

A New Advancement Playbook

What Today’s Teams Must Get Right to Grow Giving and Build the Pipeline

The advancement landscape is changing fast. This diagnostic outlines the core components of a strategy operating at full capacity—one that reflects donor expectations, makes smart use of staff and budget, and builds the pipeline for long-term success. Use it to assess where your team is strongest and where there’s room to grow. **Rate each area from 1 to 5, with 5 as most competent.**



Aligning Strategy with Donor Interests and Institutional Goals

Cohesive Donor Experience

We deploy a centralized, cohesive donor experience that balances institutional needs with donor affiliations (such as unit-based appeals and athletics).

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Building a Strong Donor Pipeline Through Strategic Engagement

New Donor Acquisition

We identify and engage new donor segments, including recent alumni, parents, and affinity groups, using data-informed targeting, personalized messaging, and digital outreach to grow the base of support.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Advancing Fundraising Through a Stronger Digital Donor Experience

Targeted Digital Marketing

We invest in paid digital ads on platforms like LinkedIn, Facebook, and Instagram to re-engage past and new supporters, highlight urgent fundraising deadlines, and sustain long-term interest in the institution.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Using Data to Reach New Audiences and Deepen Donor Loyalty

Fundraising Metrics and Performance Tracking

We track acquisition and retention rates, analyze channel performance, and identify trends that help inform strategy and progress toward annual goals.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Maximizing Staff Capacity to Focus on High-Impact Fundraising

Modern Staffing Structure

We reassess staff roles and responsibilities, incorporate fractional leadership and outsource vendor support where appropriate, and invest in professional development to retain talent and support staff growth.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Hyper-Personalized Communications

We segment and personalize communications for all university audiences based on their experience and giving history, including unique strategies to upgrade donors to giving society levels.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Mid-Level Donor Engagement

We use CRM insights and targeted outreach to deepen engagement with mid-level donors, increase annual support, and identify future leadership and major gift prospects.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Retail-Inspired Engagement Tactics

We apply digital strategies from the retail space to identify unlisted supporters, test message performance by segment, and follow up with those who engage online. Our approach reflects expectations for personalized outreach in the Amazon era.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Donor Data and CRM Strategy

We have confidence in our data and use our CRM to append contact records, track engagement for modeling, and target key donor populations for acquisition and upgrades.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Capacity to Support Key Relationships

We reserve staff time and capacity to lead programming for key stakeholders, including students, young alumni, parents, reunion donors, campaign volunteers, and affinity groups.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Coordinated Program Execution

We work across teams and vendors to execute coordinated campaigns that avoid duplication and confusion. We prioritize shared strategy, support affinity groups like athletics, and partner with vendors such as mail houses to deliver consistent donor experiences.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Strategic Donor Stewardship

We deliver consistent, timely, and personalized stewardship through digital and traditional channels that clearly show the impact of giving, build donor trust, and encourage long-term loyalty.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Giving Day Campaigns

We have a consistent Giving Day that builds energy around philanthropy, grows the base of donor participation, and continues to generate more revenue.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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AI-Enabled Engagement Strategy

We use AI to surface donor insights, predict giving likelihood, and recommend next steps across segments to improve personalization, targeting, and overall campaign effectiveness.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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Staff Productivity and Role Prioritization

We maximize staff productivity by focusing on leadership annual giving portfolios, affinity programs, and higher-revenue efforts, using tools like AI to streamline tasks and reduce manual work.

LEVEL OF PERFORMANCE

1	2	3	4	5	N/A
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