EAB

The Hidden Indicators of High Performance

A "Moneyball" Approach to Fundraising Productivity

Advancement Advisory Services

Lessons From Thousands of Fundraisers

EAB's Advancement Benchmarking Database

11,000+
Fundraiser records in the dataset

250+
Institutions contributing data

5 Years
Of benchmarking data

$75B+
In fundraising activity tracked

> My board was able to see that I wasn't just using instinct or past experience, but we were making strategic decisions about how we were going to align the future of the organization around **a rich, deep dataset**.
>
> *Rich Bundy*
> *Foundation President, University of Cincinnati Foundation*

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Strong Decisions Balance Data with Context

> The data can tell you where the patterns are, but **the strongest leaders know that the pattern is not the prescription**. Benchmarks should challenge our assumptions and sharpen our decisions, not make them for us. You can be perfectly aligned to the benchmark and still make the wrong decision for your institution."
>
> *Vice President of Advancement, Private University*

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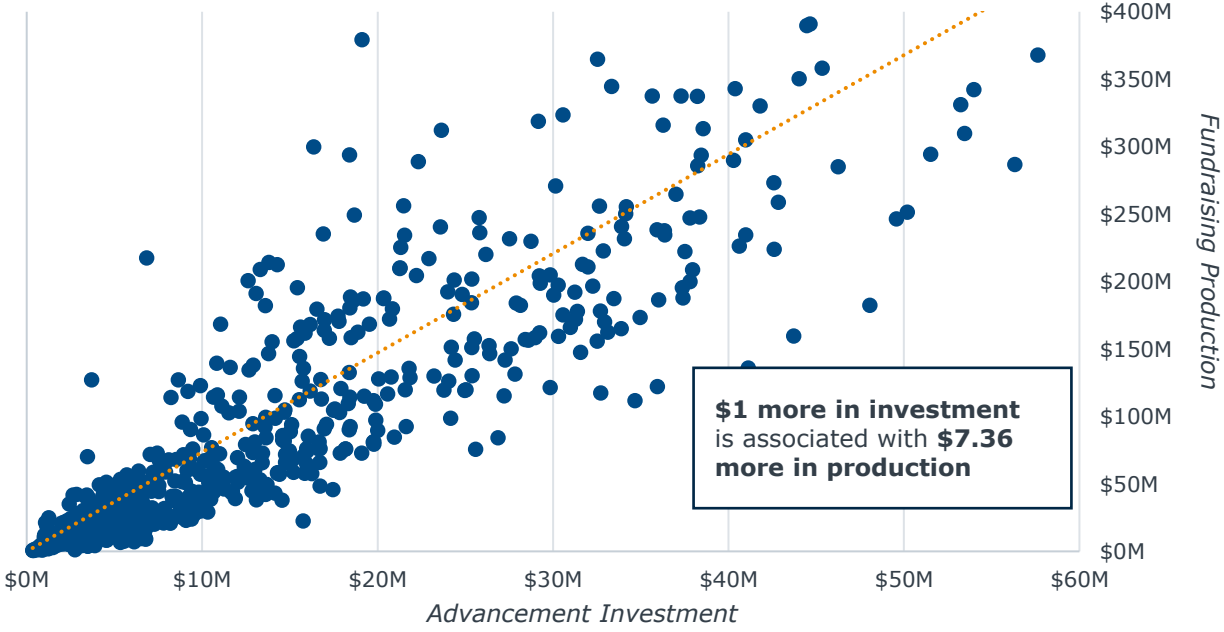
Source: EAB interviews and analysis.

Advancement Investment Pays Off

Each Dollar Spent Is Associated with $7.36 in Additional Production

Advancement Investment v. Fundraising Production

EAB Benchmarking, FY2021-FY2025



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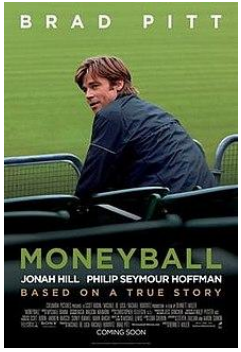
Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Winning Without Spending Top Dollar

"Moneyball" Metrics Help Resource-Constrained Teams Compete



Oakland A's Recruit Undervalued Players Based on Key Metrics

Following 2001 season, Oakland Athletics **lose three talented free agents** to larger market teams

Rather than traditional **scout observations**, A's recruit inexpensive players based on **data analyses** of key metrics

A's General Manager Billy Beane identifies on-base percentage and total bases earned as **key indicators of player performance**

Oakland A's execute **20-game winning streak** and make 2002 playoffs with one of **lowest budgets in the league**

Source: Mark Adams, "The Man Behind Moneyball," https://www.domo.com/blog/the-man-behind-moneyball-the-billy-beane-story; Ryan Wright, "Moneyball," http://bleacherreport.com/articles/858470-moneyball-a-look-inside-major-league-baseball-and-the-oakland-as; EAB interviews and analysis.

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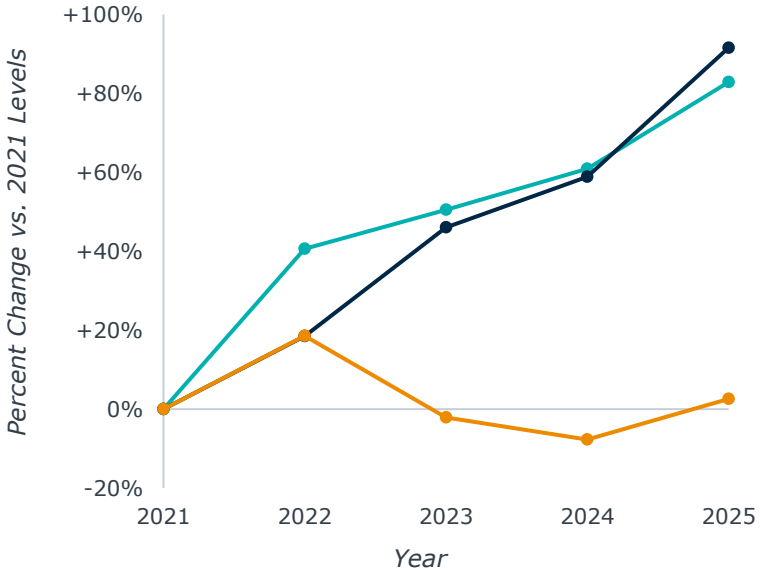
Greater Scale Has Not Improved Efficiency

Investment and Fundraising Have Expanded Without Notable ROI Growth

Percentage Change at the Median Institution Compared to FY2021 Levels

Advancement Benchmarking Data, FY2021-FY2025



Advancement Investment

+92% +$6.2M

Fundraising Production

+83% +$31M

Return on Investment

+3% +$0.15

1) Dollar figures are not adjusted for inflation. In 2025 dollars, advancement investment increased 61% and fundraising production increased 54% from FY2021 to FY2025. ROI is unaffected by inflation adjustment.

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Two Analysis Levels Reveal Performance Drivers

Each View of Fundraising Performance Answers Different Questions

Division-Level Analysis

- Unit: advancement shop
- Outcome: fundraising ROI
- Question: What distinguishes the most efficient shops?



Fundraiser-Level Analysis

- Unit: individual MGO record
- Outcome: production and fundraising value
- Question: What conditions support higher-performing fundraisers?

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Top ROI Performance Spans Institution Types

ROI Quartiles Establish a Clear Efficiency Gradient

Five-Year Average of Annual Median ROI, by Quartile, FY2021–FY2025

Bottom Quartile	Second Quartile	Third Quartile	Top Quartile
$3.00	$4.88	$6.95	$11.01

Top Quartile Representative of the Broader Benchmarking Population

Average Annual Composition of U.S. Benchmarking Institutions, FY2021–FY2025

Institution Characteristic	All Participants	Top Quartile
Public	55%	54%
Private	45%	46%
Large[1]	66%	63%
Small	34%	37%

1) "Large" institutions enroll 10,000+ total students. "Small" institutions enroll fewer than 10,000 students.

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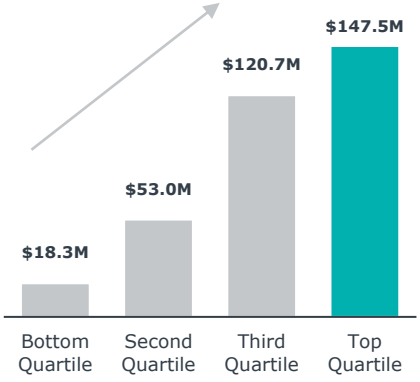
Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

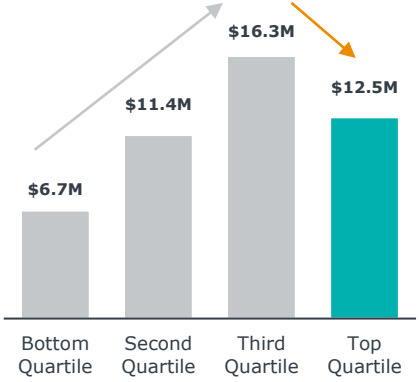
Top Quartile Breaks the Spend-to-Grow Pattern

Top-ROI Shops Raise More Than Third Quartile Shops Despite Less Investment

Median Fundraising Production and Advancement Investment, by ROI Quartile, FY2021-FY2025



Fundraising Production



Advancement Investment

Top Quartile Shops Doing More With Less

+$26.8M

More raised by top quartile shops compared to third quartile shops

-$3.8M

Less spent by top quartile shops compared to third quartile shops

+$4.06

More raised for each dollar spent by top quartile shops

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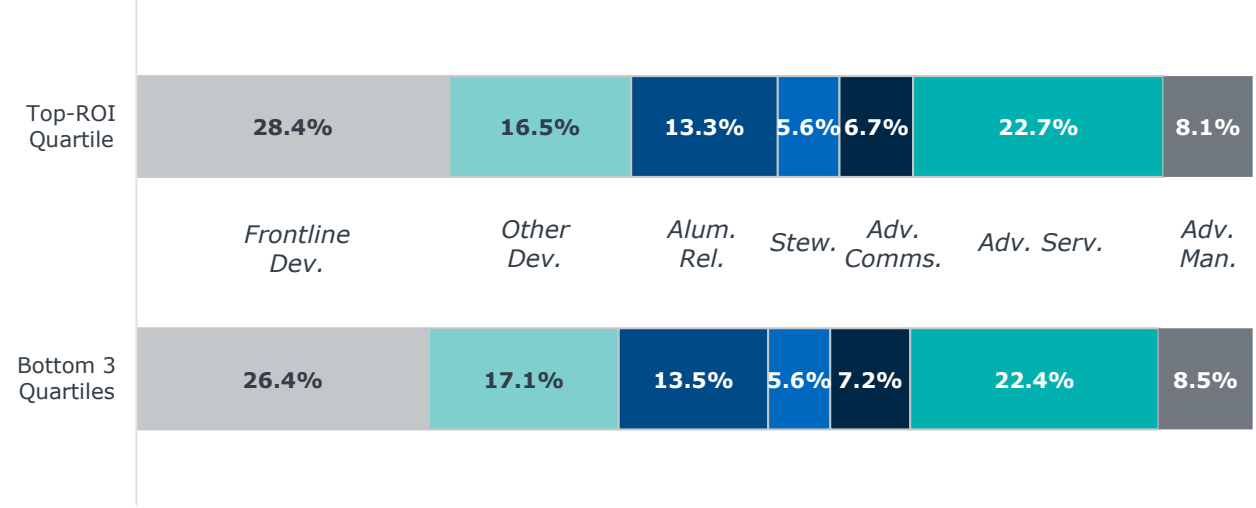
Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Staffing Mix Does Not Explain High ROI Achievement

Top-ROI Shops Look Similar Overall

Average Staff Allocation for Top-Quartile ROI Institutions, FY2021–FY2025



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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Five Hidden Indicators Challenge Assumptions





Common Assumption		Evidence-Based Indicator
More high-net-worth[1] prospects improve ROI	1 **Prospect Focus**	High-ROI shops prioritize coverage and convert $1M+ prospects
Fundraiser ROI plateaus by year three	2 **Tenure Advantage**	Fundraiser tenure continues to lift ROI well beyond year three
Smaller portfolios perform better	3 **Portfolio Quality**	Portfolio composition matters more than size
More activity drives performance	4 **Outcome Metrics**	Average gift and proposal value matter more than activity volume
Unit-based MGOs perform better	5 **Org Structure**	Central MGOs raise more

1) "High-net-worth" refers to prospects with a wealth capacity above $100k

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Prospect Abundance Does Not Explain Performance

ROI-Optimized Shops Carry Fewer Top Prospects…

Prospect Volume, by ROI Quartile, FY2021–FY2025

	Third Quartile	Top Quartile	Difference
Total $100k+ Prospects	7,097	4,950	-30%
Total $1M+ Prospects	550	327	-41%
Frontline Fundraisers	30	24	-20%
$100k+ Prospects per Frontline Fundraiser	246	240	-3%

…Yet Raise Far More With That Prospect Base

Fundraising Production, by ROI Quartile, FY2021–FY2025

	Third Quartile	Top Quartile	Difference
Total Fundraising Production	$120.7M	$147.5M	**+22%**
Fundraising Production Per Frontline Fundraiser	$3.70M	$5.67M	**+53%**

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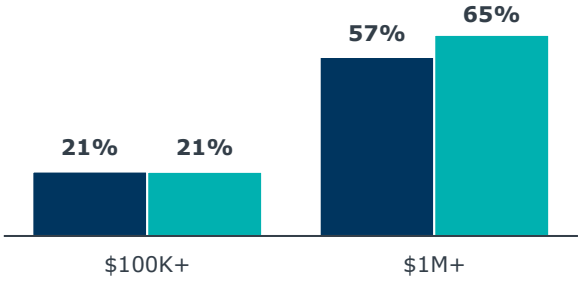
Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Top-ROI Shops Use Capacity More Effectively

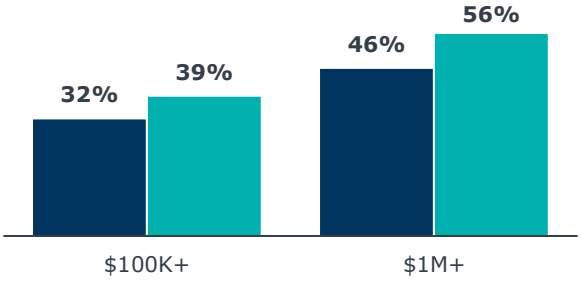
Top-ROI Shops Prioritize $1M+ Prospects for Assignment

Share of Rated Prospects Assigned to a Fundraiser, FY2021–FY2025



Top-ROI Shops Convert More Rated Prospects Into Donors

Share of Rated Prospects Who Have Given in the Past Five Years, FY2021–FY2025





Top Quartile Shops Make Bolder Bets With Scarce Portfolio Capacity

21%

Assignment rate of $100k+ prospects across the top two quartiles

+8 pts

Higher $1M+ assignment rate

1.5x

Dollars per assigned $100K+ prospect relative to Q3

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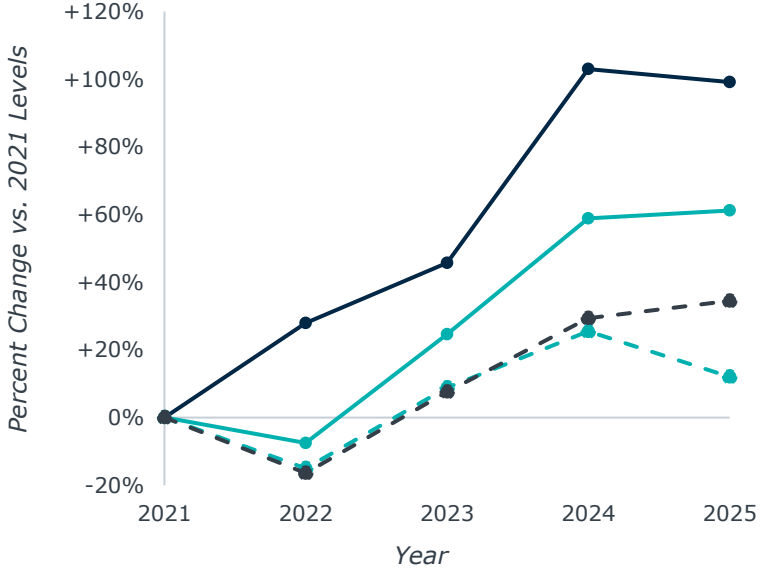
Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Assignment Has Not Kept Pace With Prospect Growth

Shops Have Identified More Capacity Than Portfolios Have Absorbed

Percent Change in Median Prospect Counts Compared with FY2021

Advancement Benchmarking Data, FY2021-FY2025



Total $1M+ Prospects

+99% +263

Total $100k+ Prospects

+61% +2,704

Assigned $1M+ Prospects

+35% +82

Assigned $100k+ Prospects

+12% +138

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Prospect Focus

Lessons for High Performance

- High-capacity prospect pools are expanding faster than prospects are being added to fundraiser portfolios.
- High-ROI shops make better use of their prospect pools through stronger high-capacity assignments and donor conversion.

Decisions CAOs Need to Make Now

- **Portfolio capacity:** Reserve scarce portfolio space for the highest-capacity prospects.
- **Reassignment discipline:** Set clear triggers for returning stalled high-capacity prospects to the pool.

Putting the Evidence into Practice

University of South Dakota Moves Modeled Principal-Gift Prospects Into Cultivation

- A $15K modeling effort surfaced 300+ overlooked principal-gift prospects, expanding the high-capacity pool that the data says to prioritize.
- South Dakota mobilized early-tenure fundraisers to move them into cultivation; those prospects generated $17M in one year and $61M across a six-year span.

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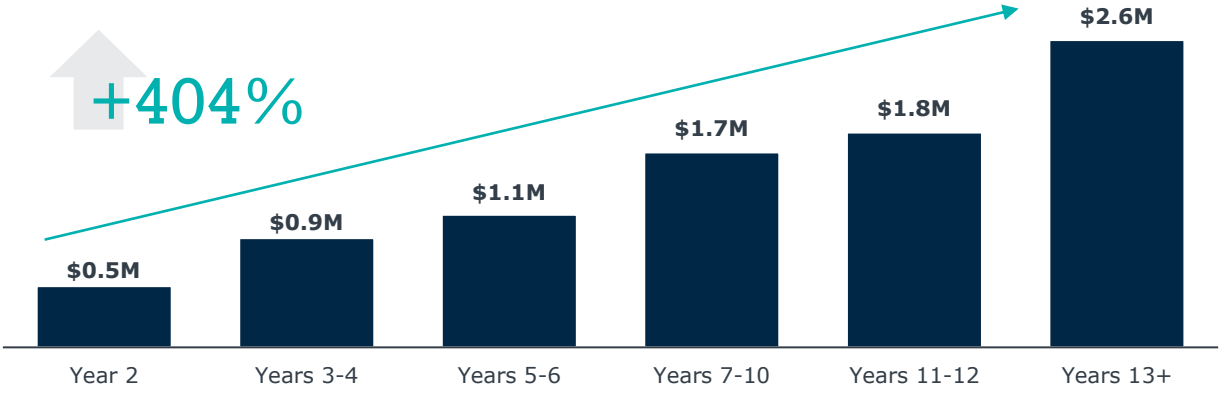
Fundraiser Productivity Builds With Tenure

MGOs with 13+ Years of Tenure Raised 5x More than Fundraisers in Year 2

Median Dollars Raised per MGO, by Tenure, FY2021–FY2025



+19% Higher median ROI at institutions with a larger share of long-tenured MGOs

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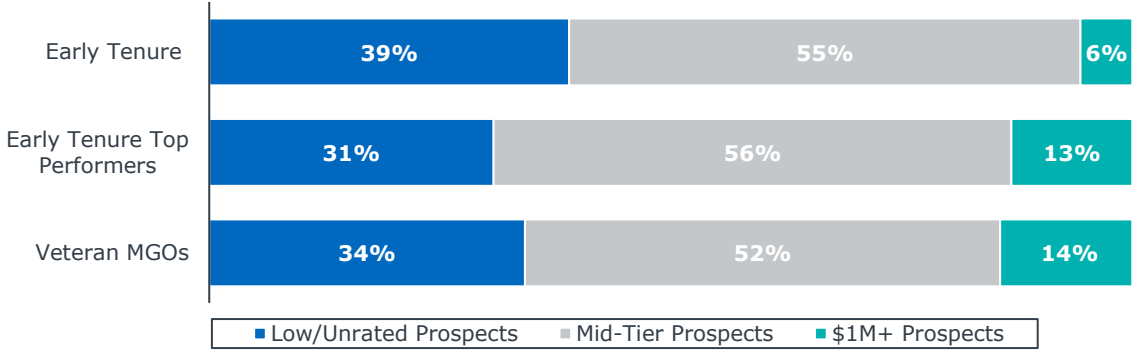
Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Top New MGOs Start With Veteran-Like Portfolios

Top Early-Tenure Performers Manage Veteran-Like Portfolio Capacity

Median Share of MGO Portfolio by Capacity Tier, Tenure, and Performance, FY2021–FY2025



Better Starting Portfolios Help Close the Experience Gap

2.2x

Share of $1M+ prospects compared with other early-tenure MGOs

8 pts lower

Share of low- or unrated prospects compared with other early-tenure MGOs

1) Early tenure = 12–23 months in role; top performers = top quartile by durable revenue; veteran MGOs = 7+ years in role.
2) Durable revenue calculates total dollars raised without a fundraiser's largest gift.
3) Low/Unrated prospects include prospects with a wealth capacity below $100k.

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Tenure Advantage

Lessons for High Performance

- Fundraiser productivity builds with tenure, making retention an important part of sustaining high ROI.
- Strong starting portfolios distinguish new fundraisers who achieve early success.

Decisions CAOs Need to Make Now

- **Retention investment:** Concentrate retention efforts on high-performing fundraisers whose departure would carry the greatest cost.
- **Starting portfolio allocation:** Give promising new MGOs enough high-capacity prospects to accelerate their early performance.

Putting the Evidence into Practice

Formal Career Ladders Help Retain Productive Fundraisers

- High-performing shops offer two advancement paths (i.e., management or high-performing individual contributor), with increasing gift and portfolio expectations at each level.
- Giving fundraisers a credible future at the institution supports the retention decision above, protecting the large production advantage that comes with tenure.

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Portfolios Shrink Across the Board

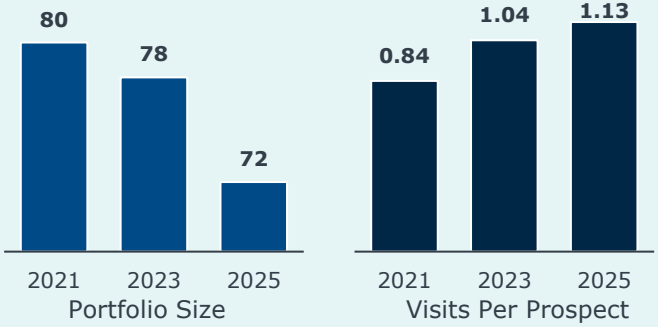
Smaller Portfolios Gained Momentum in the Late 2010s

"**Shrinking portfolios** to give all fundraisers access to the best prospects—so that they're able to concentrate on only those prospects capable of and likely to make a gift and so that their fallow prospects are available to be solicited by other successful fundraisers…**will sharpen the focus on raising major gifts**."

David Lively
Vice President for Alumni Relations and Development, Northwestern University

Portfolios Have Slimmed Down and Visits Per Prospects Up

Portfolio Size and Visits per Prospect for Median Fundraiser, FY2021–FY2025



-10%

Drop in median portfolio size, FY21-FY25

+35%

Growth in median visits per prospect, FY21-FY25

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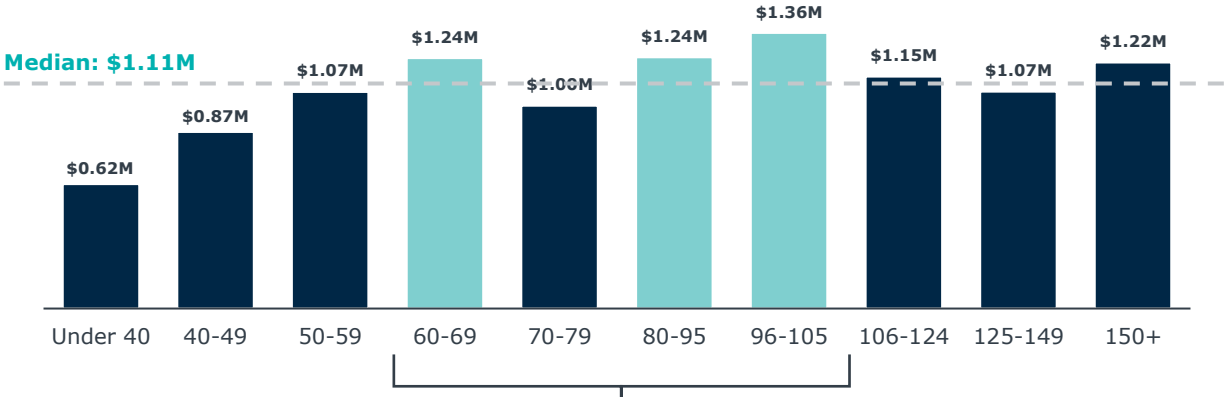
Source: D Lively, "Managing Major Gift Fundraisers; a Contrarian's Guide," CASE, 2017; EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Portfolio Size Alone Does Not Predict Performance

Optimal Performance Peaks Between 60 and 105 Prospects

Median Dollars Raised per MGO, by Portfolio Size Band, FY2021–FY2025



Portfolio Size Doesn't Predict Performance on Its Own

96-105
Size of the highest performing portfolio band

60-69
Smallest portfolio size band raising above the median

$1.11M
Median production per MGO across all portfolio size bands

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

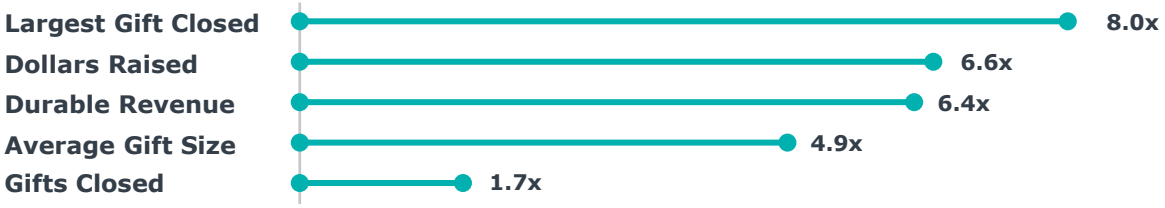
Beyond the Size Debate

Nearly Identical Portfolio Sizes Produce Large Differences

MGO Portfolios Holding Between 60 and 105 Prospects, by Dollar Raised Quartile, FY2021–FY2025

Metric	25th Percentile	75th Percentile	Difference
Portfolio Size	81	83	+2
Largest Gift Closed	$150K	$1.20M	+$1.05M
Dollars Raised	$436K	$2.86M	+$2.43M
Durable Revenue	$234K	$1.50M	+$1.27M
Average Gift Size	$38K	$185K	+$147K
Gifts Closed	10	17	+7

Difference Between 25th and 75th Percentiles



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Capacity Mix Separates High and Low Performers

Top Performers Hold Richer Portfolios with Less Dilution

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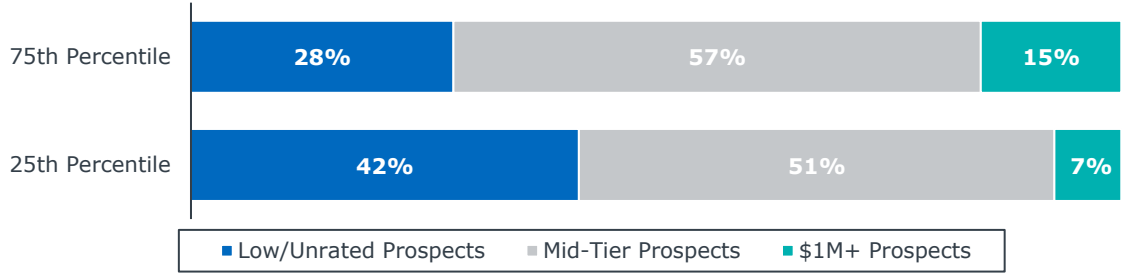
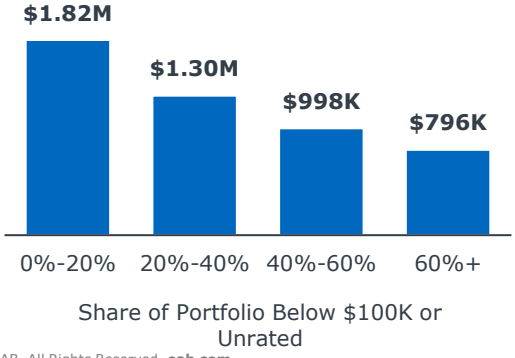


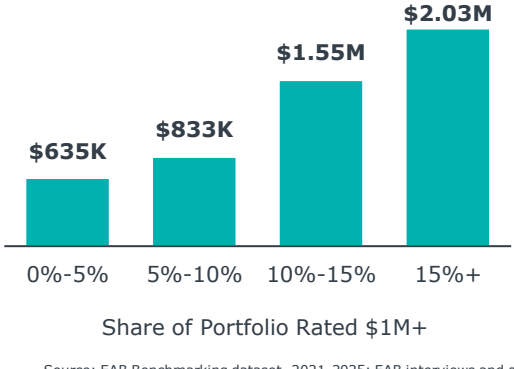
Production Falls with Low-End Dilution

Median Dollars Raised per MGO



Production Rises with $1M+ Share

Median Dollars Raised per MGO



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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Portfolio Quality

Lessons for High Performance

- Similarly sized portfolios can produce very different results, making prospect quality a more useful management priority than the number of assigned names.
- Portfolios concentrated in high-capacity prospects support stronger production; low-capacity and unrated prospects dilute that opportunity.

Decisions CAOs Need to Make Now

- **Portfolio standards:** Establish guardrails for the shares of high-capacity and low-capacity prospects in each portfolio.
- **Review cadence:** Make portfolio cleanup and replacement a recurring management practice.

Putting the Evidence into Practice

Kansas State Turns Portfolio Quality into a Score

- Kansas State's credit score-like "Optimal Portfolio Score" measures sustainability and compares each MGO with institutional averages and performance goals.
- The common score gives managers a practical trigger for recurring cleanup and prospect replacement.

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Activity Dominates Fundraiser Scorecards

Most Shops Track the Same Five Metrics

Five Core Metrics Emerged

Most Shops Track the Following:

- Visits: 100% (n=60)
- Solicitations/proposals: 93% (n=56)
- Dollars raised: 83% (n=50)
- Commitments: 73% (n=44)
- Qualifications: 62% (n=37)

48% of institutions segment metrics/targets by fundraiser role/tenure (n=29)

Less Common But Interesting Metrics

- Yield rate
- Dollar goal based on salary multiplier
- Dollar goal based on prospect close probability
- Portfolio penetration
- Unique visits
- Multi-unit corporate campus visits
- Internal faculty meetings / dean engagement
- Close rate
- Assists/shared credit
- Referrals

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Source: EAB Advancement Advisory Services Metrics Survey, March 2026.

Leaders Question Volume-Based Scorecards



Metrics need to be adapted. **We currently incentivize visits whereas other models focus on quality over quantity**. Our next evolution of metrics will be geared toward principal gifts and more about quality interactions.

AVP for Development, Public Research University

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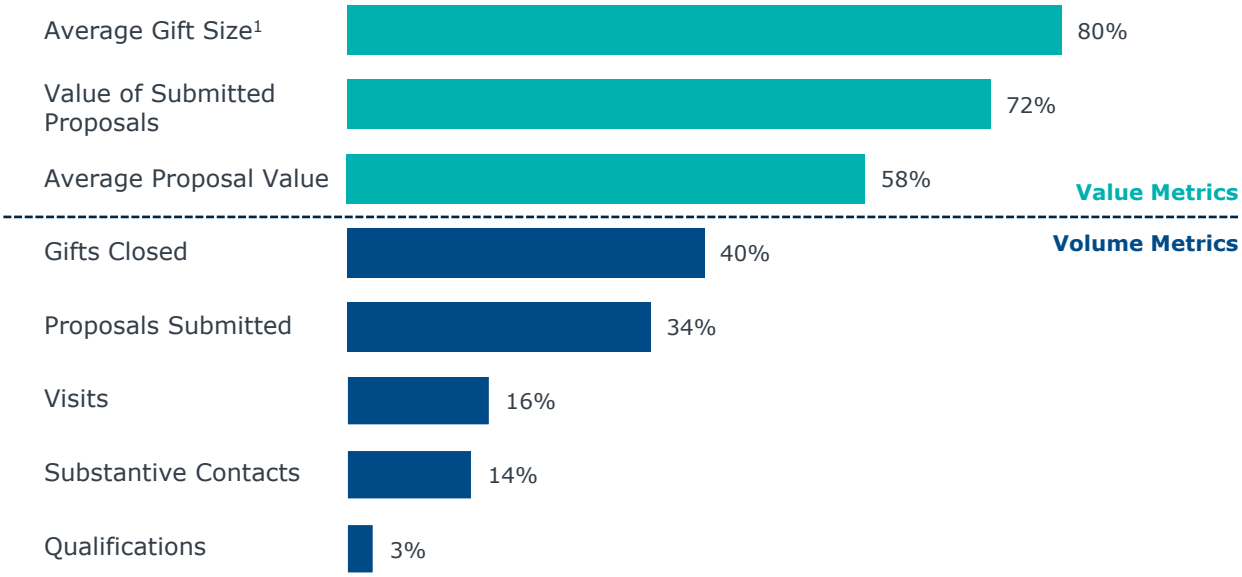
Source: EAB interviews and analysis.

Common Metrics Are Weak Signals of Performance

Average Gift Size and Average Proposal Value Outperform Volume Metrics

Value Metrics Outperform Volume Metrics

Correlation with Dollars Raised, by MGO Output



1) Average gift size is mathematically related to total dollars raised, so its correlation partly reflects that relationship.

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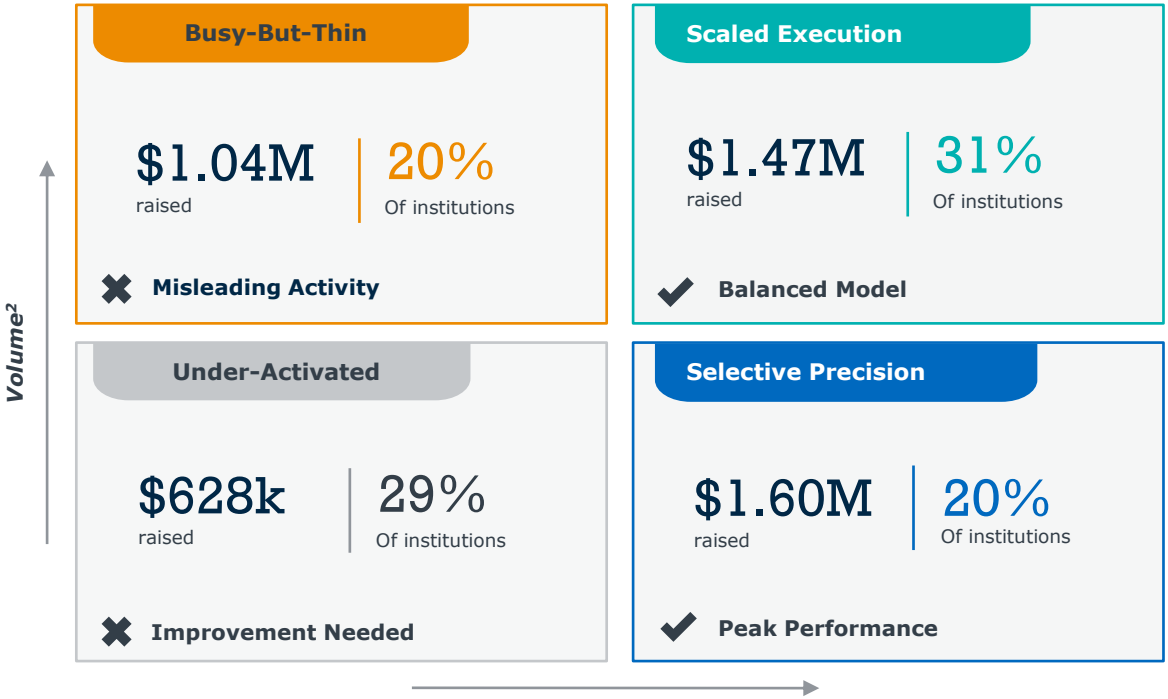
Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Fundraisers Take Different Paths to Performance

Four Fundraiser Performance Patterns Based on Activity and Value



1) Value score averages standardized institutional medians for durable revenue, average gift size, and average proposal size.
2) Volume score averages standardized institutional medians for visits, proposals, and gifts.

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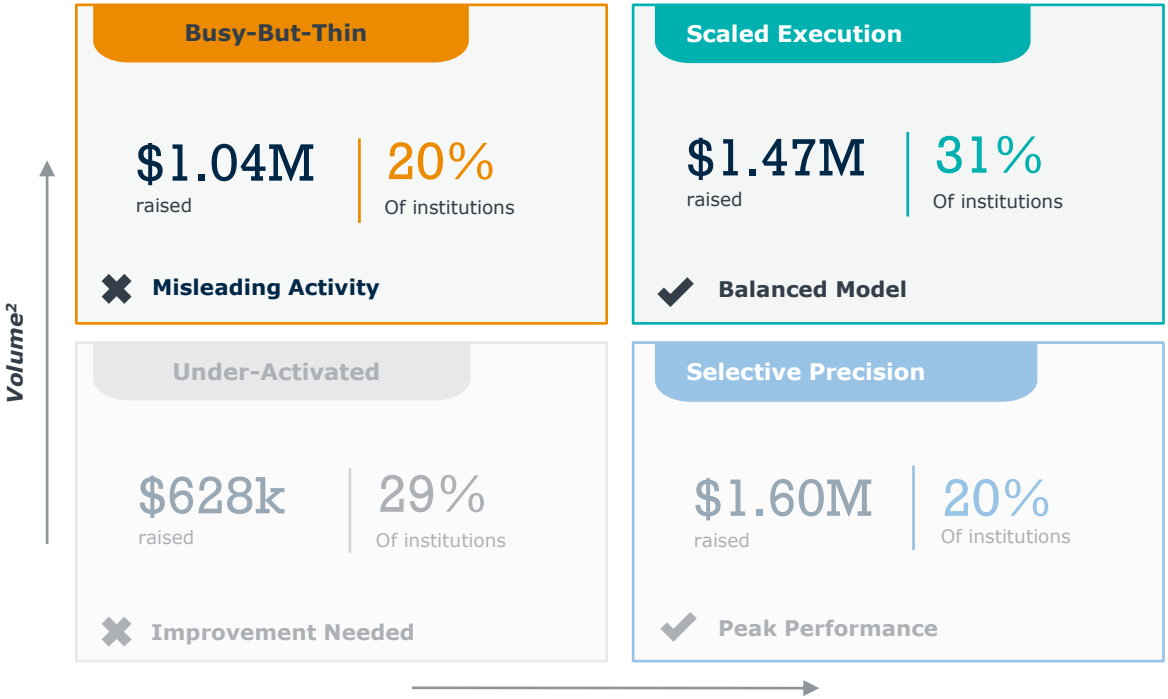

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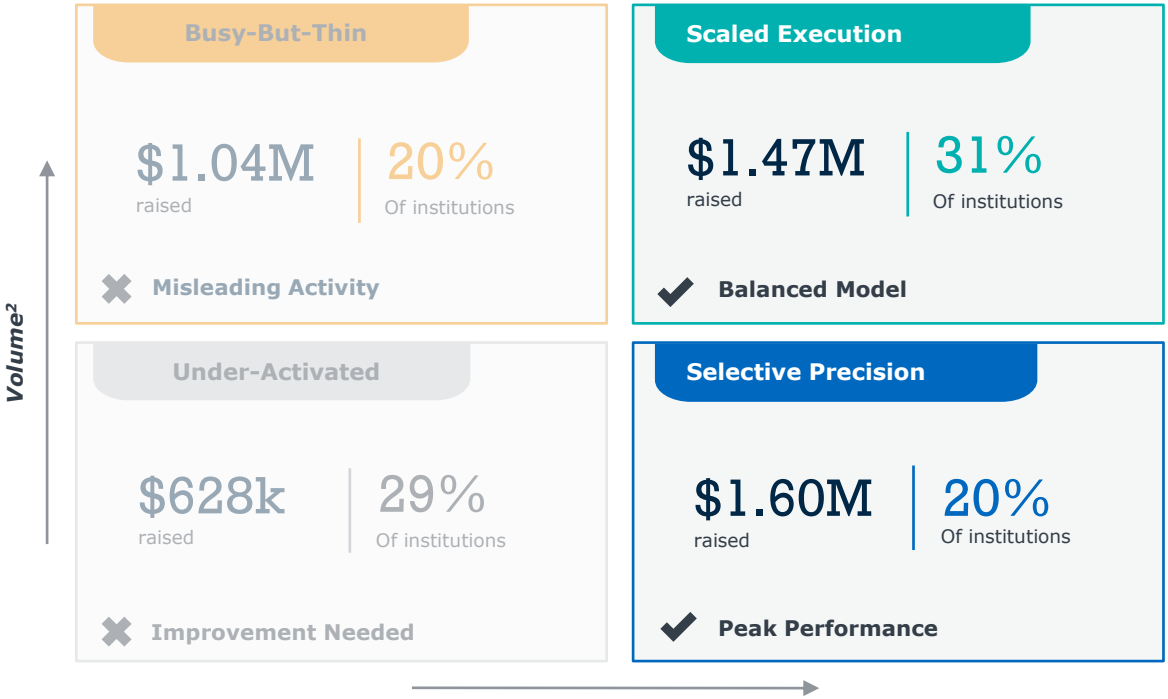
Fundraisers Take Different Paths to Performance

Four Fundraiser Performance Patterns Based on Activity and Value



1) Value score averages standardized institutional medians for durable revenue, average gift size, and average proposal size.
2) Volume score averages standardized institutional medians for visits, proposals, and gifts.

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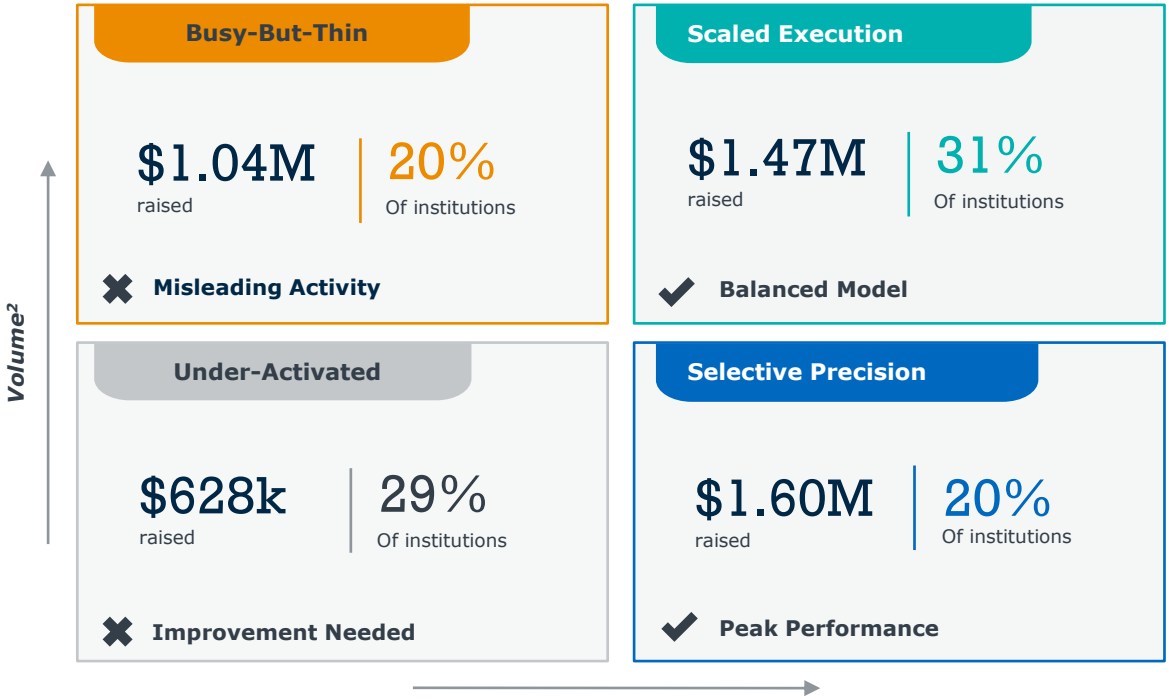

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Common Scorecards Reward Busy-but-Thin Results

The Busiest Fundraisers Close More Gifts but Raise About 30% Less

Metric	Busy-but-Thin	Selective Precision
Gifts Closed	**23**	8
Dollars Raised	$1.04M	**$1.60M**
Average Gift Value	$47k	**$158k**
Average Proposal Value	$77k	**$221k**
Visits	**104**	75

Selective Precision Raises More with Less Activity

-65%
Fewer gifts closed

+54%
More dollars raised

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Two Paths to High Performance

Scaled Execution and Selective Precision Generate Similar Revenue

Scaled Execution

Key Characteristics

- High activity is paired with high ask value
- Slightly smaller commitments than selective precision but stronger durable revenue
- Larger portfolios but also greater coverage

*"Fundraisers have their work cut out for them with bigger portfolios, but **every touchpoint they make is targeted**. It's what makes our performance sustainable year over year."* – CAO, large public university

	Scaled Execution	Selective Precision
Durable Revenue	**$747k**	**$688k**
Average Proposal	**$179k**	**$221k**
Average Gift	**$110k**	**$158k**
Visits	**114.5**	**75**
Portfolio Size	**101**	**67**

Selective Precision

Key Characteristics

- Lower activity and smaller portfolios but more targeted proposals
- Consistent revenue generation across portfolio
- More aggressive individual fundraiser targets

*"**Make the right asks at the right time**. We set aggressive targets, but we've messaged effectively over time to ensure buy-in"* – AVP, large private university

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Outcome Metrics

Lessons for High Performance

- Activity counts alone provide an incomplete picture of fundraiser effectiveness.
- Strong performance can come from selective pursuit of larger gifts or higher activity paired with strong gift value.

Decisions CAOs Need to Make Now

- **Scorecard weighting:** Reduce the emphasis on raw activity and elevate gift and proposal value.
- **Performance expectations:** Select the appropriate performance path for each role and align goals accordingly.

Putting the Evidence into Practice

Oregon State Diagnoses Busy-But-Thin Performance

- Oregon State added root-cause KPIs (e.g., portfolio penetration and unique prospects visited) to the usual counts of visits, proposals, gifts, and dollars.
- Managers can see when high activity centers on too few or too-low-capacity prospects, then coach toward higher-value activity instead of simply demanding more volume.

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Outcome Metrics

Immediate Next Step After Today



Complete EAB's Fundraiser Value vs. Volume Assessment

Ask your strategic leader about participating in EAB's new service to help identify which performance quadrant your fundraisers fall into.

Additional EAB Resources



EAB's Fundraiser Productivity Benchmarking

Benchmark fundraiser activity and performance against peer institutions



Organizational Chart Review

Work with EAB subject matter experts to ensure your fundraising team is organized for success.

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Source: EAB interviews and analysis.

Five Hidden Indicators Challenge Assumptions

Common Assumption		Evidence-Based Indicator
More high-net-worth prospects improve ROI	1 Prospect Focus	High-ROI shops prioritize coverage and convert $1M+ prospects
Fundraiser ROI plateaus by year three	2 Tenure Advantage	Fundraiser tenure continues to lift ROI well beyond year three
Smaller portfolios perform better	3 Portfolio Quality	Portfolio composition matters more than size
More activity drives performance	4 Outcome Metrics	Average gift and proposal value matter more than activity volume
Unit-based MGOs perform better	5 Org Structure	Central MGOs raise more

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Deans Value Fundraisers Who Know the Unit

"Our development officer is deeply connected to the college. They understand our faculty, our priorities, and the alumni who care most about our work. **That proximity to the unit is what makes them effective with donors**."

Dean of Engineering, Public Research University

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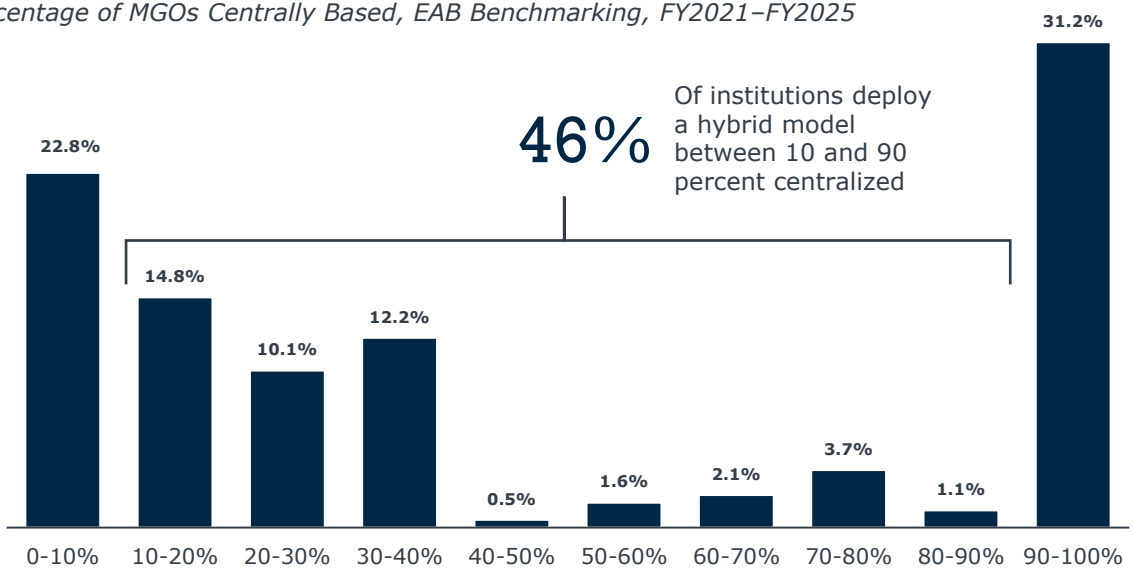
Source: EAB interviews and analysis.

Centralization Does Not Have to Be All or Nothing

Nearly Half of Institutions Operate Hybrid MGO Models

MGO Structures Span the Full Centralization Spectrum

Percentage of MGOs Centrally Based, EAB Benchmarking, FY2021–FY2025



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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Centralized MGOs Lead on Value

Unit-Based MGOs Complete More Activity, While Central MGOs Raise More

Unit-Based MGOs Score on Volume…

Median Portfolio Size

Central MGOs	Unit-based MGOs
61	69

Median Proposals Submitted

Central MGOs	Unit-based MGOs
16	19

Median Visits

Central MGOs	Unit-based MGOs
70	79

…but Central MGOs Win With Value

Dollars Raised

Central MGOs	Unit-based MGOs
$1.69M	$1.27M

Average Gift Size

Central MGOs	Unit-based MGOs
$150k	$90k

Average Proposal Value

Central MGOs	Unit-based MGOs
$233k	$142k

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Same Headcount Produces Very Different Results

Comparing Centrally Based and Unit-Based MGOs Across Engineering Units

Central MGOs Generate More Value from Similar Portfolios

MGO Comparison Using Median Performance Across Engineering Units

	Central MGO	Unit-Based MGO
Prospects	89	83
Total Contacts	103	157
Average Gift Value	$72K	$44K
Average Proposal Value	$120K	$74K
Dollars Raised	$1.8M	$1.1M

+$700K More dollars raised by a central MGO with a similar number of prospects

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

Organizational Structure

Lessons for High Performance

- Hybrid structures are common, allowing institutions to combine central coordination with unit relationships.
- Central fundraisers tend to secure larger gifts with less activity, underscoring the importance of focus and protected fundraising time.

Decisions CAOs Need to Make Now

- **MGO placement:** Place fundraisers in units where proximity to deans, faculty, and priorities creates distinctive value.
- **Central coordination:** Maintain common prospect allocation, performance expectations, and management discipline across every reporting structure.

Putting the Evidence into Practice

University of Miami Models the Value of Protecting MGO Time

- Miami's predictive model shows deans the return tradeoffs when MGOs devote 50%, 65%, or 80% of their time to fundraising.
- The evidence supports shifting communications, events, and administrative work to central or unit support; a 75% fundraising-time goal implied 25% more fundraising potential.

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Source: EAB Benchmarking dataset, 2021-2025; EAB interviews and analysis.

How EAB Can Help



Time Allocation Predictive Model

An interactive tool to help deans and CAOs understand and quantify how time lost to gift officer distractions affects fundraising.

Perfecting the Academic-Advancement Partnership

Use this study to identify and engage new advancement partners across campus and extend the reach of current fundraising superstars to more donors.

Scan for EAB's latest insights and resources on managing decentralization effectively.

Time Allocation Predictive Model

Perfecting the Academic-Advancement Partnership

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More activity drives performance	4 **Outcome Metrics**	Average gift and proposal value matter more than activity volume
Unit-based MGOs perform better	5 **Org Structure**	Central MGOs raise more

1) "High-net-worth" refers to prospects with a wealth capacity above $100k

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Next Steps



Request a High-Performance Diagnostic

Request a diagnostic comparing your division with the high-performance benchmarks. Benchmarking participants can ask EAB to complete it using submitted data; others can request a self-guided version.



Request a Value vs. Volume Assessment

Ask about EAB's value vs. volume assessment to understand your team's fundraising approach and identify opportunities to strengthen performance.



Discuss Your Priorities with Your Strategic Leader

Connect with your Strategic Leader to discuss revising fundraiser metrics, strengthening portfolios, or evaluating where greater centralization could help.

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