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MONTHLY**DIAGNOSTIC**
November 2011

ENGAGEMENT-FOCUSED ADVANCEMENT:

Finding a Sustainable Financial Future for Your Institution

ACADEMIC IMPRESSIONS

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A LETTER FROM AMIT MRIG
PRESIDENT, ACADEMIC IMPRESSIONS

The operating environment for institutions is increasingly challenging – rising competition, declining resources, and changing demographics are all putting tremendous pressure on colleges and universities. As with organizations in any industry, when conditions get tougher, there is a tendency to retrench and focus on short-term objectives and needs.

Many institutions have responded to the recent economic downturn in this way, adjusting their fundraising tactics to maximize immediate returns. However, institutions must ask themselves: Is this strategy sustainable, and does it position our institution to compete in the future?

Institutions that take a longer-term view and adopt a more intentional and authentic approach to engaging alumni, parents, and others in their work are capable of generating more significant returns – and not only financial returns. A more engaged constituency leads to greater advocacy for the institution, a widening network of resources on which the institution can draw for input, and increased opportunities for partnerships that will help the institution advance its mission.

In this issue, we've reached out to some of the most forward-thinking experts in advancement and to a university president to find out how an engagement-focused approach works, how to create buy-in from institutional leadership, and how to involve key academic stakeholders in the effort. We hope their advice will be useful to you.

MONTHLY DIAGNOSTIC ONLINE

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AI Contributors

Amit Mrig
PRESIDENT, ACADEMIC IMPRESSIONS

Amit co-founded Academic Impressions in 2002 to provide a variety of educational products and services that help higher education administrators tackle key, strategic challenges. Since 2002, AI has designed and directed hundreds of conferences and has served representatives from over 3,500 higher education institutions. Besides designing and leading events for cabinet-level officers focused on strategic planning, budgeting, and leadership development, Amit leads Academic Impressions' ongoing research into the five- and 10 year challenges facing higher education and plays a lead role in outlining each issue of *Higher Ed Impact: Monthly Diagnostic* to highlight how college and university leaders can take an institution-wide approach to answering those challenges.

Daniel Fusch
DIRECTOR OF RESEARCH AND PUBLICATIONS, ACADEMIC IMPRESSIONS

At Academic Impressions, Daniel provides strategic direction and content for AI's electronic publication *Higher Ed Impact*, including market research and interviews with leading subject matter experts on critical issues. Since the publication's launch in 2009, Daniel has written more than 150 articles on strategic issues ranging from student recruitment and retention to development and capital planning. Daniel previously served as a conference director for Academic Impressions, developing training programs focused on issues related to campus sustainability, capital planning, and facilities management. Prior to joining Academic Impressions, Daniel served as adjunct faculty for the University of Denver. Daniel holds a Ph.D. in English.

Jason J. Shuba
SENIOR CONFERENCE DIRECTOR, ACADEMIC IMPRESSIONS

Jason leads AI's advancement business and directly manages all of its efforts in shop planning, major/planned giving, campaigns, and advancement services. Since joining the company, he has developed innovative programming covering topics across advancement management, including acclaimed offerings on partnerships with academic leadership, maximizing board/advancement relationships, and staff evaluation. Licensed to practice law in Colorado and Illinois, he received his B.A. from Denison University and J.D. from Case Western Reserve University.

Featured Contributor

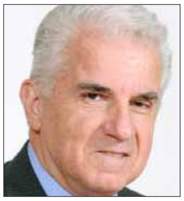
James M. Langley
FOUNDER AND PRESIDENT, LANGLEY INNOVATIONS

Before forming his own comprehensive advancement consulting firm, Jim served as vice president for advancement at Georgetown University. At Georgetown, he led the institution's offices of alumni affairs, strategic communications and marketing, development, medical center development, and advancement services. During his tenure, he produced record numbers in new commitments and dollars despite a difficult economy, and launched a number of innovative programs, including the Student Discovery Initiative, which uses current students to interview alumni who have been only occasionally engaged with the university.

Jim arrived at Georgetown after spending eight years as the vice president for advancement at the University of California, San Diego. At UCSD, he led the planning and execution of the institution's seven-year $1 billion campaign, then raised almost half the target amount in three years, despite a weak economy. He also expanded and improved outreach to key constituencies, increased and strengthened volunteer participation, acted as university spokesperson, and implemented programs that improved community relations. During Jim's tenure, significant increases were posted in federal funding, national and international publicity, and alumni participation.

Before arriving at UCSD, Jim served as vice president for external affairs at Georgia Institute of Technology. At Georgia Tech, he increased annual gift income from $26 million to $76 million and more than tripled the institution's endowment to well over $500 million. Jim began his career in higher education at Miami University and served at the University of Cincinnati as well as the University of Massachusetts. Operations under Jim's management have won awards in virtually every area of university advancement.

Contributors



Angelo Armenti, Jr.
PRESIDENT, CALIFORNIA UNIVERSITY OF PENNSYLVANIA

Since Dr. Armenti's arrival at California University of Pennsylvania in 1992, applications have increased by 90 percent, average SAT scores have increased by 95 points, FTE enrollments have increased by 30 percent, and four-year graduation rates have increased by 80 percent. Many new academic programs have been initiated, and his leadership has led to other accomplishments as well, including the creation of an athletic hall of fame, completion of the college's first capital campaign, adoption of a university bill of rights, formation of a new governance structure, introduction of a new general education curriculum, and construction of several new institutional buildings. Dr. Armenti is active with the Commission on Higher Education of the Middle States Association of Colleges and Schools and has served as campaign chair and president of the Mon Valley United Way.

Rajesh N. Bellani
ASSOCIATE PROVOST AND DEAN OF STUDENTS, RHODE ISLAND SCHOOL OF DESIGN

At Rhode Island School of Design, Raj oversees health services, counseling services, residential life, student programs and leadership development, multicultural affairs, career services, the registrar's office, and academic advisement. Prior to RISD, Raj worked at Colgate University for eight years, where he held a variety of academic and student-affairs positions, including assistant dean of multicultural affairs, dean of the sophomore-year experience, and associate dean of academic initiatives. Before his tenure at Colgate, he established a strong foundation in student affairs through his work at both the College of the Holy Cross and Wesleyan University.

Beth Braxton
DIRECTOR OF ANNUAL GIVING, UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

Beth began her career in development in 1991. She spent more than seven years in health care development, including five years as assistant director and later director of development for community hospitals in North Carolina. In these positions, Beth gained experience in events, planned giving, faculty/staff campaigns, major gifts, annual giving, and volunteer management. In addition, she has worked as director of major gifts at UNC's Kenan-Flagler Business School and assistant dean for development and alumni affairs at the School of Journalism and Mass Communication before being asked to take over UNC's annual fund in 2003. After her appointment as director of the annual fund, UNC's annual fund saw an increase of 37 percent in dollars raised over four fiscal years.

Christopher S. Groff
EXECUTIVE DIRECTOR, CORPORATE AND FOUNDATION RELATIONS, FAIRLEIGH DICKINSON UNIVERSITY

Chris manages the CFR philanthropic planning, research, and stewardship process for all three of Fairleigh Dickinson's campuses. His work and leadership has successfully led to an increase of corporate fundraising dollars at FDU since the 2008 financial collapse. Chris previously specialized in external relations in finance, economic development, and public policy as a director of corporate and foundation relations at Rutgers, The State University of New Jersey. A frequent regional and national speaker, Chris is also a lecturer in communications.

Ben Jarrett
ASSISTANT DIRECTOR, ADVANCEMENT, GEORGETOWN UNIVERSITY

Ben has managed Georgetown's student and young alumni giving program since 2007. His focus on pipeline development, young donor engagement, and retention has helped to establish a strong culture of philanthropy with this constituency. In 2009, he was awarded a CASE Venture Fund to plan an Alumni Life Continuum Conference for District II universities.

Leonard M. Jessup
DEAN AND HALLE CHAIR IN LEADERSHIP, ELLER COLLEGE OF MANAGEMENT, UNIVERSITY OF ARIZONA

Prior to his recent appointment at the University of Arizona, Len served for more than a decade at Washington State University in a variety of leadership roles, including dean of the College of Business, vice president of University Development, and president of the WSU Foundation. In his role at the WSU Foundation, Jessup led the transformation of the university's fundraising efforts, which resulted in doubling its overall fundraising totals and achieving record numbers of donors. During his tenure, the university received a commitment for the largest gift in its history and initiated its largest comprehensive campaign. As dean of WSU's College of Business, Len led a complete, two-year reengineering of the business program that resulted in the successful AACSB reaccreditation of the college in Spring 2004.

Marianne Pelletier, CFRE
DIRECTOR, ADVANCEMENT RESEARCH AND DATA SUPPORT, CORNELL UNIVERSITY

Marianne is currently managing the prospecting effort for Cornell's $4 billion "Far Above" campaign. She has been in the fundraising field since 1988, when she joined the research team at Harvard's University Development Office. Marianne has served as a researcher for Harvard, Lesley University, and Carnegie Mellon University, where she directed the research department. She previously served as director of annual giving and development services for Southern New Hampshire University. The president of APRA-UNY, APRA's Upstate New York chapter, Marianne is also an associate with the Helen Brown Group, where she serves on HBG's data mining team.

CONTENTS

Engagement-Focused Advancement: Finding a Sustainable Financial Future for Your Institution

WHAT ENGAGEMENT-FOCUSED ADVANCEMENT LOOKS LIKE

The funding landscape for higher education has changed in ways that make it necessary for institutions to rethink their approach to advancement. Donors, both individual and corporate, are increasingly less likely to make unrestricted gifts, and alumni indicate that they feel disengaged and unvalued by their alma mater (according to a national survey of higher education alumni conducted in 2010 by the Collaborative Innovation Network for Engagement and Giving, only 52 percent of alumni believe their alma mater values its alumni relationships). As a result, many institutions are trying to meet advancement goals in a challenging economy by calling on fewer and fewer donors. This is an unsustainable advancement strategy.

Only by focusing on engagement strategies with all of your constituents — including everyone from students to faculty to business to alumni — can your institution break free of this pattern and build a sustainable constituency base of support into the future. This requires a fundamental rethinking of your institution's approach to engaging donors and other constituents, and it requires that the whole institution share responsibility for the work of advancement. This entails:

- Bringing more functions within the institution into the work of cultivating prospects
- Bringing these functions into the work early on, well in advance of solicitation
- Prioritizing long-term planning for developing meaningful relationships with key constituents, over short-term solicitation goals
- Developing multilayered partnerships that invite your constituents to take a more active role in the advancement of the institution's mission

Think not just about engaging prospects in fundraising, but engaging them in the life and the mission of the institution. Rather than conveying the message, "Come help us raise money," convey the message, "Come help us achieve this shared objective."

Jim Langley, Langley Innovations

Jim Langley, founder and president of Langley Innovations, and past vice president of advancement at Georgetown University, offers two scenarios to illustrate how an engagement-focused approach to advancement can lead to a sustained alignment with the institution and deeper commitment and contribution from your constituents. Both of these scenarios suggest ways to cultivate a sense of shared enterprise that both leads to positive outcomes beyond just dollars raised (such as advocacy for your institution and valuable input into challenges faced by your institution) and makes the ask a natural — and in some cases, anticipated — next step rather than an imposition or a cold solicitation.

SCENARIO A: ENGAGING PARENTS

Langley suggests engaging parents by involving them in the design of student affairs programs. Educate parents about some of the dynamics of undergraduate life (for example, about factors that contribute to student success), and seek their input on institutional programming. For example, you might convene a small group of parents to provide input on programs that support the emotional health and stress management of students, or on intramural programs or intercollegiate athletics, or career services. "These are all programs that parents may like to contribute input to, and they all have a bearing on the parents' view of the value of the education their child is receiving."

When the ask comes, the need and the opportunity are clearer to these parents if they have been informed and involved along the way in the design of campus services and have provided their input on challenges the institution is facing. The solicitation then becomes an informed conversation about what you've been facing and what you hope to achieve together. It isn't a solicitation that comes out of the blue but that evolves out of an informed discussion.

Jim Langley, Langley Innovations

Here's an example.

"We want to engage parents during the first year," Langley notes, "and we know that their probability of giving will be the greatest in the second year, after which the probability decreases. So the ideal time to engage parents is right after Thanksgiving of the first year. They have seen their student return home and have received a report card on institutional performance — i.e., on whether their son or daughter is happy."

After Thanksgiving, Langley suggests, send your president and your vice president of student affairs (VPSA) to a location with a high density of parents, and invite 20 parents to a salon event hosted by a parent volunteer who is already very engaged with your institution. Send these 20 parents an invitation that makes it clear that:

- They are being invited to a private reception to meet with your president and VPSA
- You want to hear directly from them what they have learned from their student about the student's experience with the institution so far
- You want to share with them your master plan for student life and invite their input

Langley suggests offering a 15-minute presentation during the reception about the institution's plan for student life, then stop and gather input from the parents: "Now, let's stop and hear about your experience. How is it working through the eyes of your son or daughter? What is and what isn't working?"

Constructive feedback at the reception sets the stage for a later ask. Hear parents' concerns, acknowledge what needs to be done, and indicate what you intend to do in the next year to address it. "Watch their reactions," Langley adds. "Then follow up by having an advancement officer pay a call." The purpose of this initial visit is not to make the ask but to present the parent with an early-stage planning document that responds to the concerns they voiced, and ask for their further input.

You create a sense of shared ownership and a spirit of continuous improvement. That inspires parents and engenders their support. You listen, you care, you respond, and then when you ask, it is clear how the parent can help you make a difference.

Jim Langley, Langley Innovations

SCENARIO B: ENGAGING UNALIGNED PHILANTHROPISTS

Here's a second example that illustrates outreach to potential donors that is founded in collaborative work to advance the institution's mission. Suppose that your institution is looking to build or expand an ethics initiative or a business ethics program, and you have identified that you have the dual goals of developing an academically rigorous program that has a deeply practical focus — the program needs to address real-world issues. In this case, Langley suggests, identify business leaders who have expressed interest or concern about business ethics and then invite them to the president's office to offer their expertise in a briefing.

At the briefing, the president can ask questions such as:

- What is the best way to strengthen our students' grasp of business ethics — is it a course, a program, an ethics center?
- As business leaders, what would you want to see on a resume from a recent graduate that would make a difference?

Capture the ideas, thank the business leaders who attended, and emphasize that their briefing will have a direct influence on the design of your initiative. Then follow up; share with them a draft of the initiative, check to see if you captured their input faithfully, and seek their feedback on whether the initiative is on the right track.

Because they helped shape the concept and then refine it, these business leaders are likely to see themselves as involved in the project, and as having shared ownership in it. "This is evolutionary engagement versus precipitous engagement," Langley remarks. "This approach takes away the feeling of being ambushed or taken for granted. Rather than simply ask for funds to meet your institution's need, you instead have the opportunity to ask, 'Can you help us support this project or entity, this bold concept that we created together?' In some cases, you won't even have to ask for funds, because they will become so engaged and enthused along the way that they may volunteer an amount to see the project done."

Engaging Corporate Donors

In our recent article, "**An Engagement-Centered Approach to Corporate Relations**," Chris Groff, executive director of corporate and foundation relations at Fairleigh Dickinson University, notes that more corporations are increasingly eager to partner with institutions in ways that help meet their organizations' objectives, beyond just making a philanthropic gift. Groff suggests:

- Take steps to establish your CFR office as a "one-stop shop" for connecting companies with resources they need (e.g., student recruiting, volunteer opportunities for their staff, executive education, research)
- Develop multilayered partnerships, deepening your existing corporate relationships by partnering on multiple efforts
- Creating "partnership overview" documents that help your connections at that company make the case for a philanthropic gift
- Identifying stewardship activities that not only recognize the organization but engage them further in the work of your institution

"Companies are now very accountable for the funding they give to philanthropic efforts," Groff adds. "You really need a broad and deep relationship with the company. CFR needs to be responsible not just for bringing in money but for bringing in relationships."

Read more **in this article**.
http://www.academicimpressions.com/news.php?i=244

A LONG-TERM STRATEGY THAT SHOWS RESULTS

The engagement-focused approach to advancement defers solicitation in favor of first developing a greater degree of engagement, because greater engagement leads to a higher long-term return not only in monetary gifts but in other benefits, such as high levels of input and volunteerism from key stakeholders, as well as broader constituency and advocacy for your institution. This focus on sustainable, long-term return, however, can make engagement-focused initiatives a difficult sell when the financial pressures under which institutions operate tend to encourage short-term thinking and a prioritization of short-term results.

As you pilot specific engagement-focused initiatives, it will be critical to mine your data to show the short-term returns that you do receive. If you hold stronger club events for young alumni or increased opportunities for alumni to connect with your faculty, what indicators can tell you in the short term that these efforts will bear fruit?

To learn what you can look for, we turned to Marianne Pelletier, Cornell University's director of advancement research and data support. Using alumni relations as her example, here are ways that Pelletier suggests measuring the degree of engagement and its impact on giving:

QUANTIFIABLE MEASURES

Pelletier offers these examples of quantifiable measures to assess the impact of engagement-focused initiatives:

- The distance between the first attendance at an event and the first gift.
- Which events or forms of engagement connect your institution to higher donors.
- The impact of event attendance on the likelihood of accepting a solicitation visit.
- Track an "information score" — Pelletier's idea is that the amount of information volunteered by a prospect is an indicator of the degree of their engagement; for example, if a prospect volunteers their cell phone information or information about their children, that is an indicator of increased engagement. It is also a measure that you can correlate over time with giving behaviors.
- Note individuals who call your office to send their regrets and decline attending an event. These individuals are showing a degree of engagement and interest simply by investing their time to call you. Are they likely to welcome further engagement?

Finally, make sure to track these indicators not only going forward, but also in mining your past data. Identifying the types of events or engagement efforts that in the past have contributed to a high long-term return can provide the basis for your first investments in increasing engagement.

GETTING STARTED

There are two critical first steps in shifting resources toward an engagement-focused approach to the advancement of your institution:

- Framing the issue for your institution's leaders
- Engaging the board in a pilot project

Whether the conversation is initiated by a new president or by the head of your institution's advancement operation, someone first needs to raise the issue that it is imperative not just to bring in more dollars and more donors but also to find fundamentally better ways to build support for your institution. Langley adds: "Make sure your key internal stakeholders understand why merely relying on your institution's development officers to continue going out to prospects and saying, 'We're doing great work, would you help us?' will not be enough to secure your institution's future."

It's critical to shift the focus from solicitation to engagement. Each institution needs to ask the question: Do our fundraising tactics really match our values? Or is there a disconnect between who we say we are and how we behave as an institution?

Amit Mrig, President, Academic Impressions

Next, engage the board members in planning the new strategy. To get their buy-in, Langley suggests talking about engagement-focused advancement as both "a more graceful way to raise money and as a strategy for building long-term engagement and commitment from your donors. Everyone on that board has been approached at some time in a way that was not welcome to them; they are predisposed to understand the need for a new approach."

Finally, identify a specific project that can serve as a pilot for a more engagement-focused approach, and engage the board members in that initial project. Ask the board chair to host the first event. In this way, you can get not only board support for the necessary shift in thinking, but also board engagement in developing and testing the approach.

LEARN MORE ABOUT ENGAGING YOUR BOARD

Read our article, **Engaging the Board in Your Campaign**, for practical tips on finding opportunities to engage the board in what board members do best — big-picture thinking, advocacy, and getting key messages out to the community.

http://www.academicimpressions.com/news.php?i=113

IN THIS ISSUE: A WHOLE-INSTITUTION APPROACH TO ADVANCEMENT

The 'lone wolf' approach of sending out a development officer to make the ask is not as successful as the engagement-focused approach. The new approach brings us back to what true philanthropy is: people working together to achieve a common purpose.

Jim Langley, Langley Innovations

The institutions well-positioned to thrive amid decreased external funding and economic uncertainty will be those that have engaged all of their constituents in the work of advancement. In this issue of *Higher Ed Impact: Monthly Diagnostic*, we have interviewed some of the foremost horizon thinkers in higher education advancement to identify new approaches to solving the challenges facing your institution. This issue will offer practical advice for:

- Engaging more of your alumni by rethinking what connects them to your institution
- Engaging future donors in philanthropy during the four years in which your institution interacts with them on a daily basis — in other words, while they are still students
- Engaging academic leaders in the work of cultivation, solicitation, and stewardship
- Building wider and deeper external constituency by identifying influencers in the community who have traditionally been neglected and then bringing them into more formal relationships with your institution

We will also offer links to further resources — such as recent articles *Higher Ed Impact* has published on engaging corporate donors, engaging the board, engaging faculty and staff volunteers, and harnessing the power of alumni volunteerism.

ENGAGEMENT-FOCUSED FUNDRAISING: A WHOLE-SHOP APPROACH

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RECONNECTING AND RE-ENGAGING YOUR ALUMNI

According to a national survey of higher education alumni conducted by the Collaborative Innovation Network for Engagement and Giving and presented to the Annual Giving Directors Consortium (April 2010), only 52 percent of alumni believe their alma mater keeps them closely connected and values its alumni relationships. This lack of engagement represents a significant impediment to engaging alumni philanthropically. We turned to Jim Langley, president of Langley Innovations, for his advice on how institutions need to rethink their strategy for engaging future donors.

A DIAGNOSIS: HOW INSTITUTIONS AND ALUMNI MISCONNECT

"The underlying malady," Langley remarks, "is a loss of emotional engagement with the institution. Alumni remain appreciative of their degree and of their time at the institution, but feel *emotionally* detached from the alma mater after graduation." This disaffection can take different forms for different generations of alumni:

- Young alumni are likely to have graduated with a significant load of student debt and are now facing the challenges of building a career amid a sluggish economic recovery; when asked to give back financially to their alma mater, their response may be that they are already giving back — by paying their tuition bill (via debt) over the next decade
- Alumni later in their careers (ages 35-55) may have attended alumni events and received fundraising literature from their institution, but may feel that their alma mater hasn't done enough to maintain an emotional connection with them

Langley believes that the root cause of the disaffection is the same across generations: "Too often, we make alumni relations conditional on fundraising. We don't mean to, but each time an alum hears from their alma mater, who are they hearing *from*?"

Alumni perceive that the events they are invited to are orchestrated by the advancement office, and that the institution's main purpose in re-engaging them is to secure their financial support. In effect, we have made love conditional — and people don't like conditional love. We value relationships based on mutual respect and mutual benefit. The alumnus wants to re-engage with the institution, not with the advancement office.

Jim Langley, Langley Innovations

EFFECTIVE ALUMNI ENGAGEMENT: LEARN AND CONNECT

Langley's own research on alumni participation rates indicates two factors that are shared by most institutions that see high alumni engagement: an extensive peer network among alumni, and programming that offers alumni significant exposure to and connection with faculty. Langley indicates examples such as the Webb Institute, a marine biology school unranked by *US News & World Report* but far in the lead in its alumni participation rates. Like many institutions that have lower student to faculty ratios, Langley notes that the Webb Institute "has learned the keys to maintaining contact after commencement, engaging alumni in an intimate learning environment."

It's so obvious that we have missed it. What do alumni want from their alma mater? The same things students do. Connection to their peers and access to the faculty. That's what the whole experience of higher learning is about.

Jim Langley, Langley Innovations

A better approach to engaging and cultivating alumni, Langley suggests, is to coordinate efforts through the advancement office but have those efforts be led by stakeholders with whom the alumni already want to engage, such as faculty and students. In the early stages of cultivation, the advancement office needs to take a more facilitative role — for example, by coordinating faculty/alumni interactions via webcasts and other virtual conversations on timely topics.

"In this model, if I am an alum," Langley remarks, "I get to continue to learn, I can continue to gain valuable information from people I trust, at a standard of excellence that I trust. I get to connect, and I get to learn. If the advancement office is successful in facilitating these connections, it creates the reason to introduce itself."

Don't interpret lack of response as an unwillingness to give. Interpret it as unwillingness to engage solely with the advancement operation.

Jim Langley, Langley Innovations

START BY LISTENING

Langley argues that the best engagement strategy is an "extensive listening exercise that then informs an extensive outreach that is ultimately owned by the president of the institution." Your office needs to listen to several key things:

- Who your alumni want to connect with, and how
- What they want to learn

It is critical that the inquiry proceed directly from the institution's president — not from the vice president of advancement. "Otherwise," Langley cautions, "it sends a signal that we want to listen so that we can ask for money from you."

Langley recommends a letter from the president that conveys that the alma mater cares about what matters to its alumni, wants to continue to provide education and outreach that will be valuable to them, and accordingly is inviting the alumni to participate in this listening exercise.

In conducting the listening exercise, think outside the box. For example, an institution could think of annual fund callers not just as solicitors but as market researchers. When your call center connects with alumni, make sure alumni know that their voice and their input is being sought out, and that their alma mater is interested in learning how better to provide services that will be useful to them.

Langley offers this sample scenario: "How many institutions," he asks, "in the face of a significant economic contraction a few years ago, queried their alumni and asked, 'How is this affecting you? What has happened to your home's value? How adversely is your employment situation affected?' A wise institution would have run a 'state of the family' report, pulsing alumni about what's most important to them and how they are faring — and showing that the institution cares."

SUMMARY

In short:

- Conduct research to better understand the state of your institution's alumni family, and their level of connection with you
- Let that research inform the content you push out through alumni publications and social media channels
- Connect your alumni with your most distinguished and popular faculty, and with students
- Use webcasts and other virtual technologies to make the learning experience more available to your alumni

"By fostering the exchange of knowledge and the ability to make meaningful connections — and not only career connections but connections within a learning community," Langley emphasizes, "we create the rationale for fundraising."

TAKE THE NEXT STEP: MAKING THE MOST OF YOUR ALUMNI VOLUNTEERS

This **February 2011 article in Academic Impressions**' *Higher Ed Impact* offers a primer on harnessing the power of alumni volunteerism. Get tips for building constituency and commitment through volunteer opportunities that engage alumni in the real work of the institution.

http://www.academicimpressions.com/news.php?i=156

ENGAGING FUTURE DONORS WHILE THEY ARE STILL STUDENTS

Amid the decline of state support for public institutions and a less forgiving fundraising climate, establishing a more reliable pipeline of invested donors is critical — and to develop a stronger donor pipeline, the key is to start earlier. Yet institutions attempting to raise giving rates for young alumni are often rebuffed. In a study of the attitudes of young alumni conducted last summer, the Engagement Strategies Group confirmed that the majority of young alumni are reluctant to give due to high tuition costs and a lack of understanding of how institutions of higher education are funded and how institutions do (and don't) draw on endowment spending to finance their needs.

Colleges and universities need to solicit more support from their former students, but what reports such as the Engagement Strategies Group survey demonstrate is that the best opportunity to create an ambassador for your institution is to cultivate them while they are still students on campus. It is more expensive and much more difficult for the development office to repair relationships after commencement. You can't remedy the student experience after the fact, and you can never fully recover the lost opportunity to get your students bought in, from the beginning, to the value your university contributes to their lives and to society.

You have access to your incoming students. You have access to them for four years. That's the time to educate them as to how their institution is funded and invite their participation. Start when they come through the door, and spend four years working on awareness, appreciation, and giving.

Angelo Armenti, President, California University of Pennsylvania

Data on the success of early adopters of student philanthropy programs illustrates the impact of student giving on young alumni giving, and suggests the opportunity to realize substantial long-term gains by planting the right seeds in the minds and hearts of your students:

- Between 2006 and 2009, the University of North Carolina increased participation in senior giving from 13 percent to 42 percent, and doubled the percentage of young alumni who were giving in their first few years after graduation.
- During the first quarter of the current fiscal year, Georgetown University

has seen 150 percent more young alumni donors than last year at this time. Georgetown has also retained 25 percent of the members of the class of 2010 who made gifts as seniors last year.

BEYOND INSTITUTIONAL ADVANCEMENT: INVOLVING THE ENTIRE CAMPUS

What's needed is a cross-campus initiative, led by the president, to ensure that a stellar student experience leads directly to stellar support from your alumni. Cultivating future donors effectively during their undergraduate years requires the combination of a well-delivered undergraduate experience and a student philanthropy program that educates students about the financial realities the institution faces and invites them to take ownership in their alma mater's future.

Truly laying the groundwork for long-term private support requires rethinking how your institution manages its relationship with students at all points in the student life cycle. From the moment a new student receives an acceptance letter, that student needs to be invited to take pride in their future alma mater, and to consider their enrollment a membership in a lifetime community whose members share a critical mission and cause.

By treating students as stakeholders in the future success of the institution, we predispose them to be more understanding, engaged, and supportive of their alma mater. We err by treating them like kids. The more we treat them as adults and community members, the more they will feel a valued part of the enterprise. Entrust them with real responsibilities.

Jim Langley, Langley Innovations

The message that students are constituents in a relationship of mutual benefit and common cause needs to be conveyed throughout the student experience. To do this:

- Audit the way you deliver services to your students, whether financial aid, campus safety, residence life, or career services (note inefficiencies and listen and respond to student concerns). If you want students to become ambassadors for your institution throughout their lives, you have to deliver for them. Often students grow disaffected or disillusioned with their alma mater, and graduate feeling that they were not heard or cared for, because of inefficiencies in campus services that could have been easily identified and remedied.
- Invite students into open and transparent discussions of the financial challenges the campus faces (for example, through town hall settings).
- Offer specific opportunities for students to take shared ownership of their future alma mater — such as recruiting student ambassadors to interview alumni, creating a student foundation with real money to invest (use the return to fund student scholarships), or inviting students to assist in selecting visiting speakers or co-directing their residence halls.

STUDENT PHILANTHROPY: A LONG-TERM STRATEGY TO ENSURE DONOR SUPPORT FOR YOUR INSTITUTION

Cultivating engagement and student philanthropy throughout the student-to-alumni life cycle represents a crucial strategy for ensuring your institution's long-term financial health, and it is critical to act now in order to cultivate the degree of giving that will allow your institution to remain competitive in future years.

Effective student philanthropy requires much more than a series of ad hoc initiatives — it requires sustained engagement from convocation through to commencement. Here are three examples of efforts to consider:

FOCUS ON PEER-TO-PEER EDUCATION

Invite students to use their own resources and resourcefulness to educate their peers about private giving; Georgetown University has started a program in which two sophomores lead a team of 50 students (30 of which are in their first two years), who are each tasked with interveiwing five students each month. Not only does this approach leverage peer-to-peer interactions to raise awareness, it also builds the groundwork for a powerful prospect database at almost no cost. "Don't be afraid of letting students run such an effort," advises Ben Jarrett, assistant director of advancement at Georgetown. "You want them engaged, you want them to have responsibility, you want them to have a stake in the future of the institution."

CONNECT STUDENTS AND ALUMNI

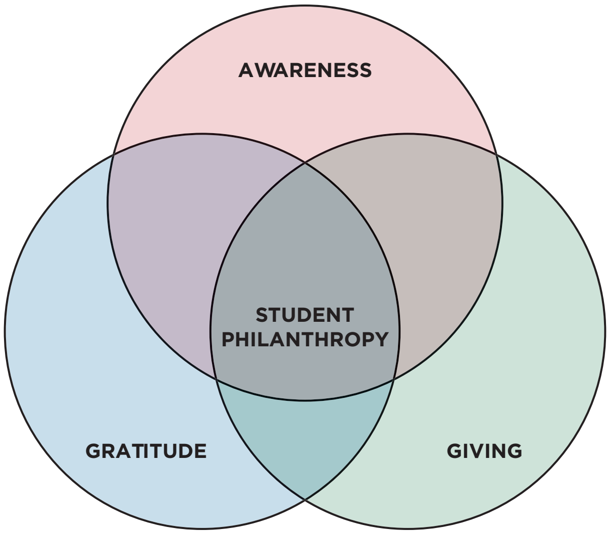
Connect students with alumni as early as possible by leveraging alumni as mentors, by inviting alumni speakers to talk during the first pivotal six weeks of the freshman year, and by getting student representatives involved in the alumni association — this both educates students about philanthropy and re-engages alumni as volunteers. Raj Bellani, associate provost and dean of students at the Rhode Island School of Design, remarks: "We have a wonderful base of alumni, this intellectual human resource lying in databases. We need to close the loop and engage them not just in career networking but in the leadership development of the next generation of students."

RUN A SENIOR CAMPAIGN

Run a senior campaign, not just a senior gift drive. Beth Braxton, director of annual giving at the University of North Carolina at Chapel Hill, suggests investing in a year-long campaign to raise awareness among seniors (and other classes) about the importance of giving. "Model your senior campaign after your annual fund campaign," Braxton advises. "Treat your students the same as alumni, and take the opportunity now to educate your future alumni about the campaign and to set the precedent."

STUDENT PHILANTHROPY: THE ACADEMIC IMPRESSIONS MODEL

In 2007, Academic Impressions researched the top student philanthropy programs in the United States and identified a student philanthropy model that highlights three core components shared by the most effective student philanthropy programs:



The Academic Impressions Student Philanthropy Model

This model provides a conceptual framework for rethinking the way you invite students into your long-term donor pipeline. A successful student philanthropy initiative needs to move your students toward three objectives:

- Creating awareness: Do your students know how their education is funded? Do they understand the importance of private giving to their school?
- Developing gratitude: Do your students express gratitude for the support they have received? Do your students feel grateful for the role of private support in their educational opportunities?
- Cultivating giving: Have your students acted on their awareness and gratitude with a philanthropic gesture?

LEARN MORE

Our **November 2011 issue of *Higher Ed Impact: Monthly Diagnostic***, entitled "Translating a Positive Student Experience into Lifetime Support for Your Institution," offers a comprehensive look at effective student engagement in philanthropy.

http://www.academicimpressions.com/monthly_diagnostic.php?i=130

ENGAGING YOUR ACADEMIC LEADERS

Not only are there many times when a dean or a department chair will need to be involved in the conversation between a potential donor and the institution, there are also many times when that academic leader may need to be the only official involved in the conversation. This is because the donor may want to hear from the academic leader in his or her field of interest, rather than from a professional fundraiser. And as more institutions, both private and public, look to ramp up fundraising efforts in a sluggish economy, the role of academic leaders will become increasingly vital.

For advice on engaging your academic leaders in the work of development, we turned to Leonard Jessup, currently the dean of the Eller College of Management at the University of Arizona, and previously responsible for Washington State University's foundation. Jessup has served on both sides of the table: the academic side and the foundation, so he brings both perspectives to bear on the issue of how best to bridge the gap between the advancement shop and the academic side of the house. Here's his advice.

THE FIRST HURDLE: THEY HAVE TO BELIEVE IN THE VALUE

Academic leaders can be passionate about advancement work — if you make the case for it effectively. Jessup recommends moving down the rank from the president and provost to the department heads, "walking them through the calculus." In other words, help them see the value proposition — that this is time well-spent — and then help them see why the answer is not just to hire more fundraisers, and why the more important a gift is, the more they will need to be involved in soliciting it.

"Once the provost is on board," Jessup advises, "have a meeting of the deans with the head of advancement and the provost in one room. The priority of fundraising work has to be clear. Then follow up with individual conversations about the value proposition."

SECOND: ENGAGE DEANS IN SETTING THE FUNDRAISING AGENDA

Often development officers, noting the disinterest of their deans, ask the wrong question. They want to know how they can get deans more engaged in cultivation, solicitation, and stewardship activities. Jessup suggests that the right question is: How can I get my deans more engaged in setting the fundraising agenda?

Jessup notes that academic deans will be committed to solicitation and stewardship activities if the advancement work they are involved in is aligned with their strategic priorities — and when that alignment is clear, the positive impact of that fundraising work on the institution will be far greater. "What you want to do is invite your deans, your department heads, and your faculty to think about a long-term vision for where they want their academic unit to go, and what support is needed to achieve that vision," Jessup advises. "The vision needs to drive the fundraising agenda. When you have major gifts coming in that support the mission and the aspirations of that unit, then it is easy to engage deans in the work."

For example, if a dean has indicated that a certain department is unlikely to thrive without more endowed chairs, then you can focus on raising gifts to endow chairs. The dean is then working with the development officer on a project that is of vital importance to the unit. "When the fundraising becomes mission-critical," Jessup notes, "the dean is more likely to be working very closely with donors. They'll be embedded in each other's lives. Thanking them then happens naturally and organically."

REMOVE IMPEDIMENTS: INTELLIGENT MATCHING

"Matching a particular dean to the right development officer, the right prospect, and the right process is critical," Jessup adds. If the academic leader is "green," pair them with a development officer who will be a good mentor to them; to the dean who has done fundraising work before, offer more leeway in choosing they would like to work with."

When pairing deans with major gift prospects, take personality types into consideration. "If you have a dean with an open, spontaneous style," Jessup suggests, "someone who is energetic and shoots from the hip, pair that person with the alum from Silicon Valley who interacts with people in the same way. If your dean is cut from a more traditional academic cloth and likes to hear himself or herself talk, be careful who you match them with. You don't want to put oil and water together when you know it won't work."

The same intentionality is needed when preparing deans for the cultivation process. For example, suppose one of your deans likes to hunt, fish, and participate in outdoor activities, and typically avoids cocktail parties and martini bars. This dean might be out of his element at a social function. "Orient this dean's meetings around the activities he likes to do," Jessup advises, "where he will be comfortable and confident."

Similarly, one dean may be at their best commanding a room filled with people, and may be in their element holding court over dinner, while another dean may be excellent one-on-one but would not be good at running a conversation around a dinner setting. Take individual personalities and styles into account.

OFFER COACHING AND TRAINING

Training has to be done in a way that doesn't embarrass the dean. Keep it private, in a one-on-one setting, and ensure that you have the right development officer doing the training.

Leonard Jessup, University of Arizona

Academic leaders who are newer to fundraising work will need guidance. Jessup recommends covering:

- Carrying a major gift portfolio — and the value of focusing on a few prospects
- Moves management, and how to build regular meetings into their weekly schedule
- Expectations around the time commitment involved and how long it can take to move from cultivation to gift
- How to understand and interpret rejections

Once the deans are well into the process, Jessup recommends coaching them on more specific items — such as how to do a lunch if it's the first lunch, and how to do a lunch if it's time to make the ask.

PREPARING DEPARTMENT CHAIRS

Share our article, **Five Things Department Chairs Need to Know About Fundraising**, with leaders on the academic side of the house, to offer a quick primer (and dispelling of myths).

http://www.academicimpressions.com/news.php?i=200

TAKING ENGAGEMENT TO THE NEXT LEVEL: BUILDING ACHIEVEMENT NETWORKS

Alumni and other prospects desire more meaningful engagement with your institution, meaning a continuation of the learning experience, connection with their peers, and (if they are to become volunteers and donors) a sense of shared purpose and of shared work toward a common cause. Jim Langley, president of Langley Innovations, argues that one of the most effective ways to build a sense of shared purpose is to share successes — and he notes that while colleges and universities often publicize their successes through press releases, they frequently miss many more meaningful opportunities to leverage success stories to build constituency.

Langley suggests that institutions have many unrealized opportunities to engage those individuals who may not have been previously connected with the institution but who have an impact in the lives of the institution's best and brightest. The basic idea is that when celebrating the successes of students at the high end of educational attainment (for example, students who have received a distinguished graduate fellowship or who are graduating in the top 5 percent of their class), institutions could also be reaching out to those students' personal networks and inviting them into the celebration and afterward into sustained engagement with the institution.

We asked Langley to elaborate on this concept of "achievement networks" and how they can be used to build deep and long-term constituency. Here is his advice.

SAMPLE SCENARIO: THE RHODES SCHOLAR

Here's an example. Suppose that one of your students is selected as a Rhodes Scholar. A typical institutional response is to send out a press release and hold a reception to honor the student. "The student then goes on to Oxford," Langley remarks, "and that's the end of it. A huge opportunity has been missed to build constituency and to build out a circle or community of excellence, an achievement network."

What the institution could have done in this case, Langley notes, is approach the student and offer to work with them to celebrate with those individuals who have contributed to the student's success:

- Ask the student for the names, phone numbers, and addresses of 12 to 15 people who contributed to their success and made a difference in their lives
- Issue letters from the president inviting those individuals to a reception

Note that these individuals are not necessarily professors or staff at your institution. Some of them may be fellow students. Some may advanced placement teachers from high school, or a minister, or someone who had an influence during the student's early childhood. Whoever these individuals are, send letters from your institution's president to them, letting them know that the student has been selected as a Rhodes Scholar and remembers them as a primary influence in her life. Let them know that the institution wants to honor them and congratulate them for their significant achievement to the success of youth.

"Suddenly," Langley suggests, "someone out there who may have been feeling unrecognized and unloved gets a letter saying they have been recognized and are valued. At this point, the ripple effect of the one student having been named a Rhodes Scholar increases fifteenfold. And it doesn't stop there. The recognized individuals put the letter on their wall; perhaps they frame it. They tell their colleagues and their family. And these are individuals who are making a difference in the lives of young people. These are influencers and suppliers of achievement. These are the people your institution needs to engage."

BUILDING A NETWORK OF SUPPLIERS AND INFLUENCERS

We want more and more people to feel a part of the long-term achievement of human talent. We want to recognize our suppliers and our supply lines in the production of human achievement.

Jim Langley, Langley Innovations

Langley suggests that if the institution were to hold such receptions and identify key influencers over a period of years, you would begin to see "achievement networks" revealed. He suggests asking critical questions:

- Do Rhodes Scholars (or, in another example, those students graduating in the top 5 percent of their class) tend to concur in listing certain kinds of people or even certain people as having influence? Is there a pattern in the evolution of a Rhodes Scholar?
- Are there faculty and staff at your own institution whose names keep surfacing on these lists, who are making a difference?
- Do your high achievers note particular teachers or particular programs at particular feeder schools? (And can you connect your recruiters with those teachers?)

As you identify the people who have made a difference in the achievements of your students, find ways to invite them to serve as a formal part of your community. Here are examples:

- An award or recognition
- A refresher course for an advancement placement teacher — "if an advanced placement math teacher keeps appearing when students list their achievement networks," Langley suggests, "then bring that person on board. Invite them to work with your best faculty in mathematics; offer to underwrite the expense."
- Convene a topic on at-risk populations, and invite and include it the program key people from the achievement network
- Identify individuals who made a difference for your high-achieving students in the sciences, and invite them to a meeting on how to engage more youth in the sciences

"What would you like to have more of?" Langley asks. "More science students? More women in the sciences? More men in the liberal arts? More lower-income students? What does your institution need? Look for students who are exemplars in that field or that community, find out who made a difference for them, then go back to those people who made a difference and make them a part of the conversation. Ask them: how do we achieve our goals? By sharing the celebration of success in a way that identifies and builds a network of those who influence achievement, you in fact make success more possible in the future, and in the process you understand the anatomy of success."

This approach to engaging an achievement network allows you to:

- Learn how to replicate and expand on the student successes you already see
- Generate positive word of mouth and raise the profile of your institution
- Create advocates for your institution and grows your engaged community
- Find opportunities to seek grants for research on issues related to student achievement and success

This represents a true "engagement-focused" approach to advancement, an approach designed not only to attract the attention of potential donors, but to identify and cultivate partners in the success and advancement of your institution's core mission. Amid a future that is challenging both financially and in terms of the broader challenges colleges and universities will need to adapt to, the institutions best positioned to move forward will be those that have a sustained commitment to engage and harness the brainpower and passion of their communities' most critical constituents.