



The future of advancement in higher education

A conversation with fundraising experts

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Despite new challenges posed by the coronavirus pandemic, advancement departments are still responsible for raising funds for their institutions. With dramatic shifts around the world, advancement professionals are working through challenges to find new ways to succeed in the face of an uncertain future.

At this year's Ellucian Live Online event, three advancement experts came together during a panel discussion led by Ellucian Chief Product Officer Stephen Laster. Panelists discussed current issues, technology adoption, and a glimpse into the new normal for institutional fundraising. (Comments have been edited for clarity and length.)

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FEATURING:

Stephen Laster

Chief Product Officer,
Ellucian

Judy Doherty

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for Advancement Systems
and Services, Dartmouth

Beth Wiley

Assistant Vice President for
Advancement Services,
East Tennessee State
University (ETSU)

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Systems Analyst,
Montage Health



The current state of affairs

Indecision and strategy during disruption



“What we’re lacking right now is the ability to implement journey marketing and marketing automation. What we’re doing is slow to deliver, which is not a great consumer experience. We can’t get things out fast enough for people. It’s disjointed because we don’t have the journeys all lined up the way we should. And things are moving so fast in this current environment, we can’t move quickly enough because we’re doing it manually.”

JUDY DOHERTY, ASSOCIATE VP FOR ADVANCEMENT SYSTEMS AND SERVICES, DARTMOUTH



“About a year ago we signed on to a new product that I’m so glad we have right now... a new technology, which is artificial intelligence. Our development officers have a tool that will, in essence, serve up a prospect, and also an auxiliary prospect for discovery purposes. **And that really saved our production toward the end of the year when we all went remote**, because they didn’t have to go looking for people to contact each day.”

BETH WILEY, ASSOCIATE VP FOR ADVANCEMENT SERVICES, ETSU



“As new systems come about, they give you different ways of tracking things. Everyone has to look at their business practice, because how many different ways do you want to dissect a donation? You have all these new tools at your disposal—**so do you stay the same or do you change? And if you change, what is that change going to look like?**”

LANDAU DAVIDSON, SYSTEMS ANALYST, MONTAGE HEALTH





Fundraising during COVID

Reassessing prospects, technology, and events



“With COVID, we have to add another screwdriver to our tool set.

We have an online platform that does event registration, but we had to sign up with another one that’s similar because it does virtual events. So now we’re going to have two platforms that are about the same, but we need to be able to do virtual events.

LANDAU DAVIDSON, SYSTEMS ANALYST, MONTAGE HEALTH



“Our development officers said that there are many prospects that they are able to connect with more easily because people aren’t so busy doing social activities.

They’re stuck at home and the time is there that they didn’t have before. Then on the other hand, there are other constituents who have young children at home and are trying to work, and teach, and take care of them at the same time. I think everyone’s just figuring this out right now.”

BETH WILEY, ASSOCIATE VP FOR ADVANCEMENT SERVICES, ETSU

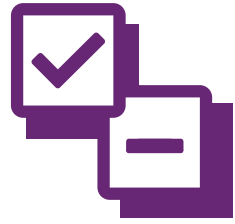


“We can’t work in the administrative functions the way we used to work. As I think about advancement services, we’ve been juggling those things forever. This current COVID environment has helped us prioritize, accelerate, and bring together all of these systems and services in a way we never had.

We didn’t have the capacity to bring it all together before.”

JUDY DOHERTY, ASSOCIATE VP FOR ADVANCEMENT SYSTEMS AND SERVICES, DARTMOUTH





Risk vs. reward

Mentorship, generosity, and proactive assistance



“The key for all of us is to know when we can assume the risk for radical change, and when it’s worth it. It’s critical that we’re pragmatic. We’ve got to be in the middle. We can’t assume too much risk, but in other cases, optimization is absolutely the right thing to do. **All appropriate solutions depend upon the situation—it is not a one-size-fits-all.**”

JUDY DOHERTY, ASSOCIATE VP FOR ADVANCEMENT SYSTEMS AND SERVICES, DARTMOUTH



“**Every institution is different**; every institution has different needs at different times. And so, we’ve got to start there and survey our own shops and find out what we need, and then provide those.

BETH WILEY, ASSOCIATE VP FOR ADVANCEMENT SERVICES, ETSU



“You have to not just look at the bells and whistles. Is it going to replace something? Is it adding on? Do you have the resources? And do your users have a skill set? **Before you jump into these new technologies, you have to evaluate your staff and your resources** to see if they can handle it, to keep it efficient as possible as you move forward.”

LANDAU DAVIDSON, SYSTEMS ANALYST, MONTAGE HEALTH





Building relationships through technology

The importance of communication



“In the end, our main goal is to build and maintain relationships, so we’re looking for technologies that can support doing that in whatever way we need to do it today. And that is different today than it was six months ago.”

BETH WILEY, ASSOCIATE VP FOR ADVANCEMENT SERVICES, ETSU



“That is an age-old problem with technology adoption: We sometimes forget the most important step—that there are still humans involved. **We stand in a moment of time where technology has great promise**, perhaps great complexity, and needs real vision and guidance to advance the work we do as a collective community in advancement.”

STEPHEN LASTER, CHIEF PRODUCT OFFICER, ELLUCIAN



“The responsibility of advancement organizations is to secure the financial resources to help the institution move forward. We have to raise the money, and we do that by educating our alumni and our donors. **Our communications are critical.** “

JUDY DOHERTY, ASSOCIATE VP FOR ADVANCEMENT SYSTEMS AND SERVICES, DARTMOUTH





Forecasting the future

What's next for advancement



“Be present, be at the table, show up. Our conferences and events team, for a very short period of time, were probably a little nervous about their jobs. They have since transformed into managing our entire student arrival during COVID. That team now serves the institution in a very similar way, but so different. **I think it's a good example of relationship management and how we should be institutionally moving forward.**”

JUDY DOHERTY, ASSOCIATE VP FOR ADVANCEMENT SYSTEMS AND SERVICES, DARTMOUTH



“**We're probably going to need more marketers within the advancement arena.** We don't have them currently at East Tennessee State, but we have been making noise about that. We've talked about an event planner, but maybe we're not going to need one because there will be more virtual events. I think things are going to be changing. We just can't predict at this point in what things will be like five years.”

BETH WILEY, ASSOCIATE VP FOR ADVANCEMENT SERVICES, ETSU



“We need to approach change with pragmatism. **We need to remember that the key is enabling our users to really make the most of the technology.** And we need to realize that there's probably no turning back and tomorrow is some blend of yesterday and today. And that together, I think we can serve our institutions well.”

STEPHEN LASTER, CHIEF PRODUCT OFFICER, ELLUCIAN



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