Impact of COVID-19 on Advancement Staff Metrics: Post-Secondary Institutions

June 2020
A Survey of How COVID-19 has Impacted Post-Secondary Institution Advancement Metrics

As charities face sudden operational and financial challenges due to the pandemic, Advancement teams are facing challenges in adapting targets, metrics and strategies to connect with and solicit donors. Offord Group developed a brief survey to learn about how COVID-19 has impacted gift officer metrics at Canadian post-secondary institutions. The surveys asked participants to categorize how they are adjusting FY20 and FY21 Advancement staff metrics, based on institutional plans as of May 2020.

Respondents by Institution Type and Location

A total of 21 post-secondary institutions participated in the survey; 17% universities, 19% colleges and 10% other. Six provinces are represented in the cohort.

<table>
<thead>
<tr>
<th>Province</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>ON</td>
<td>8</td>
</tr>
<tr>
<td>QC</td>
<td>4</td>
</tr>
<tr>
<td>NS</td>
<td>3</td>
</tr>
<tr>
<td>AB</td>
<td>2</td>
</tr>
<tr>
<td>MB</td>
<td>2</td>
</tr>
<tr>
<td>NB</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total Responses</strong></td>
<td><strong>21</strong></td>
</tr>
</tbody>
</table>

- University (71%; 15)
- College (19%; 4)
- Other (10%; 2)
Summary of Findings

Adjustments to FY20 Gift Officer Metrics

More than half of post-secondary institutions are adjusting FY20 gift officer metrics. At 45% of these institutions, the changes to metrics apply to the entire Advancement team by overall percentage, while 18% vary by gift officer. The primary focus of adjusted metrics is on both activity and dollars.

Adjustments to FY21 Gift Officer Metrics

There is uncertainty among post-secondary institutions about whether FY21 metrics will be adjusted, with two-thirds undecided at this time. Six institutions are planning to make changes, and most are adding new metrics and/or decreasing the expectation for total dollars raised.

New Gift Officer Metrics as a Result of COVID-19

Most institutions have introduced new gift officer metrics as a result of COVID-19. Of those making additions, most have added measurements for stewarding major gift prospects, counting meaningful contacts vs visits, conducting portfolio reviews/cleanup, and/or participating in video visits with constituents.

Alumni Relations and Donor Event Metrics

Institutions are changing the focus and implementation of activity while trying to maintain or heighten alumni and donor engagement. Many are pivoting to virtual engagement due to the pandemic, acknowledging that in-person events may not be feasible for an extended time. Identifying what types of events will most effectively drive virtual engagement has been challenging.

Challenge/Matching Grants

More than half of post-secondary institutions have received major gifts in the form of challenge/matching grants to drive fundraising for COVID-19 related initiatives.
Findings and Analysis

Adjustments to FY20 Gift Officer Metrics

More than half of post-secondary institutions (52%) are adjusting FY20 gift officer metrics, while 29% are not and 19% are undecided.

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

The 11 institutions adjusting gift officer metrics in FY20 were asked additional questions to determine how those modifications are being made. Changes to metrics are by overall percentage at 45% of these institutions, while 18% varies by gift officer and 9% are by overall department goal reduction. Twenty-seven percent remain undecided about how they are adjusting metrics.

How are you adjusting gift officer metrics?

[Diagrams showing the distribution of adjustments: Yes (52%), No (29%), Undecided (19%), By overall percentage (45%), Varies by gift officer (18%), Other - Overall dept goal reduction (9%).]
The primary focus of adjusted metrics is on both activity and dollars (73%).

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

- Activity + Dollars (73%)
- Dollars (18%)
- Activity (9%)

Adjustments to FY21 Gift Officer Metrics

There is less certainty about whether FY21 metrics will be adjusted: 67% of respondents are undecided, while 29% are making plans to do so and 5% do not intend to make changes.

Are you planning to adjust FY21 gift officer metrics?

- Yes (29%)
- No (5%)
- Undecided (67%)

The six institutions adjusting FY21 gift officer metrics were asked an additional question to identify changes being made. Most of these institutions are adding new metrics (67%) and/or decreasing the expectation for total dollars raised (50%).
How are you specifically planning to adjust FY21 gift officer metrics? (select all that apply)

- Adding new metrics: 67%
- Decreasing dollars raised: 50%
- Decreasing solicitations and closures: 33%
- Increasing contacts: 33%
- Decreasing contacts: 17%
- Increasing solicitations and closures: 17%
- Undecided: 17%

New Gift Officer Metrics as a Result of COVID-19

Only three institutions have not introduced any new metrics. Of the 18 institutions that have, most are measuring how they are stewarding major gift prospects (78%), counting meaningful contacts vs visits (67%), conducting portfolio reviews/cleanup (61%), and/or participating in video visits (50%) with constituents. The 17% that responded Other are conducting COVID-19 related outreach and solicitations.

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

- Stewardship of MG prospects: 78%
- Meaningful contacts vs visits: 67%
- Portfolio review/cleanup: 61%
- Video visits: 50%
- Annual giving solicitations of MG prospects: 44%
- Professional development: 39%
- Other: 17%
Alumni Relations and Donor Event Metrics

Of the 17 institutions that provided responses to changes in alumni relations and donor event metrics, most are changing the focus and implementation of activity while trying to maintain or heighten alumni and donor engagement.

Comments were reviewed for a primary sentiment and categorized accordingly. Most institutions (38%) are pivoting to virtual engagement due to the pandemic, acknowledging that in-person events may not be feasible for an extended time. Identifying what types of events will most effectively drive virtual engagement has been challenging.

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

<table>
<thead>
<tr>
<th>Change in Engagement</th>
<th>University</th>
<th>College</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pivoting to virtual engagement</td>
<td>38%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undecided</td>
<td>31%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Focusing on engagement in general</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Events cancelled</td>
<td>13%</td>
<td></td>
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</tbody>
</table>

Challenge/Matching Grants

More than half (52%) of institutions have received major gifts in the form of challenge/matching grants to drive fundraising for COVID-19 related initiatives.

Did you receive any major gifts in the form of challenge/matching grants to drive your fundraising program for COVID-19 response?

<table>
<thead>
<tr>
<th>Response</th>
<th>University</th>
<th>College</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>60%</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>No</td>
<td>33%</td>
<td>25%</td>
<td>50%</td>
</tr>
<tr>
<td>Don't Know/Not Sure</td>
<td>7%</td>
<td>25%</td>
<td>50%</td>
</tr>
</tbody>
</table>
Additional Comments

Several additional comments were offered by participants that reflect how post-secondary Advancement teams are weathering the pandemic, including:

- Several solicitations of prospective transformational gifts have paused
- Making changes to priorities and the case for support
- Opportunities to devote more time to stewardship – Stewardship and donor relations teams are busier than ever!
- Expanding communication channels to reach and inform constituents
- Demand for alumni engagement and alumni assistance has never been higher
- Meeting the immediate and short-term needs of students
- Alumni are reaching out to ask how they can help current students impacted by COVID-19