



Modern Strategies to Boost Alumni Engagement

Connecting with Alumni Through Smarter Data and Technology

Meet Your Presenters

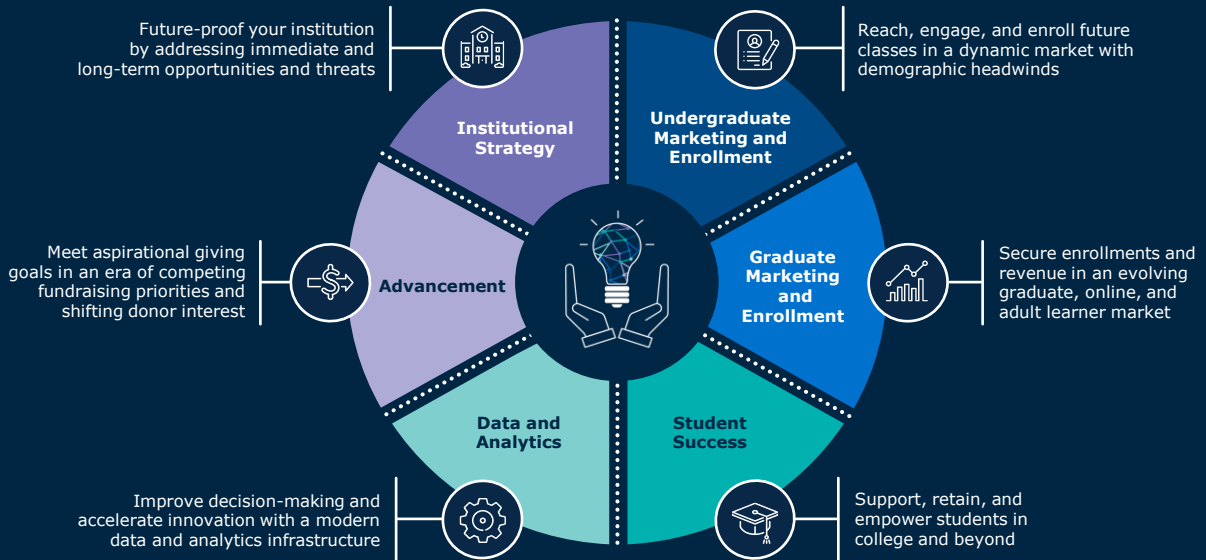


Shelly Walia
*Director, Partner
Development*



Mike Saxvik
*Managing Director,
Technology*

Insight-Powered Solutions for Your Top Priorities and Toughest Challenges



We partner with **2,800+** institutions to accelerate progress, deliver results, and enable lasting change.

95%+ of our partners return to us year after year because of results we achieve, together.

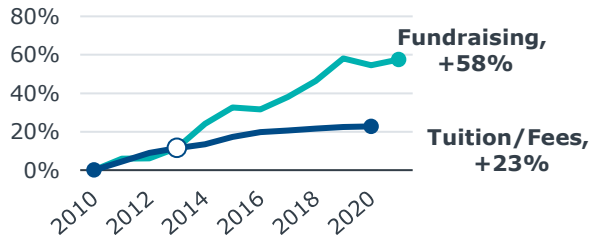
- 1 **The Shifting Advancement Landscape**
- 2 Enhancing Your Alumni Data Foundation
- 3 Smarter Data for Segmentation and Personalization
- 4 Let Technology Work for You with AI, Automation, and Multi-Channel Messaging
- 5 Inside Navigate360 Advancement CRM



Advancement Is Facing a Financial Crossroads

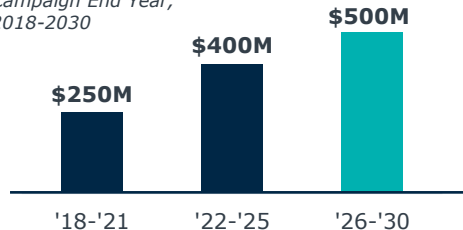
Reliance on Advancement Grows as Tuition Stalls and Pipelines Shrink

Advancement Growth Outpaces Tuition



Campaign Goals Keep Rising

Median Campaign Goal by Campaign End Year, 2018-2030



A Generous Generation

↑40%
increase in **average amount of charitable giving** among millennials from 2016-2022

But Many Factors Lead to Education Losing Ground...

↓3.6%
decrease in giving to the **education sector** in 2022



Uncertain Economy



Deprioritized Donor Interests



Generic Marketing



Incomplete Data

Sources: Fundraising Archive; Inside Higher Ed; EAB Advancement Investment and Performance Initiative (2010–2021, inflation-adjusted to 2020 dollars); Giving USA (2023); National Philanthropic Trust, Charitable Giving Statistics (2023); Inside Higher Ed Survey of Presidents (2021); Chronicle of Philanthropy (2023); Association of Fundraising Professionals (2022); CNBC (2020).

What Do Your Alumni Expect From You?



Meaningful Engagement Requires Deliberate Effort



Engaged Alumni

1



Personalized messaging
that appeals to their
interests and recognizes
their experiences

2



Authentic outreach
that isn't exclusively
focused on fundraising

3



**Coordinated, cohesive,
and thoughtful** relationship-
building over time

Quick Poll

Which of these barriers creates the biggest hurdle for your alumni engagement strategy?

The Challenging Reality



Most Community Colleges Not Equipped For a Robust Engagement Strategy



Generic Content

One-size-fits-all messaging lacks the personalization needed to drive engagement



Staffing Woes

High turnover and vacancy rates make it hard for existing staff to scale their work



Data Gaps

Poor contact tracking contributes to outdated and incomplete alumni information



Static Marketing

Static, outdated messages—and an over-reliance on familiar channels—fails to capture diverse audiences



Manual Processes

Lack of automations and workflow templatization adds to staff workload



Clunky End-User Tools

Existing engagement tech, if there is any, isn't sufficient for needed outreach and tracking

- 1 The Shifting Advancement Landscape
- 2 **Enhancing Your Alumni Data Foundation**
- 3 Smarter Data for Segmentation and Personalization
- 4 Let Technology Work for You with AI, Automation, and Multi-Channel Messaging
- 5 Inside Navigate360 Advancement CRM

Enhancing Your Alumni Data Foundation



Identify Your Gaps and Deploy Methods for Finding Alumni Data



Pull Data from Core Institutional Systems

- Student Information Systems (SIS)
- Student Success CRMs
- Departmental spreadsheets
- Consolidated alumni records from all sources



Shift from Disconnected Lists to Centralized Data

- Remove inconsistencies, duplicates, and outdated information
- Establish a unified source of truth to enable reliable alumni segments and streamlined workflows



Fill Gaps with New Contact Data

- Use embedded forms, microsites, and event landing pages
- Encourage alumni to update their preferred email

- 1 The Shifting Advancement Landscape
- 2 Enhancing Your Alumni Data Foundation
- 3 **Smarter Data for Segmentation and Personalization**
- 4 Let Technology Work for You with AI, Automation, and Multi-Channel Messaging
- 5 Inside Navigate360 Advancement CRM

Data Is Key to Strong Alumni Relationships



More Data Improves Outreach—When You Can Activate It

Good data should:

Reflect a **complete history** of your alumni's time on campus



Be easy for your staff to **find and use** in their outreach

Personalized Segmentation Drives Engagement



Use Custom Fields, Cohorts, and Data to Deliver Personalized Outreach



Rich Student Data

Incorporate majors, minors, activities, and program involvement



Custom Cohorts

Tailor groups based on backgrounds and experiences



Dynamic Fields

Track interests, preferences, and engagement signals



Tailored Messaging

Personalize outreach to help boost engagement

- 1 The Shifting Advancement Landscape
- 2 Enhancing Your Alumni Data Foundation
- 3 Smarter Data for Segmentation and Personalization
- 4 **Let Technology Work for You with AI,
Automation, and Multi-Channel Messaging**
- 5 Inside Navigate360 Advancement CRM

Technology-Driven Multi-Modal Messaging



Text







Email



Print

Evolving Your Alumni Engagement Strategy



The Status Quo	The Next Level	The Payoff
 <p>Email marketing with limited personalization</p>	<p>Personalized communications that leverage rich and unique data</p>	<p>Alumni engage with and act on content that is relevant to them</p>
 <p>Static/single-channel marketing</p>	<p>Segmented, multi-modal outreach for alumni engagement</p>	<p>Alumni are engaged with different forms of outreach</p>
 <p>Data gaps that prevent meaningful relationships</p>	<p>A connected data system that maintains knowledge of students' time on campus</p>	<p>Recipients see themselves reflected in your messaging, which leads to forming stronger relationships with your institution</p>
 <p>One-off communications</p>	<p>Automated, AI-supported outreach that delivers timely, relevant messages</p>	<p>Alumni stay connected and informed with consistent, tailored touchpoints</p>

From Individual Use to Shop-Wide Integration

17

AI Foundation Roadmap for Advancement Leaders

Establishing a Pathway to Transformation

Advancement leaders are at a pivotal moment to establish a strong foundation for fully leveraging generative AI. Chief advancement officers can use this roadmap to assess their divisions' maturity across three stages of AI foundation development and take the necessary steps to guide their teams forward. Prioritizing AI foundations will unlock future-state generative AI capabilities, including advanced analysis, scaled personalization and cultivation, increased staff capacity, and more.

STAGE 1

Identify Current State of AI Usage and Educate Staff



- Chief Advancement Officer** educates self and staff on generative AI basics
 - Information should include:
 - What is generative AI?
 - What are large language models (LLM)?
 - What risks are there to using public generative AI?
 - What is the reliability of AI?
 - What can we learn from central IT on the topic of AI? Etc.
- Chief Advancement Officer** establishes time to review AI efforts as a leadership team
 - Establish a working group or include AI strategy as a line item in existing leadership meetings.
- Advancement Services** conducts staff survey on generative AI use and shares the results widely
 - Questions may include: current AI uses, AI use-case results, preferred AI technology, AI failures or pitfalls, and self-identification to assist with AI adoption or testing, etc.
- Every Divisional Leader** creates and shares department-specific AI guidelines
 - Guidelines may include: protocols for reviewing AI-generated emails, verifying data in prospect research, and requesting access to new AI technology through IT.

STAGE 2

Execute Targeted AI Pilot and Support AI Trials



- Chief Advancement Officer** establishes or signs off on a formal generative AI use policy for advancement
 - Policies may include institutional AI guidelines, protocols for authorized use of generative AI tools, AI-specific data governance, and standards for transparency in AI-assisted communications.
- Advancement Services and IT** assess technical foundation and necessary progress for AI integration
 - Assess current advancement technology capabilities, evaluate existing vendor AI tools, review data and security infrastructure readiness, and identify necessary upgrades for future AI integration.
- Chief Advancement Officer** selects division to pilot AI technology and allocates implementation resources
 - Identify teams to pilot AI technology, ensure alignment with the division's strategic plan, analyze technical feasibility, allocate budget, develop training resources, and implement assessment mechanisms.
 - Evaluate pilot success by tracking staff adoption rates, collecting feedback, measuring efficiency and effectiveness gains, and gathering stakeholder input, where applicable.
- Chief Advancement Officer** appoints managers to lead AI adoption and professional development
 - Talent management or divisional leaders establish AI mentorship networks or programs, implement regular peer-led AI training sessions, create AI assistance resources, and design a process for requesting small budgets to support AI experimentation.

STAGE 3

Scale Generative AI Implementation to All Divisions



- Chief Advancement Officer** supports AI implementation across two or more divisions
 - Leaders from two or more divisions integrate AI into their processes and effectiveness, aiming to enhance the division's efficiency and effectiveness.
- Chief Advancement Officer** and leaders incorporate AI adoption in every existing divisional strategic plan
 - Create or update strategic plans for each division to incorporate AI-driven efficiency and effectiveness into relevant short- and long-term goals.
- Talent management or divisional leaders** integrate AI proficiency into professional development goals
 - Allocate time during existing meetings to support AI adoption and provide necessary training for staff to perform their job functions effectively.
 - Talent management updates standards to evaluate staff AI competency and adoption, as well as assess AI skills in new hires.
- Chief Advancement Officer** directs Advancement Services and IT to improve data infrastructure for future AI use
 - Teams audit and upgrade constituent data management practices, implement division-wide data entry standards and training, and develop a roadmap for long-term data improvements.



Discover more ways to experiment with AI and make informed decisions on AI investments.

eab.com/resources/tool/compendium-ai-applications-higher-education

© 2025 by EAB. All Rights Reserved. 39487

- 1 The Shifting Advancement Landscape
- 2 Enhancing Your Alumni Data Foundation
- 3 Smarter Data for Segmentation and Personalization
- 4 Let Technology Work for You with AI, Automation, and Multi-Channel Messaging
- 5 **Inside Navigate360 Advancement CRM**

Inside Navigate360 Advancement CRM



Centralized student, alumni, and donor **data**



Automations for segmented outreach at scale



Built-in AI to create campaigns, generate reports, and more



User-friendly **tools** to manage events and track engagement



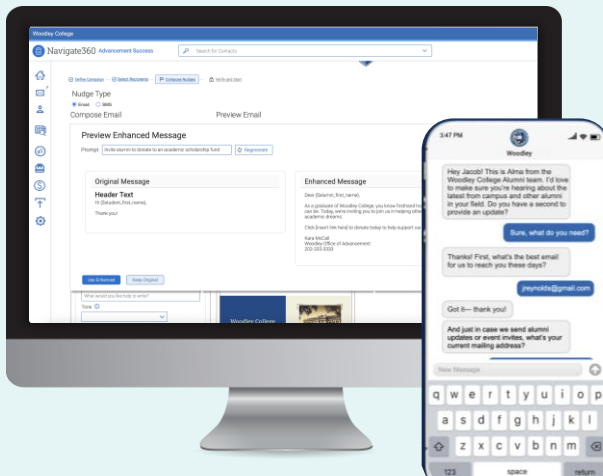
A **cohort** of like-minded peers



Expert **guidance** every step of the way

Accelerate Your Alumni Work at Scale with Navigate360's Responsible AI

- ✓ Use the profile summarizer to **quickly learn about your alumni** before a conversation
- ✓ Generate data-informed **custom multi-channel communication**
- ✓ **Generate reports** on what **engagement tactics** are most effective



With AI Agent Add-On:

- ✓ Create an autonomous fundraiser chatbot to **engage website visitors** and guide them to your donation form
- ✓ Instruct the AI agent to **contact alumni**, collect current contact and employment information, and update your records

How Can We Help?



What Topic Are You Interested In?

I'd like to speak to an expert about...



- 1 Improving my college's **alumni engagement strategy**
- 2 Improving my college's broader **fundraising strategy**
- 3 Improving alumni **data quality**
- 4 **Embedding AI** into our alumni engagement strategy
- 5 Joining the **Alumni Engagement Intensive**
- 6 Booking a personalized **Navigate360 Advancement CRM demo**



Demo



Spring 2026 Learning Cohort: Alumni Engagement

This Learning Intensive equips Navigate360 Launch Cohort partners with strategies and tools to build early, scalable alumni engagement.

With guidance from EAB experts, participants will explore evolving trends, micro-engagement opportunities, and approaches that align alumni motivations with institutional goals.

Sessions provide practical guidance, examples, and actionable steps to design high-impact pathways that strengthen connection, activate alumni, and support long-term advancement success.

Next Steps:

Select Participants:

This Learning Intensive is open to anyone from a Launch Cohort institution/foundation.

Objectives

Participants will be able to:

- ▶ **Understand the current trends and pressures** impacting alumni engagement
- ▶ **Identify and design micro-engagement opportunities** that encourage broad, low-lift alumni participation
- ▶ **Develop scalable volunteer and engagement pathways** that support institutional priorities and cultivate long-term affinity

Spring 2026 Sessions:

- 1 The New Landscape of Alumni Engagement**
February 12, 2026
- 2 Micro-Engagements That Make it Easy to Say Yes**
March 3, 2026
- 3 Aligning Engagement With Institutional Priorities**
March 23, 2026

How Can We Help?



What Topic Are You Interested In?

I'd like to speak to an expert about...



- 1 Improving my college's **alumni engagement strategy**
- 2 Improving my college's broader **fundraising strategy**
- 3 Improving alumni **data quality**
- 4 **Embedding AI** into our alumni engagement strategy
- 5 Joining the **Alumni Engagement Intensive**
- 6 Booking a personalized **Navigate360 Advancement CRM demo**

Related Resources For You



1

Send me a copy of **today's slide presentation**:



2

Read our blog on **key trends shaping advancement in 2025**:

BLOG

8 key trends shaping advancement in 2025

What's next for fundraising and donor engagement

February 12, 2025, By Jenny Jones, Principal, Advancement Marketing Services

3

Read our blog on how **stability starts with advancement**:

BLOG

In an unpredictable year for higher ed, stability starts with advancement

3 strategies advancement leaders can use to protect mission-critical work

November 10, 2025, By Jenny Jones, Principal, Advancement Marketing Services

4

Get insights delivered to your inbox from the **EAB Advancement blog**:





202-747-1000 | eab.com

