100+ civil rights investigations initiated

75%

Alignment between Trump Administration's policy changes and Project 2025 playbook

The One Big Beautiful Bill Reshaping the Rules



5



Loan Caps And Program Changes

Graduate borrowing capped and Grad PLUS eliminated; Parent PLUS restricted, limiting undergrad access and increasing scholarship need



Repayment Overhaul

Repayment options cut to two plans, reducing flexibility and forgiveness



Endowment Excise Tax

New tiered excise tax (up to 8%) increases pressure on wealthy institutions



Charitable Deduction Changes

Universal deduction may boost giving, but high-income limits could reduce large gifts



Federal K-12 Tax Credits

New 100% federal credits for K-12 scholarships may divert dollars from higher ed



Earnings-Based Accountability

Programs that don't show graduates earning enough could lose access to federal aid

Source: U.S. Congress, *One Big Beautiful Bill*, Public Law 119-21, 2025; Inside Higher Ed, "How OB BB Reshapes Higher Ed Finance," July 2025; Tax Policy Center, "Impact of Charitable Deduction Changes in OB BB," 2025; Education Week, "Federal K-12 Scholarship Tax Credit: What It Means," July 2025.

Policy Shocks Add Complexity



Advancement Not Immune to Political Changes



Research Gaps

- Federal research cuts increase **competition** for private funding
- Faculty hesitant—and unprepared—to secure private grants



*"Clearly, we **cannot fill the gap** and we're never going to be able to, but we have to try."*



Compliance & Donor Stewardship

- **Gift agreements reassessed** for DEI compliance
- **Donors concerned** with rising presidential scrutiny and lawsuits



*"We're trying to be **responsive to donors** without drawing further attention to ourselves from the administration."*



Endowment and Tax Threats

- **Endowment tax** raises concerns for donors
- **New tax laws** may decrease individual and corporate giving, cause gift bunching, or disincentivize **DAF¹** use



*"Donors are questioning if an endowment tax is going to mean their gift will have **less impact**."*

Are you being asked to fund research cuts? If so, how are you tackling these initiatives?

1) Donor-Advised Fund

Policy Shocks Add Complexity

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How are you approaching revisiting existing gift agreements and how are you planning to adjust future gift agreements?

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What is your institution doing about new endowment taxes and what is your messaging to donors?

1) Donor-Advised Fund



Endowment Tax

- ▶ The OBBB¹ imposes a tiered tax structure, including an 8% excise tax on universities with endowments exceeding \$2 million per student
- ▶ Universities with less than 3,000 students are exempt from the tax
- ▶ The Joint Committee on Taxation estimates the tax will bring in \$761 million over the next ten years
- ▶ Critics warn that some schools will be forced to raise tuition or cut financial aid substantially

Additional Tax Changes

- ▶ Corporate donations must exceed 1% of taxable income before deduction kicks in
- ▶ For high-income individuals, the maximum charitable deduction is now capped at 35%,
- ▶ A universal charitable deduction was reinstated for non-itemizers (\$1,000 for individuals, \$2,000 for joint filers) but this excludes DAFs²
- ▶ Starting 2027, individuals can claim dollar-for-dollar credit for making contributions to Scholarship Granting Organizations (up to \$1,700 annually)

1) One Big Beautiful Bill

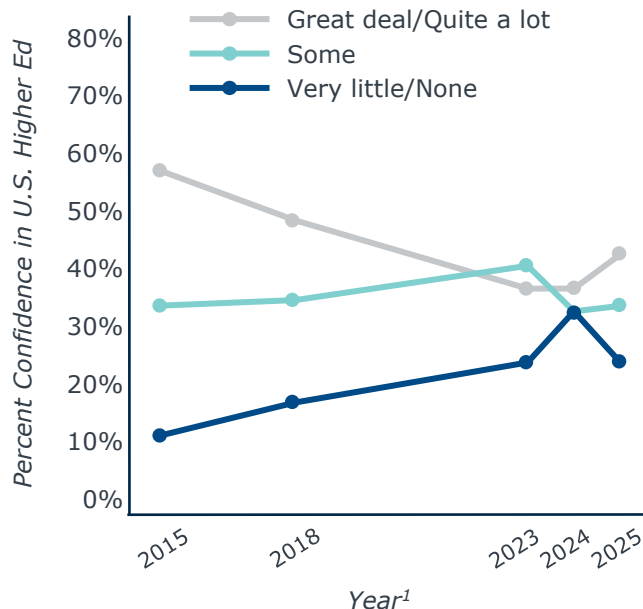
2) Donor-Advised Fund

Finally Making Some Inroads on Public Trust



After a Decade of Decline, Confidence in Higher Ed Shows Signs of Rebounding...

Gallup Poll for Confidence in U.S. Higher Ed



...But Underlying Drivers Reveal Plenty of Work Left to Be Done

- ✓ Communications about higher ed's contributions to research and innovation helped move the needle
- ✓ Chipped away at critiques about being too expensive and loan debt

- ✗ Lost ground with those who are not confident about political agendas (e.g., too liberal) and poor leadership
- ✗ Lost ground with those who are confident about the need for a degree and preparing students to get ahead

1) Gallup survey data is only available for 2015, 2018, 2023, 2024, and 2025.

Higher Ed's Social Contract Is Being Rewritten



Unresolved Vulnerabilities



Student Value Gap & Workforce Misalignment



Research Irrelevance & Weak Accountability



Cultural Disconnect & Political Bias

Historic Assumptions

Opportunity via public subsidy: ▶

Students financially supported regardless of cost, major, or earnings potential

Research and resource autonomy to serve public good: ▶

Basic research supported as a national priority, institutions have discretion to allocate resources

Institutional autonomy: ▶

Institutions governed freely, set their own values, and stayed above politics

Emerging Contract

Fiscal constraint:

Loan caps, borrowing conditions, cohort default rate accountability, earnings tests

Strategic alignment and productivity expectations: ▶

Research funding cuts, faculty productivity review expectations, endowment tax

Conditional governance: ▶

Leadership takedowns, public OCR¹ investigations, pressure to change accreditation requirements

What concerns do you have around the historic assumptions being rewritten? What about the government settlements?

1) Office for Civil Rights.



Advancement Investments

TOPIC

2



Budget Cuts Across the Board

We haven't had a budget cut since 2008...until this year. Now we're doing a lot of scenario-planning exercises about what will happen if certain executive orders manifest. Our institution asked us all to make **5% cuts in our budget**.

That may not sound huge on paper, but in practice it means **putting long-planned initiatives on hold, delaying key hires, and rethinking how we prioritize programs**. It's forcing us to make some tough decisions and really focus on the work that will have the greatest impact on our ability to generate private support."

— Vice President of Advancement, Private Elite R1

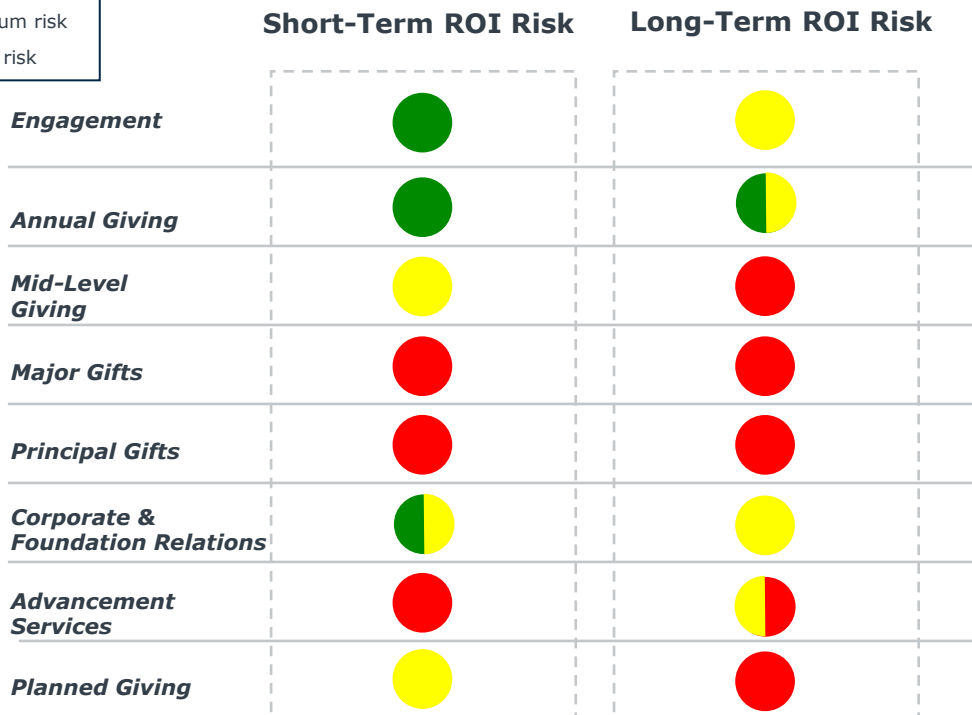
Elite Universities Announce Budget Cuts and Layoffs



Cuts to Advancement Detrimental



Short-Term Savings Threaten Long-Term Sustainability



Strategizing to Sustain Fundraising Revenue



Three Strategies Under Consideration for Budget Reductions

1

Out-Counsel Low Performers

“I’m going to do my best to retain my highest performers. To be honest, a few fundraisers on our team aren’t great fits anyway.”

2

Merge Overlapping Departments

“We’ve been talking for years about bringing alumni relations and annual giving together. Now may be the time, especially since it would yield cost-savings.”

3

Avoid Cuts in Units Correlated with ROI

“I need to avoid hitting our fundraising revenues. Expectations are too high. I’m going to start with the units that have the lowest short-term ROI.”

What strategies have your teams taken to reduce budget without negatively impacting production?

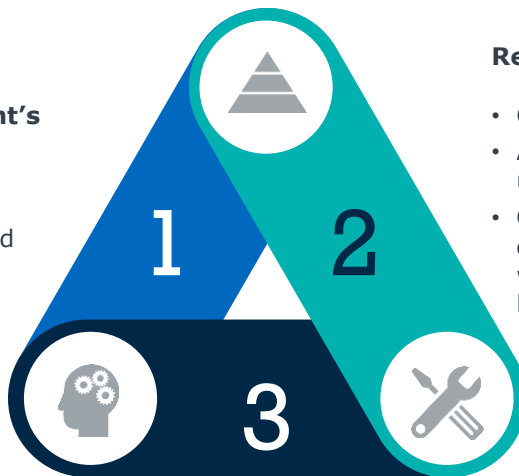
Rightsizing for Impact



An Example of How Divisions Are Becoming Smaller and More Focused

Top Giving Only

- **Redefined engagement's purpose** to just be for prospective donors
- **One annual giving appeal** that's outsourced



Reduced Inefficiencies

- Centralized fundraisers
- Automated repetitive tasks using ChatGPT
- **One weekend-long top donor event each year**, with access to executive leadership

Increased Effectiveness

- **ChatGPT** trains and consults early career fundraisers based on input from experienced fundraisers
- ChatGPT analyzes past accepted proposals for similarities

1) Pseudonym

Preparing for a Leaner Landscape



Data Required for a Strong Case

+\$6M

Fundraising-generated revenue... for every **\$1 million invested**

+7%

Increase in investments year-over-year for partners using EAB's Advancement Benchmarking

Aggregated Benchmarking Staffing Correlations

+1 FTE correlates with revenue¹...

- Planned Giving Officer: **+\$17.5M**
- Major/Principal Gift Officer: **+\$2.6M**
- Advancement Services: **+\$2.2M**
- Development Support: **+\$2.0M**



Benchmarking Workbooks
Due February 20th, 2026

Is anyone adding new positions? If so, where?

1) These numbers are different when we remove shops with over \$250M in annual production

Calibrating Pipeline Investments



How Do We Meet Today's Growing Expectations, While Preparing For Tomorrow?

Goal: Prioritize the activities that will get future major gift prospects into the pipeline for tomorrow



Two Paths to the Goal

- 1 Reduce Low-ROI Efforts
- 2 Expand High-ROI Priorities

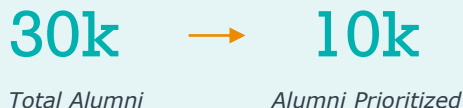
- Downgrading events
- Consolidating mass communications
- Single annual solicitation push for the masses
- Shedding disinterested and low-capacity alumni



Slim Down the Prospect List

Targeted Outreach to Only Engaged Donors Optimizes Staff Workload

Sweets University¹ only focuses engagement on alumni with the highest engagement potential by deprioritizing alumni identified as having lower engagement potential



Engagement Survey

Launch an alumni engagement survey



Data Analysis and Prioritization

Segment alumni into groups based on engagement level and potential



Shrink Alumni Strategy

Focus pipeline strategy on alumni with most engagement potential

1) Pseudonym

What are your reactions to this? What risks, if any, concern you?



Pass the Baton to an Automated Fundraiser

Texas State's Autonomous Fundraiser Does Work of Twenty Gift Officers

Automated Outreach Allows Scalability Without Resource Constraint



- ✓ Sends automated & personalized messages to **2,000 donors in portfolio**
- ✓ Analyzes donor behavior & interactions for **tailored engagement**
- ✓ **Responds to donor inquiries** in real-time without delays

"Emma was our second-largest fundraiser on Giving Day because she can effectively manage 2,000 prospects. That large of a portfolio would usually require 20 annual gift officers, resulting in minimal ROI due to time spent on discovery visits."

Brooks Hull, VP of Advancement,
Texas State University

AI Fundraiser Delivers Unmatched Results in Just One Week

More Donors Engaged

925

Donors reached

More Touchpoints

70%

Of portfolio has
five+ touchpoints

More Gifts Secured

\$4k

Dollars raised
from **78 gifts**



Technology Integration

TOPIC

3

AI to the Rescue?



Where We Are Today With AI and Its Influence on Results

Artificial Intelligence Promises Gains

200

HOURS SAVED

Annual impact equivalent to adding an extra colleague for every 10 team members

\$1T

ANNUAL SAVINGS

One trillion potential savings from companies in the S&P 500 because of AI automation and headcount

15%

INCREASED PRODUCTIVITY

Estimated increase in sales **productivity** due to AI optimization

Payoff Still Uncertain

Harvard Business Review:
AI-Generated “**Workslop**” Is Destroying Productivity

Forbes:
Why **95% of AI Pilots Fail**, and What Business Leaders Should Do Instead

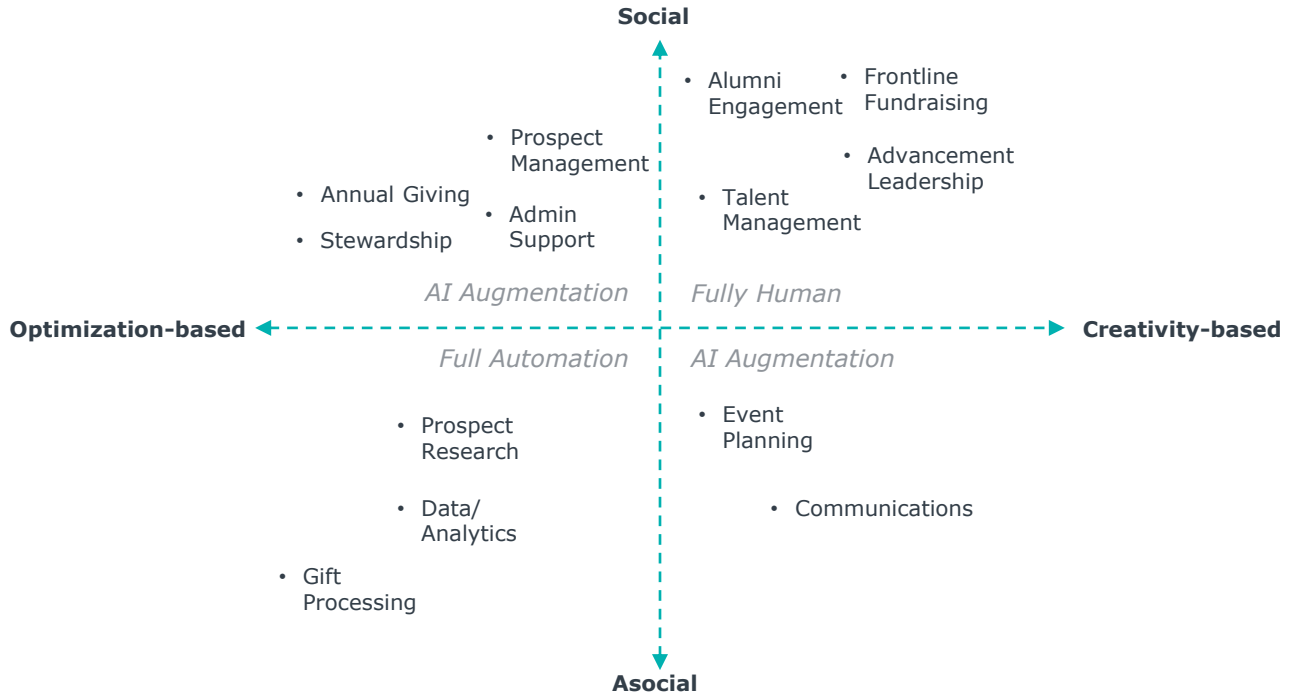
Medium:
The AI **Implementation Paradox**: Why 42% of Enterprise Projects Fail Despite Record Adoption

Is anyone on your leadership team seeing AI “workslop”?

Advancement's Automated Future

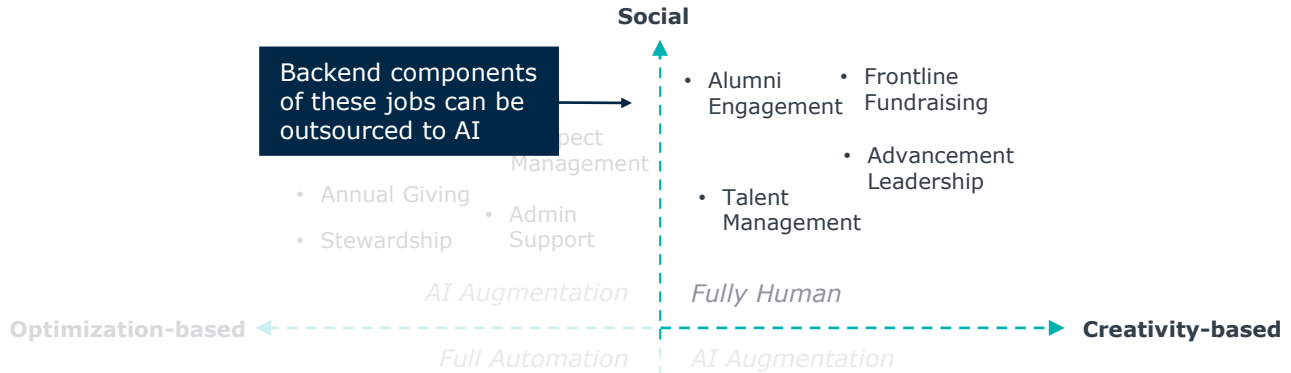


Assessing Where Advancement Should Keep a Human Element



Advancement's Automated Future

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Parts of Fundraising Can't Be Replaced

“I know people are worried about AI, but philanthropy is authentically human. I think a good analogy is basketball. Sure, we could have two teams of robots competing, but no one would watch that. It's not an enjoyable sports game without the human authenticity. Philanthropy is the same. **We can't turn everything over to AI.**”

*Terrence Sawyer, President
Loyola University Maryland*



AI Use Cases Run the Gamut from Administrative to Creative Tasks

- Organizing board meeting notes
- Editing and proofing proposals
- Content generation for giving campaigns
- Drafting messages
- Prospect research
- Program development
- Drafting job descriptions
- Metrics research
- Creative messaging
- Image creation for milestone celebrations
- Social media captions
- Donor communications
- Writing email subject lines
- Organizing internal documents
- Reformatting copy
- Synthesizing grant narratives
- Crafting clever campaign slogans
- Drafting gift policy agreements

Change Management to Encourage AI Adoption

- Ensure leadership expresses an **AI + Human approach**
- Have leadership share their uses of AI regularly
- Require employees to have one goal that includes AI use
- Add **AI experimentation** to manager-employee check-ins
- Create space for employees to **share out success** stories

How are your teams using AI? What has been most successful and what has failed?

What Predictions Do You Have for AI?



A Few We've Considered...



1. Advancement services **headcount drops ~30%**
2. Gift officer **portfolios grow 20%** with AI support
3. Yield rates climb with AI-driven strategy
4. Donors demand hyper-personalized communications and **real-time responsiveness**
5. Fewer entry-level roles due to AI **drain the talent pipeline**



Strategic Talent Management

TOPIC

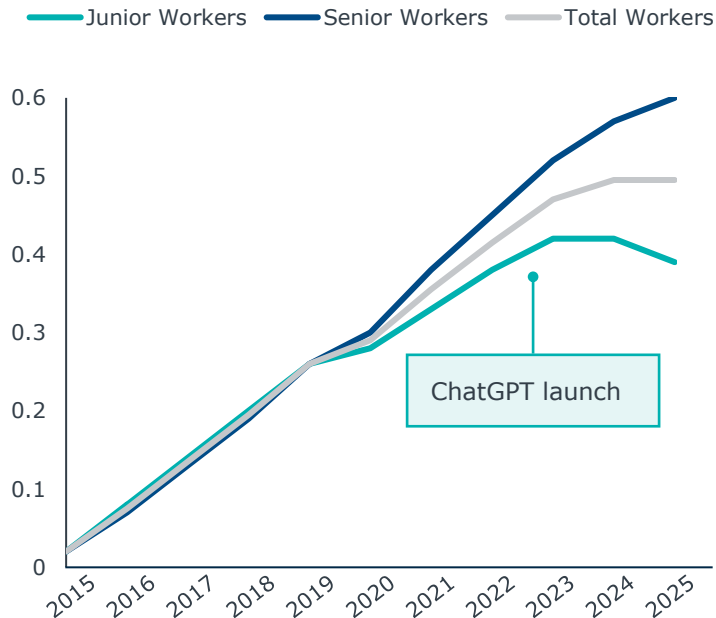
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Technology's Influence on Jobs



Do you Believe in Coincidences In Data?

Average Number of Total, Junior, and Senior Workers
(Normalized to 0 in January 2015) at 285,000 U.S. Firms¹



AI's Disruption Already Visible at the Entry Level

-7.7%

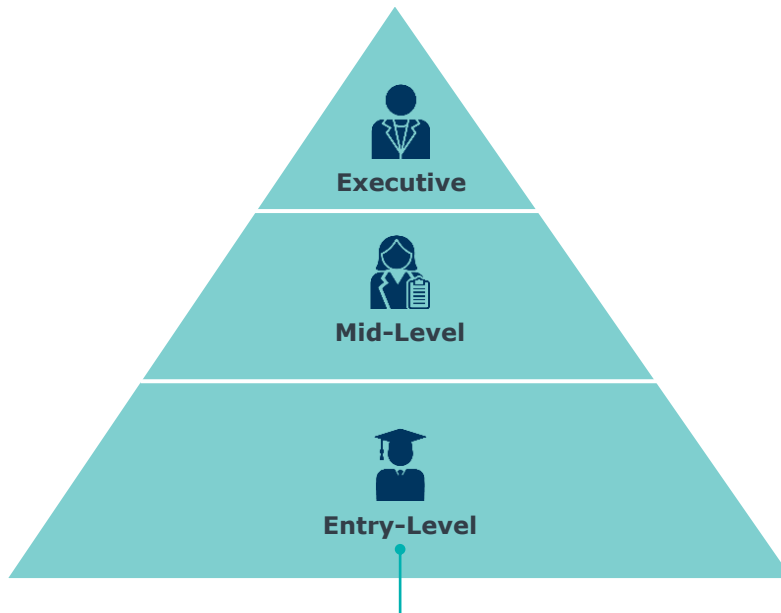
Decline in junior headcount across firms that adopted AI (Jan 2023 - Jun 2024)

-40%

Decline in junior hires in wholesale and retail trade per quarter at firms that adopted AI (compared to non-adopters)

1) Harvard University researchers' analysis of LinkedIn resumes and job postings data; n=62 million workers across 285,000 U.S. firms.

The Traditional Career Ladder



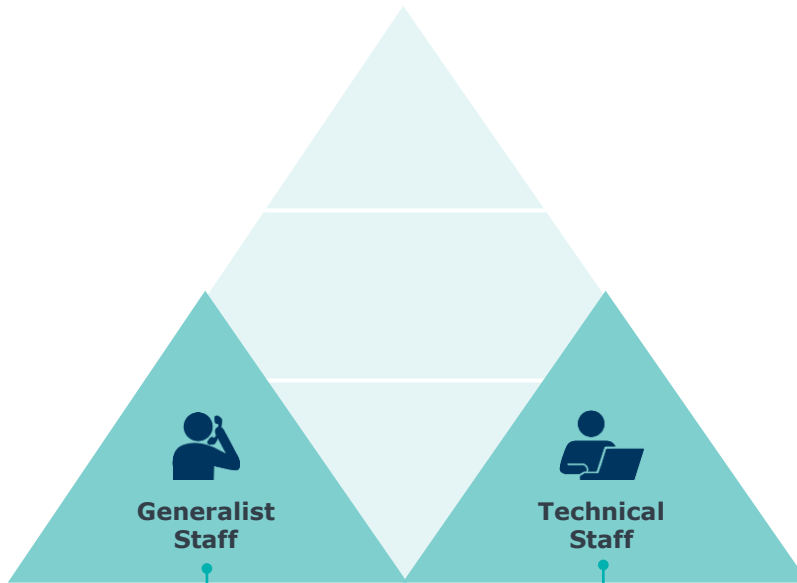
Executive

Mid-Level

Entry-Level

- Abundant, accessible starter jobs
- Accessible with minimal professional experience or polish
- Progression assumed—time and loyalty yield advancement
- Employers expect to train and socialize junior hires

AI Disrupts Traditional Career Ladder



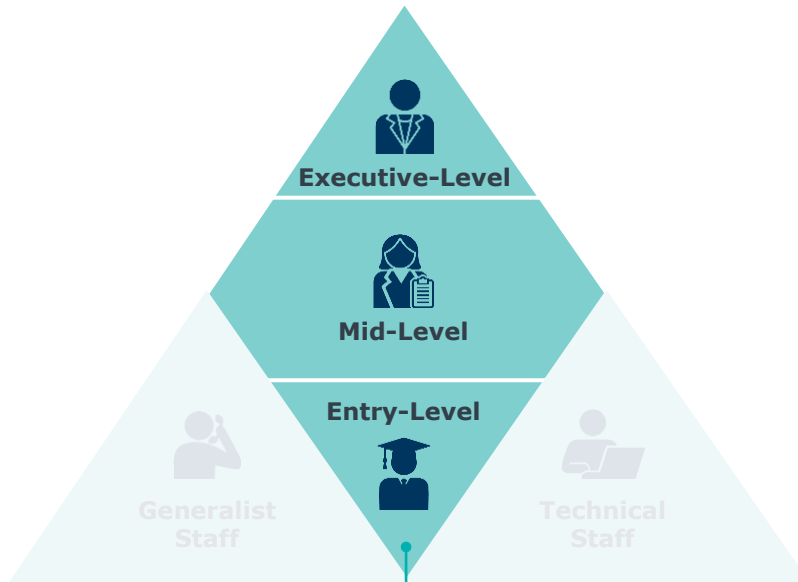
**Generalist
Staff**

**Technical
Staff**

Broad pool of unskilled generalists disappear first as routine, low-complexity work is automated or outsourced

Technical specialists are squeezed out as AI tools replicate or outcompete narrow expertise once seen as entry pathways

The New Career Ladder



Entry points are scarce and tightly gated

How is your team balancing the talent pipeline and AI strategies that take away learning opportunities?

Turnover a Concern At All Levels



60% of institutions (n=20) decreased production the year after CAO left

The median institution **decreased production 12.4%**

What is your shop doing on the topic of succession planning?



\$3.75M lost when a gift officer leaves during a campaign

\$163k direct and indirect costs of backfilling a fundraiser vacancy

Are you starting to see turnover slow down?

Source: Sargeant et. al, "What Makes Fundraisers Tick?" Institute for Sustainable Philanthropy and Revolutionise International Ltd., 2022; EAB Staff Retention and Incentive Compensation Survey, 2023; EAB Benchmarking dataset, 2024; EAB interviews and analysis.

DEI for Students Under Siege, What About With-In Advancement Divisions?

Threats to DEI on Campus

January 2025

President Trump issued an EO¹ defining biological sex as male or female. The Department of Education eliminated the nonbinary gender marker from the FAFSA form

February 2025

President Trump issued an EO rescinding several initiatives aimed at advancing educational equity for Hispanic, Native American, and Black students

April 2025

Immigration and Customs Enforcement (ICE) agents began terminating thousands of students' legal residency at institutions across the country

What is happening within your division when it comes to DEI?

1) Executive Order



Corporate and Foundation Relations

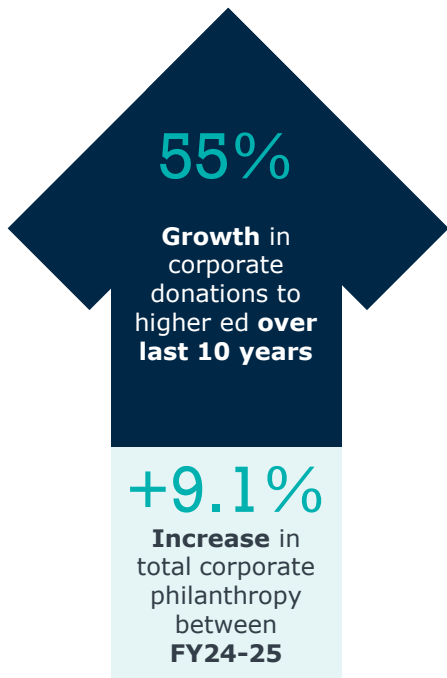
TOPIC

5

An Upward Trajectory



Corporate Partnerships Hold Institutional and Advancement Potential



Benefits to Advancement

- Support for innovation in health sciences, technology, and medicine generates **additional revenue**
- Increased connectivity with corporate ecosystems pave way for **volunteering** and engagement

Benefits to University

- Potential to **fill research funding gaps**
- Enhances institutional reputation and visibility with employers
- Influences student internship and **job placement**
- Improves feedback loop between workforce and career preparation efforts

The Lion's Share of Foundation Giving Goes to Higher Ed



Since 2007, foundations have supplied largest share of support to higher ed



Foundation funding grew 13% in 2024 (\$20.4B, up from \$18B)



More willing to fund new faculty or novel research through seed grants



Help expand university partnerships with local and regional communities

Current Challenges to Foundation Fundraising

- CAO and VPR collaboration historically siloed
- Faculty ill-equipped to write foundation proposals
- Insufficient stewardship and reporting
- **Increased faculty competition for private grants**

What is your institution doing to coordinate foundation efforts across campus with the increase in faculty interest?

Corporate Partnership Stifled by Internal Silos



Until Structural Problems Are Fixed, We Won't Reach Our Potential



Solutions for Silos

- Central authority to coordinate across campus
- Corporate committee for strategy alignment
- Top existing corporations assigned executive owner to drive strategy

Decentralization Unravels Enterprise-Wide Impact

Corporations bombarded with asks from multiple on-campus partners

Faculty reluctant or unable to dedicate time to quantify partnership impact

Over-emphasis on unit-specific goals puts university priorities at a disadvantage

What trends are you seeing in corporate giving at your institution?

How are you preparing faculty for relationships with corporations?

Top Lessons from Prioritizing Corporate Partnerships



Lead With Executive Support

- Executive sponsorship for centralized efforts
- Support from president, provost, and cabinet

Offer Robust Options



- Corporate capstone
- Sponsored research
- Executive education
- Student & faculty engagement
- Business collaboration
- Talent recruiting
- Co-location



Provide Faculty Training

- Upskilling deans and faculty on corporate strategy and how they fit into the picture
 - Simple, two-page pitch decks
 - Executive talking points
 - Industry readiness consortium

Include Holistic Metrics



- Corporations are excluded from MGO performance metrics
- Corporate partnership strategy is institutionalized
- Dashboards that store all corporate relationships



International Fundraising

TOPIC

6

What's At Stake



Foreign Gifts Make a Difference

Between July 2024 – February 2025¹

-28%

CHANGE IN
FOREIGN GIFTS

\$290M in foreign gifts, down from **\$405M** in previous data collection cycle

270

INSTITUTIONS

Received donations from constituents abroad

131

COUNTRIES

Contribute to 529 gift transactions that were reported to the US Department of Ed

How have your international donations been affected?

Largest Individual Foreign Gifts (July 2024 – February 2025)

Ucla

\$30M (Japan)



**Stanford
University**

\$20M (Norway)

BYU

BRIGHAM YOUNG
UNIVERSITY

\$14M (Canada)



**HARVARD
UNIVERSITY**

\$10M (Switzerland)

Berkeley
UNIVERSITY OF CALIFORNIA

\$9.4M (Hong Kong)

1) The Office of Federal Student Aid collects foreign gift data twice per year.



US Government Makes Changes

Administration Attacks Foreign Influence on Higher Education

DETERRENT Act (H.R. 1048)

The House passed a bill that would lower the reporting trigger for foreign gifts from \$250,000 to \$50,000 and mandate disclosure for any gift from a “foreign entity of concern”

March 2025

EO: Transparency Regarding Foreign Influence at American Universities

Gives Secretary of Education authority to request that a federal court compel universities to fulfill their foreign gift reporting obligations

April 2025

Revocation of Student Visas

U.S. Department of State suspended new student visa interviews while requiring international applicants to make their social media accounts public for “security screening”

May 2025

What changes are you making to your international fundraising strategy recently?



Campaign Relevance

TOPIC

7

Campaign Relevance on Trial

Participants Across the Board Question Purpose



Advancement

Still Resonates

- Unifies messaging across campus
- Catalyst for big ideas and academic partnership
- Motivates trusted donors

Losing Relevance

- Ability to advocate for growth
- Growing pipeline of donors and volunteers
- Staff motivation
- Record campaign goals



Institutional Leadership

Still Resonates

- Ability to define their legacy and boost resume
- Funding for their vision
- Unifying force for cabinet and staff

Losing Relevance

- Long timelines that go beyond average tenure
- Bandwidth for events and donor meetings
- Bringing constituents together from across the aisle



Constituents

Still Resonates

- Customized gift proposals
- Access to leadership
- Influence on strategic plan

Losing Relevance

- General 'Good for Society' Pitch
- Generic mass appeals
- Urgency to reach dollar goal
- Peer pressure
- Transactional recognition

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Regaining Relevance: Advancement



Course Corrections Needed

Challenges

Solutions



Difficulty securing investment →

- Benchmarking based on campaign goal
- ROI agreements
- Increased or new gift processing fees



Billion-dollar campaign goals →

- Impact goals
- Donor engagement goals
- Internal only goal



Staff burnout →

- Micro-campaigns
- Sprint campaigns



Waning pipeline →

- Personalized engagement
- Passion-focused engagement

What concerns you the most when it comes to campaigns and their relevance for advancement? Any solutions to share?

Regaining Relevance: Leadership



Course Corrections Needed

Challenges



Long timelines beyond average tenure



Solutions

- Micro campaigns
- Sprint campaigns
- Unit-level campaigns



Lower bandwidth for donor engagements



- Batch engagement
- Support from unit leaders
- Virtual meetings and donor visits



Hard to bring constituents together from across the aisle



- Outcome focus communication
- SMART goals (specific, measurable, achievable, relevant, timebound)

How is your institutional leadership changing their campaign interests and strategy?

Regaining Relevance: Constituents

Current Appeals Don't Motivate the Majority

What is Losing Relevance

- **Generic mass appeals**
- **Trust in higher ed's inherent value**
- Urgency to reach dollar goal
- Peer pressure
- Transactional recognition

1

Creating **differentiated campaigns** that communicate higher ed's value

2

Using **tailored impact messaging** in place of mass appeals

"Making our messaging and campaigns relevant to a broader audience is difficult. We've always just been focused on alumni. Not anymore. **I have to help make our upcoming public launch feel impactful to people who may never have set foot on our campus.** It's not easy."

- Executive Director, Campaign Strategy, Private Research University

What Higher Ed Brings to the Table



Our Main Value Propositions Are Often Generic



Education

*"We are committed to providing an **exceptional learning environment** that empowers students to achieve their full potential."*

- What makes a learning environment exceptional?
- How does that help students get jobs?



Community

*"By **fostering partnerships** and promoting inclusive opportunities, we ensure that the benefits of higher education **extend into communities everywhere.**"*

- Partnerships with whom?
- What value does that bring to my family?



Research

*"Our mission is to **advance discovery and innovation** that addresses the world's most pressing challenges."*

- What is the quantifiable impact?
- How does research impact students?

Bring this Presentation to Campus



Strengthening Campaigns With Partnerships



Example Working Groups:

Student Affairs, Enrollment, Career Services

External Relations, CFR, Athletics

Deans, Faculty, Unit Leaders



Advancement at a Turning Point

Roundtable Conversation with Coast-to-Coast Institutions

Advancement Advisory Services