

Advancement Moving Forward:
Update on the State of the Profession

**November 2021 Survey of Gift Officers, Alumni Relations Officers,
and Chief Advancement Officers**

November 15, 2021

BACKGROUND

The WASHBURN & McGOLDRICK November 2021 *Advancement Moving Forward* survey of advancement professionals is the sixth in our series on the state of the profession. This series began in April 2020 at the beginning of the COVID-19 pandemic. Since then, we have tracked how alumni relations officers, gift officers, and chief advancement officers have kept the momentum of their advancement efforts moving forward.

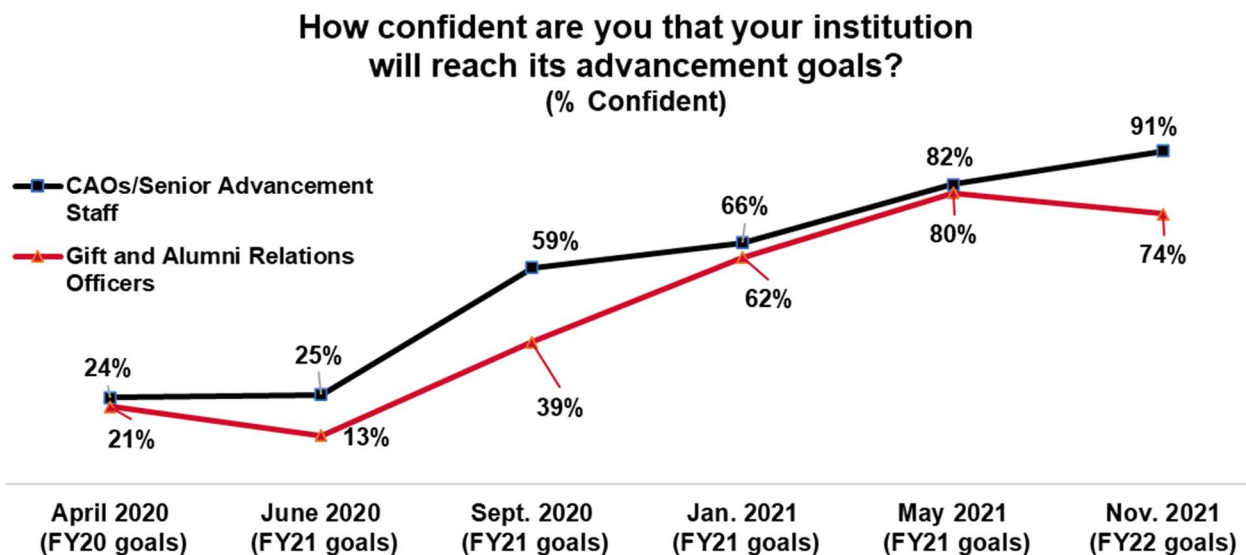
These surveys explore timely issues of importance to advancement professionals in U.S. universities, colleges, and independent schools. The topics in each survey are suggested by chief advancement officers and their senior staff to provide information that allows them to respond in a timely manner.

Confidence in achieving fundraising goals for the current fiscal year and the future of remote, hybrid, or office work have been explored in almost every survey. Over the past year we have also addressed fundraising priorities, the impact of the pandemic on advancement, Zoom fatigue, and institutional responses to Diversity, Equity, Inclusion, Belonging, and Justice (DEIB) issues.

	April 2020	June 2020	Sept. 2020	Jan. 2021	May 2021	Nov. 2021
Confidence	x	x	x	x	x	x
Office, hybrid, and remote work		x	x	x	x	x
Staff Productivity						x
Staffing vacancies						x
Adjusting to remote/hybrid work	x	x				x
Challenges to the solicitation cycle	x		x	x		x
Fundraising priorities		x	x	x	x	
Impact of the pandemic on advancement		x	x	x	x	
Zoom fatigue/use			x	x		
DEIB					x	

Details about the methodology, a list of participating institutions, and detailed tables of the results are found at the end of this report.

MAJOR FINDING: CONFIDENCE GAP RETURNS



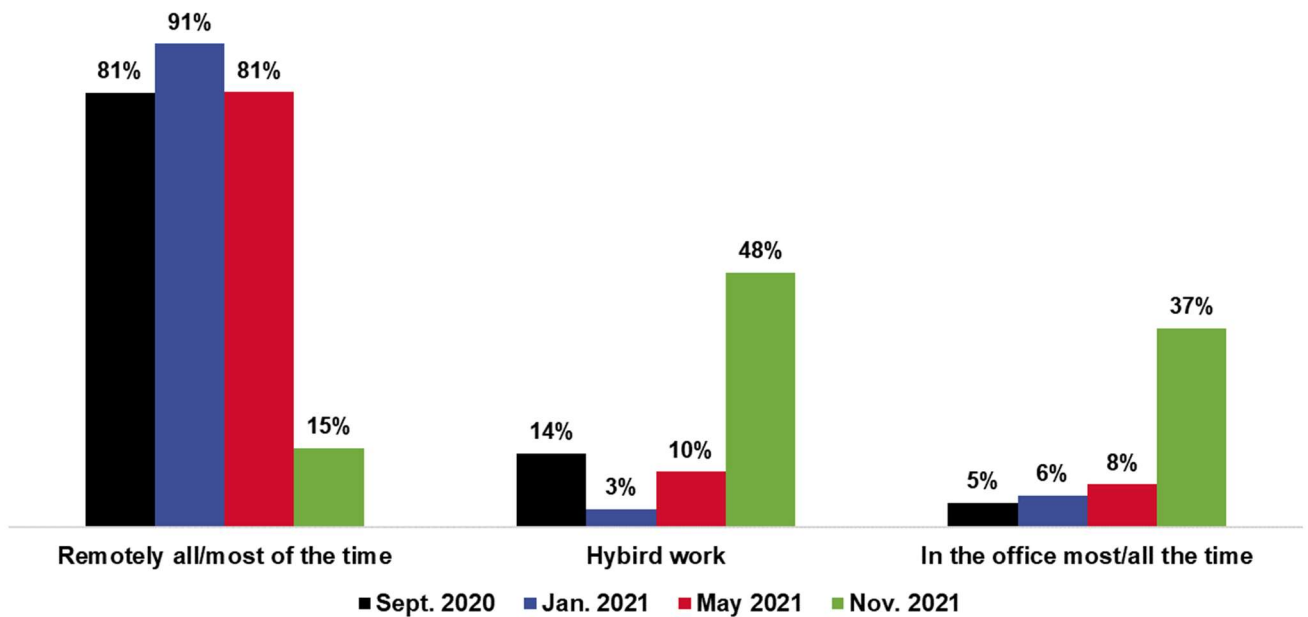
- **The November 2021 survey reveals a gap in confidence between advancement professionals has returned.** Confidence among CAOs in achieving annual advancement goals has increased from 82% to 90%. At the same time confidence among gift/alumni officers has decreased from 80% to 74%. These data suggest that confidence is high, but there is a significant difference between these two groups.
- When the WASHBURN & McGOLDRICK *Advancement Moving Forward* survey series began in April 2020, advancement staff were in the first month of adjusting to lock-downs, remote work, and quarantines. At that point only 22% of both gift/alumni officers and CAOs were confident about reaching their FY20 year-end goals.
- This low level of confidence continued into June 2020 with decreasing confidence among gift/alumni officers. While the gap continued through September 2020, a trend began towards increasing confidence for all advancement professionals. The current survey reveals the highest level of confidence among CAOs since the beginning of the *Advancement Moving Forward* survey series. Even with the gap between CAOs and their staff, nearly three-quarters of gift/alumni officers are confident about reaching their FY22 goals.
- **The downturn in gift/alumni officer gap seems to be due to (1) uncertainty about momentum; and (2) years of experience.**
 - **Uncertainty about momentum.** Respondents were asked to comment on the most substantial change to their work this fall. Analysis of those comments reveals 64% of the gift/alumni officers cite regaining momentum (35%) or returning to in-person meetings (29%). These individuals are more likely to report uncertainty (28%) about reaching FY22 goals than those citing other reasons (18%). Other reasons include travel, metrics, and staff shortages.
 - **Years of experience.** Gift/alumni officers who have worked in advancement between six and nine years are less confident (67%) and more uncertain (29%) than those working 10 or more years in advancement (77% confident and 19% uncertain).

- Age and working setting (remote, hybrid, office) have no impact on confidence in achieving FY22 goals.

The gap which appeared in September 2020 and is repeated in November 2021 might also be cyclic. Gift/alumni officers are facing a full year to achieve their goals and as they move closer to the end of the year their confidence increases. We will continue to track these data in the 2022 surveys.

MAJOR FINDING: A SHIFT AWAY FROM REMOTE WORK

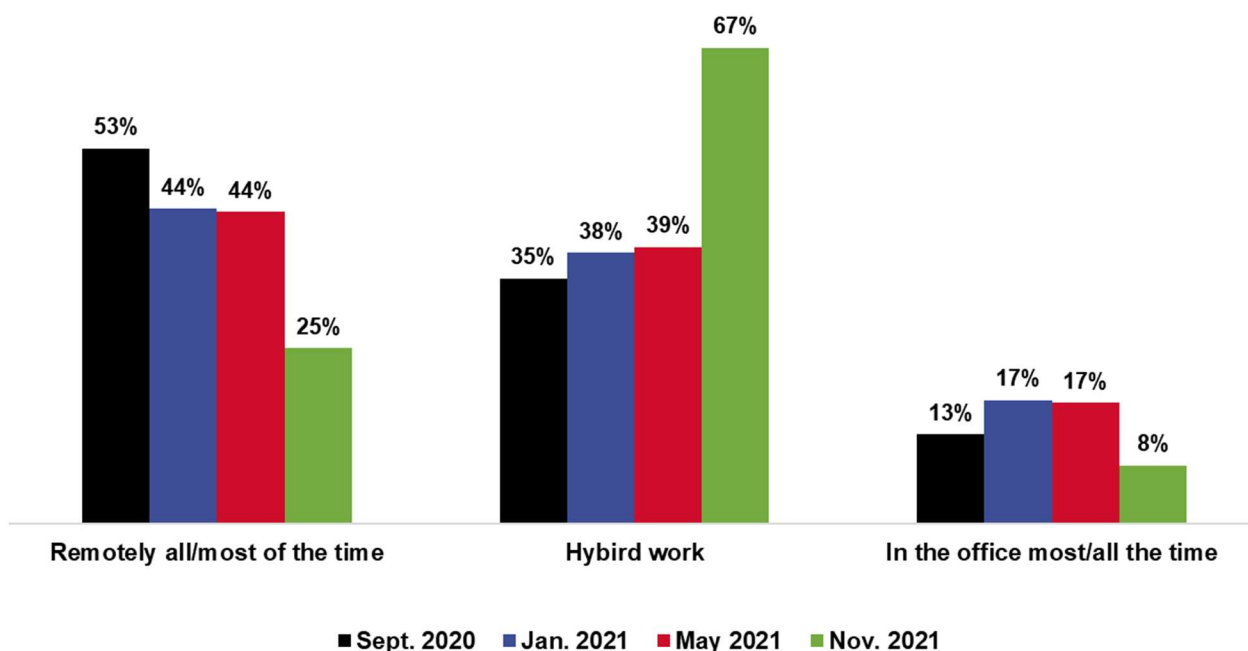
Gift & Alumni Officers: Current Work Setting
(September 2020 - November 2021)



- Throughout the past academic year (September 2020 – May 2021) the overwhelming majority (81% to 91%) of gift/alumni officers reported they were working remotely full-time. In addition, the April 2021 Washburn & McGoldrick *Advancement Moving Forward* survey revealed that three-quarters of gift/alumni officers expected most of their job responsibilities could be accomplished through a hybrid approach (See May 2021 summary at <https://www.wash-mcg.com>).
- The current November 2021 survey reveals that this expectation has largely come true, as hybrid work has emerged as the schedule for many advancement professionals. Only 15% are working remotely full-time. Nearly half (48%) are working a hybrid schedule and 37% are in the office full-time.

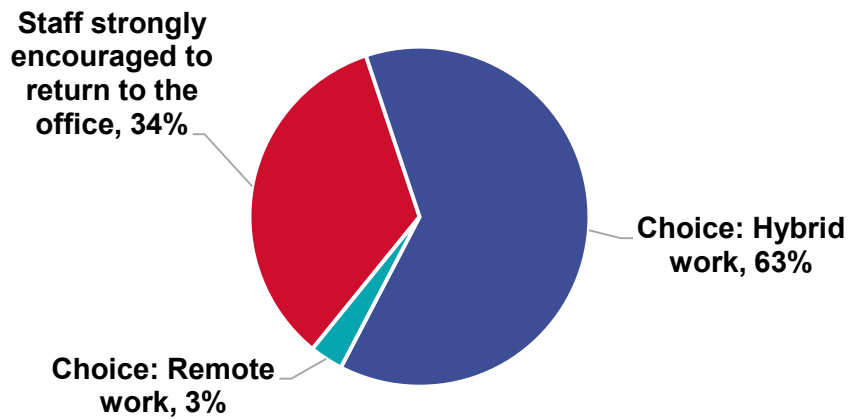
MAJOR FINDING: EXPECTATIONS OF HYBRID WORK DOMINATE

Gift & Alumni Officers: Preferred Work Setting (September 2020 - November 2021)



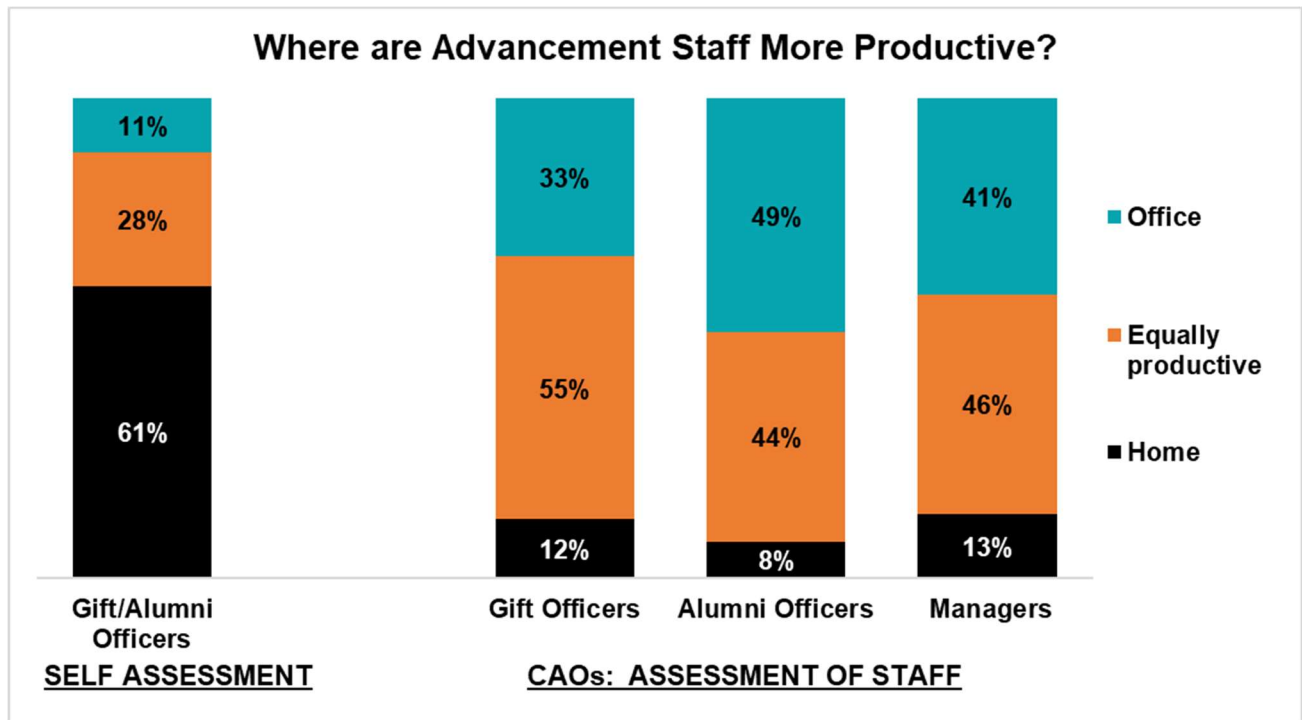
- **The November 2021 survey suggests two-thirds (67%) of gift/alumni officers would prefer a hybrid work schedule.** Over the past year the *Advancement Moving Forward* surveys have asked advancement professionals to indicate where they would prefer to work if given a choice after the pandemic. The data from these surveys suggest the following:
 - The percent of respondents indicating they would prefer to work remotely full-time has dropped significantly, from 44% as of May 2021 to 25% currently.
 - At the same time, the percent of respondents who want to return to full-time work in the office has dropped from 17% to 8%.
 - While interest in both full-time remote and full-time office has decreased, these data suggest that interest in hybrid work has increased significantly, from 39% to 67%.
- **CAOs are responding to these staff preferences with work options that include hybrid work.** In the April 2021 survey, 59% of the CAOs indicated their offices would definitely adopt a more flexible work-from-home policy once staff returned to the office than had been in place before the pandemic. As of November, those plans seem to have been put in place in many institutions.

CAOs: Work Options for Advancement Staff (November 2021)



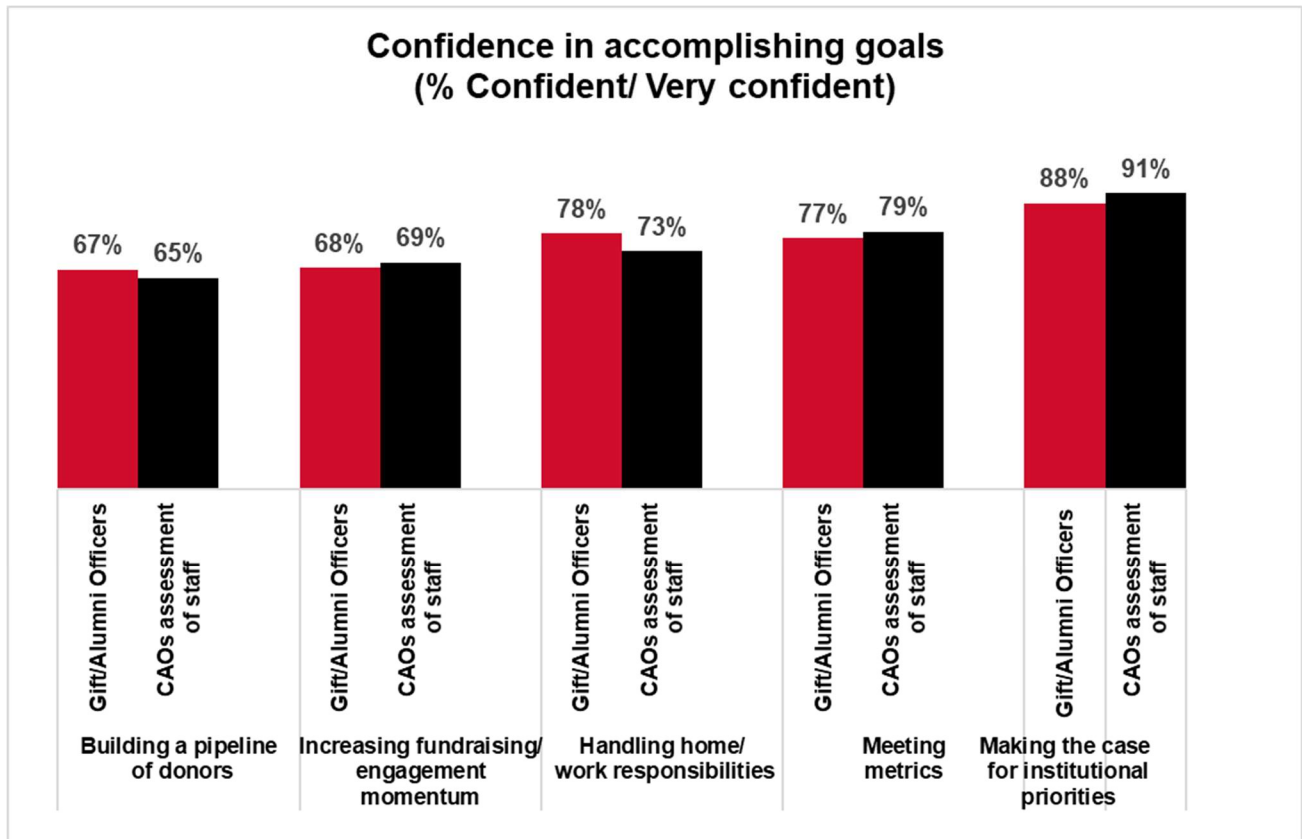
- When asked what work options are currently available to their advancement staff, 63% of these CAOs indicated their staff can choose a hybrid schedule. One-third (34%) were “strongly encouraging their staff to return to the office” full-time, and only 3% were giving their staff the option of working remotely full-time. The hybrid option nearly paralleled the preferences of their staff.

MAJOR FINDING: DIFFERENT VIEWS OF PRODUCTIVITY WITH SOME MIDDLE GROUND



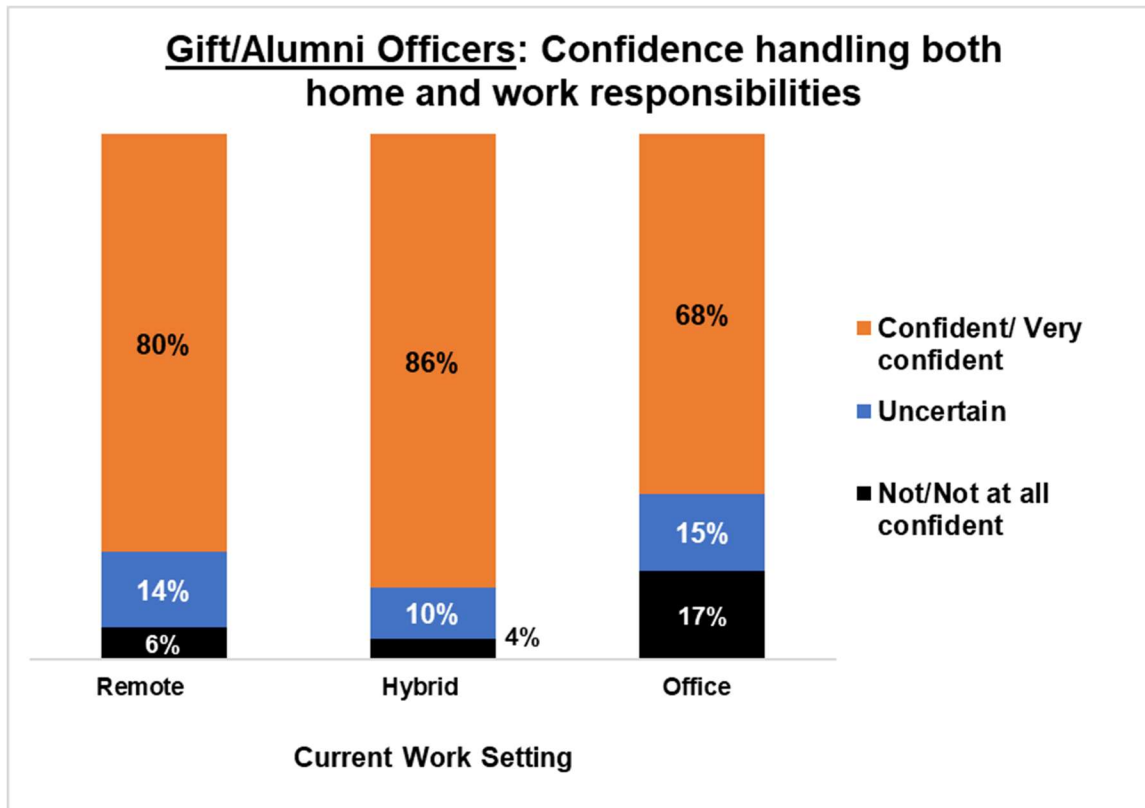
- **While there is agreement about working a hybrid schedule (see previous findings), there is significant disagreement between CAOs and gift/alumni officers as to where advancement staff are most productive.** CAOs were asked to assess whether their staff are more productive working at home or in the office, or whether they are equally productive in either location. Gift/alumni officers were asked where they feel they are most productive.
- Data collected for the current November survey indicate a significant gap between these views on productivity. Only 11% of the gift/alumni officers indicated they were most productive in the office. The majority (61%) indicated they were most productive at home. While there is no data to indicate the reasons for this self-assessment, we hypothesize that the experience working at home during the pandemic may have given them confidence in their ability to work at home.
- In contrast, only a small minority of the CAOs indicated that any of their staff (12% for gift officers, 8% for alumni officers, and 13% for managers) were more productive at home. Among the other options, between 33% and 49% indicated their staff were more productive in their office.
- **While the extremes (home vs. office, gift officers vs. CAOs) suggest disparate views of productivity, there is a middle ground.** Between 44% and 55% of the CAOs indicate their staff are equally productive work at home or in the office.

MAJOR FINDING: CONCERNS ABOUT PIPELINE AND MOMENTUM



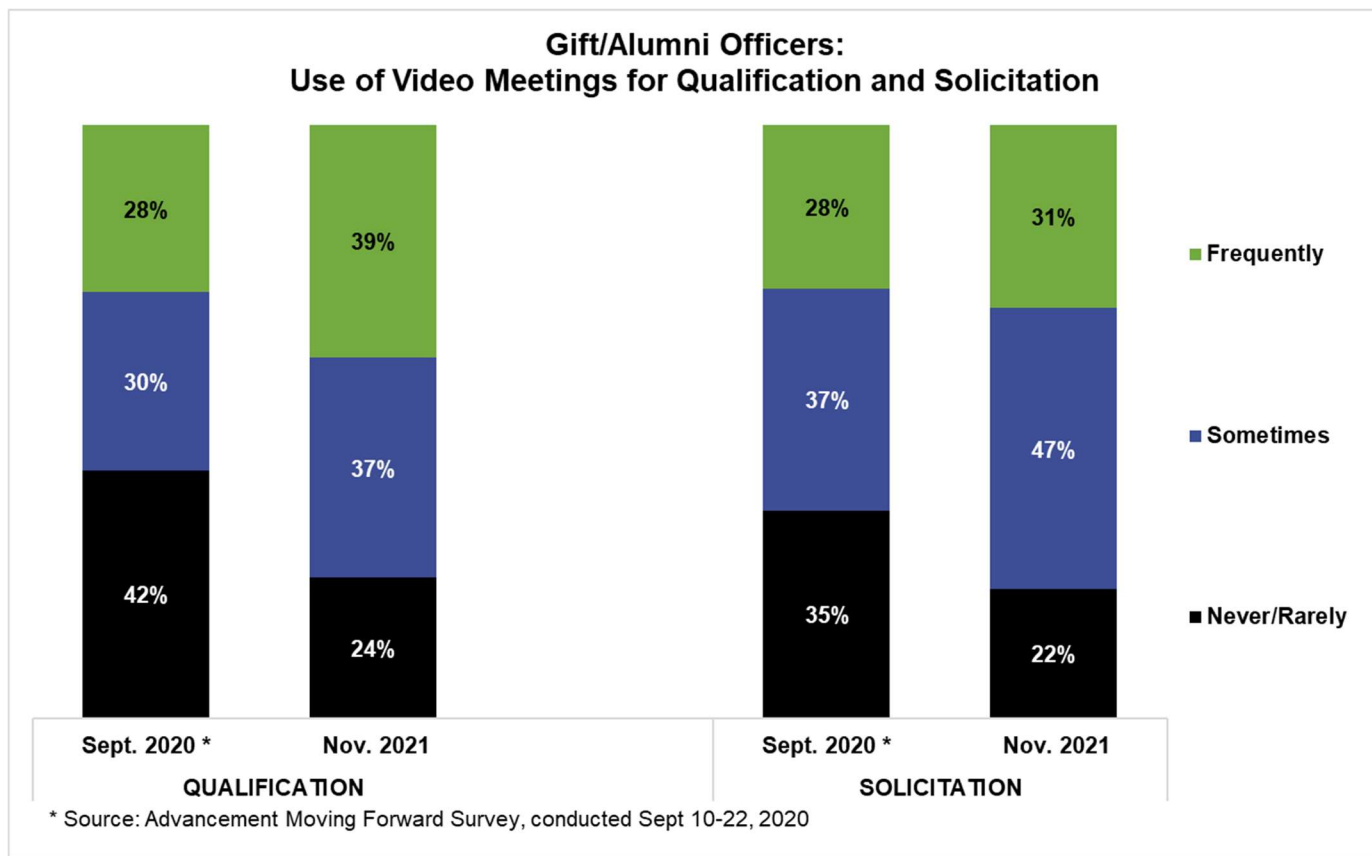
- **Gift/alumni officers and chief advancement officers agree that they are least confident about building a pipeline and increasing momentum. They are significantly more confident about making the case for institutional priorities.**
- Gift/alumni officers were asked about their level of confidence in achieving specific job related responsibilities. Chief advancement officers were asked to assess their confidence in their staff's ability to achieve these same responsibilities. The data suggest agreement between both groups about staff confidence in each of these areas.
- Closer examination of these data suggest both gift/alumni officers and chief advancement officers share the least confidence in those responsibilities having to do with momentum and the pipeline.
- **The greatest barrier seems to be qualifying prospects.** In a separate question, respondents were asked to indicate which stages of the solicitation cycle are currently the most challenging. Forty-nine percent of CAOs indicated that qualifying prospects is most challenging for their staff. Thirty-seven percent of gift/alumni officers agree. By contrast, only 10% of CAOs and 15% of gift/alumni officer indicate gift solicitation is the most challenging.

MAJOR FINDING: WORK/HOME BALANCE WILL BE CHALLENGING



- **Gift/alumni officers working a hybrid schedule are most confident (86%) about meeting the dual responsibilities of work and home.** While overall confidence in balancing work and home responsibilities is high for gift officers (78%), there is a gap in confidence based on work location.
- Confidence peaks (86%) for those gift/alumni officers who can divide their time between home and the office. Confidence is lowest for those working in the office (68%), with 17% not confident in meeting these dual demands.
- It is interesting to note a slight decline in confidence (80%) for those working fulltime at home.

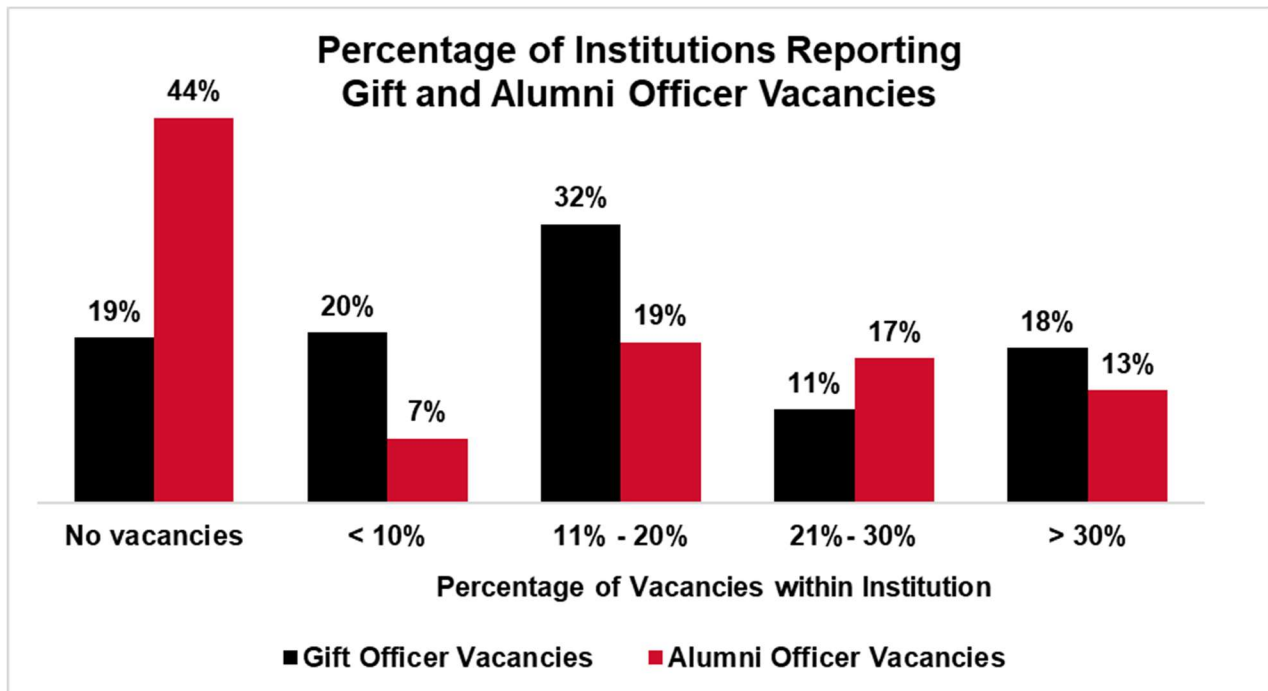
MAJOR FINDING: THE “NEW NORMAL” OF VIDEO MEETINGS



- **The use of video conferencing has increased for qualification and solicitation meetings over the last year.** In September 2020 we asked gift/alumni officers to indicate how often they used video conferencing to meet with donors, prospects, and constituents. Video conferencing was defined as using Zoom, Google Meet, Microsoft Teams or WebEx.
- As of September 2020, 58% reported using these platforms either sometimes or frequently for qualification meetings and 65% reported using them for solicitation.
- Currently 76% use these platforms for qualification meetings and 78% use them for solicitation meetings.
- These data support the October 2020 prediction by the Chronicle of Philanthropy that fundraising professionals are moving towards more “meaningful forms of outreach” beyond in-person meetings.¹ **With the overall decline in remote work and the shift toward hybrid as reported above, these data suggest the technological changes made necessary a year ago by remote work may be part of the “new normal” in advancement.**

¹ Source: The Chronicle of Philanthropy. Fundraising Strategies are Shifting. Posted 10/28/20. Available at <https://www.philanthropy.com/article/fundraising-strategies-are-shifting>

MAJOR FINDING: THE CHALLENGE OF MOVING FORWARD AND THE “GREAT RESIGNATION”



- **Sixty-one percent of CAOs at 58 institutions are reporting vacancies rates for gift officers exceeding 10%. Forty-nine percent of these CAOs report reporting vacancies rates for alumni officers exceeding 10%.** Thirty-two percent of the CAOs report vacancy rates for gift officers between 11% and 20%, while 18% report greater than 30% vacancy rates for gift officers.
- Over the past year there have been frequent reports in the media about “the great resignation” hitting various industries.
 - As recently as November 12, 2021, the **Bureau of Labor Statistics** (BLS) reported there were 10.4 million open jobs across all industries with 4.4 million workers leaving their jobs in September 2021.² They reported that 1.4 jobs are available for every person seeking employment.
 - Pre-pandemic, in January 2020, the **Association of Fundraising Professionals** reported that turnover in advancement would escalate throughout the near future as 50 percent of fundraisers had thoughts of quitting their jobs during 2020.³

² Source: U.S. Bureau of Labor Statistics, Job Openings and Labor Turnover Summary. Released on 11/12/21. Available at <https://www.bls.gov/news.release/jolts.nr0.htm>

³ Source: Association of Fundraising Professionals. Posted January 9, 2020. Available at <https://afpglobal.org/eight-fundraising-trends-2020>

- In September 2021, **The Chronicle of Philanthropy** stated increased fundraising efforts and a focus on projects put on hold due to the pandemic will make advancement a “hot” job market.⁴
- Finally, BLS projects fundraising jobs will increase from 101,300 in 2020 to 117,500 by 2030. Within higher education jobs will increase from 18,000 to 20,900.⁵ The BLS describe this growth as “above average.”

SUMMARY OF FINDINGS

Data collected in the November 2021 *Advancement Moving Forward* survey suggest:

Work setting

- Remote work has dramatically declined as both a current work setting (81% to 15%) and a preferred work setting (44% to 25%) since May 2021.
- During the same period hybrid work has increased as both a current work setting (10% to 48%) and a preferred work setting (39% to 67%).
- While 37% of alumni/gift officers are working in the office, it is a preferred setting for only 8%.
- Sixty-three percent of CAOs have a hybrid work option for their staff, nearly twice as many CAOs who are encouraging their staff to return to the office full-time.

Productivity

- Fifty-five percent of CAOs report their gift officers can be equally productive in the office as at home. Forty-four percent report their alumni officers can be equally productive in the office as at home.
- Eighty-six percent of gift/alumni officers who are currently working on a hybrid schedule report they are confident they can balance work and home responsibilities with the hybrid schedule, while only 14% are uncertain or not confident. In contrast, 68% percent of those working fulltime in the office report they can balance these dual responsibilities while working fulltime and almost one third (32%) are uncertain or not confident.

Technology

- The use of video conferencing has increased for both qualification and solicitation since September 2020.
- Comments provided by both CAOs and gift/alumni officers suggest the challenge moving forward is learning how advancement has changed during the pandemic and how to use those lessons in the future.

⁴ Source: The Chronicle of Philanthropy. The Job Market for Fundraisers Is Even Hotter Than Usual. Posted 9/29/21. (Available at <https://www.philanthropy.com/article/the-job-market-for-fundraisers-is-even-hotter-than-usual>) and How to Hang on to Fundraisers in a Hot Job Market. (Posted 9/14/21) Available at <https://www.philanthropy.com/article/how-to-hang-on-to-fundraisers-in-a-hot-job-market>

⁵ Source: U.S. Bureau of Labor Statistics, U.S. Department of Labor, *Occupational Outlook Handbook*, Fundraisers, Available at <https://www.bls.gov/ooh/business-and-financial/fundraisers.htm> .

Staff turnover is high because fundraisers have a lot of options right now. That's a real issue given that we're mid-campaign. (Gift/Alumni Officer)

My very best fundraising year was last year when most of my meetings were held virtually. I strongly believe that advancement offices will lose good fundraisers if they do not adapt to post-pandemic realities of flexible working situations. (Gift/Alumni Officer)

We are telling folks what we want to do with regard to return to office and not surveying them, which I think may be a mistake. We are struggling with retention and burnout. Our institution is trying to be sensitive, but I fear we have too much of a one-size fits all approach. (CAO)

I think we are going to have to learn how to be more flexible as an industry. And remote work likely has a place in what we do, and we are going to need to think outside of the box on what that looks like and how, other than dollars raised, we can benchmark success. (CAO)

So much of development work is independent that I believe strongly we need to trust our gift officers regardless of the environment from which they work. Team building is still important even when some staff are remote. That has been harder to solve. (CAO)

I think higher education in general is going to have to figure out a way to move forward. We are mired down and unable to regain momentum in many ways. We are still a good investment for donors, but we need to have campus partners regain some sense of excitement and urgency for their work in order for us to regain our sense of pace and focus we were accustomed to. (CAO)

The lack of empathy and understanding by university and advancement staff about what [professional staff] are juggling and facing has been disappointing. It has created a culture of burnout. (Gift/Alumni Officer)

CHIEF ADVANCEMENT OFFICERS SELECTED COMMENTS: **HOW WILL YOU EVALUATE THE EFFECTIVENESS OF LETTING STAFF WORK FROM HOME OR SPLIT THEIR SCHEDULES?**

Development teams need to be out of the office to meet donors. As long as they continue to make visits and secure funding at a similar capacity as when they were in the office, they can work from home. Also, if employees perform better because of an increased sense of work/ life balance, it's a win for everyone!

Great question! Our senior staff is tackling this as we speak. Advancement's recommendations include considering individual perspectives on their own success working in a hybrid model; considering inter-departmental perspectives on their success working w/ advancement while we are in a hybrid model; measuring individual and team progress toward goals; considering retention concerns as it could relate to changes to the current hybrid model; etc.

We are conducting a one-year pilot with positions evaluated as to their role, and then the person in the role...arrangement range from fully remote to hybrid to fully in person. We have a college wide evaluation system in place and are experimenting with a whole range of structures.

Basic metrics, same as before.

Going very well. People are productive and some are even more productive than during fulltime in the office.

In the same manner we evaluated staff when they worked entirely in the office. If they are engaging alumni and meeting their goals, then they are effective in their jobs.

It will be a performance-based analysis as well as understanding the impact on morale.

It's very difficult if not impossible to gauge the difference when hybrid. In the end it comes down to trust.

Same as we did before, productivity, project completion, proposals, etc.

We have established a [group] that is guiding the remote work pilot. This team established guidelines and worked with senior team this past summer to shape the approach and assessment process. In basic terms (for Advancement) our very measurable goals and objectives will help us assess our own effectiveness as a team.

Through ongoing management of goals and objectives. Working remotely can often increase effectiveness!

We are conducting manager training on managing remote staff. For our frontline, we have pretty specific metrics that they must meet, so this is a part of our overall evaluation program.

We are using the same metrics that we would if staff were in the office full-time. Their progress will be measured based on their ability to complete their project in a timely manner and at a level commensurate with past work effort.

We really do not have a system in place for evaluation, whether for advancement or the institution as a whole. The current hybrid model is not an ideal situation and ideally, we'd have the staff back on campus.

We will use our performance management tools to track and document goals, analyze key performance metrics and assess effectiveness. We will also continue to ask qualitative questions about collaboration and innovation on our teams. Are teams working "well" together and in support of partners?

GIFT/ALUMNI OFFICERS SELECTED COMMENTS:

HOW SHOULD YOUR PRODUCTIVITY BE EVALUATED IF YOU WORK FROM HOME OR SPLIT YOUR SCHEDULE (HYBRID WORK)?

Honestly, the same way it is in the office. Sometimes I am able to get through more working from home because there are no office distractions or lost time walking across campus for meetings.

In the same way as it would be if I was in the office: results, meeting metrics and goals. Requests for meetings, communications with prospects/donors, number of meetings, number and amount of gifts.

The same things as if in the office 100%. I have MORE time to work on these things when working a hybrid schedule and remotely because I'm NOT spending my time in a car where I can't give 100% of my attention to my work because I'm driving.

Utilize the same metrics as before pandemic with broader definition of what qualifies as a "visit." We now use phone calls and zoom conversations if they result in a "move" or significantly advance the philanthropic conversation.

JBR - Judge by results.

Metrics, if I'm hitting my goals, it doesn't matter where I'm physically located.

Productivity should be evaluated by measurable actions taken in pursuit of raising dollars and securing donors.

If I'm maintaining my level of outreach (number of emails/calls/meetings) with the same or more success, I count my time working from home as productive as being in the office

In managing my team, I evaluate their productiveness on whether or not they are meeting their goals that we decided on in early July. If they are engaging their donors with their outreach and soliciting them with success, then I know they are being productive.

Measurable metrics with more flexibility. Including phone calls, video calls and substantive emails/texts as visits and meaningful contacts

Results and progress toward agreed-upon goals. I'm reluctant to view anything from March 2019-August 2021 as predictive of what I can accomplish in a hybrid environment moving forward. I think we are only now coming to a point where we can really articulate norms for hybrid work and allow employees to determine sustainable work models.

The ongoing challenges of the pandemic -- including not meeting with prospects face-to-face -- is a more significant challenge than the issue of working from home or hybrid. For hybrid work, there may need to be some accounting for the challenges of transitioning between different work environments.

Virtual meetings and calls with donors and prospects should continue to count as visits as we have still moved the needle forward on our goal to engage and discuss philanthropy. I think the amount of time we spend on the road meeting donors in person is not as significant as it used to be in that we can be more strategic about the in-person meetings that are absolutely necessary.

We have all been working from home for a year and a half now? I don't understand why we're pretending that we can't do it and be as productive as we would in the office. We literally did it for 18 months. This question has come up a lot in our "hybrid transition" and I honestly find it a bit offensive.

We need more emphasis on other forms of meeting as valid, not just in-person visits. Only measuring success as happening in-person is outdated and not reflective of current work happening during the pandemic, and most likely moving forward.

With an understanding of the different and new ways to engage donors and have conversations, a Zoom call, email exchange or phone call can be as productive as an in person visit.

CHIEF ADVANCEMENT OFFICERS SELECTED COMMENTS:

WHAT DO YOU FEEL WILL BE THE MOST SUBSTANTIAL CHANGE TO YOUR WORK IN ADVANCEMENT THIS FALL?

Trying to get campus partners to think innovatively again. Everyone is in the dumps or paralyzed by uncertainty.

Uncertainty of staff and alumni about face-face willingness to meet.

A shift in energy and morale. We are ending a campaign and there is a far-reaching feeling of burnout. The burnout results from not only our work, but the times. We'll need to find a way to gently push forward while respecting everyone's personal situation.

Adjusting to meetings and events that will need to be a blend of in-person and remote engagement.

Balancing alumni engagement in the in-person, hybrid, and virtual spheres - and the expectations that come with that.

Continuing to work in a world of unknowns. We just did a hybrid model for our Alumni Weekend. Hoping to get 500; we realized 900 in attendance.

Finding new ways to retain staff and keep morale high. Needing to convey to leaders that efficiency can be maintained, and goals can be achieved while providing staff with more hybrid flexibility

Getting back into a sense of normalcy. Learning what we can keep what worked in the pandemic and what to return to.

Having a very hard time building a team. Currently have five major openings in department. Everyone -- three forward facing staff members are stretched.

Increased staff burnout and fatigue - from a lingering pandemic, having so many open positions, and the demands of full-time return to work, for many. People are exhausted and see no relief in sight.

My institution is not yet "out of the woods" with respect to financial fallout from the pandemic. As a result, budgets across campus are impacted and vacant positions have been placed on hold. Additionally, for the few vacant positions deemed essential and therefore able to be filled, recruitment has been a significant challenge.

Some reorganization in the wake of several resignations and hopefully onboarding new team members.

GIFT/ALUMNI OFFICERS SELECTED COMMENTS:

WHAT DO YOU FEEL WILL BE THE MOST SUBSTANTIAL CHANGE TO YOUR WORK IN ADVANCEMENT THIS FALL?

Now that we are back in the office, work/life balance has become more difficult. I have a long commute (over an hour each way) and this makes for a very long day.

Being in the office every day. It is harder to have work-life balance. We exceeded goals last year but were told we were back in office 100%. Shows we didn't learn anything.

The option to work remotely as a hybrid / temporary schedule. I'm not able to find affordable childcare so this Remote Work option is a necessity for me.

The challenge between balancing institutional budgets post-pandemic and finding the resources/time for staff to move forward with innovation and institutional priorities.

Balancing a hybrid work environment for me and my team; increased focus on discovery to rebuild pipeline.

Balancing the changes that COVID has brought and opportunities that we now have of working from home. Donors and prospects are much more open to taking a call or video meeting.

Continuing to push fundraisers to consider zoom and phone calls to be as important and critical as in-person visits.

Donors are still reticent to meet in person - and many are still working from home and are not in their offices in urban centers where meetings can occur easily.

Returning to travel.

Adding in-person meetings and events on top of the virtual programming we've adapted the last year and a half. Translation = more to do with as many or even fewer people.

Differing levels of risk tolerance (for both me and my prospects) is the most substantial change.

We have recently returned to the office full-time but are still not traveling. At some point, I believe we will need to resume face-to-face interactions, but readjusting to the initial change getting back into the office will take some attention.

So much wasted time being required to go to campus.

The transition back to the office has been difficult because it has decreased my productivity and overall quality of life.

I fear this pressure to be in office all the time will negatively impact my work/productivity, but I do have a door I can close while I am in office so it's not the end of the world.

We are understaffed by about 20 people out of a team of what's normally ~75. The substantial change is that everyone is working 300%, there are no long-term plans because everyone is running from one fire to the next, and we're heading for a breakdown.

We're still adjusting to having lost many positions in our office.

The lack of flexibility in my office. There is no acknowledgement of the collective global trauma that the world has been through over the last two years. The university doesn't believe in science and has not taken the pandemic seriously. It is short sighted. Our entire department is burned out and there is turnover.

Staffing shortage in our office. This situation is not sustainable.

Realization that our institution is not immune to the "Great Resignation" and hiring new staff will be very difficult.

Our most substantial issue is lack of staff. We're very short handed and that puts a heavy burden on those still working.

Some of my staff strongly prefer to work from home; I worry they will leave. We have many openings across Advancement, not sure when or by whom they will be filled.

Onboarding new staff and maintain culture within my team.

We're moving more fully into a capital campaign, so the volume of work on all levels is increasing.

Re-engaging with donors/prospects in person after almost two years of 100% virtual engagement.

Finding ways to truly engage prospects who are potential donors. That group of people is Zoom fatigued and increasingly busy with the return of in-person activities.

Keeping momentum going as this somewhat uncertain time continues longer than expected.

I still believe it is difficult to build a pipeline in the current environment.

Re-engaging donors since COVID. Many have lost almost 2 years of the engagement. Playing catch up for all that was lost during the pandemic without falling victim to burnout.

As the Advancement team is getting back to pre-pandemic normal (or new normal), so are our prospects. They still support our organization and mission, but they are playing catch up and don't necessarily have time to meet or talk to us at the present time.

Qualifying new prospects.

A personal concern is trying to meet the challenge of "catching up" in engagement and philanthropy (fundraising). However, quite confident based on current outcomes that goals will be achieved.

Not too much has changed since we've been working remotely for almost 2 years, so this fall hasn't presented any changes since we've just continued in that format.

CHIEF ADVANCEMENT OFFICERS:

WHAT RECRUITMENT OR RETENTION STRATEGIES ARE YOU USING?

Praise. Reward. Repeat.

We can recruit and cast a wider net for talent since we know some advancement positions can work for different locations. We are saying upfront that workers have options whether to work remotely.

Flexible schedule or work location opportunities. Communicating clear paths for advancement.

Looking carefully and intentionally at skills and abilities vs. current job descriptions, with the notion of helping people use the majority of their strengths in their work. Being generally as flexible as we can with schedules and time.

Networking seems to be the most effective way for us to generate interested candidates. Offering a hybrid work environment helps with retention.

Recruitment: 1. Signing bonuses 2. Hybrid/flexible schedules Retention: 1. Hybrid/flexible schedules 2. Clear goals and transparent assessment 3. Creating opportunities to have fun

Trying to be as flexible as possible in work schedules and location. More regular and intentional conversations about what's going on, what we're planning, and opportunities being created.

Recruitment: proactive outreach; highlight region as highly sought-after work/life location Retention: professional development and training opportunities; "stay" conversations; leadership assignments.

We have reimagined the hiring process, first by creating a new hiring manual and second a hiring committee. We have enlisted a search firm for a number of director level positions. We are promoting from within when applicable.

We are struggling here and are open to suggestions and ideas.

METHODOLOGY

- The **November 2021** survey was sent on October 18th to 2,434 chief advancement officers, vice presidents for advancement, AVPs, directors of development, gift officers (school/center-based, central, and regional) and alumni relations officers at universities, colleges, museums, and independent schools throughout the United States. The survey closed on November 2, 2021.
- The survey took four to six minutes to complete, with a 91% completion rate for gift/alumni officers and 86% for CAOs/senior advancement staff.
- **Responses to the November 2021 survey were received from 455 individuals representing 119 institutions.** Responses were received from 12 independent schools, 11 HBCUs, and seven HSIs. No responses were received from Tribal Colleges and Universities we surveyed. Ninety-four chief advancement officers or other senior advancement staff at 58 institutions responded to the survey. The respondent's age and years of experience in advancement are summarized below.

Years of Experience in Advancement

	Gift & Alumni Officers	CAOs/VPs/AVPs
Five years or less	20.5%	5.3%
Six to nine years	14.4%	7.5%
10 years or more	65.1%	87.2%

Age of Gift & Alumni Officers Respondents

34 or younger	16%
35-44	26%
45-54	30%
55-64	22%
65 or older	6%

- **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 2021 survey is +/- 4.1% at 95% confidence level. This suggests that we are 95% certain that results of this *Advancement Moving Forward* survey are within 4.1% of the results we would have observed if we had

responses from all 2,434 advancement staff who were sent the survey. An acceptable margin of error used by most surveys is typically between 4% and 8% at the 95% confidence level.

- The **April 2021** survey had 461 respondents representing 103 institutions margin of error +/- 4.0% at 95% confidence level). Results are available at <https://www.wash-mcq.com/>.
- The **January 2021** survey had 506 respondents representing 84 institutions (margin of error +/- 3.6% at 95% confidence level). Results are available [here](#).
- The **September 2020** survey had 430 respondents representing 59 institutions (margin of error +/- 3.7% at 95% confidence level). Results are available [here](#)
- The **June 2020** survey had 386 respondents representing 53 institutions (margin of error +/- 3.9% at a 95% confidence level).Results are available [here](#).
- The **April 2020** survey had 416 respondents representing 48 institutions (margin of error +/- 3.7% at 95% confidence level). Results are available [here](#).

PARTICIPATING INSTITUTIONS

Academy of the Holy Names *	Gettysburg College
Amherst College	Harvard-Westlake School *
Appalachian State University	Haverford College
Bates College	Howard University
Bentley University	Illinois Institute of Technology
Bethune-Cookman University	Ithaca College
Binghamton University	Jackson State University
Bowdoin College	Kingswood Oxford School
Bowie State University	Lafayette College
Brewster Academy *	Lenoir-Rhyne University
Bryn Mawr College	Longwood University
Bucknell University	Loyola University - Maryland
California State University- Chico	Lycoming College
Carroll University	Marist College
Choate Rosemary Hall *	Middlebury College
Colby College	Miss Porter's School
College of the Holy Cross	Moses Brown School *
College of Wooster	Mount Holyoke College
Colorado College	Nazareth College
Coppin State University	New England College
Davidson College	Norfolk State University
Denison University	North Carolina Agricultural & Technical State University
Dickinson College	North Carolina School of Science and Math
Fairfield College Preparatory School *	North Carolina State University
Fairfield University	Northeastern University
Florida International University	Ohio University
Fordham University	Ohio Wesleyan University
Franklin & Marshall College	Philander Smith College
George Washington University	Philips Academy - Andover *
Georgetown University	Plymouth State University

*Indicates Independent School

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Pomona College
Portland State University Foundation
Prairie View A&M University
Providence College
Quinnipiac University
Rollins College
Rutgers - The State University of New Jersey
Saint Anselm College
Scripps College
Siena College
Smith College
Smithsonian Institution
Southern University and A&M College
Southwestern University
St. Andrew's School *
St. Francis College
St. Lawrence University
St. John Fisher College
Stonehill College
SUNY Potsdam
Swarthmore College
Syracuse University
Texas Christian University
Texas Tech University
The Catholic University of America
The Governor's Academy *
The Lawrenceville School
The University of Baltimore
The University of Maryland - Baltimore
Towson University

Trinity College (CT)
Trinity University (TX)
Union College
University of California Santa Barbara
University of Central Florida
University of Chicago-Booth School of Business
University of Houston
University of Maryland - Baltimore County
University of Maryland - College Park
University of Missouri System
University of New Hampshire
University of North Carolina - Chapel Hill
University of North Carolina - Charlotte
University of North Carolina - Greensboro
University of North Carolina - Wilmington
University of Pittsburgh
University of Rhode Island
University of Richmond
Valparaiso University
Vanderbilt University
Vassar College
Villanova University
Virginia Museum of Fine Arts
Washington University - Saint Louis
Wesleyan University
Western Carolina University
William & Mary
Winston-Salem State University
Woodberry Forest School *

DETAILED TABLE 1: CONFIDENCE IN REACHING GOALS

How confident are you that your institution will reach its advancement goals? (April 2020 – November 2021)

CAOs/Senior Advancement Staff

	April 2020 (FY20 goals)	June 2020 (FY21 goals)	Sept. 2020 (FY21 goals)	Jan. 2021 (FY21 goals)	May 2021 (FY21 goals)	Nov. 2021 (FY22 goals)
Not at all confident	13%	5%	0%	1%	0%	0%
Not confident	27%	18%	8%	0%	8%	1%
Uncertain	36%	52%	32%	32%	9%	7%
Confident	9%	18%	49%	43%	39%	53%
Extremely confident	15%	6%	11%	23%	44%	38%

Not/Not at all Confident	41%	23%	8%	1%	8%	1%
Uncertain	36%	52%	32%	32%	9%	7%
Confident/ Extremely Confident	24%	25%	59%	66%	82%	91%

Gift and Alumni Relations Officers

	April 2020 (FY20 goals)	June 2020 (FY21 goals)	Sept. 2020 (FY21 goals)	Jan. 2021 (FY21 goals)	May 2021 (FY21 goals)	Nov. 2021 (FY22 goals)
Not at all confident	10%	8%	2%	1%	0%	1%
Not confident	33%	24%	13%	8%	4%	3%
Uncertain	36%	55%	46%	29%	16%	21%
Confident	12%	10%	37%	52%	43%	53%
Extremely confident	10%	4%	2%	10%	37%	21%

Not/Not at all Confident	43%	32%	15%	8%	4%	5%
Uncertain	36%	55%	46%	29%	16%	21%
Confident/ Extremely Confident	21%	13%	39%	62%	80%	74%

DETAILED TABLES 2: CURRENT AND PREFERRED WORK

Where are you currently working? (September 2020 – November 2021)

Gift and Alumni Relations Officers

	Sept. 2020	Jan. 2021	May 2021	Nov. 2021
Remotely all/most of the time	81%	91%	81%	15%
Hybrid work	14%	3%	10%	48%
In the office most/all the time	5%	6%	8%	37%

Where would you prefer to work? (September 2020 – November 2021)

Gift and Alumni Relations Officers

	Sept. 2020	Jan. 2021	May 2021	Nov. 2021
Remotely all/most of the time	53%	44%	44%	25%
Hybrid work	35%	38%	39%	67%
In the office most/all the time	13%	17%	17%	8%

DETAILED TABLE 3: PRODUCTIVITY

Productivity of Gift & Alumni Officers by Location (November 2021)

	Gift & Alumni Officers: <i>Where are you most productive?</i>	CAOs: <i>Where are your staff most productive?</i>		
		Gift Officers	Alumni Officers	Managers
More productive at home	39%	3%	1%	2%
Slightly more productive at home	22%	9%	6%	11%
Equally productive	28%	55%	44%	46%
Slightly more productive in the office	9%	21%	24%	24%
More productive in the office	2%	12%	25%	17%

Home	61%	12%	7%	13%
Equally productive	28%	55%	44%	46%
Office	11%	33%	49%	41%

DETAILED TABLE 4: CONFIDENCE IN ACCOMPLISHING JOB RESPONSIBILITIES

Confidence in accomplishing job responsibilities (November 2021)

		Not/Not at all confident	Uncertain	Confident/ Very confident
Making the case for institutional priorities	Gift/Alumni Officers	4%	8%	88%
	CAOs assessment of staff	1%	8%	91%
Building a pipeline of prospective donors	Gift/Alumni Officers	7%	26%	67%
	CAOs assessment of staff	2%	33%	65%
Handling both home and work responsibilities	Gift/Alumni Officers	9%	13%	78%
	CAOs assessment of staff	7%	20%	73%
Increasing fundraising or engagement momentum	Gift/Alumni Officers	5%	27%	68%
	CAOs assessment of staff	2%	29%	69%
Meeting job performance metrics	Gift/Alumni Officers	4%	19%	77%
	CAOs assessment of staff	2%	19%	79%

Gift Officers: Confidence in accomplishing job responsibilities
by current work location
(November 2021)

		Not/Not at all confident	Uncertain	Confident/ Very confident
Making the case for institutional priorities	Remote	2%	4%	94%
	Hybrid	4%	7%	89%
	Office	5%	11%	84%
 				
Building a pipeline of prospective donors	Remote	6%	33%	60%
	Hybrid	3%	26%	71%
	Office	11%	24%	65%
 				
Handling both home and work responsibilities	Remote	6%	14%	80%
	Hybrid	4%	10%	86%
	Office	17%	15%	68%
 				
Increasing fundraising or engagement momentum	Remote	2%	27%	71%
	Hybrid	3%	26%	71%
	Office	9%	29%	63%
 				
Meeting job performance metrics	Remote	6%	12%	82%
	Hybrid	2%	21%	77%
	Office	5%	19%	75%

DETAILED TABLE 5: USE OF TECHNOLOGY

Gift & Alumni Officers: Frequency of using technology for QUALIFICATION meetings? (November 2021)

	Never	Rarely	Sometimes	Frequently
Video conference (Zoom, Google, meetings, WebEx)	3%	21%	37%	39%
Phone calls	6%	21%	47%	26%
In-person meetings	12%	17%	39%	33%

Gift & Alumni Officers: Frequency of using technology for SOLICITATION meetings? (November 2021)

	Never	Rarely	Sometimes	Frequently
Video conference (Zoom, Google, meetings, WebEx)	7%	15%	47%	31%
Phone calls	6%	27%	48%	19%
In-person meetings	8%	13%	33%	46%

DETAILED TABLE 6: VACANCIES IN ADVANCEMENT

Percentage of Institutions Reporting Gift & Alumni Officer Vacancies (November 2021)

	Gift Officer Vacancies	Alumni Officer Vacancies
No vacancies	19%	44%
< 10%	20%	7%
11% - 20%	32%	19%
21%- 30%	11%	17%
> 30%	18%	13%
Median Percent of Vacancies	15.0%	7.5%