

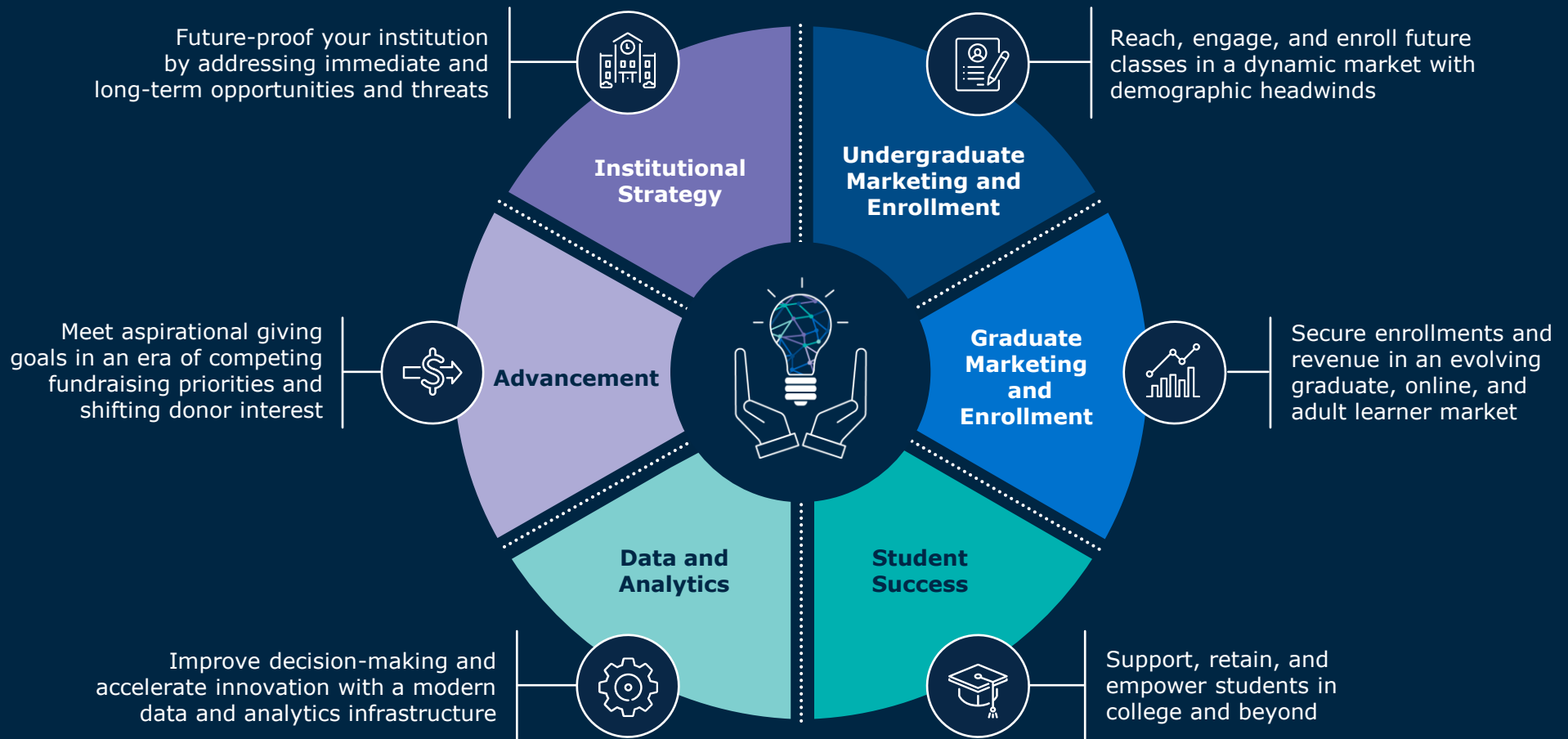


EAB RESEARCH

Advancement Advisory Services Partnership

Coast-To-Coast

November 18-19, 2025

Insight-Powered Solutions for Your Top Priorities and Toughest Challenges

We partner with **2,800+** institutions to accelerate progress, deliver results, and enable lasting change.

95%+ of our partners return to us year after year because of results we achieve, together.

Your EAB Team



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Research Advisory Services experts provide on-demand strategic advice, thought partnership and best practice recommendations

Advancement Advisory Services

Comprehensive Support Aligned to Your Top-of-Mind Challenges



Advancement

Advancement Advisory Services supports Advancement leaders to solve the field's biggest challenges, backed by EAB research, expert guidance, and world-class tools

300+

Chief Advancement Officers served through the partnership

97%

Of CAOs continue their partnerships with EAB each year

1

Best Practice Research

Annual research agenda set and guided by advancement's most top-of-mind challenges

2

Diagnostics, Benchmarking and Decision Tools

Tools to benchmark investment, ROI, fundraiser performance and support the implementation of best practices.

3

Implementation and Change Management Support

Ongoing advisory and implementation support for campus-wide initiatives

4

Global Peer to Peer Networking

In-person and virtual convenings to drive alignment and share best practices across the sector

How EAB Supports Advancement

Universities are navigating a rapidly shifting philanthropic landscape, with heightened competition for donor support, rising expectations for impact and transparency, and increasing pressure to demonstrate the value of advancement activities. **EAB's Advancement Advisory Services** supports advancement leaders with proven strategies to align fundraising goals with institutional priorities and respond to donor-investor expectations.

RESEARCH AND EXPERT ADVICE FOR EVERY TOPIC IN YOUR PORTFOLIO

Strategic Imperative

Common Pitfalls

EAB Support



Optimize **Advancement ROI**

- Over-investing in low-impact initiatives
- Misalignment between staffing and institutional priorities
- Failure to measure true return on advancement activities

Advancement benchmarking analysis to identify investment and performance gaps



Drive Fundraiser
Efficiency and Productivity

- Filling portfolios with too many prospects
- Failing to remove cold prospects from portfolios
- Overemphasis on activity metrics (e.g., number of visits) instead of outcomes

Best practices for linking fundraiser activity to meaningful outcomes



Build a Sustainable
Donor Pipeline

- Overemphasis on alumni participation rates
- Lack of engagement opportunities for emerging prospects
- Underutilizing data and emerging technologies

Tactics for broadening the donor base, leveraging alumni data analytics, and creating inclusive engagement programs



Collaborate with the Academy
to Secure Top Gifts

- Deans lack clarity on their role in fundraising
- Faculty do not understand donor-investor expectations
- Missed opportunities to connect academic vision with donor interests

Facilitated session with advancement and academic leaders to align on big ideas



Develop a Strong
Campaign Strategy

- Donor and staff fatigue from overlapping or prolonged "perma-campaigns"
- Unclear campaign priorities and messaging
- Leadership turnover leading to shifting institutional priorities

Resources for stakeholder education, decision support, and implementation guidance across the campaign



Attract & Retain
Advancement Talent

- Inadequate recruitment pipelines for advancement professionals
- Underinvestment in onboarding and professional development
- High turnover due to lack of career pathways

Strategies for recruiting, developing, and retaining advancement talent

EAB Supports the Chief Advancement Officer's Strategy

NEW RESOURCES AND TOOLS



The CAO's Role in Modern Anchor Institution

In light of the current climate of declining public confidence in higher ed, explore actionable strategies for aligning university fundraising and advancement initiatives with community needs, effectively structure CFR across the institution, foster trust & confidence, and communicate ROI



AI Foundation Roadmap For Advancement Leaders

[Infographic](#)

- Assess organizational readiness across key stages of AI foundation development
- Identify next steps to unlock generative AI capabilities



Strategic Differentiation

To position institutions for success in a rapidly changing sector, Advancement leaders must rethink long-standing assumptions. We work with you to reframe institutional messages and pillars to be truly differentiated: relevant, distinctive, and provable.



Advancement Leadership and Change Management in Today's Environment

Change management is a critical skill for leaders as they expand impact and influence on campus. This session offers frameworks and practical strategies for advancement leaders navigating demographic shifts, financial constraints, and organizational change. Explore approaches to resilient leadership, goal and practice prioritization, and strategic planning that enable advancement professionals to sustain momentum and drive philanthropic success in today's complex higher ed environment.

ACTIVE AREAS OF RESEARCH



Navigating Financial, Political, and Demographic Pressures

Available October 2025

- Explore philanthropy's role in supporting resilience amid sector-wide challenges
- Rethink funding strategies considering mounting institutional pressures



Aligning Resources and Talent to Unlock Principal Gift Potential

Available October 2025

- Learn how to scale principal gift efforts beyond one-off wins
- Discover innovations in team structure, portfolio strategy, proposal development



Six Trends Reshaping Pipeline Development

Available October 2025

- Identify and adapt to emerging trends in donor engagement
- Gain insights into building sustainable gift pipelines under growing pressure

SIGNATURE SERVICES



[Advancement Benchmarking](#)

Use advancement investment and performance data to make strategic staffing and investment decisions



[Organizational Design Review](#)

Audit organizational structure against best practices to identify opportunities for improvement



[Campaign Concierge](#)

Address campaign challenges and priorities to strengthen fundraising efforts across the campaign life cycle

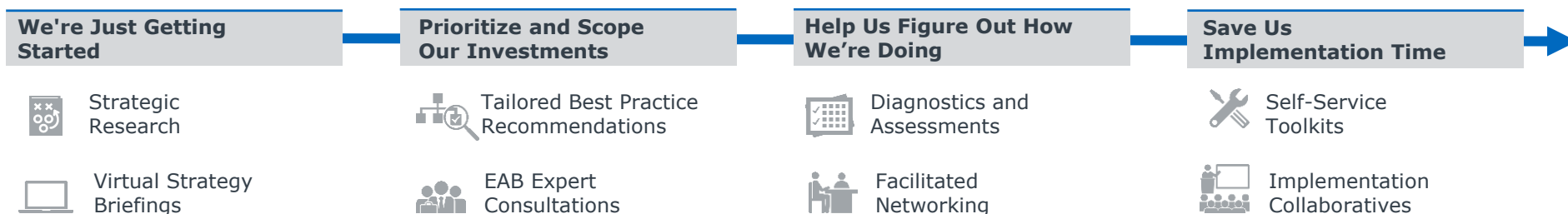
Six Attributes of a Thriving Institution



How Advancement Leaders Derive Value From Partnership

Moving You Forward, Wherever You Are

Whether you are in early stages trying to set course, or trying to get from “good to great,” together we determine the best support.



Explore Our Extensive Research Library

Advancement leaders commonly turn to their EAB partnership and eab.com for resources to advance their goals within advancement.

- Advancement Campaigns
- Alumni and Volunteer Engagement
- Diverse Staff Workforce
- Fundraising
- Hiring and Recruiting
- Major and Principal Gifts
- Metrics and Reporting
- Organizational Design
- Professional Development
- Staff Retention
- Talent Management

Download [The Three Constraints on Fundraising Growth](#) Research Report

Use the [Major Gift Lead-Generation Tool](#)

Download the [Uncovering Incentive Compensation Strategies in Higher Education Advancement](#) Infographic

Opportunities for Advancement Boards and Volunteers



The Annual Higher Ed Advancement State of the Sector

Strategize for an Unstable Decade in Higher Ed

Advancement leaders must rethink long-standing assumptions to position their institutions for success in a rapidly changing sector. EAB research will examine the financial, political, and demographic forces reshaping higher education and highlight advancement-specific opportunities and risks to building resilient strategies.



The Next Era of Campaign and Fundraising Strategy

Rethinking Fundraising Models to Drive Impact

Fundraising goals set by presidents and boards, whether annual or campaign-specific, are increasingly harder to meet. Advancement leaders must innovate to overcome donor fatigue, campaign ubiquity, and generic priorities to meet them. Confront fundraising “norms” and their potential harm to sustainability and examine new models and innovations for advancement structure and strategy. We also look at transformational gift trends, scaling major gift cultivation, and engaging volunteers.



Board and Institutional Leadership and the Campaign

Align Leadership to Drive Campaign Success

In this session, we dig into today’s fundraising campaign environment including the growth in goals, the importance of the right investment to reach them, and how to meet shifting donor-investor demands. We investigate how the donors of today and tomorrow have evolved, and how we must clearly communicate ideas and impact to populate the pipeline, retain donors, and secure major and principal gifts



Inspiring Donor Investment Through Storytelling

Crafting Narratives That Inspire Giving

Aligning leadership, boards, and advancement teams around a shared storytelling strategy has never been more important. This alignment strengthens donor engagement and investment. In this session, we demonstrate how blending data with compelling narratives captures donors who seek measurable outcomes, personal connection, and societal relevance. Finally, we offer practical approaches to refine messaging, engage stakeholders, and inspire sustained philanthropic support.



Anticipating the Impact of Gen Z

Engaging the Next Generation of Donors

As the next generation of alumni, donors, and volunteers gain giving potential, advancement must understand generational trends to create compelling engagement and fundraising strategies. This session spotlights the attributes that make generation Z unique and dives into the impact these attributes will have on advancement.



The State of Alumni Relations

Advancement leaders face a pivotal moment to redefine how their institutions connect with alumni. This session showcases innovative strategies and real-world examples from across higher education to help teams spark meaningful engagement, inspire giving, and strengthen lifelong relationships. Drawing on EAB research, it highlights actionable approaches to align alumni engagement with institutional priorities, cultivate future donors, and build a resilient, mission-driven advancement strategy.



APPENDIX

Appendix – Select Services

Benchmarking
Website Optimization Audit
Campaign Concierge

EAB's Advancement Benchmarking



Evaluate Investment & Performance

- > Compare advancement ROI to peer institutions
- > Assess staffing levels relative to peers
- > Analyze fundraising performance across several gift bands



Analyze Fundraiser Productivity

- > Measure gift officer efficiency against peers
- > Optimize portfolio composition
- > Evaluate gift officer compensation



Examine Advancement Spend

- > Identify areas of overspending compared to peers
- > Highlight opportunities for sustainable growth
- > Determine where to "strategically shrink" while preserving outcomes

Support Your Strategic Decision-Making



Reports and Board Slides

Two reports and tailored slides for leadership presentations



Custom Expert Analysis

Actionable insights and guidance from EAB experts



Change Management Support

Best practices for implementing data-driven decisions

Source: EAB interviews and analysis.

Website Optimization Audit

About the Audit

A well-designed website can be a highly effective tool for communicating a compelling – and differentiated – value proposition to current and prospective donors. Drawing upon industry best practices from across the public and private sectors, the Website Optimization Audit service provides Advancement Forum partners with an objective assessment of their giving website that highlights areas of excellence and identifies opportunities for targeted improvement.

STEP 1

Contact your Strategic Leader to request an audit.

STEP 2

A member of our team will complete an analysis of gaps in functionality, content, and design for your website. We will complete a customized report with prioritized opportunities for improvement.

STEP 3

Within 12 weeks you will receive your customized report with our recommended changes.

Areas of Website Performance We Review



Deepening Engagement

- Case for Support and Impact Stories
- Campaign Information
- Other Engagement Opportunities
- Contact Information



Making a Donation

- Arriving at the Giving Page
- Finding a Fund to Support
- Checkout Page



Mobile Giving and Engagement

- Navigability
- Making a Gift

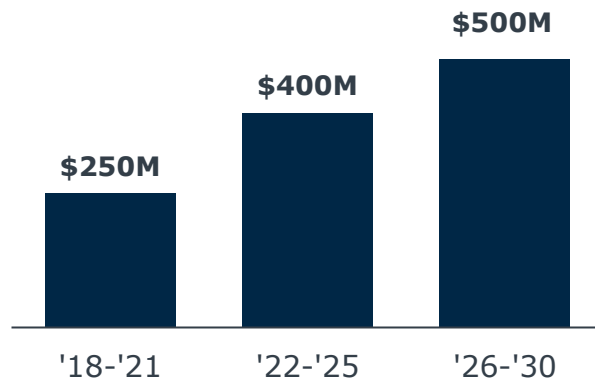
Innovate on Campaign Strategy for Success and Sustainability

Mega Campaigns Come With Challenges for Advancement Industry

Overly-optimistic campaign goals set by presidents and boards are increasingly harder to meet. Advancement leaders must overcome declining budgets, donor fatigue, campaign ubiquity, and generic priorities to meet goals.

Goals Double Across the Board

Median Campaign Goal by Campaign End Year, 2018-2030



Risks Threatening Campaign Success

81%

Of **institutions** saw **budget declines** in FY'21 compared to FY'20

#1

Reason **HNW donors** **stopped giving** was 'too much solicitation'

Partnering with EAB

- 1** Request a **partner intensive on campaign innovations**
- 2** Schedule a campaign concierge **planning call to identify your top priorities**
- 3** Bring EAB to campus to **educate the board on their role** in a campaign



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ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.