



***Advancement Moving Forward:  
The State of Advancement and Alumni Relations***

**Confidence, Engagement, and Challenges**

**November 2023**

If you have questions or comments, or suggestions for future survey topics,  
please contact us at [info@wash-mcg.com](mailto:info@wash-mcg.com)

## BACKGROUND

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The WASHBURN & McGOLDRICK November 2023 *Advancement Moving Forward* survey of advancement professionals is the tenth in our series on the state of the profession. This series began in April 2020. Since then, we have tracked how alumni relations officers, gift officers, senior advancement staff, and chief advancement officers (CAOs) have kept the momentum of their advancement efforts moving forward.

These surveys explore timely issues of importance to advancement professionals in US universities, colleges, and independent schools. The topics in each survey are suggested by CAOs and their senior staff to provide information that allows them to respond in a timely manner.

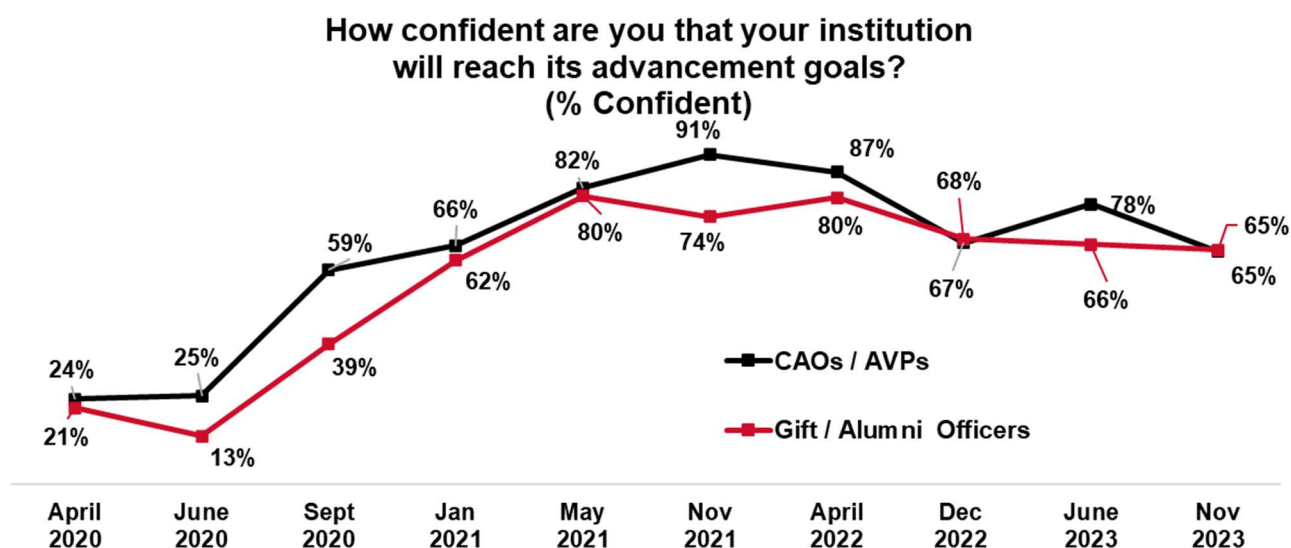
The November 2023 survey focuses on five topics:

- Confidence in achieving FY24 goals
- Office, hybrid, and remote work
- Alumni engagement (priorities and barriers)
- Advancement/alumni relations integration
- Challenges going forward

Confidence in achieving fundraising goals for each fiscal year and the prevalence of remote, hybrid, or office work have been explored in almost every survey. Over the past year we have also addressed staff turnover, fundraising priorities, the use of technology to engage donors and alumni, videoconference fatigue, and institutional responses to DEIB issues. A full list of topics appears in the methodology section of this report.

The November 2023 survey was conducted in October and November 2023. Responses were received by 417 individuals from 134 colleges, universities, independent schools, and museums. These include four Historically Black Colleges and Universities and five Hispanic-Serving Institutions. Details about the methodology and a list of participating institutions can be found at the end of this report.

## MAJOR FINDING: CONFIDENCE IN MEETING GOALS HAS STABILIZED OVER THE YEAR BUT IS STILL BELOW LEVELS EVIDENT TWO YEARS AGO

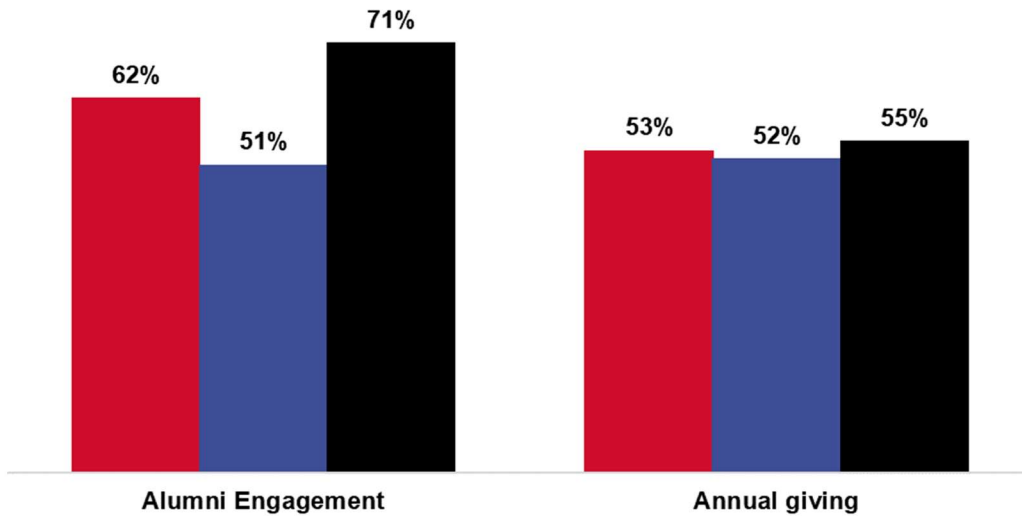


- WASHBURN & McGOLDRICK's *Advancement Moving Forward* survey reveals that **the rise in confidence in achieving institutional advancement goals seen between April 2020 and April 2022 has fallen but stabilized over the past 12 months.**
- Overall confidence was at an all-time low in April 2020 as offices were closed and institutions were pivoting to a new way to engage alumni and donors. In the 12 months that followed, overall confidence rose steadily and peaked in November 2021. At that point 91% of CAOs/AVPs and 74% of gift/alumni officers were confident about meeting their annual goals.
- **This level of confidence lasted through April 2022, but then dropped.** By December 2022 approximately two-thirds of all institutional advancement staff expressed overall confidence in meeting their goals. This level has not changed significantly for the past year.

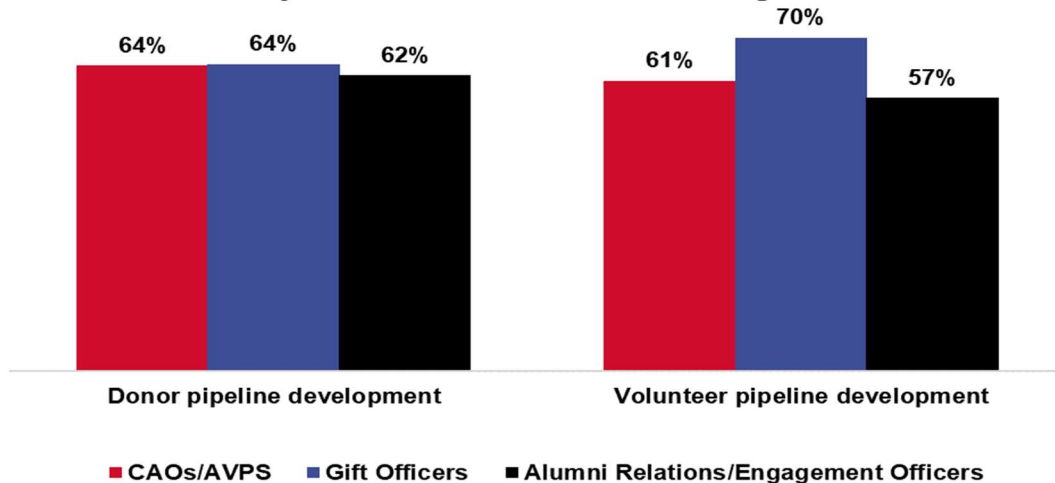
### BEHIND THE NUMBERS

The November 2023 *Advancement Moving Forward* survey explored four attributes of confidence that provide insight into differences between CAOs/AVPs, gift officers, and alumni relations/engagement officers. Specifically, respondents were asked about their confidence in meeting engagement, annual giving, donor pipeline, and volunteer pipeline goals.

### Confidence in Attaining FY24 Goals



### Uncertainty or No Confidence in Attaining FY24 Goals



- The results reveal that there is **underlying confidence in engagement and giving**, but uncertainty or a lack of confidence in donor and volunteer pipeline development.
- Alumni relations and engagement officers are significantly more confident about meeting their own alumni engagement metrics (71%) than gift officers (51%). Likewise, gift officers are significantly more likely (70% versus 57%) to report uncertainty or a lack of confidence in developing a volunteer pipeline.
- The data suggest that advancement staff are more confident about current outcomes (giving and engagement) and lack confidence about building toward the future (pipelines).

## MAJOR FINDING: YOUNG ALUMNI ENGAGEMENT, THE DONOR PIPELINE, AND ANNUAL GIVING ARE TOP PRIORITIES

	SHARED TOP PRIORITIES		
	CAOs/ AVPs	Gift Officers	Alumni Relations/ Engagement Officers
Build pipeline of donors	62%	70%	53%
Increase annual giving	59%	63%	54%
Engage young alums	51%	40%	59%
Alumni professional/career networks	38%	31%	31%
Keep alumni informed about institutional initiatives	33%	36%	32%

The respondents were asked to identify the top priorities for engaging their alumni or donors.

- **The data suggest that advancement leadership, gift officers, and alumni/engagement officers are focused on the same top five priorities.**
- The priority of financial goals is evident in the high rank given to both building a donor pipeline and increasing annual giving. While there is high confidence in meeting annual giving goals and lower confidence in a donor pipeline, these data suggest that both are high priorities for the gift officers. They are significantly more likely to indicate that this is a high priority compared to alumni relations or engagement officers.
- Conversely, significantly more alumni relations or engagement officers give engaging young alumni a high priority than gift officers. While these staff are significantly more confident in meeting FY24 engagement goals, these data suggest they are also focusing on engaging younger alumni.
- Engaging alumni through professional or career networks is the fourth priority for all respondents. Approximately one-third of the respondents consider alumni networks a top five priority, with slightly more importance given by CAOs/AVPs.
- Finally, an equal percentage of respondents agree that keeping alumni informed about institutional initiatives is a top priority.

### BEHIND THE NUMBERS

While the respondents identify the same top priorities, there is a divergence of opinion beyond these top choices.

- Specifically CAOs/AVPs are more likely than their staff to identify building and supporting alumni affinity groups as a priority. Thirty-seven percent of CAOs/AVPs identify it as a top priority, compared to 29% of alumni officers and 19% of gift officers.

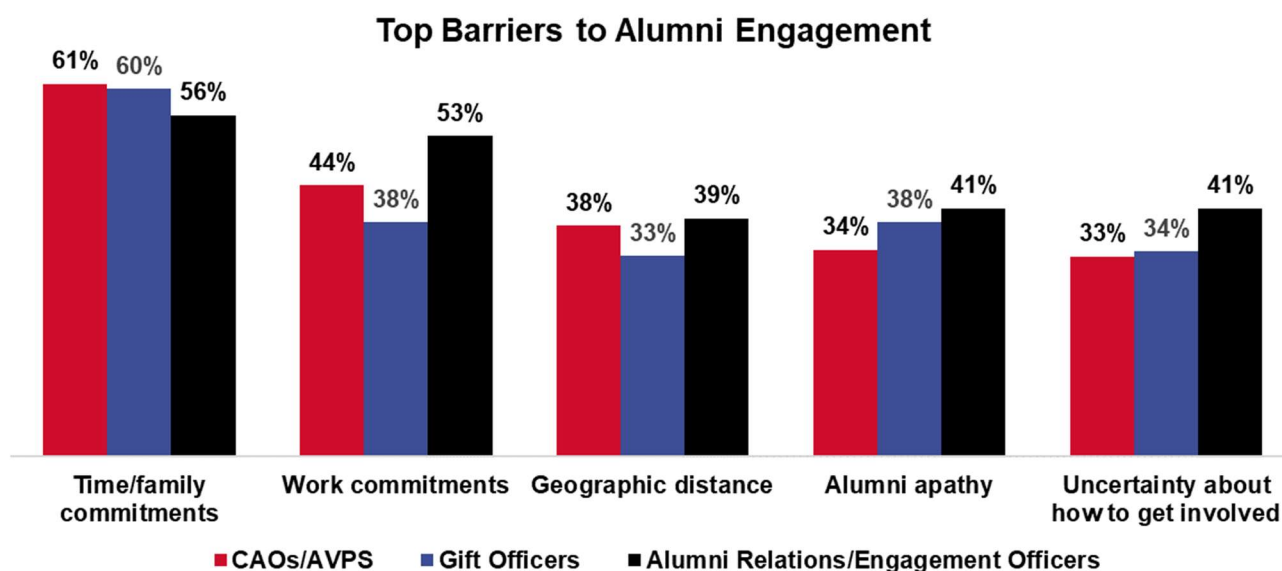
OTHER PRIORITIES	
<b>CAOs/AVPs</b>	
<b>Build and support affinity groups</b>	37%
<b>Gift Officers</b>	
<b>Increase alumni event attendance</b>	32%
<b>Alumni Relations/Engagement Officers</b>	
<b>Reach out to non-engaged alumni</b>	34%
<b>Increase DEIB alumni leadership</b>	32%
<b>Increase alumni volunteering</b>	31%

- Gift officers (39%) are more likely to focus on increasing attendance at alumni events. This is more than twice the number of alumni and engagement officers (15%) who identify attendance as a priority. While there is no data to clarify this gap, the reason may be that gift officers are looking for access to donors and see alumni events as a chance to cultivate giving.
- Alumni relations and engagement officers are more likely to focus on expanding engagement, increasing DEIB leadership, and increasing volunteering. Less than 20% of gift officers identify these as priorities.

#### WHAT IS MISSING—AND A CAVEAT

- Social media presence was identified as a priority by less than 10% of all advancement professionals. Recent WASHBURN & McGOLDRICK alumni surveys suggest that 52% of alumni graduating since 2000 prefer social media as their means of getting information from their college or university. Ninety-four percent of these younger alumni have social media accounts and 57% of alumni graduating before 1970 also have accounts.
- **A caveat about interpretation:** This question allowed the respondents to identify only their top four priorities. They had to weigh all the options and then choose which ones were most important. The results might have been different if respondents had been allowed to choose all their priorities and those seen as “lower” priorities may have had more responses. The low priority given to social media may have been a result of the respondents weighing this against the other options.

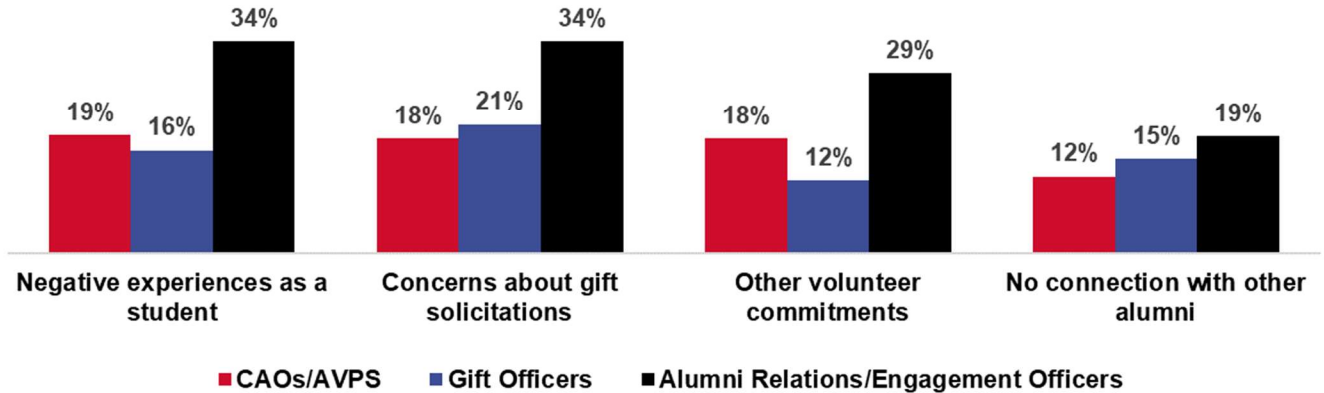
## MAJOR FINDING: FAMILY AND WORK COMMITMENTS ARE BARRIERS TO ALUMNI ENGAGEMENT



Respondents to the November 2023 *Advancement Moving Forward* survey were asked to indicate all the reasons they consider are barriers to alumni engaging with their institutions. The results suggest that demands on time, distance, and apathy are the top barriers.

- There is consensus among all advancement professionals that their institutions are primarily “competing” with their constituents’ other time and family commitments. Other top barriers with which they agree are distance, apathy, and uncertainty about volunteer opportunities.
- Alumni relations and engagement officers are significantly more likely (53%) to indicate they are “competing” with the work commitments of their constituents. This is an expected result since alumni and engagement officers are competing for time while gift officers are competing for time and giving.

## Lower Barriers to Alumni Engagement



- Barriers less likely to be cited by advancement professionals are wide-ranging. CAOs/AVPs and gift officers agree that the lower barriers are negative experiences alumni had as students, concern about gift solicitations, and other volunteer commitments.
- Alumni relations and engagement officers are significantly more likely to cite each of these as barriers, albeit lower barriers than their advancement colleagues.

## BEHIND THE NUMBERS

Over the past two years WASHBURN & McGOLDRICK alumni surveys have asked alumni the reasons they do not engage more with their institutions. **Comparing the responses from 31,351 alumni to the responses from advancement professionals reveals important differences between the voices of alumni and the perceptions of the professionals.**

	Advancement Moving Forward (Nov 2023)	WASHBURN & McGOLDRICK Alumni Surveys (2022–23)*
Time/family commitments	60%	25%
Work commitments	43%	32%
Geographic distance	36%	46%
Lack of interest in alumni events	31%	15%
Disagreement with priorities	30%	20%
Financial limitations	25%	46%
Negative experiences as a student	20%	10%
Other volunteer commitments	17%	17%
No connection with other alumni	14%	17%

\* Based on responses from 31,351 undergraduate alumni



- Alumni are significantly more likely to cite financial limitations (46%) and geographic distance (46%) as the reasons they do not engage or provide financial support. These are cited by significantly more alumni than by advancement professionals (+21% and +10%, respectively).
- Institutional advancement professionals cite time/family (60%) or work commitments (43%) as the top two reasons their constituents do not engage. This represents a significant gap between these perceptions and the same barriers cited by alumni themselves (+35% and +11%, respectively).
- Additional gaps between professional perceptions and alumni feedback are seen in a lack of interest (+16%), disagreements with institutional priorities (+10%), and the negative experiences their alumni had as students (+10%).

## **MAJOR FINDING: THE INTEGRATION OF ENGAGEMENT AND ANNUAL GIVING IS SEEN AS GOOD TO EXCELLENT, BUT MORE INFORMATION SHARING IS NEEDED.**

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The May 2023 *Advancement Moving Forward* survey asked respondents to evaluate the degree to which their alumni engagement programs are integrated into the broader advancement program. Thirty-six percent of those respondents indicated that their programs were fully integrated and 46% indicated they had already begun to integrate. The remaining respondents were either thinking about it (9%) or had completely separate operations (8%).

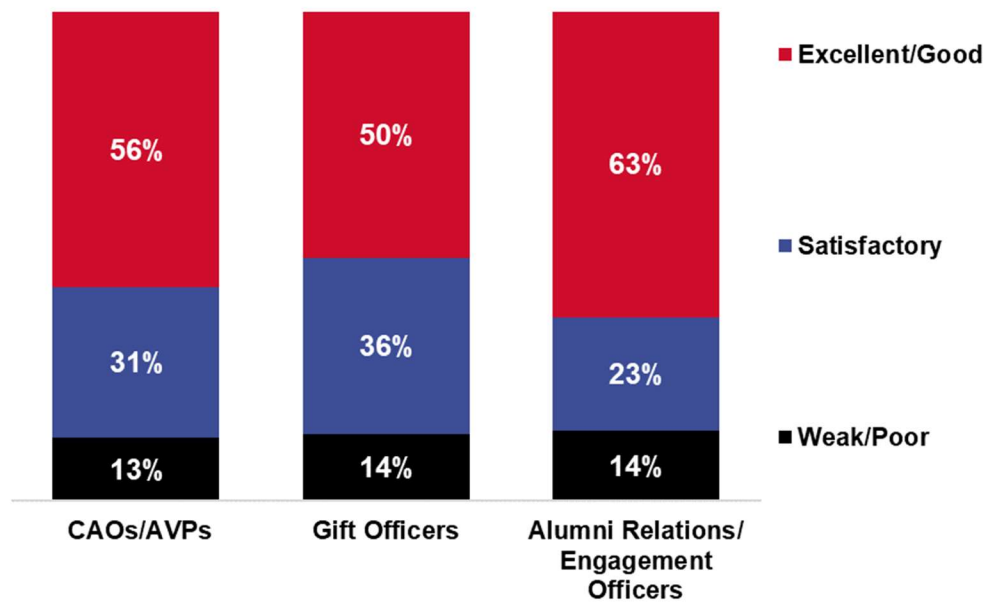
The November 2023 survey pursued this issue by asking respondents two questions:

*How do you judge the working relationship between annual giving and alumni relations at your institution?*

*How informed are you of the following (engagement and fundraising) goals and strategies at your institution?*

Responses to the second question, in particular, were used to determine the degree to which gift officers and alumni officers are aware of each other's priorities, strategies, and goals.

### The working relationship between annual giving and alumni relations

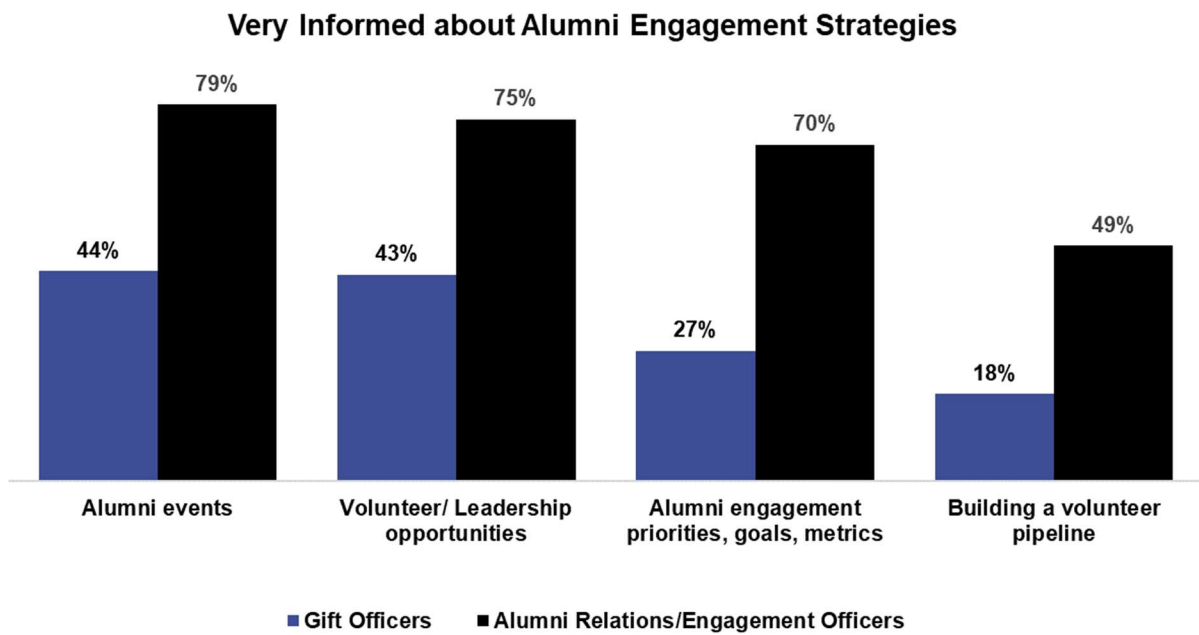
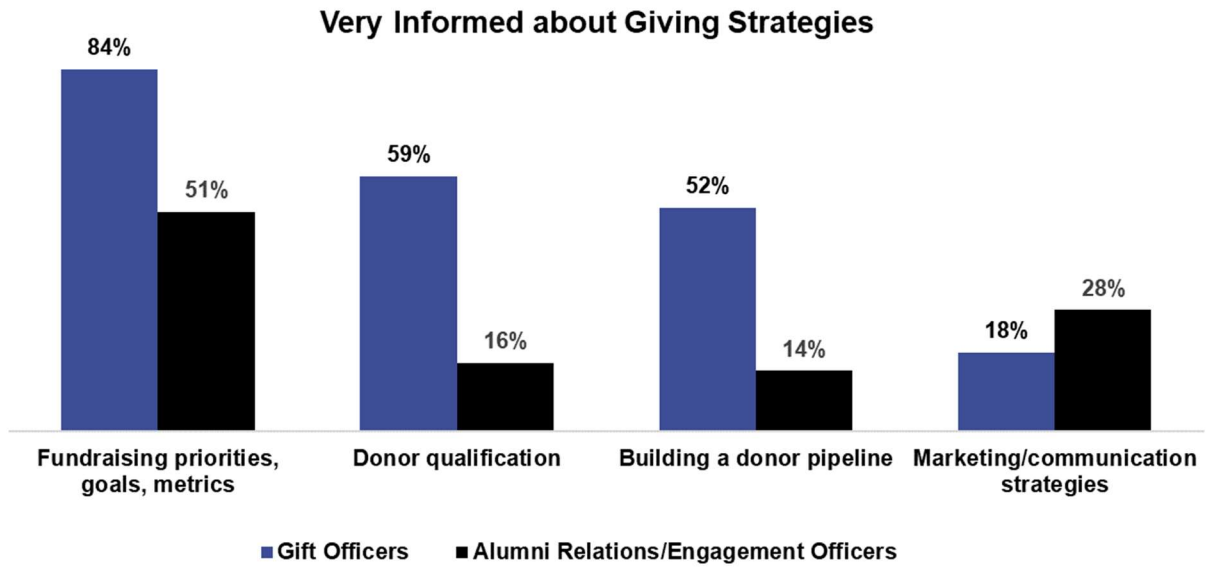


- The majority of respondents indicate the working relationship is good to excellent. Alumni relations and engagement officers are significantly more likely (63%) to give a high assessment to this relationship than gift officers (50%). COAs/AVPs fall between these two areas (56%). Gift officers are more likely to be satisfied (36%).
- When asked how aware they are of their goals and priorities the data suggest advancement professionals are highly aware of fundraising priorities, goals, and metrics (74%). Approximately 40% are aware of alumni engagement priorities, goals, and metrics.

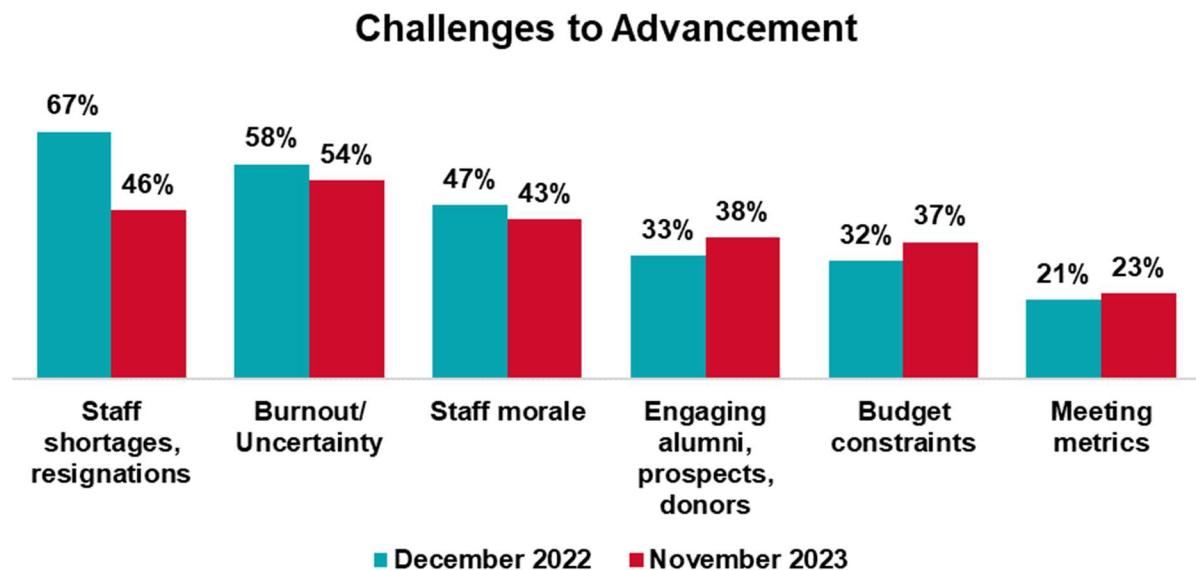
### BEHIND THE NUMBERS

**Closer examination of awareness reveals a significant gap between what they know about their own area or responsibility and the area of their colleagues.**

- Specifically, alumni and engagement officers are significantly less aware of the strategies of gift officers and gift officers are significantly less aware of the work of their alumni relations and engagement colleagues.
- For example, 84% of gift officers are aware of their own fundraising priorities, goals, and metrics, compared to 51% of alumni relations and engagement officers. This 33% gap in awareness is also reflected in the 43% difference in awareness of engagement priorities, goals, and metrics (27% versus 70%).
- Pipeline development for either donors or volunteers also has a gap (38% and 31%, respectively) between these two areas within advancement.



## MAJOR FINDING: RESIGNATIONS, BURNOUT, AND MORALE CONTINUE TO BE THE LEADING CHALLENGES IN ADVANCEMENT



Over the past year WASHBURN & McGOLDRICK's *Advancement Moving Forward* surveys have tracked the challenges facing advancement. These data suggest the following:

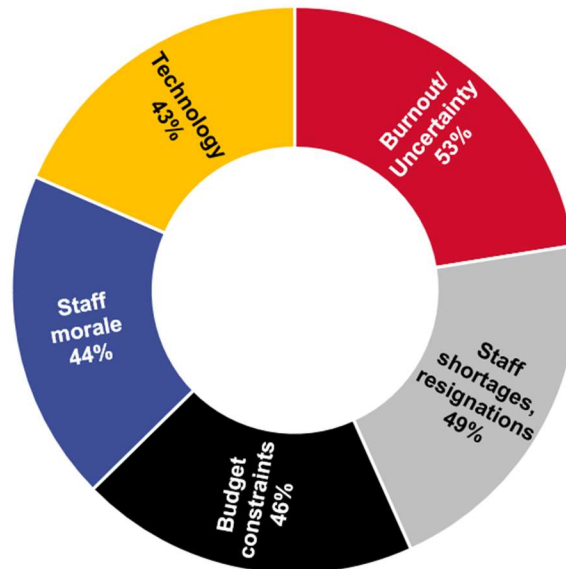
- **Comparison of the top challenges reveals that the only significant shift has been a decline from 67% to 46% in the percentage worried about staff shortages or resignations.** This remains one of the top concerns.
- Burnout, uncertainty, and staff morale round out the top three challenges.
- Other concerns that were added to the November 2023 survey and are worth noting include:
  - ♦ Technology (e.g., CRM, AI, and data analytics), which 43% of CAOs/AVPs and 41% of alumni officers cited as a challenge. Significantly fewer gift officers (28%) cited it as a challenge.
  - ♦ The economy was cited as a concern by 33% of CAOs/AVPs, compared to 25% of gift officers and alumni officers.

## BEHIND THE NUMBERS

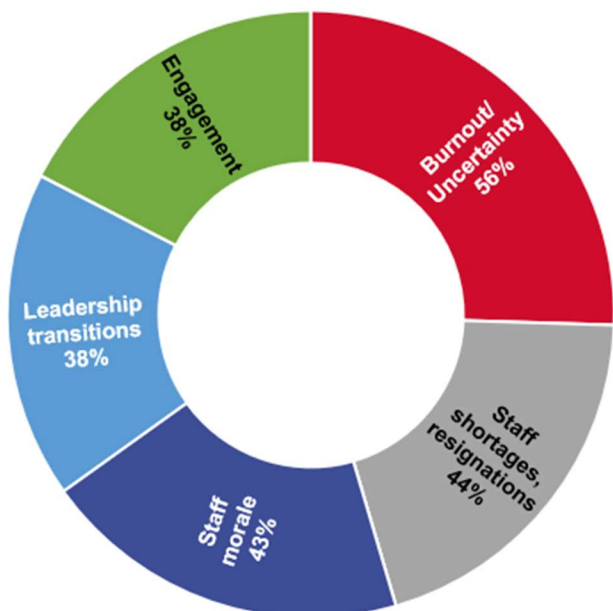
An examination of how the challenges vary within institutional advancement reveals how each professional divides up these issues. As mentioned above, burnout and uncertainty are the leading challenges in advancement for all professionals. The order and relative attention given to the remaining challenges vary by job. For example, CAOs/AVPs and gift officers report that the second challenge on their list is staff shortages. This falls to fifth for alumni relations/engagement officers. Engaging alumni, prospects, and donors completes the list for gift officers and is the only group that has it as a top five challenge.

### CHALLENGES GOING FORWARD

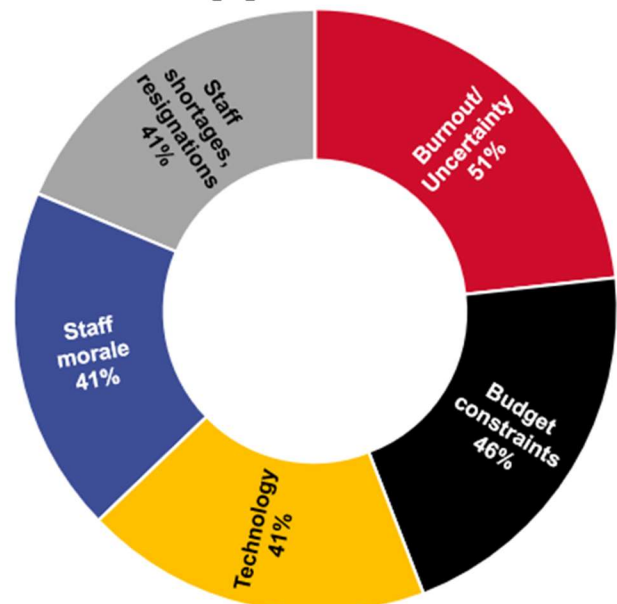
CAOs/AVPs



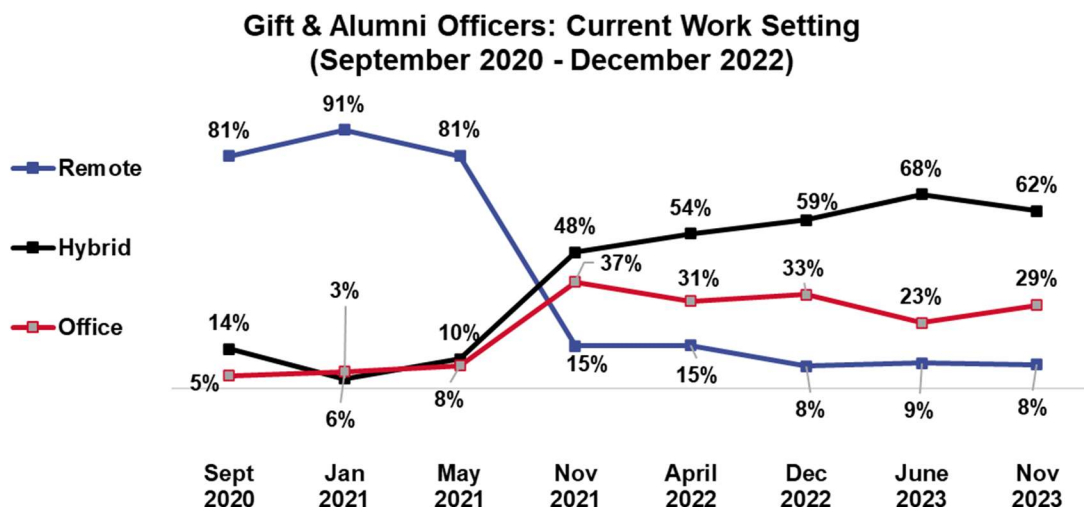
Gift Officers



Alumni Relations/  
Engagement Officers



## MAJOR FINDING: HYBRID WORK SETTINGS HAVE BECOME THE NORM FOR GIFT AND ALUMNI RELATIONS OFFICERS

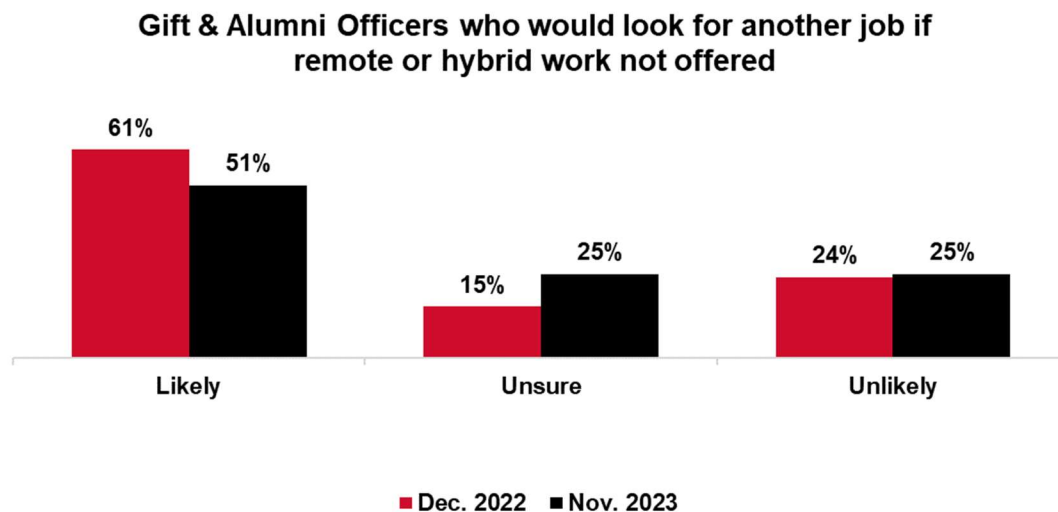


There has been a lot of media coverage concerning the future of hybrid and remote work options. Will professionals return to full-time office work? Will the opportunity to work alternative schedules decline? The WASHBURN & MCGOLDRICK *Advancement Moving Forward* survey has tracked work settings for advancement professionals since September 2020. These longitudinal data suggest that work settings have stabilized over the past two years.

- **Hybrid work dominates the work setting for gift and alumni officers.** It rose as an option once remote work started to decline. Since April 2022 there has been a significant gap between those working a hybrid schedule and those in the office full-time. At the present time 46% of gift officers and 61% of alumni relations or engagement officers are working two days per week at home and three days in the office. On average they are each working 2.5 days per week in the office. At the present time 62% of these professionals are working a hybrid work schedule.
- **Full-time remote work, which dominated work settings three years ago, has declined** and there is no evidence to suggest it is returning. Currently only 8% of gift and alumni officers are working remotely full-time.
- **Full-time office work increased in November 2021, and has seen some slight shifts,** but has generally stayed the same since April 2022. Currently only 29% of gift and alumni officers are working in the office full-time.

## BEHIND THE NUMBERS

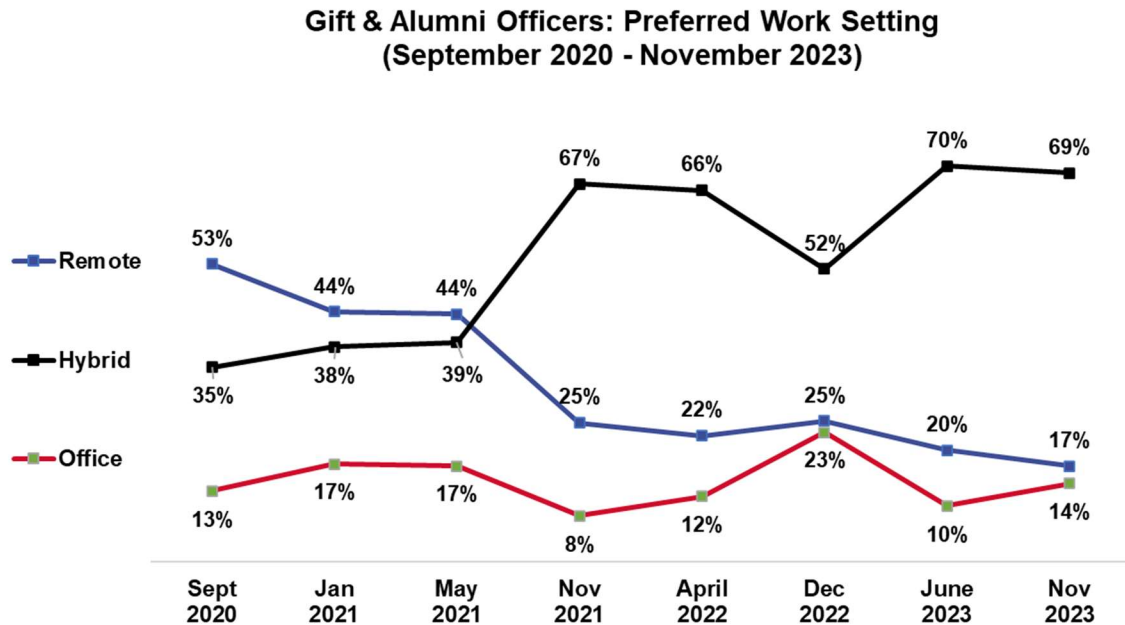
The follow-up question for those working either hybrid or remotely is would you look for another job if alternative options like remote and hybrid work were no longer offered? Would you stay in your current job, or would you leave?



WASHBURN & McGOLDRICK's *Advancement Moving Forward* surveys asked this question in December 2022 and November 2023.

- **The data suggest a decline in the percentage of gift and alumni officers who would likely look for another job (61% to 51%)** with an equal increase in those who are unsure about looking. The percentage who are unlikely to leave has remained stable over the past year at one-quarter of the staff.
- For the 49% of CAOs/AVPs who list staff shortages as one of their top challenges, the likelihood of 51% of their remote workers looking for a new job represents a realization of their fears. Additionally, the 53% who are worried about staff burnout and the 44% concerned about staff morale may want to carefully consider changes to work setting requirements.

## MAJOR FINDING: STAFF PREFER HYBRID WORK SETTINGS BY A WIDE MARGIN



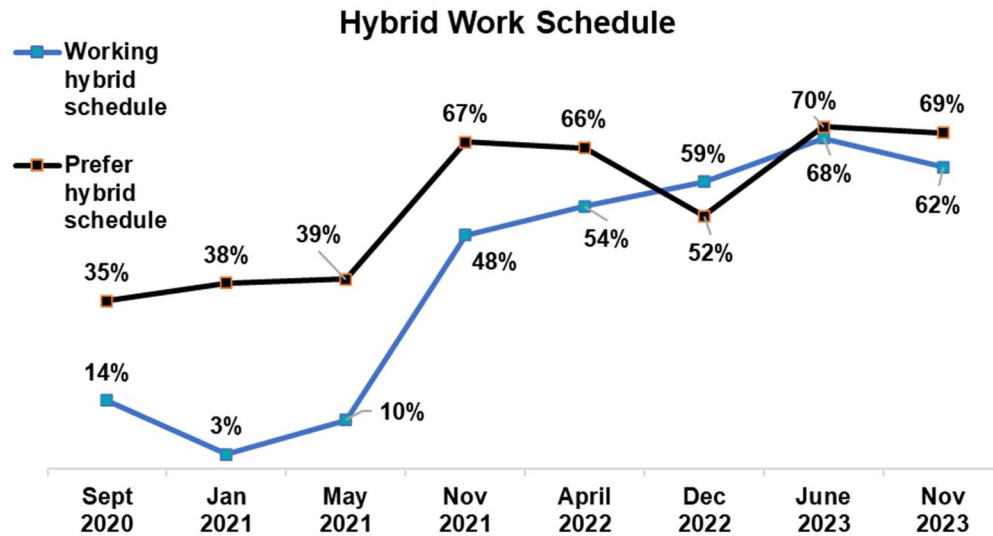
In addition to tracking where advancement professionals are working, the WASHBURN & McGOLDRICK *Advancement Moving Forward* surveys have followed where these staff would prefer to work.

- The results of the November 2023 WASHBURN & McGOLDRICK *Advancement Moving Forward* survey show that **more than two-thirds (69%) of gift and alumni relations officers prefer a hybrid work schedule**. Data collected since September 2020 indicates that interest in hybrid work schedules has increased dramatically, from 35% in September 2020 to 69% in this survey. Seventeen percent (17%) would prefer to work primarily remotely, and 14% would prefer to work primarily in the office.



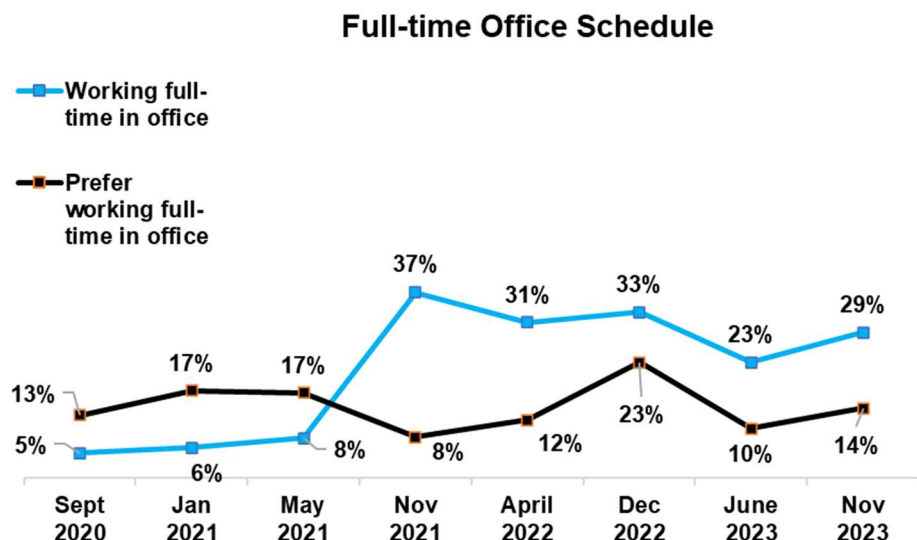
## BEHIND THE NUMBERS

Overlaying actual work settings and preferred work settings reveals that, since December 2022, alumni and gift officers working a hybrid schedule are working exactly where they prefer. However, a statistically significant gap exists between preference and actual setting for those working full-time in the office.



Between September 2020 and May 2021 when 81% to 91% of staff were working remotely and 3% to 14% were working a hybrid schedule, approximately 40% of those working a hybrid schedule preferred this option. Even after November 2021, when remote work dropped to 15% and full-time office work began to return, hybrid work grew as the option of choice. Eventually the gap between hybrid work as the preferred option and the actual work setting began to diminish. This suggests that staff working a hybrid schedule are working exactly where and how they want to work.

Data for staff working in the office full-time reveal a significant gap between preference and the actual work setting that has remained in place for the past two years. Currently 29% of alumni and gift officers are working full-time in the office, while only 14% prefer this choice.



## SELECTED COMMENTS: YOUR PRODUCTIVITY

### **WHAT ARE YOUR OBSERVATIONS (CHALLENGES OR BENEFITS) ABOUT YOUR PRODUCTIVITY WORKING A HYBRID OR REMOTE WORK SCHEDULE?**

NOTE: WHERE THEY ARE CURRENTLY WORKING IS NOTED IN PARENTHESES

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#### **BENEFITS**

##### **Chief advancement officers**

"I think we have worked to effectively implement an effective hybrid work environment for our teams and don't plan to pivot away from this work environment. Most team members are working in the office 3 days and remote 2 days, though we have a growing number of permanently remote colleagues based on geographic opportunities." (Full-time office)

"Getting a break from the office interruptions when I have prospecting or writing to do (office tasks as VP) I have benefitted greatly from working remotely one day a week. Productivity and big picture thinking has increased." (Hybrid)

"Just as productive as hybrid or fully remote as when in the office full time. More fulfilled outside of work when having the opportunity to work remotely." (Hybrid)

"For productive staff, working hybrid helps them recharge when they need it and set aside block times for tasks that are best done without interactions. (Hybrid)

##### **Assistant or associate vice presidents/senior directors**

"Good work/life balance allows me to be most productive and at my best. It helps avoid burnout. I am really a fan of hybrid work." (Hybrid)

"Gift officers can focus more time on prospect and establish healthier work/life balance." (Hybrid)

"Being able to work hybrid gives me the flexibility to work where I am most productive." (Hybrid)

"Hybrid works well for all generations of staff members. It's worked well for us, and we've had less turnover." (Hybrid)

"The flexibility to work at home at times means that I'm able to be productive at times when I previously would not have been available to work." (Hybrid)

##### **Frontline gift officers (e.g., leadership annual giving, major gifts, planned gifts)**

"Being able to work from home one to two days gives me hours back in my life, that allows me time to rest more, complete tasks that distract me from work otherwise, and saves me financially from the expenses incurred with traveling to and being at work." (Hybrid)

"I actually think a hybrid schedule is perfect for me. It allows me the time in the office for in-person meetings, lunches, team building, etc., but it also allows me uninterrupted time at home to really dig

into a spreadsheet or send out a ton of outreach emails, etc. I would be ok with going into the office up to 3 days a week but anything more than that would actually hurt my productivity I think.” (Hybrid)

“I am more productive when working remote, but in-office days are important for collaboration, morale-building, and coaching/training.” (Hybrid)

“I am much more productive remotely. In addition to working when I would otherwise be commuting, there are many distractions at work and not as comfortable or enjoyable.” (Hybrid)

### **Alumni relations or alumni engagement officer**

“A remote schedule allows for better work/life integration.” (Full-time remote)

“Flexibility is a benefit of hybrid work. There are many times during the semester when there is a need to be in the office more than 3 times a week, as long as staff are flexible to come to the office outside of the required days it doesn’t present a challenge.” (Hybrid)

“I feel we are productive because we have flexibility to meet our professional and personal obligations. We have support from senior leadership to encourage work life balance within the hybrid schedule.” (Hybrid)

## **CHALLENGES**

### **Chief advancement officers**

“For unproductive staff, hybrid worsens their lack of productivity.” (Hybrid)

“I come in every day. But my team can now work 3 days at home. I worry about their connectivity to each other. And how we deepen our culture when we are so rarely together.” (Full-time office)

“For some working from home can be distracting.” (Hybrid)

### **Assistant or associate vice presidents/senior directors**

“Disconnected. They are not as available to pitch in and help. Miss the intellectual collisions that occurred when they were not remote.” (Full-time office)

“It makes some days meeting heavy.” (Hybrid)

### **Frontline gift officers (e.g., leadership annual giving, major gifts, planned gifts)**

“I worry about new hires learning about the culture and mission of our university. People worked harder when they had to come to work most days and it felt like more of a team but the horse is out of the barn and this is the new normal.” (Hybrid)

“I miss connecting with colleagues organically. When I come in (with a big commute) very few colleagues are there.” (Hybrid)

### **Alumni relations or alumni engagement officers**

"I value the relationships built in-person." (Hybrid)

"Missing the organic connections with colleagues." (Hybrid)

"When I'm in the office, it becomes more of a social hour." (Hybrid)

## **SELECTED COMMENTS: COLLABORATION**

### **WHAT ARE YOUR OBSERVATIONS (CHALLENGES OR BENEFITS) ABOUT WORKING WITH COLLEAGUES OR STAFF WHO ARE WORKING A HYBRID OR REMOTE WORK SCHEDULE?**

NOTE: WHERE THEY ARE CURRENTLY WORKING IS NOTED IN PARENTHESES

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### **BENEFITS**

#### **Chief advancement officers**

"I sense a better work/life balance with our hybrid workers." (Full-time office)

"Benefits: when remote, it's easier to reach people (email, Google chat, Zoom, phone, text, whatever). And they're not as stressed, so the quality of the interaction is much better. And our office has monthly mandatory in-person meetings, so relationships remain on track." (Hybrid)

"Working hybrid makes all the staff really appreciative of our time out of the office and our time together. It's important to have time together to collaborate, and the individual work can then be done from anywhere." (Hybrid)

#### **Assistant or associate vice presidents/senior directors**

"I think we proved we can do it during the pandemic. Some jobs lend themselves to more remote work while others do not. We lose out on new employees with a lack of a hybrid policy compared to the competition." (Full-time office)

"My team is generally happier with the flexibility to balance all aspects of their / their families' lives." (Full-time remote)

"Everyone has adapted very well." (Hybrid)

"The one benefit is that it is helping us retain talent. Our staff retention has improved significantly over the past fiscal year." (Hybrid)

“Hybrid schedules make people more strategic about how they use time in the office—interacting directly with colleagues.” (Hybrid)

### **Frontline gift officers (e.g., leadership annual giving, major gifts, planned gifts)**

“A person’s schedule does not determine how they do their work. It is the individual’s work ethic that matters most.” (Full-time office)

“Staff are happier to have flexibility. I think hybrid is important to continue to allow in-person meetings/collaboration as much as is possible.” (Full-time office)

“My team is generally happier with the flexibility to balance all aspects of their / their families’ lives.” (Full-time office)

“I don’t see any challenges with today’s technology.” (Hybrid)

### **Alumni relations or alumni engagement officers**

“We have good infrastructure for hybrid work.” (Full-time remote)

“I think that a hybrid work schedule allows for a lot of flexibility and collaboration in our division.” (Hybrid)

“No challenges, everyone is able to communicate effectively.” (Hybrid)

“My direct team is very responsive to each other regardless of our physical location and we are always present in office on our assigned days.” (Hybrid)

## **CHALLENGES**

### **Chief advancement officers**

“It is harder to build a relationship outside of work touches since we rarely see one another; hybrid person’s disengagement with institution/work. I have not seen anyone yet who is hybrid who is ‘loving it’ when it comes to their work or their affinity to their institution.” (Full-time office)

“Things that would normally be solved, communicated, or shared through quick stand-up conversations and informal communication now end up being waves of emails, scheduled additional meetings, etc. While staff feel supported by flexible/hybrid work schedules, they do not recognize the impact of these practices on the day-to-day efficiency and function of the division or the longer-term implications across training and culture.” (Full-time office)

“Lack of face-to-face interaction in the office hurts camaraderie.” (Full-time office)

“Remote workers face isolation. Many people indicate their preference for fully remote work but encounter unexpected consequences such as losing the boundary between work and home. Instead of working from home, they begin living at work.” (Hybrid)

“Hybrid meeting participation can be challenging. Difficult to keep track of where people are or whether they can be contacted.” (Hybrid)

### **Assistant or associate vice presidents/senior directors**

“There is much less collaboration and connection since the hybrid model has been implemented. It is a great option for the employee, but we are kidding ourselves if we truly believe it is better for the institution.” (Full-time office)

“Communication and engagement is harder.” (Full-time office)

“They aren’t as connected to the institution, mission, or team.” (Full-time office)

“It’s hard to keep up with peer relations with people you don’t interact with much on a daily / weekly basis.” (Full-time remote)

“Lack of spontaneous conversations; miss social aspects.” (Full-time remote)

“The hybrid schedule creates layers of asynchronous communications flow, which is ultimately not efficient or productive to the workday, especially when there is only one all-in day for the office. Email traffic is at an all-time high! Virtual technology allows people to multi-task during meetings, which distracts them. It can be difficult to keep a team uniformly fluent about projects.” (Hybrid)

“Challenge to delegate to support staff (timely, ability to set understanding and expectations); loss of team spirit.” (Hybrid)

### **Frontline gift officers (e.g., leadership annual giving, major gifts, planned gifts)**

“Challenge: them staying engaged, communication, not able to pop in for discussions.” (Full-time office)

“Loss of collaboration, team morale.” (Full-time office)

“It is hard to get to know the team with hybrid schedules.” (Full-time office)

“No cohesive plan—seems everyone is doing their own thing. Some unfairness is being felt by those in the office.” (Full-time office)

“Staff are not equally informed about items that matter.” (Full-time office)

“I feel disconnected from our remote staff.” (Hybrid)

“Schedule availability, inability to have off-the-cuff, real-time conversations.” (Hybrid)

### **Alumni relations or alumni engagement officers**

“Not as connected with other team members.” (Full-time office)

“Our team has a few members who work hybrid and everyone else is full-time in the office. I notice some resentment towards those who work hybrid.” (Full-time office)

“There is a noticeable reduction in opportunities for spontaneous brainstorming and collaboration that occurred in unplanned ways when all were co-located. This has decreased innovation, led to longer/more difficult onboarding of new staff, and in some ways, decreased efficiency in completing

collaborative projects. It has also led to reduced team cohesion, as we know less about each other as individuals and people outside of our work roles than we did prior to the pandemic. There are great individual benefits to remote/hybrid work (that I myself have benefitted from), and I support that being an option. However, I believe that there is a need to address the challenges that I mentioned for hybrid teams, and I don't think that we've figured out how to do that well." (Full-time office)

"They don't know what's going on campus." (Full-time office)

"Can be difficult to connect." (Hybrid)

"I accomplish more and can advance conversations/projects quicker when meeting in person. I find that colleagues who come in only 1x/week are not as productive as they spend it mostly 'catching up' with you." (Hybrid)

## METHODOLOGY

- The **November 2023** survey was sent in October and November 2023 to 3,424 CAOs, vice presidents for advancement, AVPs, directors of development, gift officers (school/center-based, central, and regional), alumni engagement officers, and alumni relations officers at universities, colleges, museums, and independent schools throughout the US. The survey closed on November 14, 2023.
- **The survey took five minutes to complete**, with a 94% completion rate. This includes responses to two open-ended questions.
- **Responses to the November 2023 survey were received from 417** individuals (180 CAOs/senior advancement staff, 146 gift officers, 59 alumni relations officers, and 32 Advancement Services staff), **representing 134 institutions**. Responses were received from seven independent schools, four HBCUs, five HSLs, and two museums.
- **Topics April 2020 to November 2023**

	April 2020	June 2020	Sept 2020	Jan 2021	May 2021	Nov 2021	April 2022	Dec 2022	June 2023	Nov 2023
Confidence	x	x	x	x	x	x	x	x	x	x
Office, hybrid, and remote work		x	x	x	x	x	x	x	x	x
Alumni engagement							x	x	x	x
Advancement/Alumni Relations integration										x
Future challenges	x		x	x		x	x	x	x	x
Using technology to engage donors			x			x	x	x	x	
Staff productivity						x		x		
Staffing vacancies						x	x			
Adjusting to remote/hybrid work	x	x				x				
Fundraising priorities		x	x	x	x					
Impact of the pandemic on advancement		x	x	x	x					
“Zoom” fatigue			x	x						
DEIB					x				x	

- **Margin of error:** While response rates are frequently cited as a measure of a survey’s “success,” the margin of error is the more important statistic. **It is a measure of the accuracy of the results.** The margin of error for the November 2023 survey is +/- 4.5% at a 95% confidence level.



This suggests that we are 95% certain that results of this *Advancement Moving Forward* survey are within 4.5% of the results we would have observed if we had responses from all 3,424 individuals who were sent the survey. The acceptable margin of error used by most surveys is typically between 4% and 8% at the 95% confidence level.

Results of all the surveys are available at <https://www.wash-mcg.com/>.

## PARTICIPATING INSTITUTIONS

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Academy of the Holy Names\*

Adams State College

American Jewish University

Amherst College

Appalachian State University

Ball State University

Berea College

Boston College

Bowdoin College

Bryn Mawr College

Bucknell University

Carleton College

Carnegie Mellon University

Carroll University (WI)

Colgate University

Colorado College

Davidson College

Denison University

DePauw University

Dickinson College

Drexel University

Duke University

Eckerd College

Elizabeth City State University

Elon University

Fairfield College Preparatory School \*

Fairfield University

Florida International University

Florida State University

Fordham University

Franklin & Marshall College

Furman University

George Fox University

Georgetown University

Georgia Tech University

Gettysburg College

The Governor's Academy\*

Grinnell College

Hamilton College

Hampton University

Haverford College

High Point University

Illinois Institute of Technology

Immaculata University

James Madison University

Kenyon College

Kingswood Oxford School\*

Knox College

Lafayette College

Lenoir-Rhyne University

Lincoln University

Loyola University (MD)

Lycoming College

Macalester College

Michigan State University

Middlebury College

Morehouse College

Mount Holyoke College

Muhlenberg College

New England College

North Carolina School of Science and Math

North Carolina State University

Northeastern University

Oberlin College and Conservatory

Occidental College

Ohio State University

Ohio University

Phillips Exeter Academy\*

Potsdam University (SUNY)

Providence College

Rollins College

Rosemont College

Rutgers–The State University of New Jersey

Saint Anselm College

Siena College	University of North Carolina School of the Arts
Skidmore College	University of Pittsburgh
Smith College	University of Rhode Island
Smithsonian	University of Richmond
Springfield College (MA)	University of South Carolina
St. Catherine University	Valparaiso University
St. John Fisher College	Vanderbilt University
St. Lawrence University	Vassar College
SUNY College of Environmental Science and Forestry	Villanova University
Stonehill College	Virginia Commonwealth University
Suffolk University	Virginia Museum of Fine Arts
Swarthmore College	Wake Forest University
Syracuse University	Washington and Lee University
Texas Christian University	Washington College
Texas Lutheran University	Washington University in Saint Louis
Texas Tech University	Western Carolina University
The Catholic University of America	Western Michigan University
The University of Maryland - Baltimore	Wheaton College (MA)
Towson University	Whitman College
Trinity College (CT)	William & Mary
Trinity University (TX)	Williams College
Tulane University	Winston-Salem State University
Union College	Woodberry Forest School*
University of Arizona	
University of Buffalo	
University of California–Santa Barbara	
University of Chicago Booth School of Business	
University of Delaware	
University of Houston	
University of Maryland–Baltimore County	* Indicates independent school
University of Maryland–College Park	
University of Massachusetts Lowell	
University of Missouri System	
University of New Hampshire	
University of North Carolina–Chapel Hill	
University of North Carolina–Charlotte	
University of North Carolina–Wilmington	