

Planning During Times of Uncertainty

A Planning Tool to Help You Lead Through Change

Higher education is navigating significant challenges—from shifting federal policies and economic volatility to decreasing alumni engagement and growing public skepticism. Advancement leaders are experiencing heightened pressure from multiple directions as they work to sustain institutional support and trust.

In today's climate, long-term strategies need to be able to flex as conditions evolve. This chart helps you stress-test your advancement plans by mapping out how your strategy might shift across different scenarios. Use it to prepare for what's next, align your team around shared priorities, and make faster, more confident decisions.

Variable 1 Positive Positive/Positive Positive/Negative (Best case scenario) Variable 2 Negative Variable 2 Positive Negative/Positive Negative/Negative (Prepare for risk)

1 Choose two variables to plan around

Consider the areas of greatest uncertainty or potential change for your team. These may include risks, challenges, or scenarios that warrant proactive planning.

Examples: donor engagement, budget or resources, leadership priorities, campaign planning, or staffing.

Variable 1		

Variable 2

2. Assess your institution's current state

Mark the box that best represents your institution's current state. This will serve as a clear foundation for strategic planning.

How to interpret the chart:

- Positive = going well or improving
- Negative = uncertain, declining, or under pressure

If uncertainties are donor engagement and budget, the top-left box (positive/positive) means donors are engaged and funding is strong.

3. Explore each future scenario

In all four boxes, write what advancement could look like under that scenario.

- What would shift in strategy, resources, or team focus?
- What risks or opportunities might emerge?

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Variable 1 Positive

Positive/Positive (Best case scenario)

High engagement / strong budget

- Scale segmented campaigns across channels and invest in journey-based donor engagement
- Provide staff training or hire external support to focus on audience research and creative testing
- Launch multi-year pipeline initiatives that target highpotential segments (loyal donors, LYBUNTs)
- Integrate real-time data and predictive analytics to personalize outreach and optimize campaign performance

Positive/Negative

High engagement, constrained budget

- Prioritize donor relations and stewardship, upgrades, and retention over acquisition
- Shift staff to support digital engagement at scale (e.g., redeploy student callers or print-focused staff)
- Focus on high-ROI segments and campaigns; pause expansion efforts
- Use compelling donor engagement data to build a case for increased institutional investment in Advancement.

Negative/Positive

Variable 2 Positive

Low engagement / strong budget

- Invest in reactivation and re-engagement campaigns (especially lapsed donors)
- Run pilot efforts to test new audience segments, channels, or messaging
- Allocate funding toward infrastructure improvements (e.g. CRM, email platform, digital channels)
- Strategically invest in strategies that target, grow and retain priority audiences

Negative/Negative (Prepare for risk)

Low engagement / tight budget

- Focus on retaining core donor base (loyal, recurring givers)
- Evaluate underperforming channels or campaigns and reallocate resources toward low-cost, high-impact tactics that drive stronger engagement.
- Use urgency messaging to reignite support
- Build internal reports showing engagement decline and longterm revenue risk to strengthen the case for reinvestment

Variable 2 Negative

1. Choose two variables to plan around

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Donor engagement

Variable 1

Resources and budget

Variable 2

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Variable 1 Negative