EAB

Reorienting Engagement Around Donor Growth

Eight Transformations for the Engagement Enterprise

Advancement Advisory Services

Traditional Engagement Is Difficult to Defend

"If 97% of my funds are coming from 3% of my donors, then **why am I spending such a large portion of my budget engaging the other 97% of prospects?**"

Senior VP of Advancement and Alumni Relations, Selective Private

"Most of what alumni engagement does is event management. The events themselves are mostly attractive to non-donors. **We need engagement to start building donor pipelines**."

Chief Advancement Officer Large Public



"The **ROI of engagement is weak** to say the least. That's okay when times are good, but right now budget is tight. **We don't have the dollars** to make 40-year gambles."

Vice President of Development Large Public

"Engagement needs to get clear on their role fast, or someone else will realize **it's easier to get rid of them** and start fresh."

Associate Vice President of Development Regional Public

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Source: EAB interviews and analysis.

Engagement Investments Not Adding Up

Alumni Relations Appears to Have a Low ROI

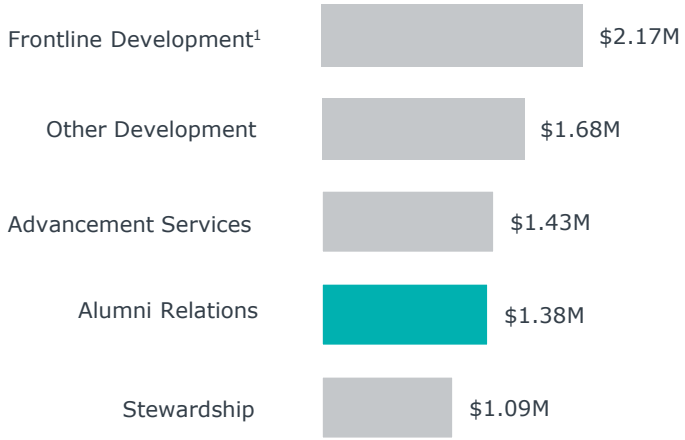
Engagement Investments By the Numbers
Divisions with +100 FTEs, FY2021-2025

22
Average number of alumni relations staff

$3.5M
Average alumni relations investment

$1.4M
Association with net fundraising production

Association with One FTE Increase
FY 2021-2025, Net Fundraising Production[1]



1) Frontline staff refers to major gift officers, principal gift officers, CFR, and planned giving. It excludes leadership annual giving and annual giving.

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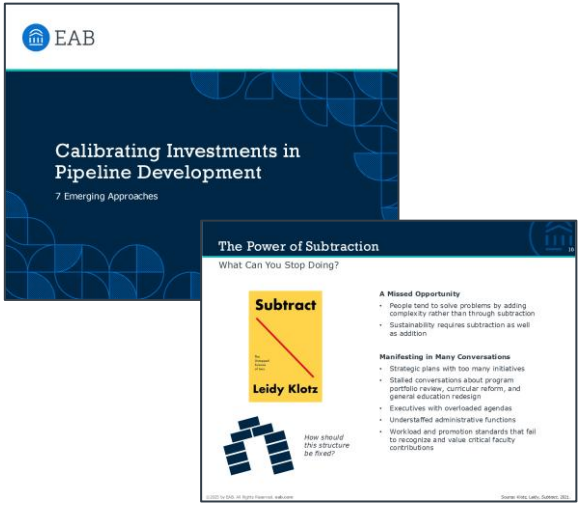
Source: EAB Advancement Benchmarking; EAB interviews and analysis.

The Case for Subtraction Still Holds

Last Year's Recommendations Remain Necessary, but No Longer Sufficient

Advancement Advisory Services 2026 Research



The Power of Subtraction

- Downsize Homecoming
- Merge Reunions
- Merge Alumni Magazines
- One Annual Mass Solicitation
- Outreach Only to Engaged Donors
- Targeted Physical Magazines
- Remove Alumni Boards

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Source: EAB interviews and analysis.

Reorienting Engagement Around Donor Growth

Prioritize Donor Growth Now While Building Long-Term Value

Drive Fundraising Returns Now

Immediate Priority

1

Deepen Prospect Relationships

Develop high-potential constituents outside current portfolios

2

Attract Potential Donors

Bring likely future donors into the advancement pipeline

Build the Conditions for Sustained Value

Long-Term Return

3

Build Constituent Intelligence

Learn who constituents are and what motivates them

4

Grow Alumni Affinity

Strengthen connection and future willingness to engage

5

Expand Institutional Capacity

Mobilize constituents around broader institutional priorities

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Pivoting Required

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Engagement Teams Have Skills Needed to Pivot

Engagement and Fundraising Positions Have Significant Overlap

60% **Overlap in skills listed on engagement job descriptions and fundraising positions**

Director of Alumni Relations

Knowledge, Skills and Abilities Required

- Knowledge of alumni engagement best practices and advancement models
- **Strategic planning** and organizational leadership
- Ability to manage complex budgets and operations.
- **Advanced communication and public speaking abilities**
- Knowledge of board management, volunteer leadership, and governance structures
- **Excellent interpersonal** and relationship-building skills

Director of Development

Knowledge, Skills and Abilities Required

- Securing major grants and gifts
- Planning and implementing development initiatives in conjunction with **strategic planning**
- Ability to conduct research and prepare reports to support development objectives
- **Verbal and written communication skills** and the ability to **present effectively** to small and large groups
- Database management skills
- **Exceptional interpersonal skills** and the ability to interact effectively

Source: ChatGPT analysis of "Development Officer," *The University of New Mexico*; "Director of Alumni Relations," *The University of New Mexico*; EAB interviews and analysis.

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From Broad Participation to High-Value Relationships

Deepening Prospect Relationships

Low-ROI Goal

Engage **as many people** in as many ways as possible

Example:

- Engage 100 people
- 5 are high net-worth individuals
- No post-engaged outreach occurs
- One enters a portfolio incidentally

High-ROI Goal

Engage unassigned, **high-capacity prospects** more deeply

Example:

- Engage 25 people
- 20 are high net-worth
- 9 take a call
- 4 land in portfolios

Other Industries See Success When Focusing on Previously Engaged Customers

5-7x Cheaper to retain an existing customer than to acquire a new one

+25% Potential increase in profit from a 5% improvement in retention

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Source: Gallo, Amy, *Harvard Business Review*, "The Value of Keeping the Right Customers"; Reichheld, Fred, *Bain & Company*, "Prescription for Cutting Costs"; EAB research and analysis.

Extending Who Receives Individual Attention

Transformation #1: Engagement Has One-On-One Constituent Responsibilities

Carnegie Mellon University

Engagement Portfolios

Rising stars and high-capacity alumni get highly personalized attention within an engagement staff's portfolio

SFU SIMON FRASER UNIVERSITY

Double Attention

Engagement metrics and alumni relationship management mirrors development, to consider how prospects are being engaged outside of giving

UNIVERSITY OF WATERLOO

"Ghostwriter"

Designated engagement staff send personalized emails on behalf of frontline staff to tee up a meeting and deepen relationships with prospects

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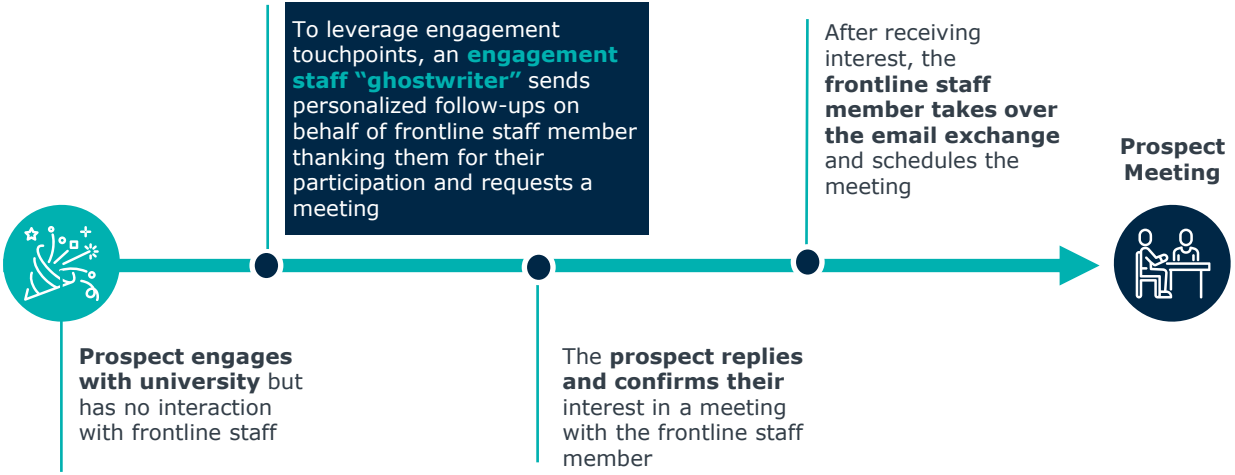
Source: EAB interviews and analysis.

From an Event to a Meeting

Transformation #1: Engagement Has One-On-One Constituent Responsibilities

UNIVERSITY OF WATERLOO

Post-Activity Follow-Up Assigned to Engagement "Ghost Pipeline Manager"



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Source: EAB interviews and analysis.

Deeper Engagement Is Associated with Larger Gifts

Transformation #2: Engagement Advances Donor Upgrades

University of Iowa's Gift Size Accelerator Lives in Engagement

- Engagement tracks constituent engagement depth using a point system
- Data team analyzed the correlation between engagement depth and giving
- Engagement staff use engagement point totals alongside other indicators to identify constituents most likely to increase engagement and giving.



Creating a "Complete" Picture of Engagement

Iowa deploys a simplified engagement submission form for on-campus partners hosting events. It captures only four essential data points to increase compliance.

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Source: EAB interviews and analysis.

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Replace Happenstance

Attracting Potential Donors Intentionally

Low-ROI Goal

Engagement attracts high-capacity prospects only by **happenstance**

- Events: social event that plays into nostalgia or networking
- Volunteering: target asks based on interests or academic major
- Communication: general newsletters, news about incoming students, alumni awards, etc.

High-ROI Goal

Analyze and replicate efforts to attract high-capacity prospects

- Events: provide attendees meaningful access to their interests and making an impact
- Volunteering: target asks to young alumni and HNW prospects
- Communication: specific, approachable information on institutional impact

"Despite historical assumptions, the engagement team right now is less about being outgoing and is more of a logistics team. But their goal should be targeted connection and **engaging people who are going to move the needle**."

Vice President for Advancement, Regional Private University

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Source: EAB interviews and analysis.

Creating a High-End 'Front Porch'

Transformation #3: Engagement Owns HNW Prospect Attraction



Leadership Access

- Presidential dinners to get a peek behind the strategic curtain
- Fireside chats with deans about the research happening in their departments



Academic Interests

- Faculty-led live or pre-recorded lectures on popular topics
- On-campus tours of research facilities to demonstrate impact



Extracurricular Perks

- Invitations to popular athletics games and tournaments
- Volunteering opportunities for music and theater productions



Recognition

- Recognize rising stars within the university community
- Reward top donors and engaged volunteers

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Source: EAB interviews and analysis.

Create a Feedback Loop

Texas State Analyzes Post-Event Metrics to Increase Focus

Analyze Event Metrics	Draw Conclusions	Actions to Improve
Event Attendance & Giving History	**80% to 90%** of attendees from single event were **non-donors**	**Refine invitation criteria** to attract "right" prospects to events
Attendee Survey & Giving Capacity	90% of attendees claim **event strengthened their relationship** to university	**Assign direct follow-up** from gift officers to maintain momentum
Event Budget & Lead Generation	**Event cost does not affect** number of new leads coming in	**Prioritize low-cost events** to attract a range of prospects
Attendee Experience & Giving History	**Donating attendees have preferences** for event structure & topics	**Reshape events around donor preferences** for higher ROI

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Source: EAB interviews and analysis.

Volunteering Creates a Strong Pipeline

Transformation #4: Engagement Connects Alumni to Future Giving

Volunteering Attracts Younger Generations

82%
Of 12 to 25-year-olds have engaged in some form of service

47%
Of Gen Z volunteers in higher ed, while only 40% donate

54%
Of Millennials identify as volunteers

Non-Volunteers	Volunteers
Average lifetime gift - $13K	Average lifetime gift - $180K
25% donated at least once to their alma mater in the last year	72% of gifts over $10K in the past year were given by active volunteers
5% report feeling "very connected" to their alma mater	36% report feeling "very connected" to their alma mater

Source: "2026 National Alumni Survey Report," *CMAC*; *Ruffalo Noel Levitz*, 2025 National Alumni Donor Survey Report; Weatherford, Greg II and A Quian, "The Power of Youth Service," *Gallup*, March 9, 2026; CivicScience, "Americans Are Volunteering More," *CivicScience*, April 29, 2026; EAB interviews and analysis.

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Building a Volunteer Program

A Disciplined Operating Model for Long-Term Volunteer Value

Build a Common Management Foundation

Staffing and Structure

Appoint a central program owner and volunteer liaison. Define each role's responsibilities and training.

Track and Follow-Up

Maintain CRM records of volunteers' interests and feedback to understand when to offer new opportunities.

Tailor Management to the Volunteer Role

Types of Volunteers

Volunteers typically fall within these categories: one-off, programmatic, ambassador, and strategic leader.

Management Approaches

Different volunteers need different levels of vetting, communication, evaluation, and succession planning.

Provide Meaningful Service to Cultivate Major Gifts

Who to Prioritize

People with mission affinity and financial capacity. Offer important roles related to their interests, like advisory or campaign councils.

Service and Social Impact

Do not make volunteering contingent on giving. Demonstrate impact before moving to philanthropy.

Setting Up Volunteer Management Is No Simple Task

"You need to **treat volunteers as a critical function** to have exceptional volunteers. **It takes a lot in the beginning**, creating clear goals about how to select and use volunteers, but once you have a structure in place it can repeat itself."

Cindy Fredrick, Senior AVP of Engagement
University of Virginia

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Source: EAB interviews and analysis.

Impact Increasingly Important

Frontloading What Potential Donors Care About Most

70%

Of alumni need to believe their **gift amount matters**

66%

Of alumni rate their alma mater's ability to **demonstrate how their gift is used as critical.**

Affluent Donors[1] Are Less Confident in Gift Impact

According to a 2025 Bank of America Study, affluent donors do not feel educated on the social impact of their gifts. A mere 20 percent of affluent donors track their giving's effectiveness, and **only 40 percent report that their gift is having the intended effect**.

1) Defined as households with a net worth of more than $1 million (excluding the value of their primary home) and/or an annual household income of $200,000 or more.

Source: *Ruffalo Noel Levitz*, 2025 National Alumni Donor Survey Report; "Navigating Change with Purpose | How Affluent Households Shaped Philanthropy," *Bank of America*; EAB interviews and analysis.

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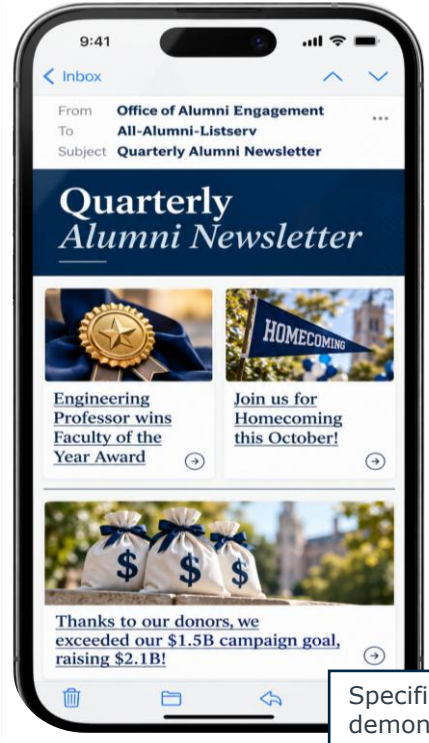
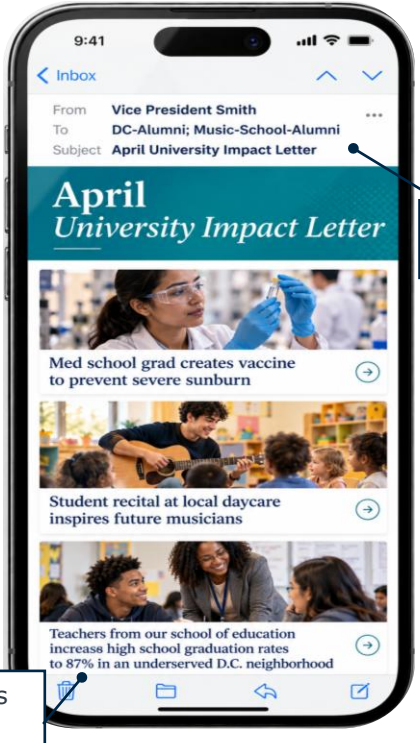
Clearly Communicate Impact

Transformation #5: Engagement Owns Educating Constituents on Impact





Segmented outreach

Specific numbers demonstrating tangible change

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Source: EAB interviews and analysis.

Drive Fundraising Returns Now: Deepening and Attracting Potential Donors



Discussion Questions

- Is your engagement team responsible for deepening and attracting relationships with high net worth (HNW) individuals? If yes, how is that measured?
- What barriers are preventing pipeline connectivity between engagement and development? Are there solutions you've considered or tested to overcome them?

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Building Constituent Intelligence

Enabling Personalized Engagement and Targeted Development Outreach

Low-ROI Goal

Engagement **tracks attendance** or interactions for events they host

- Interest tracking: nonexistent unless event title has topic listed, nothing tracked for communications
- Data collection: limited to advancement-led efforts, not capturing engagement occurring elsewhere on campus

High-ROI Goal

Alumni and **constituent interests and affinity** are collected based on their signals and actions

- Interest tracking: staff input prospect interests into a central database for both large and small interactions
- Data collection: pulled from a variety of university avenues, from emails to college-based events

Personalization Produces Measurable Commercial—and Advancement—Value

96%
of marketers reported that personalized experiences have increased sales

87%
of customers value brands that recognize them and understand their history

73%
of shoppers are more likely to buy when recommendations are relevant to their preferences

Source: *Five9,* 2025 Customer Experience Report; A. Rollins, *Attentive*, 2026 Personalization Trends: What 1,000+ Shoppers Expect From Brands; *HubSpot*, The State of Marketing; EAB interviews and analysis.

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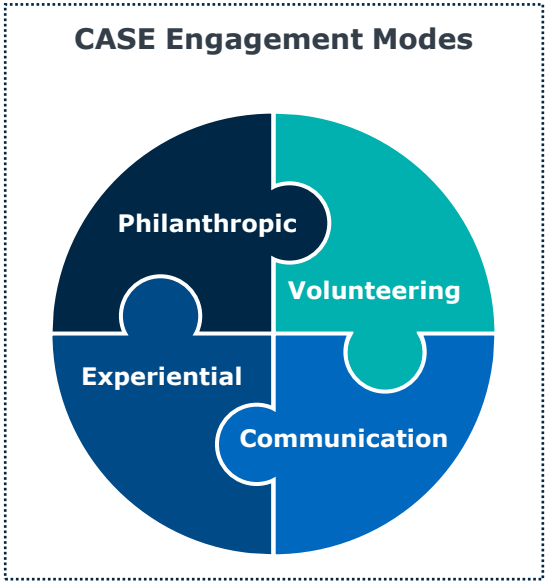
CASE Metrics Fall Short of Actionable Data

CASE Categories Organize Activity but Not Constituent Intelligence



> "CASE metrics are great, but they **don't tell me anything about the prospects when I'm trying to schedule a visit**. I know they volunteered but I don't know for what. I know they've given but I don't know to what. I know they've opened an email, but I don't know if they even liked that email"
>
> *Chief Development Officer*
> *Regional Private University*

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Source: EAB interviews and analysis.

Choose an Engagement Score You Can Sustain



5-Star Score

- Constituents receive 0-5 stars for overall engagement and for the 4 CASE modes
- Scores are weighted with communication and experiential accounting for 20%, and volunteering and philanthropy for 30%

4-Category Score

- 162 possible points based on 4 buckets: connections, activities, giving, and digital
- Connections are based on characteristics like being alumni, while activities giving, and digital are more active, current choices

100-Point Score

- 25 possible points for each of the CASE modes, 100 points total
- Points are awarded based on things like type of volunteering, consecutive years of giving, and five-year engagement trends

Weigh the Essentials

Weight scores based on most valuable inputs

Mixture of Scores

Include passive and active variables

Attainable Metrics

If it's easy to measure, track it

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Source: EAB interviews and analysis.

Building Actionable Constituent Intelligence

Transformation #6: Engagement Records Actionable Constituent Data

Current Barriers	Promising Practices
Inconsistent engagement data from campus partners	Simplified dean submission form with minimal inputs: event title, topic, alumni name
No way to track donor interests within the CRM	Engagement interest codes get tagged to each constituent
Attendance is captured, but not motivations or influences	Post-event surveys that asks if the event strengthened their connection with the university
Constituent preferences live in staff notes or memories	Add a CRM maintenance goal for all staff to ensure records are updated

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Source: EAB interviews and analysis.

Building Constituent Intelligence



Discussion Questions

- How is your engagement team collecting and inputting constituent intelligence?
- What metrics or goals (individual or team) would be helpful to ensure this work happens?

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Treat Engagement as an Institution-Wide Capability

Don’t Recreate the Wheel

Low-ROI Goal

Engagement creates **net-new opportunities** for alumni and constituents

- Each opportunity costs significant time and money, often without the guarantee of a return

High-ROI Goal

Engagement **utilizes existing campus opportunities** to engage alumni and constituents

- Connecting alumni to other parts of campus lowers the investment in engagement activities

Institutional Affinity Is Strongly Associated with Philanthropic Intent

A 2025 study found that alumni who feel “very connected” to their alma mater are…

24x

more likely to donate than those who feel very disconnected

81%

more likely to rank their alma mater as a top philanthropic priority

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Source: *Ruffalo Noel Levitz*, 2025 National Alumni Donor Survey Report; EAB interviews and analysis

Most Alumni Engagement Already Happens Beyond Advancement

"Advancement leaders need to take a step back and understand all the ways an institution collectively engages people. For us, D1 Athletics are huge. Our arts and entertainment venues are huge. Our pre-college camps are huge. **We connect with thousands of alums and friends through these activities**. Some of us still think that without an alumni relations officer embedded in every school, we're not engaging people. **That kind of mass engagement is already taken care of outside of advancement**."

Jonathan Purvis, VP of Advancement and Marketing
Butler University

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Source: EAB interviews and analysis.

Route Constituents to the Right Institutional Partner

Transformation #7: Engagement Becomes the Connector, Not the Provider

Areas Engagement Should Connect Alumni To	Connection Strategies
Career Support	Case-By-Case
Life Stage Engagement	Virtual Engagement Officer
Continuing Education	
Talent Support	CRM Data
Athletics	AI Chatbot
Research	

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Source: EAB interviews and analysis.

AI Can Scale Engagement's Connector Role

Rice's 'Sammy' Accelerates Engagement's Alumni Connections

RICE ALUMNI

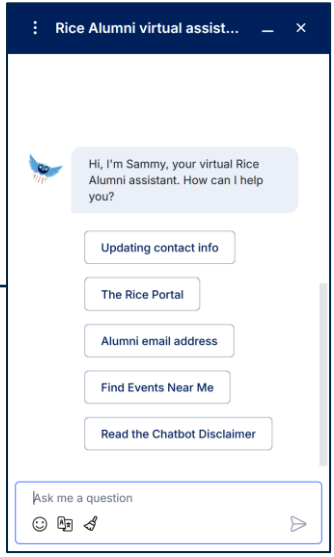
Alumni Virtual Assistant Capabilities

Customized Responses

Typed questions get a customized response (e.g., asking 'what events are happening in my city?' provides registration links)

FAQ Options

Most frequent questions pop up as clickable options



'Sammy' Gives Time Back

80%

Of inquiries handled by 'Sammy' giving time back to staff for high-value engagement

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Source: EAB interviews and analysis.

Growing Alumni Affinity



Discussion Questions

- Which areas on campus beyond of advancement build alumni affinity?
- How much time does your engagement team focus on net-new alumni affinity building efforts? Do you wish it was different?

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Claim Credit for Outcomes Beyond Fundraising

Low-ROI Goal	High-ROI Goal
Advancement measures value of engagement only through **advancement-specific goals** • Correlations are run between events/volunteering and philanthropic giving	Advancement tracks and shares broadly contributions to **campus-wide outcomes** • Engagement tracks the impact their activities have on enrollment, retention, student outcomes, etc.

"Something we're more interested in recently is **external university revenue generation that comes out of alumni work**. Anything that can have ROI, even if it's not tracked within our department. It's a powerful way to set us up as **intentional and strategic partners** on campus."

Ophelia Yu, Senior Director, Alumni Relations
Simon Fraser University

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Source: EAB interviews and analysis.

Non-Fundraising ROI

Transformation #8: Engagement Gets Credit for Institutional Outcomes

Increase Enrollment	Amplify Political Advocacy	Expand Experiential Learning	Boost Student Retention	Improve Post-Graduation Outcomes
Alumni postcards and outreach to admitted students increase yield	Conversations with local lawmakers drive support for higher education	Connections with alumni business owners can lead to co-ops	Alumni mentors increase student success and graduation rates	Events for both students and alumni to network increase hiring

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Source: EAB interviews and analysis.

Expanding Institutional Capacity



Discussion Questions

- Where is your team's contribution to institutional priorities recognized or unrecognized?
- What metrics could you provide leaders to demonstrate influence?

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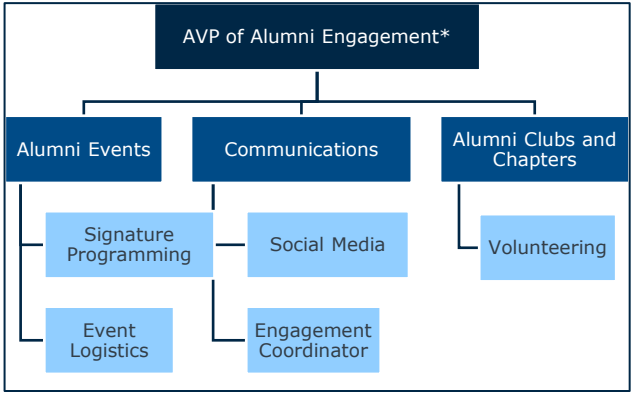
Redesign Engagement Around ROI, Not Activities

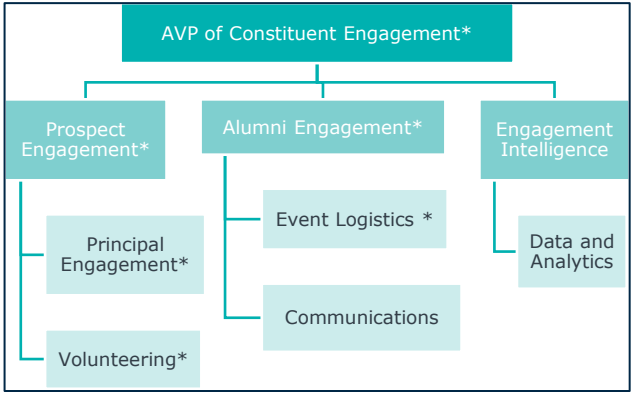
Traditional Model: Activity Coverage

Focus: events, social media, volunteering, and emailing



Modern Model: Donor Growth

Focus: prospect relationships and knowledge building



* Indicates that they hold a portfolio

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Source: EAB interviews and analysis.

Three Decisions Will Initiate the Transformation

Choose the Goal, Define Success, and Assign Ownership



Choose the Goal

Where is the division now? Where is transformation needed urgently?



Define Success

How will you measure the short-term goal and long-term goal?



Assign Ownership

Assign a leader to explore vision execution and provide them with clear parameters.

Research Re-Cap: Reorienting Engagement Around Donor Growth

Drive Fundraising Returns Now

1) *Deepen Prospect Relationships*
2) *Attract Potential Donors*

Build the Conditions for Sustained Value

3) *Build Constituent Intelligence*
4) *Grow Alumni Affinity*
5) *Expand Institutional Capacity*

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Source: EAB interviews and analysis.

Next Steps



Share Reflections with Engagement AVP



Implement New Outcome Goals or Metrics



Bring This Research to Your Team

(December 3rd, 1pm ET)

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