

Advancement Metrics Impacted by COVID-19: Post-Secondary

As a special thank you for participating in our survey, the following supplemental report includes additional data from our survey analysis. Thank you again for participating!

Institution Type and Location

Institution Type	Count	%	Province	Count	%
University	15	71%	ON	8	38%
College	4	19%	QC	4	19%
Other	2	10%	NS	3	14%
Total Responses	21	100%	AB	2	10%
			MB	2	10%
			NB	2	10%
			Total Responses	21	100%

Are you adjusting FY20 gift officer metrics given the impact of COVID-19 on your fundraising operation?

Adjusting FY20 Metrics	Count	%
Yes	11	52%
No	6	29%
Undecided	4	19%
Total Responses	21	100%

Adjusting FY20 Metrics	Count	%	Adjusting FY20 Metrics	Count	%
Yes	11		University	15	
University	8	73%	Yes	8	53%
College	2	18%	No	4	27%
Other	1	9%	Undecided	3	20%
No	6		College	4	
University	4	67%	Yes	2	50%
College	2	33%	No	2	50%
Undecided	4		Other	2	
University	3	75%	Yes	1	50%
Other	1	25%	Undecided	1	50%

How are you adjusting FY20 gift officer metrics?

How Adjusting FY20 Metrics	Count	%
By overall percentage	5	45%
Undecided	3	27%
Varies by gift officer	2	18%
Other - Overall dept goal reduction	1	9%
Total Responses	11	100%

How Adjusting FY20 Metrics	Count	%
By overall percentage	5	
University	4	80%
College	1	20%
Undecided	3	
University	2	67%
College	1	33%
Varies by gift officer	2	
University	2	100%
Other - Overall dept goal reduction	1	
Other	1	100%

How Adjusting FY20 Metrics	Count	%
University	8	
By overall percentage	4	50%
Varies by gift officer	2	25%
Undecided	2	25%
College	2	
Undecided	1	50%
By overall percentage	1	50%
Other	1	
Other - Overall dept goal reduction	1	100%

Do your adjusted FY20 gift officer metrics focus on dollars or activity?

Focus of Adjusted FY20 Metrics	Count	%
Activity + Dollars	8	73%
Dollars	2	18%
Activity	1	9%
Total Responses	11	100%

Focus of Adjusted FY20 Metrics	Count	%
Activity + Dollars	8	
University	5	63%
College	2	25%
Other	1	13%
Dollars	2	
University	2	100%
Activity	1	
University	1	100%

Focus of Adjusted FY20 Metrics	Count	%
University	8	
Activity + Dollars	5	63%
Dollars	2	25%
Activity	1	13%
College	2	
Activity + Dollars	2	100%
Other	1	
Activity + Dollars	1	100%

Are you planning to adjust FY21 gift officer metrics?

Adjusting FY21 Metrics	Count	%
Yes	6	29%
No	1	5%
Undecided	14	67%
Total Responses	21	100%

Adjusting FY21 Metrics	Count	%	Adjusting FY21 Metrics	Count	%
Yes	6		University	15	
University	4	67%	Undecided	10	67%
College	2	33%	No	1	7%
No	1		Yes	4	27%
University	1	100%	College	4	
Undecided	14		Undecided	2	50%
University	10	71%	Yes	2	50%
Other	2	14%	Other	2	
College	2	14%	Undecided	2	100%

How are you specifically planning to adjust FY21 gift officer metrics? (select all that apply)

How Adjusting FY21 Metrics (select all)	Count	%
Adding new metrics	4	67%
Decreasing dollars raised	3	50%
Decreasing solicitations and closures	2	33%
Increasing contacts	2	33%
Decreasing contacts	1	17%
Increasing solicitations and closures	1	17%
Undecided	1	17%
Total Responses	6	

How Adjusting FY21 Metrics: Comments

I just started. We're looking at MG metrics along the lines of prospect pool activation and health vs counts of visits, for example. That allows me to oversee the whole of a person's/team's work.

Moving face to face to significant interactions (Zoom, phone, etc.)

How Adjusting FY21 Metrics (select all)	Count	%
Adding new metrics	4	
College	1	25%
University	3	75%
Decreasing dollars raised	3	
College	1	33%
University	2	67%
Decreasing solicitations and closures	2	
University	2	100%
Increasing contacts	2	
College	1	50%
University	1	50%
Decreasing contacts	1	
University	1	100%
Increasing solicitations and closures	1	
College	1	100%
Undecided	1	
University	1	100%

Have you instituted any new gift officer metrics as a result of COVID-19? (select all that apply)

New Metrics (select all)	Count	%	
No new metrics	3	14%	% of those introducing new metrics
Stewardship of MG prospects	14	78%	
Meaningful contacts vs visits	12	67%	
Portfolio review/cleanup	11	61%	
Video visits	9	50%	
Annual giving solicitations of MG prospects	8	44%	
Professional development	7	39%	
Other	3	17%	
Total Responses	21		
Total Responses w/ New Metrics	18		

New Metrics: Other

100K stage progression

COVID-19 specific outreach and solicitation

Established emergency bursary fund

New Metrics (select all)	Count	%
Stewardship of major gift prospects	14	
University	10	71%
Other	2	14%
College	2	14%
Meaningful contacts vs visits	12	
University	10	83%
Other	2	17%
Portfolio review/cleanup	11	
University	6	55%
College	3	27%
Other	2	18%
Video visits	9	
University	6	67%
College	2	22%
Other	1	11%
Annual giving solicitations of major gift prospects	8	
University	6	75%
Other	1	13%
College	1	13%
Professional development	7	
University	4	57%
Other	2	29%
College	1	14%
Other	3	
University	2	67%
College	1	33%

How have metrics for alumni relations and donor events shifted with the effects of COVID-19?

Alumni Relations and Donor Events: Primary Sentiment	Count	%
Pivoting to virtual engagement	6	38%
Undecided	5	31%
Focusing on engagement in general	3	19%
Events cancelled	2	13%
Total Responses	16	100%

Alumni Relations and Donor Events: Primary Sentiment	Count	%
Pivoting to virtual engagement	6	
University	6	100%
Undecided	5	
University	3	60%
College	2	40%
Focusing on engagement in general	3	
College	2	67%
Other	1	33%
Events cancelled	2	
University	1	50%
Other	1	50%

Alumni Relations and Donor Events: Primary Sentiment	Count	%
University	10	
Pivoting to virtual engagement	6	60%
Undecided	3	30%
Events cancelled	1	10%
College	4	
Undecided	2	50%
Focusing on engagement in general	2	50%
Other	2	
Focusing on engagement in general	1	50%
Events cancelled	1	50%

How have metrics for alumni relations and donor events shifted with the effects of COVID-19 (e.g., in-person event metrics vs. virtual event metrics)?

A quick pivot to taking alumni events online has seen positive results. Alumni content is being experienced by larger numbers of alumni who are farther afield. No donor events have gone online, though an annual golf tournament was cancelled, and an email appeal was distributed to past attendees.

All in person meetings and events are cancelled/postponed. Making contingency plans to conduct combination on-line/videotaped homecoming events, award events, and tours, but plans still have too many variables.

All metrics are being revisited and goals are being adjusted downward

All of our events have been cancelled through to the end of 2020, including reunion weekend, our signature fundraising dinner, and campaign/donor celebration events. All 'visits' have been changed to telephone conversations, and in a few instances, video calls. The [only] upside is that we have had good results in reaching donors, to talk with them about ongoing pledges and/or the opportunity to participate in funding the emergency bursary.

Definitely increased virtual events, virtual meeting, volunteer actions and outreach, meaningful contacts, social media impact

In person engagement will shift to virtual events. But the struggle is more around what type of event will drive virtual engagement. We need to examine behaviours more to develop a strategy given the change in metrics.

Metrics have not shifted per se, but our events have become tailored to a virtual audience and the subject matter more topical to current situations

More telephone, email and video call check-ins. Really getting to know donors as much as possible. Being ready and adaptable to help as needed.

Not decided yet. We are still reviewing new programs to be offered and from that metrics should be developed.

Still in development

Still in development. Will likely move to online/personal outreach to alumni and donors.

Tracking virtual attendance

Unknown

We hadn't started our annual giving campaign. We shifted attention to a Student Emergency Fund.

We lack metrics for either. Our lens is instead pivoting toward enrollment recovery, an institution-wide multi-year imperative as a core raison d'etre for our alumni engagement team. This is actually quite helpful given the low levels of alumni giving - refocusing on enrollment recovery, especially domestically, should be a focus that has legs as long as we can deliver.

Yes, we will be measuring virtual event attendees. Not a shift, but a measured increase in number of alumni on online platform, # of mentors/willing to help. Continuing to track # of volunteers.

Is there anything else you would like to share about how COVID-19 is impacting fundraising and alumni relations at your institution?

Is there anything else you would like to share about how COVID-19 is impacting fundraising and alumni relations at your school?

A number of conversations with regard to prospective transformational gifts have paused, due to an uncertain economy and bounce back, and in one instance because a donor has redirected attention to invest in a COVID vaccine. While some of these conversations will resume in time, some may not ever pick back up. We have been focusing on stewarding relationships with donors during this uncertain time. The key is to maintain contact and listen; in some cases, donors express interest in helping us address urgent need (i.e., student financial need), and in others our intent is to understand the experiences of our donors and deepen relationships through empathy. Our stewardship and donor relations team members are busier than ever.

Although the economic impact of COVID-19 is far reaching, we are finding alumni are participating in "typical" numbers. Those who usually give, continue. We have not necessarily attracted many new donors.

COVID-19 is pushing us to pivot toward supporting enrollment recovery in both alumni relations and fundraising. We are doing so at a time of recalibration for our Advancement team, so the trick will be to use the moment to help us get to where we want to be as a team, ideally faster albeit likely with more turbulence.

In our particular case it actually kick-started a struggling development team

Putting major fundraising initiatives on hold for now. New fundraising needs and potential campaigns being looked out to meet the immediate and short-term needs of students.

The silver lining has been the opportunity to devote a great deal more time to stewardship (in part because the students have more time for personalized videos, for instance). Expect the amount and reach of career-related activities to improve as well, both for recent graduates and senior students.

To say that it is a fluid situation would be a definite understatement! It has been particularly gratifying to see the number of graduates who have reached out to us to ask how they can help current students impacted by COVID-19.

All our students have lost their summer employment. We have completely re-worked our case for support to encourage tuition relief.

We are increasing communication vehicles to reach and inform our various communities. We are trying to educate them that despite COVID-19 impacting the world, we need to continue business as usual as teaching, research, academic content and student experience is still important but all of this is done differently.

We would like to increase the amount of unrestricted donations, hopefully with this crisis illustrating unexpected needs and priorities

We are still trending ahead in dollars raised in comparison to last year at this time and since everything is so uncertain it has left us in a state of flux

We had a good case for support underway so now we are pivoting slightly with a great deal of consultations and communications underway with alumni and donors. It is still unclear to see the impact of the economic decline, but engagement and conversations have never been higher. Metrics have not officially changed at the central level. Each faculty is making slight adjustments, but many are undecided. Video calls were already considered a meeting pre-COVID.

We have focused primarily on emergency fundraising. We also wrapped our comprehensive campaign during the pandemic. We are working on pledge reminders and trying to be as personalized and sensitive as possible. We have increased our offerings in alumni relations, with an emphasis on digital engagement, which has been a tremendous success.

Working extraordinary hours! Shift to virtual events is time consuming and need to build capacity in this area. Also, demand for alumni engagement and alumni help has never been higher. Don't have enough bandwidth to meet demand.