Getting the Most from Membership
An Overview of Advancement Forum Resources
Getting the Most from Membership

Our Time Today

1. Introduction to the Education Advisory Board

2. Getting Right Leaders Engaged with Right Membership Services

3. Understanding Your Priorities and Initiatives

Developing a Service Plan across the Year Ahead

- **Q1**
  - Student Services Gap Analysis Tool

- **Q2**
  - Webconference on Disciplining Social Media
  - Toolkit Download on Funding-Finance Collaboration

- **Q3**
  - Executive Roundtable
  - Insight Center Download on Student and Young Alumni Fundraising

- **Q4**
  - On-Campus Working Session
  - Research Report Download on Maximizing Annual Giving through Mass Solicitation

- Quarter-by-quarter outline of service engagement
- Mapping our work streams and service resources to your initiatives
- Permission to “nudge” you to ensure utilization
EAB – The Higher Education Practice of the Advisory Board

Thirty Years Serving Health Care, Half a Decade with Colleges and Universities

Advisory Board founded in Washington, DC doing bespoke research

1979

1986

First membership for healthcare executives; practice now serves 3,000 executives

1993

Membership for Fortune 500 C-level executives, spun off as Corporate Executive Board

2007

Education Advisory Board launched serving university president’s cabinet

2013

Research and Insights

Memberships

Academic Affairs Forum
Strategy advice and research for provosts, deans, and other academic leaders on elevating performance in teaching, research, and academic governance.

Student Affairs Forum
Research for student affairs executives on innovative practices for improving student engagement and perfecting the student experience.

Advancement Forum
Breakthrough-practice research and data analytics to help Advancement professionals maximize philanthropic giving and support institutional goals.

University Spend Collaborative
Business intelligence and price benchmarks to reduce procurement spend

Business Affairs Forum
Research and support for college and university chief business officers in improving administrative efficiency and lowering costs.

COE Forum
Breakthrough-practice research and market intelligence to help universities develop and grow continuing, professional, and online education programs.

IT Forum
Research and advice for CIOs and IT leaders on leveraging information and technology to further the higher education mission.

Student Success Collaborative
Predictive modeling and degree tracking to improve retention and completion
Partial List of Education Advisory Board Members

Flagship State Research Universities

- University of Alabama
- University of Arkansas
- University of California-Berkeley
- University of Colorado-Boulder
- University of Connecticut
- University of Florida
- University of Georgia
- University of Illinois at Urbana-Champaign
- Indiana University-Bloomington
- University of Iowa
- The Ohio State University
- University of Maryland-College Park
- University of Massachusetts-Amherst
- University of Michigan
- University of Minnesota
- University of Mississippi
- University of Nevada
- University of New Hampshire
- University of New Mexico
- University of North Carolina at Chapel Hill
- University of North Dakota
- University of Oklahoma
- University of Oregon
- Pennsylvania State University
- Rutgers University
- University of South Carolina-Columbia
- University of Tennessee
- University of Utah
- University of Vermont
- University of Virginia
- University of Wisconsin-Madison
- University of Wyoming
- West Virginia University

Public Research Universities

- Arizona State University
- Auburn University
- Ball State University
- Colorado State University
- Colorado School of Mines
- Georgia Institute of Technology
- Georgia State University
- Iowa State University
- Miami University
- Northern Illinois University
- Old Dominion University
- Southern Illinois University-Carbondale
- Texas Tech University
- University of Akron
- University of Houston
- University of Maryland-Baltimore County
- University of North Carolina at Charlotte
- Wright State University
- Boise State University
- Bryant University
- Butler University
- California Polytechnic State University
- The College of Saint Rose
- Elon University
- Gallaudet University
- Gonzaga University
- American University
- Baylor University
- Brown University
- California Institute of Technology
- Carnegie Mellon University
- Columbia University
- Cornell University
- Dartmouth College
- Georgetown University
- Harvard University
- Johns Hopkins University
- Marquette University
- New York University
- Rensselaer Polytechnic Institute
- Rice University
- Rochester Institute of Technology
- Syracuse University
- Texas Christian University
- The George Washington University
- University of Dayton

Master’s Colleges and Universities

- James Madison University
- Kean University
- Marymount University
- Midwestern State University
- MNSCU-Saint Cloud State University
- Roosevelt University
- Saint Xavier University
- Simmons College
- Towson University
- University of Alaska-Anchorage
- University of Indianapolis
- University of New England
- University of North Carolina-Wilmington
- University of Texas at Brownsville
- Western Oregon University
- Western Washington University

Community Colleges

- Anne Arundel Community College
- Bossier Parish Community College
- Broward College
- Community College of Delaware County
- Delaware County Community College
- Fayetteville Technical Community College
- Hawkeye Community College
- Ivy Tech Community College
- Lone Star College System
- Middlesex Community College
- Northern Virginia Community College
- Oklahoma City Community College
- Pellissippi State Community College
- Prince George’s Community College
- Community College of Rhode Island
- Santa Monica College
- South Puget Sound Community College
- Wake Technical Community College

Canadian Institutions

- Algonquin College of Applied Arts and Technology
- British Columbia Institute of Technology
- Dalhousie University
- McGill University
- McMaster University
- Memorial University of Newfoundland
- Ryerson University
- Simon Fraser University
- St. Clair College
- University of Alberta
- University of Calgary
- University of Guelph
- University of Manitoba
- University of Montreal
- University of Toronto

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How We Conduct Research

Our Methodology for Identifying Breakthrough Practice

**Beyond Averages**
Education Advisory Board Research focuses on answering one question: “How have successful organizations anywhere solved the pressing problems facing our members?” To that end, our analysts and consultants are dedicated to finding the most progressive and successful practices, never simply reporting what peer colleges and universities might be doing.

**100,000+ Interviews, across Higher Education and Beyond**
While relying on member surveys asking after “best” practice might be easier, it cannot surface the truly breakthrough ideas. Across the firm, our staff completes more than 100,000 in-depth interviews each year, probing for innovative new ideas, tactics, and strategies worthy of member time and attention.

**Actionable Advice**
Rather than a PowerPoint presentation simply reporting what we found in the research, our reports—typically one hundred or more pages of text and graphics—provide detailed recommendations on what to do (and not to do) as well as detailed advice on practice implementation.

**How We Conduct a Study**

**Literature Review and Expert Interviews**
A massive literature review and extensive interviews with all relevant experts provide a deeper understanding of root cause problems and help identify potential new ideas.

**Exhaustive Screening for Breakthrough Practice**
Interviews are conducted with hundreds of colleges and universities to isolate the few dozen that have pioneered truly innovative practices and can show demonstrable results.

**In-Depth Case Study Research**
Multi-day interviews and onsites are completed with these institutions to understand in detail how the practices work and the implementation requirements, benefits, and potential drawbacks.

**Rigorous Analysis and Recommendations**
The research team spends several months synthesizing the research and preparing detailed recommendations to guide members in how to implement the practices and strategies uncovered in the research.
Major Initiatives 2014-2015

What Makes a Top Performer?

Identifying Best-in-Class Gift Officer Profiles
Attitudes, Behaviors, Competencies of High-Performing MGOs?
• Recognizing patterns and behavior in top performers
• Matching MGO effectiveness with specific job skills
• Understanding the ideal mix of traits and behaviors for top performance

International Survey, Peer Benchmarking, Custom Reports
Analytics from 75+ Institutions, 750+ Individual MGO Responses
• Gathering data from MGOs and their managers
• Recognizing highly correlated success variables
• Customized reports for member institutions include relevant peer comparisons

Maximizing Lifetime Donor Value
Capitalizing on the Middle of the Pyramid
High-Return Stewardship for Mid-Level Donors
• Worth the ROI? Reassessing donor-giving societies
• New approaches to planned giving
• Graduating donors from mid-level to major gifts

Demonstrating Gift Impact via Digital Initiatives
Beyond the Generic Thank You for Annual Fund Participants
• Leveraging social media for scalable stewardship initiatives
• Quick-segmentation wins and easy-to-target affinity groups
• Systemizing donor outreach via CRMs and other tools

Competing for Talent

Reengineering MGO Recruitment
What are Progressive Peers Doing to Identify Rare Talent and Craft Compelling Offers?
• Broadening the talent pipeline and sourcing nontraditional candidates
• Utilizing multimodal approaches to assess candidate fit
• Minimizing the time gap from interview to offer acceptance

Retaining Exceptional MGO Talent
Incentives, Growth Opportunities, and Tailored Career Pathing
• Understanding the drivers of MGO engagement and loyalty
• Rightsizing next-level roles for senior fundraisers
• Developing non-monetary incentives and recognition levers

The Integrated Advancement Organization

Seeing Tangible ROI: New Directions in Alumni Relations
Recalibrating Engagement Initiatives
• Aligning alumni relations and development initiatives
• Leveraging career services to connect with alumni
• Strategies for alumni associations and regional clubs

Working with the Academy
Faculty Partnerships and Innovative Organizational Models
• Smarter connections between faculty and affinity groups
• Engaging faculty in innovative stewardship initiatives
• Analyzing pros and cons of centralized, hybrid, and decentralized fundraising models
How Our Happiest Members Get the Most from EAB

Building Your Service Plan

- Register for a **Chief Advancement Officer Roundtable or Team Summit**
- Get “Power Users” Signed Up for **eab.com Password** and **Email Updates**
- Register for **Hot Topics Webinar**
- **Deploy Gap Analysis Tool**
- **Schedule Onsite Presentation**
- **Designate Day-to-Day Contact for Your Dedicated Advisor**
Register for a Chief Advancement Officer Roundtable

What’s a CAO Roundtable?

- Concise presentations of the year’s most promising research
- Reserved for Chief Advancement Officer; typical session 20-25 participants
- Why Chief Advancement Officers attend (in members’ own words):

> It’s an efficient way to get systematically confronted with trends and ideas we need to be thinking about
> I can network with people and institutions outside my own rolodex
> I come back ready for provost and trustee questions, clear on what the Advancement team should be focused on
> Helps benchmark where we are on the spectrum from ‘typical’ to ‘best-in-class’
> Equally valuable for learning what’s working, and what’s not!

Note: We will respectfully “nudge” you if we haven’t registered you for a session in within 30 days

Investing in Major Gift Officer Success

- **Gifted & Talented: What Makes a Top Performer?**
  What are the Attitudes, Behaviors, and Skill Sets of High-Performing MGOs?

- **Competing for Talent**
  How are Peer Institutions Reengineering the MGO Recruitment Process?

Maximizing Lifetime Donor Value

- **Capitalizing on the “Over-Looked Middle”**
  How Can Donor Relations Drive Renewals and Upgrades from Mid-Level Supporters?

- **Surfacing the High-Potential Annual Fund Participant**
  What Strategies Move Hidden-Capacity Donors into Major Gift Pipelines?

Executive Roundtables

- **July 16-17** in Washington, DC
- **July 29-30** in Washington, DC
- **July 23-24** in Washington, DC
- **October 30-31** in Santa Monica, CA

Team Summit

- **November 3-4** in Washington, DC
Get “Power Users” Signed up for eab.com

Forum Home Page Password


Forum Email Updates

Where higher education goes to learn

Find out how our members benefit from the thousands of unmissable opportunities.

Learn more about eab.com

Explore By

Typically 5-25 Registered

Frequent EAB Services Users

- Associate Vice President for Development
- Associate Vice President for Advancement Services
- Director of the Annual Fund
- Director of Principal Gifts
- Director of Stewardship
- Major Gift Officers

Immediate Access to All Content

- 1,000+ short-answer reports
- 200+ best practice profiles and implementation tools
- 50+ archived web conferences

Who At Your Campus?

- Associate Vice President for Development
- Associate Vice President for Advancement Services
- Director of the Annual Fund
- Director of Principal Gifts
- Director of Stewardship
- Major Gift Officers

EAB will email link to website registration page to any individual (or they can sign up themselves on eab.com “Member Login” tab)

When prompted, register using college or university email account and create your password

Email updates highlight recently-released content and preview upcoming events

Opt-in subscription recommended for provosts and cabinet, available to anyone on campus
Register for a Hot Topic Webinars

One-Hour Overviews of Best Practice Research

How to Register

- Anyone on campus may participate at no charge; many members register with dozens of participants
- New webconferences listed under “Upcoming Events” in right-hand navigation on eab.com
- Members receive a confirmation email including details for webconference login
- Archived materials are available on the web after all webconferences

Upcoming Hot Topic Webinar Dates

- Disruptive Innovations in University Fundraising
  April 9, 2:00-3:15 PM ET
- Advancement by the Numbers
  May 14, 2:00-3:00 PM ET
- Creating a Culture of Giving Among Current Students
  June 23, 2:00-3:30 PM ET

Archived Webinars at eab.com

- Developing Next Generation Career Services
- Agile Campaign Strategy
- Innovations in Student Affairs Fundraising
- Major Gift Officers Recruitment and Retention Insights
- Informing Goals for Major Gifts Officers
- Understanding the Impact of Massive Open Online Courses (MOOCs)
Deploy Gap Analysis Tool

Survey Assesses Major Student-Facing Services to Understand Today’s Student—and Tomorrow’s Alumni

Why Deploy the Tool?

The web-based tool enables advancement executives to:

- Understand key drivers of students’ institutional affinity and likeliness to give
- Pinpoint areas of student satisfaction and dissatisfaction
- Demonstrate the need for an inter-departmental approach to institutional giving
- Create a data-driven internal dialogue

What is the Gap Analysis Tool?

- The survey site is distributed to students across campus and assess nine major student services centers and institutional affinity. Students are also asked about service utilization.
- The senior advancement officer receives a full analysis report within weeks of survey closure. The report includes results by graduation year, gender, and first-generation status.

1. Assessing Major Service Areas:
   - Career Services
   - Student Health
   - Academic Advising
   - Major Advising
   - Registrar’s Office
   - Counseling Services
   - Campus Recreation
   - Learning Lab/Tutoring Center
   - Residence Life
   - Institutional Affinity

2. Surfacing Alignment Issues: Utilize survey results to identify focus areas; significant gaps between importance and satisfaction signal need for review


4. Pinpointing Drivers of Affinity: In-Depth Analysis of Services Tied to Likeliness to Give, School Affinity

Why Deploy the Tool?

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Schedule an Onsite Presentation

Working Sessions at Your Campus to Educate Leaders and Expedite Consensus

What is an Onsite Presentation?

- EAB analyst travels on-site to highlight research findings, lead group discussions
- Members may request one onsite session per year at no charge
- Typical Formats:
  - One- to two-hour formal presentations with Q&A
  - Half-day facilitated working sessions
  - Small groups to audiences in hundreds
- Executive leadership, directors and VPs often request onsites after viewing material at Executive Roundtables to expose team to key issues or when they are unable to attend a Roundtable session

What Topics Can We Request?

Members typically request presentations around the most recent work on EAB’s major continuing and online education focus areas:

- Disruptive Innovations in University Fundraising
- Making the Direct Ask on Social Media
- Creating a Culture of Giving among Current Students
- Advancement by the Numbers
- Gifted and Talented: What Makes a Top Fundraiser?

How Do We Schedule a Date?

1. Contact your Dedicated Advisor
2. Select a presentation topic
3. Six-to-eight weeks lead time generally required to ensure speaker availability

Potential Audiences

| Task Forces and Planning Committees | Academic Program Directors |
| Key Unit Leaders | CPE Leadership |
What are Your Top Priorities in the Next 18 Months?

A Year or Two from Today, Where do You Most Need to See Progress?

Frequently-Voiced Concerns

- Student and Young Alumni Fundraising
- Dashboards and Big Data
- Major Gifts and Campaign Strategy
- Professional Development for Advancement Staff
- Organizational Structure
- Donor and Prospect Relations

Committees, Task Forces and Initiative Leaders with Whom We Should Connect?

1. _______________________
2. _______________________
3. _______________________

Other “Up at Night” Issues?