

Advancement Moving Forward:

Perspectives on the challenges to philanthropy due to the COVID-19 Pandemic

June 2020 Survey of Advancement Professionals

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MAJOR FINDINGS

The June 2020 survey is the second in our series on the ongoing impact of the COVID-19 pandemic. The first survey was conducted in early April 2020.

- Confidence concerning fundraising goals has shifted towards the positive since April 2020 when we found 43% of the respondents were not confident about making their FY20 fundraising goals. Currently, 28% are not confident about reaching FY21 fundraising goals, while 54% are somewhat confident, compared to 35% in April.
- There is a significant gap between the confidence of advancement leadership (VPs, CAOs, AVPs, etc.) and the confidence of their gift officers concerning FY21 goals. Advancement leaders are more likely to be confident (25%) than gift officers (13%). Gift officers are more likely to be “not confident” (32%) compared to 23% of advancement leaders.
- Recovery from the pandemic will not be immediate. Only 26% percent of advancement leaders feel “no time will be needed” to recover. Thirty-two percent of the leaders expect it will take up to a year to recover, and 26% expect any recovery will take between one and two years. Major gifts officers and alumni relations officers are more likely to report a longer recovery period than advancement leaders.

MAJOR FINDINGS

- The overwhelming majority of respondents indicated the pandemic will have a long-term impact on the business of educational advancement. Ninety-two percent of the advancement leaders, 79% of gift officers, and 81% of alumni relations officers report that the pandemic will change how they reach out to prospects, donors, and alumni beyond the current crisis,
- Fundraising priorities have shifted significantly in the past two months. Most respondents report more emphasis has been placed on financial aid (85%), unrestricted operating support (74%), virtual teaching (67%) career services (56%), and technology infrastructure (55%). Forty-one percent of respondents also reported a decline in emphasis on capital projects.
- Only a small number of respondents reports that their institutions have “paused” their annual giving (13%) and major gift solicitations (16%).
- While almost all face-to-face meetings, travel, and events have stopped, at least two-thirds of all respondents report an increase in the use of phone calls, emails, and video meetings to reach their donors, prospects, and alumni.
- The overwhelming majority of the respondents would like to spilt their time between working remotely and the office after this crisis has passed (70% of gift officers, 74% of advancement leaders, and 84% of alumni relations officers).

MAJOR FINDINGS

- Given the timing of the distribution of this survey, soon after the death of George Floyd, Jr. and the ensuing nationwide protests on racial inequality and systemic racism, many respondents also included comments about the need to focus alumni programming and fundraising on anti-racism initiatives on their campuses. Here is a sampling of their thoughts.

Our institutional response is now not just about the impact of COVID-19, but it is now also focused on our on-going efforts to educate and act for racial justice. (CHIEF ADVANCEMENT OFFICER)

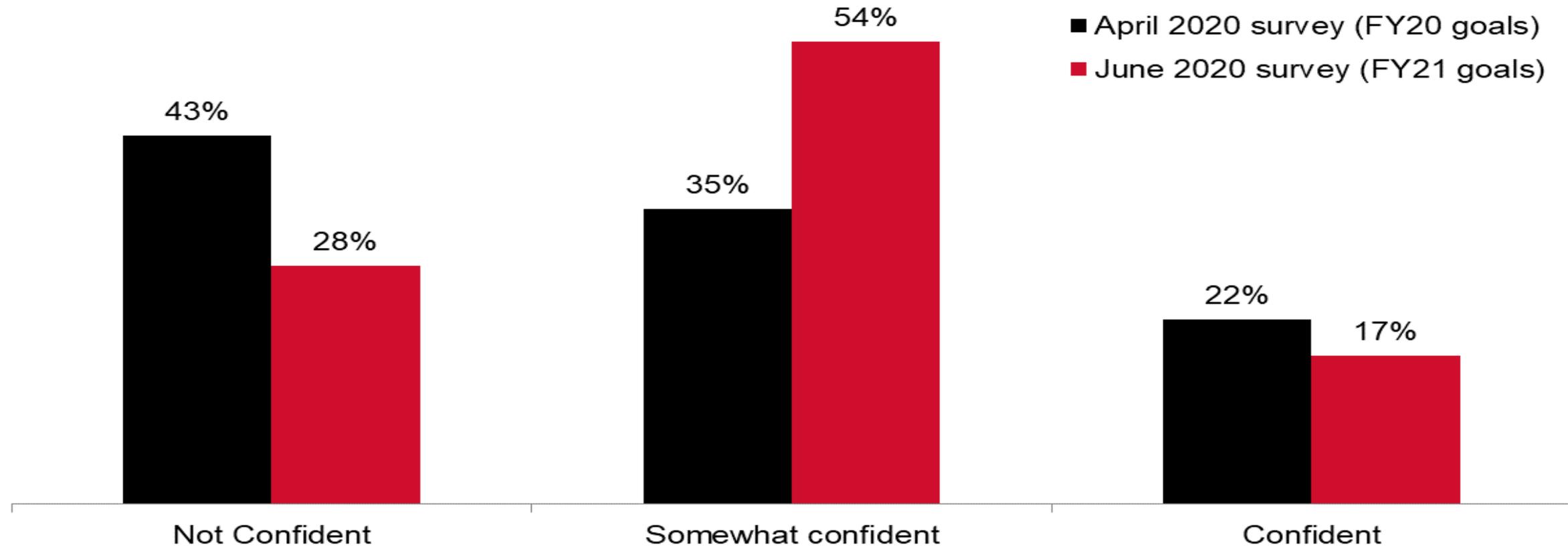
I think COVID-19 will change how we fundraise for a long time, but the Black Lives Matter movement will be something the institution and fundraising will have to address. I've had comments that communications seem disrespectful and tone-deaf during this time, especially to Black alumni. How will the fundraising world balance all the unrest the country is feeling? (GIFT OFFICER)

Our institution is growing more aware of the need to use this opportunity to not just weather the storm but to implement transformative and long-lasting change in response to the needs of the society today. (GIFT OFFICER)

A key challenge for us will be to align our case in ways that meet campus needs but also demonstrate strong relevance to broader issues in the national (and perhaps international) consciousness. (CHIEF ADVANCEMENT OFFICER)

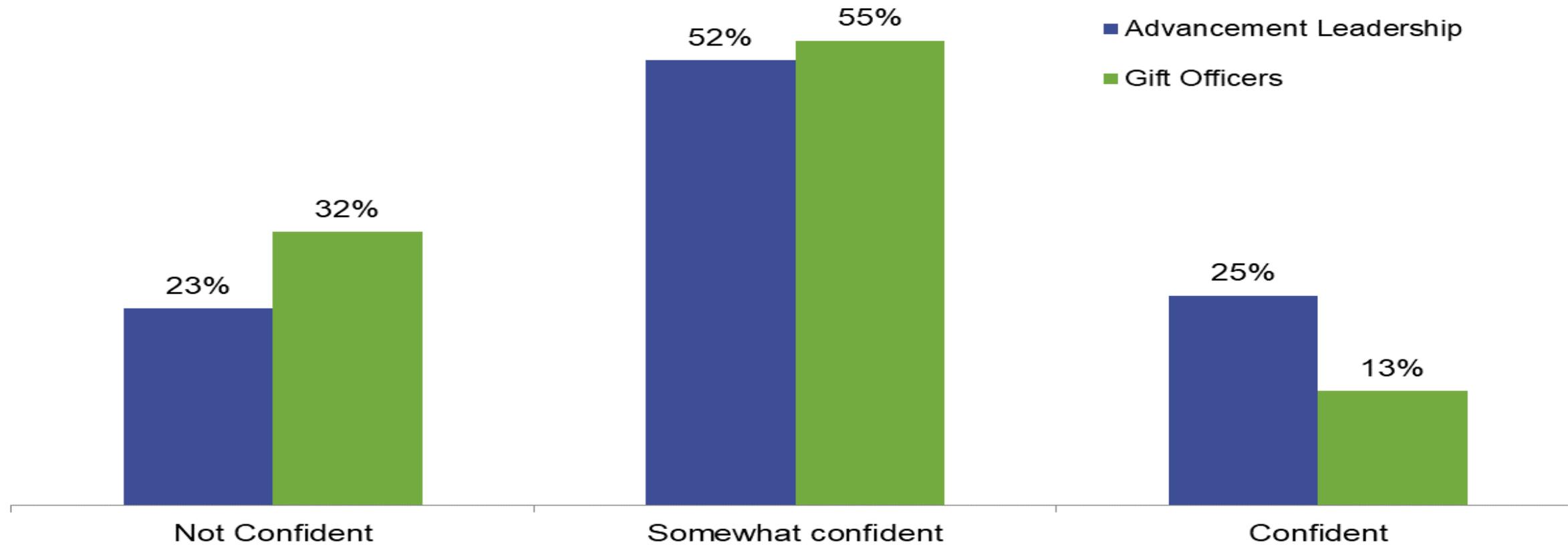
OVERALL CONFIDENCE: APRIL AND JUNE 2020

How confident are you that your institution will reach its fundraising goals?

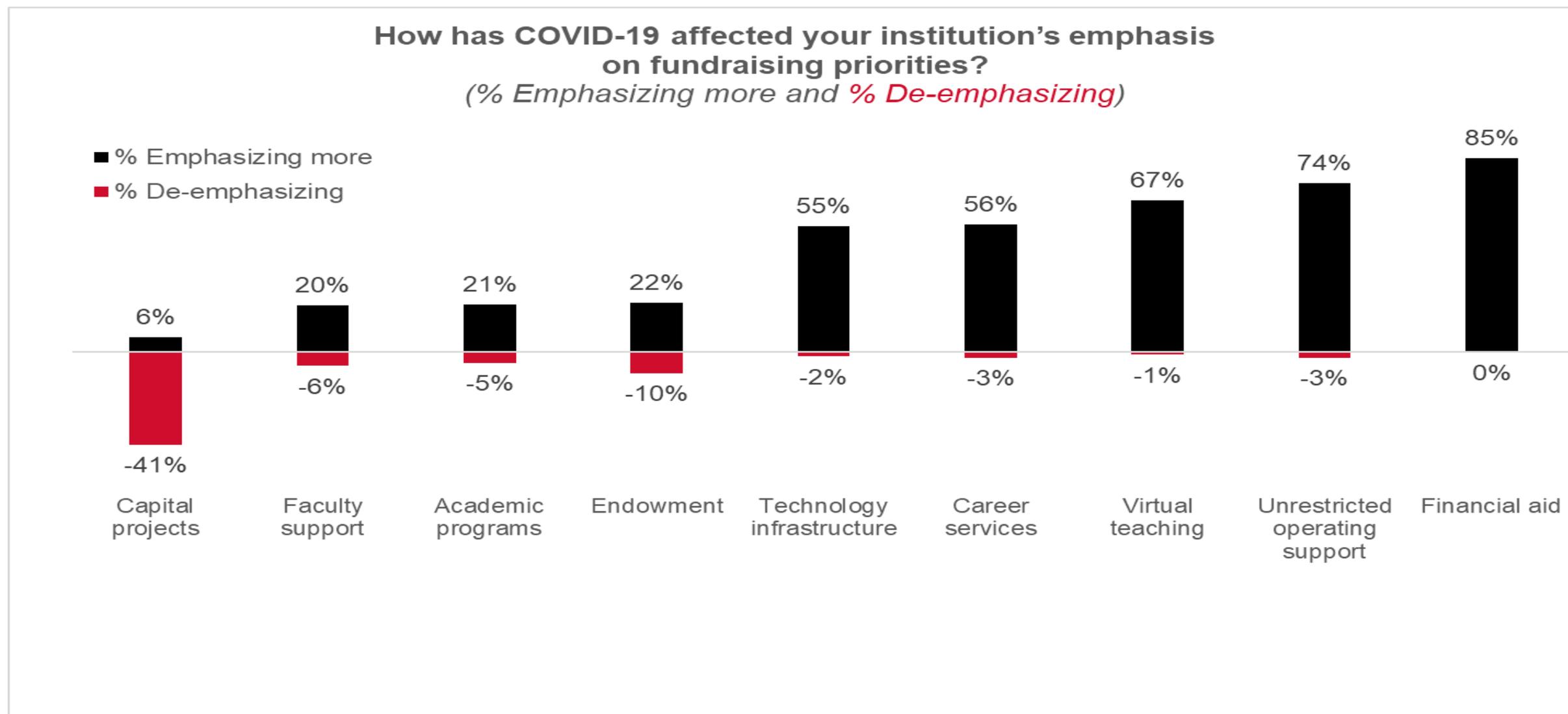


LEADERSHIP & GIFT OFFICER CONFIDENCE ABOUT FY21

How confident are you that your institution will reach its FY21 fundraising goals?



FUNDRAISING PRIORITIES



PAUSING SOLICITATIONS

Has your institution put a pause on any of the following?

Annual giving solicitations (direct mail, email, giving days)

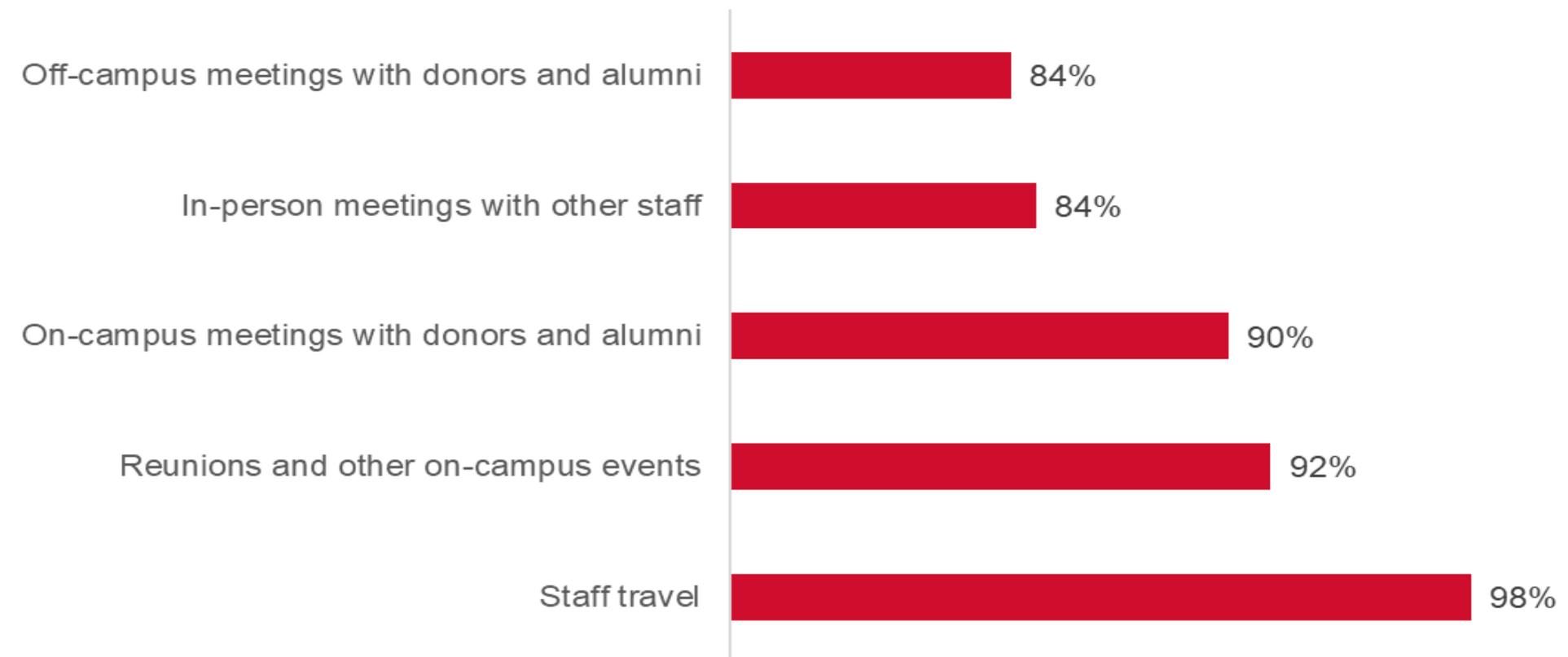
13%

Major/Principal giving solicitations

16%

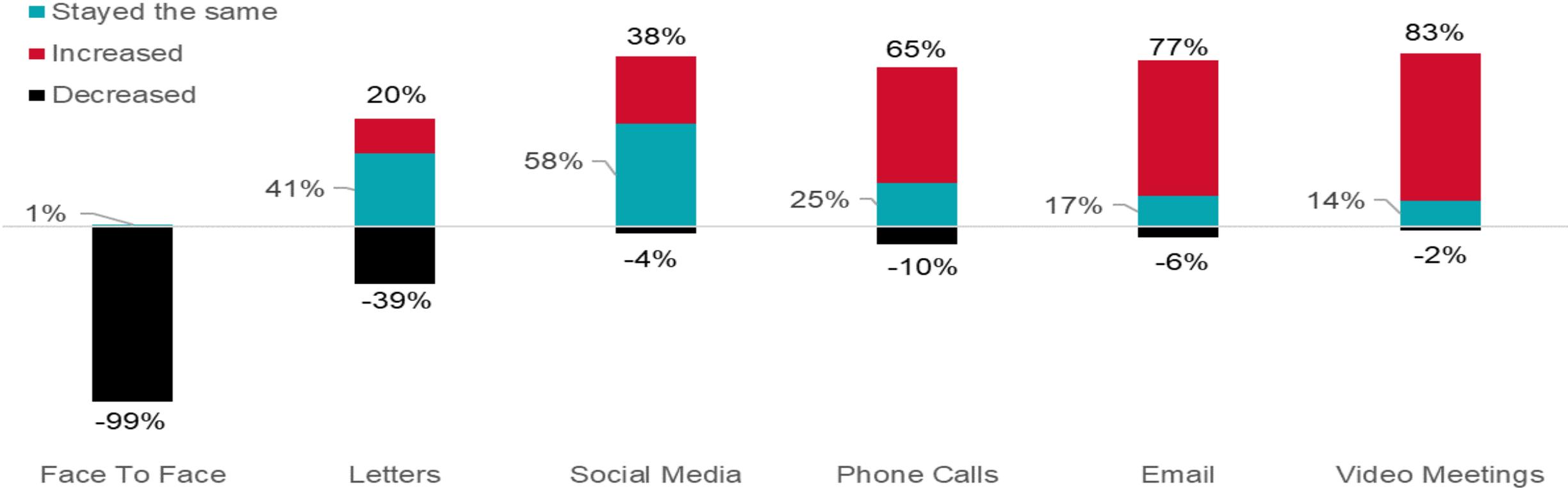
MEETINGS AND EVENTS

Has your institution put a pause on any of the following?

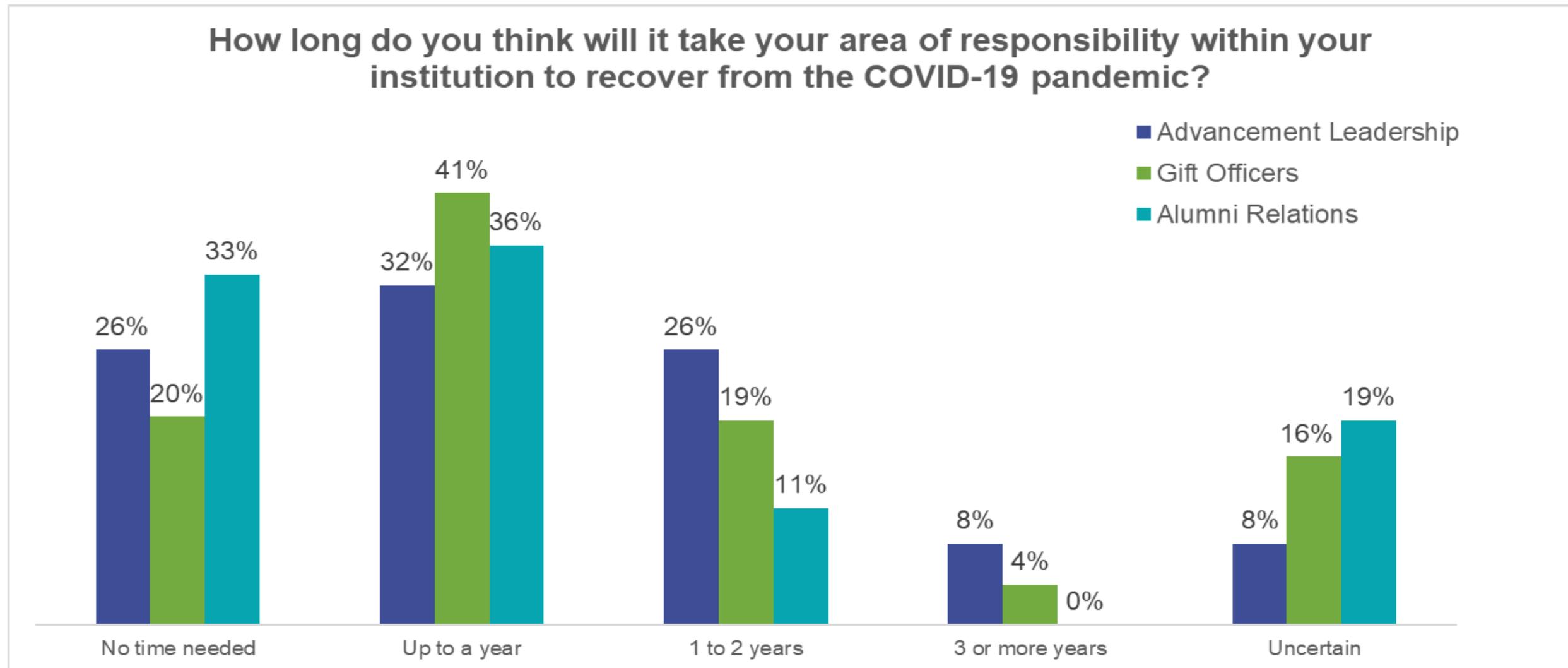


CONTACTING DONORS

How have your modes of outreach to prospects, donors, and alumni changed since the beginning of COVID-19



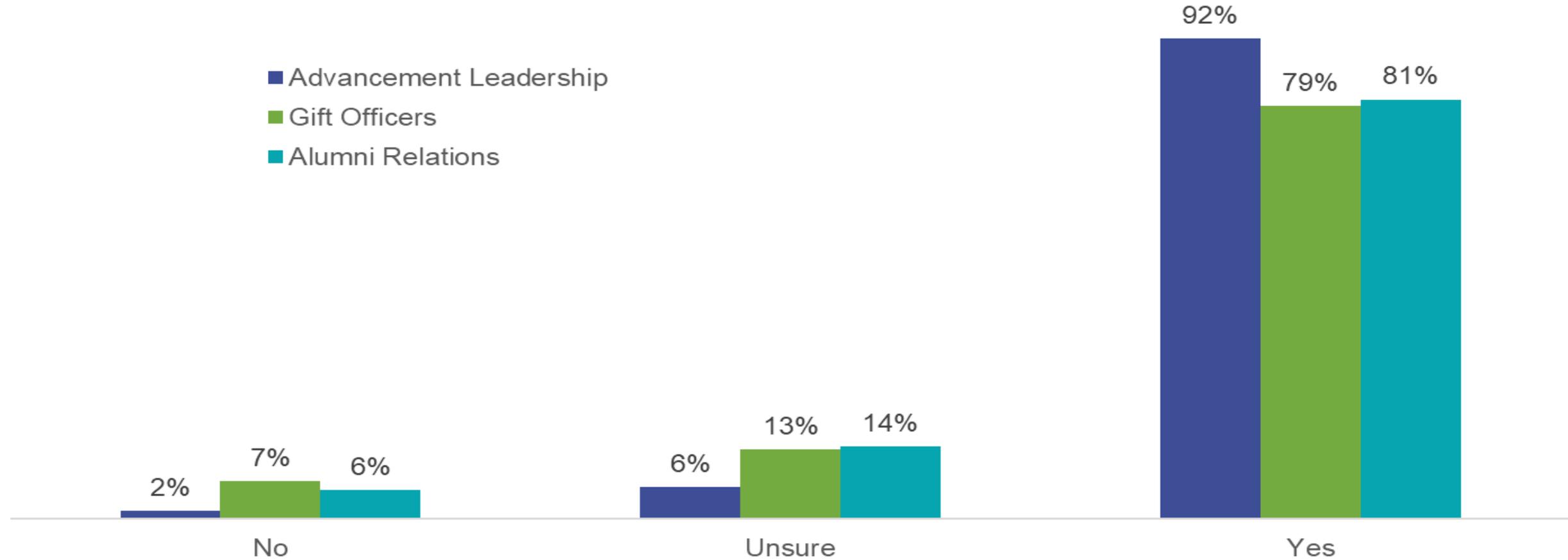
TIME TO RECOVER



LONG-TERM IMPACT

Do you feel that the pandemic will change how you reach out to prospects, donors, and alumni beyond the current crisis?

- Advancement Leadership
- Gift Officers
- Alumni Relations



WHAT DO YOU FEEL WILL BE THE MOST SUBSTANTIAL CHANGE GOING FORWARD?

(SELECTED VERBATIM RESPONSES)

- ◆ *Continued feelings of uncertainty in the donor psyche. Giving far more focused on demonstrable human needs. Acceptance of video conferencing as a legitimate engagement tool. (GIFT OFFICER)*
- ◆ *Digital/virtual events - prior to pandemic, they were non-existent at our institution. They have proven to be an effective way to engage with our constituents. I believe they are here to stay and should be part of overall alumni engagement and donor cultivation/stewardship strategies. (GIFT OFFICER)*
- ◆ *Donors and prospects will tend to look closer at the impact of their gift in terms of how much impact it had, and whether or not the impact was met in the area of their interest. I would expect capital projects to be even more challenging to raise funds for. (GIFT OFFICER)*
- ◆ *I think we have learned we have to be flexible, make decisions quickly, etc. (GIFT OFFICER)*
- ◆ *I think people will remain more comfortable with remote/virtual engagement, which will make it easier to engage with our community in meaningful ways even after it is possible to travel and meet in person again. I think in-person engagement will remain important, but virtual engagement, when it is meaningful and intentional, will be a beneficial new resource that I hope remains. (ADVANCEMENT LEADERSHIP)*
- ◆ *If we can leverage more digital communication going forward, that will be a win. Without the pandemic we would not have been able to move in this direction. (GIFT OFFICER)*

WHAT DO YOU FEEL WILL BE THE MOST SUBSTANTIAL CHANGE GOING FORWARD?

(SELECTED VERBATIM RESPONSES)

- ◆ *More thoughtful and cautious approach to fundraising, volunteer management, and engagement. (ADVANCEMENT LEADERSHIP)*
- ◆ *This is our new normal folks! As I often say, the "1990s and Reagan-omics" are long dead! COVID-19 has changed everyone's business model. I do not see any on-line tutorials on how to conduct a "qualifying" visit via Zoom or Skype. I was hired as a senior major gift officer with a college that was mid-campaign. My portfolio has a huge number of alumni donors and non-donors to be "qualified" with cold relationships. I do not see this happening at all for 2 years. And I think it will change my work plan; it must or I am out of a job! (ADVANCEMENT LEADERSHIP)*
- ◆ *By the end of this crisis, the priorities people value the most may shift. These shifts can impact all areas of life and will likely play a major role in fundraising strategies. (ADVANCEMENT LEADERSHIP)*
- ◆ *I am concerned that prospects and donors will increasingly prefer quick Zoom meetings rather than in-person meetings, and that the former will not afford an opportunity to offer more personalized connections (e.g., leaveaways, notes from grateful beneficiaries, etc.) I am also concerned that our constituents (particularly those who are immunocompromised) will decline invitations to on-campus events, even when it becomes safe to gather in larger groups. (GIFT OFFICER)*
- ◆ *We have demonstrated that we can be successful in a remote environment, so I expect there will be more acceptance institutionally with remote work. (GIFT OFFICER)*

WHAT DO YOU FEEL WILL BE THE MOST SUBSTANTIAL CHANGE GOING FORWARD?

(SELECTED VERBATIM RESPONSES)

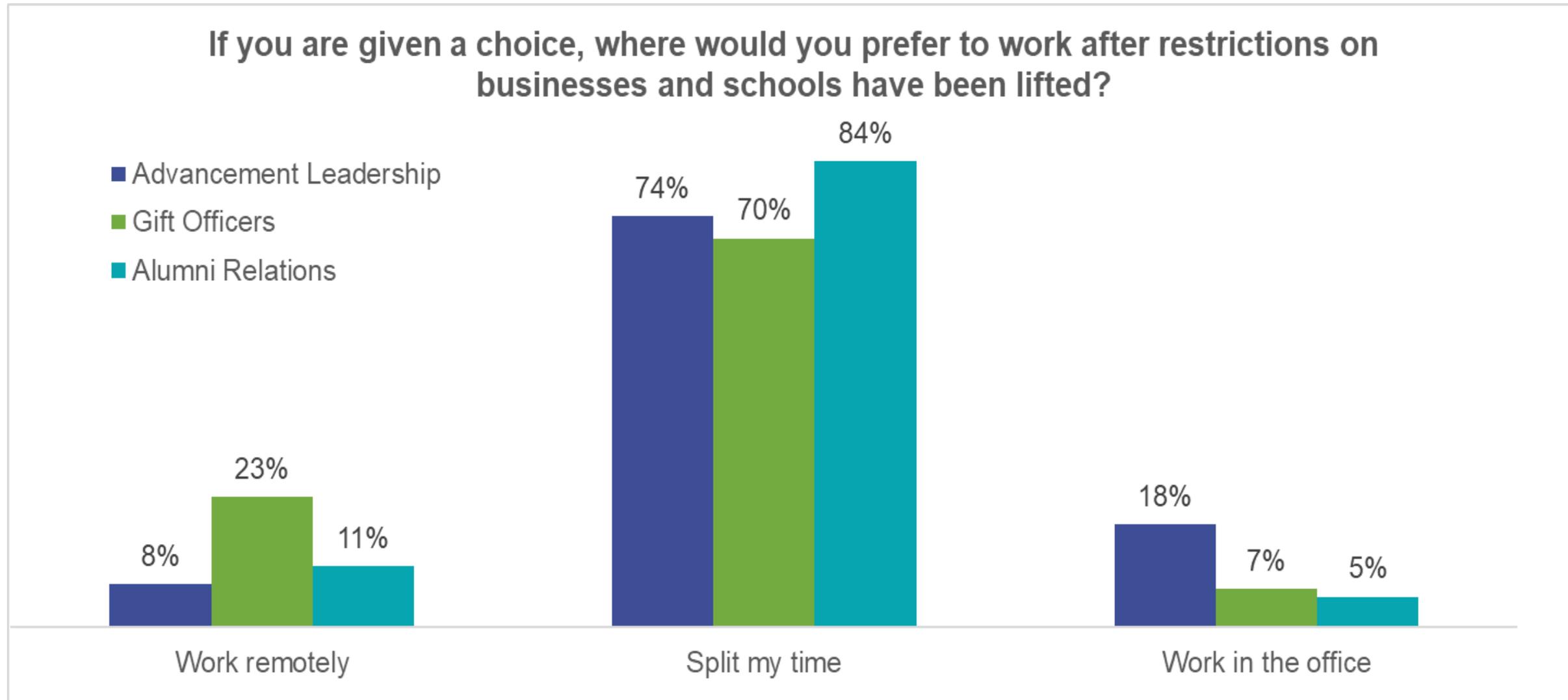
- ◆ *Being able to react nimbly will be crucial in relationship building. (GIFT OFFICER)*
- ◆ *The pivot to virtual (something we had talked about for years where events were concerned) has demonstrated that we have the potential for a significantly greater reach, so we plan to maintain virtual programming in addition to the in-person. In addition, some donors have preferred and/or been amenable to virtual meetings (less time, more professional and to the point, lower cost). That is not the case when building relationships with new donors, but for existing and well-stewarded donors, virtual meetings have produced good outcomes. (GIFT OFFICER)*
- ◆ *The "probably yes" response makes me so sad. I am worried about face to face visits not occurring, missed opportunities to connect donors with their students, programs, areas of impact that bring them such joy. (ALUMNI RELATIONS)*
- ◆ *Everyone is more comfortable with virtual connections. I anticipate both donor and gift officer being more comfortable connecting for the first-time using video conference or phone. It could really shape the way we approach qualification visits, especially those who live in areas we do not traditionally travel. (ADVANCEMENT LEADERSHIP)*
- ◆ *This period reminds us how important it is to be creative in engaging and connecting with members of our community, for the sole purpose of building connections. (GIFT OFFICER)*

WHAT DO YOU FEEL WILL BE THE MOST SUBSTANTIAL CHANGE GOING FORWARD?

(SELECTED VERBATIM RESPONSES)

- ◆ *I think people will remain more comfortable with remote/virtual engagement, which will make it easier to engage with our community in meaningful ways even after it is possible to travel and meet in person again. I think in-person engagement will remain important, but virtual engagement, when it is meaningful and intentional, will be a beneficial new resource that I hope remains. (ADVANCEMENT LEADERSHIP)*
- ◆ *The current situation requires us to be more thoughtful and timely in communicating with all of our constituents. This is a good thing that will continue as we move forward. We are very focused on community building and are using this time to reevaluate how alumni relations and development can better coordinate our efforts. This is work that will bear fruit well beyond the current situation. (GIFT OFFICER)*
- ◆ *I think we will be more mindful with communications that have an associated cost, such as mailings - budgets will be tight, and those will be the first thing to get cut (ADVANCEMENT LEADERSHIP)*
- ◆ *The sense of urgency for financial support-we have seen unprecedented giving and believe this generosity is a by-product of the pandemic-sustaining new donors. (ADVANCEMENT LEADERSHIP)*

REMOTE WORK



WHAT ELSE DO YOU WANT TO SHARE?

(SELECTED VERBATIM RESPONSES)

- *I think COVID-19 will change how we fundraise for a long time, but the Black Lives Matter movement will be something the institution and fundraising will have to address. I've had comments that communications seem disrespectful and tone-deaf during this time, especially to Black alumni. How will the fundraising world balance all the unrest the country is feeling? (GIFT OFFICER)*
- *Our institutional response is now not just about the impact of COVID-19, but it is now also focused on our on-going efforts to educate and act for racial justice and support antiracist education. (ADVANCEMENT LEADERSHIP)*
- *The pandemic has established the urgency for student financial, technological, and mental health support like no other single driver in my memory. Clarity around this singular focus has galvanized our advancement team and aligned our strategies in very positive ways. Our alumni have responded generously to this outreach and that response reminds us that clarity of purpose aligned with demonstrated impact are powerful motivators for donor engagement. (ADVANCEMENT LEADERSHIP)*
- *While wrapping up FY20 will be better than originally expected, FY21 and beyond is still very unclear. While we have our charges, we need to plan for how different the world has become. This is hard to do when we have yet to come out the other end. (GIFT OFFICER)*
- *The economy combined with the stock market has greatly impacted my donors. I want to be sensitive to their recovery and ability to give. I also think that our leadership has indicated that despite the pandemic, our metrics and goals remain the same. That alarms me given that we cannot travel or have face-to-face meetings in person with our donors. (GIFT OFFICER)*

WHAT ELSE DO YOU WANT TO SHARE?

(SELECTED VERBATIM RESPONSES)

- ◆ *The volunteer leadership has expressed a strong desire to understand how the institution is making a substantive impact on society in the wake of the pandemic. I expect that will only be heightened in the wake of the national racial unrest. A key challenge for us will be to align our case in ways that meet campus needs but also demonstrate strong relevance to broader issues in the national (and perhaps international) consciousness. (ADVANCEMENT LEADERSHIP)*
- ◆ *We've been slow to start philanthropic conversations again with donors, and I now worry about the lag time and what it's going to take to re-start. We're in the final year of a campaign and we now need to shift our priorities faster and communicate that to donors. We need more current use dollars, for example. (GIFT OFFICER)*
- ◆ *Our institution is growing more aware of the need to use this opportunity to not just weather the storm but to implement transformative and long-lasting change in response to the needs of the society today. (GIFT OFFICER)*
- ◆ *These are very uncertain times, but my organization has demonstrated an ability to pivot on the go. We have a keen appreciation for our mission, and our need to carry on, but we do so in an environment that changes on the fly. (GIFT OFFICER)*
- ◆ *Alumni and donors are starving for information about campus reactivation plans for the Fall 2020 semester and all that decisions surrounding this. (GIFT OFFICER)*

WHAT ELSE DO YOU WANT TO SHARE?

(SELECTED VERBATIM RESPONSES)

- ◆ *Discovery and qualification work have been extremely difficult. We are still trying to find ways to approach this issue heading into FY21. (GIFT OFFICER)*
- ◆ *I am reminded of the feeling of uncertainty from the 2008 recession. Many donors I talk to are feeling uncertain, with the elections coming up, with the anxiety of the coronavirus, and now the unrest and racial issues. We are seeing an uptick in interest for estate planning and providing for charity. (GIFT OFFICER)*
- ◆ *Major donors are not backing away from pre-existing commitments, but we are seeing a 3-6 months "beg off" period on new conversations. (GIFT OFFICER)*
- ◆ *Donors and alumni who are truly supportive of/interested in the institution remain vested in our overarching mission - learning and teaching. They still want to support our core mission which is helping student by relieving their debt and helping our teaching mission by supporting faculty, staff, research and infrastructure. It's the KISS model (keep it simple, stupid) - focus on the mission of learning and teaching and always be asking. (GIFT OFFICER)*

METHODOLOGY

- ◆ On June 2, the current survey was sent to 1,004 Vice Presidents for Advancement, Chief Advancement Officers, AVPs, Directors of Development, major gift officers (school/center-based, central, and regional) and alumni relations officers at 58 universities, colleges, and independent schools.
- ◆ By June 9 responses had been received from 386 individuals representing 53 institutions (38.4% response rate, margin of error +/- 3.9% at 95% confidence level).
- ◆ The earlier April 2020 survey had 416 respondents (42% response rate, margin of error +/- 3.7% at 95% confidence level). Results are available at <https://www.wash-mcg.com/new-survey-finds-majority-of-educational-advancement-officers-believe-fundraising-goals-are-at-risk-in-face-of-covid-19-health-crisis/>
- ◆ A list of participating schools appears on the next page.

PARTICIPATING INSTITUTIONS

Appalachian State University
College of Wooster
Colorado College
Davidson College
Denison University
Dickinson College
Frostburg State University
Governor's Academy
Illinois Institute of Technology
Kalamazoo College
Lafayette College
Lycoming College
Marist College
Middlebury College
Miss Porter's School
Mount Holyoke College
Nazareth College
North Carolina State University

Notre Dame Academy (Hingham, MA)
Ohio Wesleyan University
Prairie View A&M University
Providence College
Rollins College
Sage Colleges
Saint Anselm College
Siena College
Southwestern University
St. Catherine University
St. John Fisher College
St. Lawrence University
Stonehill College
SUNY Potsdam
Syracuse University
The Catholic University of America
Towson State University
Union College

University of Maryland, Baltimore
University of Maryland, College Park
University of Missouri System
University of New Hampshire
University of North Carolina System
University of Rhode Island
University of Richmond
University of Chicago Booth School of Business
University System of Maryland
Valparaiso University
Vanderbilt University
Vassar College
Virginia Museum of Fine Arts
Washington University, Saint Louis
Western Carolina University
Westover School
William and Mary

DETAILED TABLES

How confident are you that your organization will reach its fundraising goals this year?

	April 2020 (FY20 goals)	June 2020 (FY21 goals)
Extremely confident	12%	5%
Very confident	10%	12%
Somewhat confident	35%	54%
Not so confident	33%	22%
Not at all confident	10%	6%

	Advancement Leadership (June 2020)	Gift Officers (June 2020)	Alumni Relations (June 2020)
Extremely confident	7%	3%	6%
Very confident	18%	10%	22%
Somewhat confident	52%	55%	56%
Not so confident	18%	24%	17%
Not at all confident	5%	8%	0%

DETAILED TABLES

How has COVID-19 affected your institution's emphasis on fundraising priorities?

	% De-emphasizing	Staying the same	% Emphasizing more
Capital projects	41%	53%	6%
Faculty support	6%	74%	20%
Academic programs	5%	74%	21%
Endowment	10%	68%	22%
Technology infrastructure	2%	43%	55%
Career services	3%	41%	56%
Virtual teaching	1%	32%	67%
Unrestricted operating support	3%	23%	74%
Financial aid	0%	15%	85%

DETAILED TABLES

How have your modes of outreach to prospects, donors, and alumni changed since the beginning of COVID-19?

	Email	Letters	Phone Calls	Video Meetings	Social Media
Decreased significantly	<1%	14%	2%	<1%	<1%
Decreased	5%	25%	8%	2%	4%
Stayed the same	17%	41%	25%	14%	58%
Increased	47%	18%	45%	24%	27%
Increased significantly	30%	2%	20%	59%	11%

DETAILED TABLES

Do you feel that the pandemic will change how you reach out to prospects, donors, and alumni beyond the current crisis?

	OVERALL	Advancement Leadership (June 2020)	Gift Officers (June 2020)	Alumni Relations (June 2020)
Definitely not	<1%	0%	0%	0%
Probably not	6%	2%	7%	6%
Unsure	12%	6%	13%	14%
Probably yes	55%	49%	54%	64%
Definitely yes	27%	43%	25%	17%



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Our consultants are leaders in education, focusing on strategic planning, philanthropic relationships, campaign planning and execution, alumni engagement, marketing and external relations, and issues of institutional leadership, trusteeship and governance.

The power of our service is results. In an increasingly competitive and highly challenging environment for education, we are committed to helping you design and adapt programs built upon a foundation of clear communications and knowledgeable data analysis. We employ critical thinking, planning and collaboration as the basis for the strategies we help you develop.

We bring our knowledge and practical experience as leaders, managers and teachers to help you in strategic planning, development, alumni and donor relations, marketing, and board, staff and volunteer development.

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