USE OF TECHNOLOGY FOR DEVELOPMENT & ALUMNI/ CONSTITUENT RELATIONS AMONG CASE MEMBERS

JULY 2012
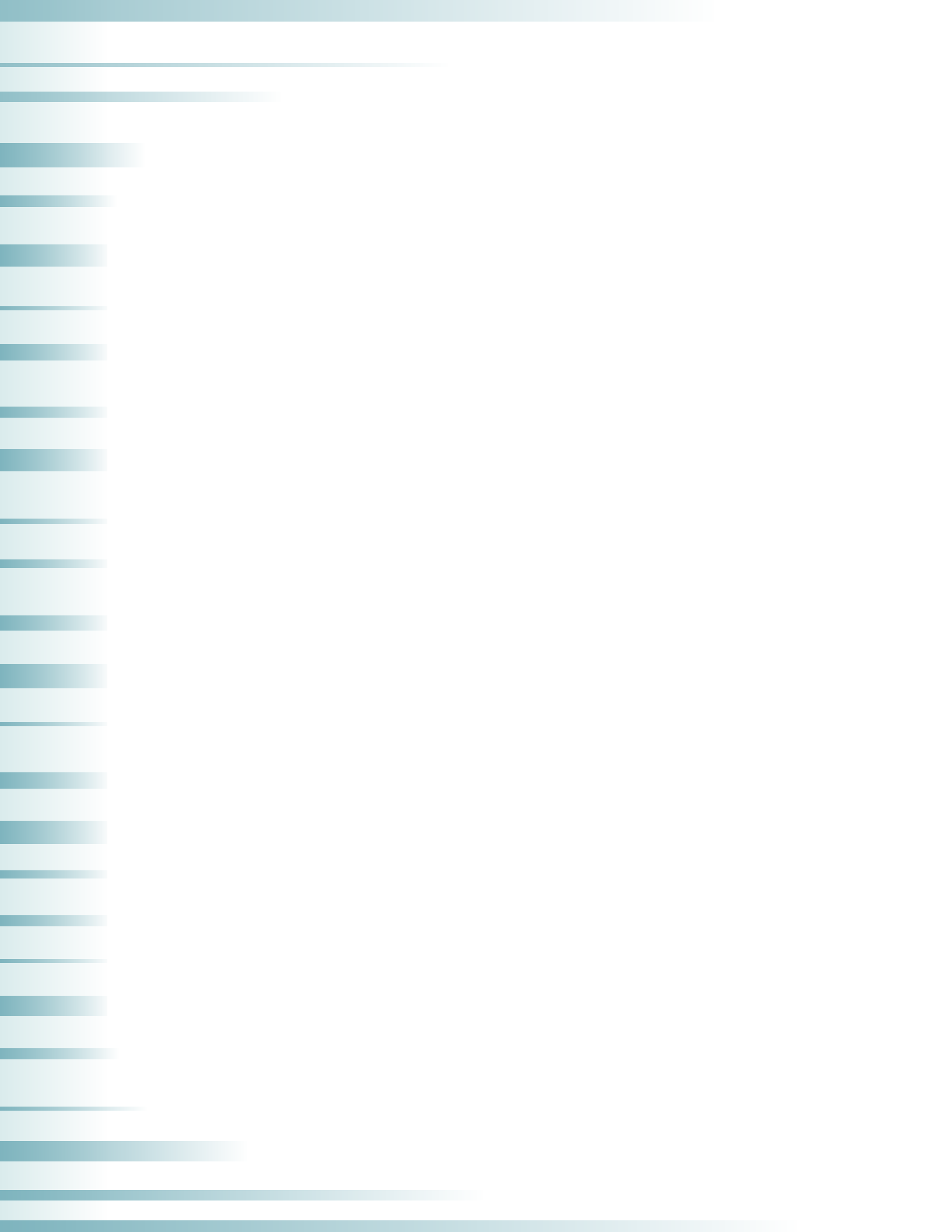
Table of contents

1. List of figures

Figures   Page

2. Background and objectives

The last two years were marked by a challenging economic recovery, the rise of social media, and the global expansion of education. All of these trends have had an impact on advancement professionals, including their strategic roles within the institution and their ability to anticipate and respond to the changes around us.

This research, commissioned by the Council for Advancement and Support of Education (CASE) and Ellucian, explores the role of "advancement-enabling" technologies in helping institutions meet the challenges of engaging constituents and attracting private support. It includes data on the use of technology, the barriers to effective use of technology, and strategies for effective deployment of technology. First conducted in 2010, the 2012 study updates our understanding of advancement's priorities and challenges, and how technology is being used to meet these challenges. Ultimately, by identifying institutional needs and understanding the role of technology tools in meeting those needs, this research can help improve the ability of advancement professionals to perform well and serve their educational purposes.

3. Methodology

This report is based on data provided by 361 advancement staff in higher education institutions and independent schools. A total of 284 practitioners from higher education institutions participated, as did 77 from independent schools (private K-12 institutions). Institutions provided data through an online survey from February 2 to March 5, 2012. Ellucian fielded the survey, and Isurus Market Research and Consulting analyzed the data and prepared this report for CASE and Ellucian.

4. Executive summary

The 2012 study reveals significant shifts in both advancement's use of technology, and the challenges that accompany these changes. At the same time, the "big picture" for advancement remains relatively stable and unchanged: Strategic priorities and challenges are much the same as in 2010.

Perennial priorities and challenges

While advancement's use of technology shifted significantly since 2010, some of the central findings from the 2010 study persist in 2012.

- Institutions' strategic priorities continue to be focused directly on fundraising, such as securing major gifts from individuals and annual giving. Institutions also continue to be largely confident in their abilities to meet these strategic needs.

- A lack of staff resources remains a major challenge for advancement professionals. A lack of staff and financial resources continues to stand out as the top challenge to institutions achieving their strategic goals, and a lack of staff is also their top barrier to effectively using technology. These challenges persist amid shrinking staffs: The number of staff members in alumni relations and development departments is considerably reduced since 2010.

- Advancement professionals continue to view technology as central to achieving their strategic vision, but they remain only moderately satisfied with both their ability to effectively leverage technology in general and with the specific tools they currently use.

- A lack of collaboration persists between advancement offices and other departments on campus, and nearly one-half of advancement professionals continue to agree that this lack of collaboration is a challenge.

Recommendation: collaborate

Lack of staff, coupled with the lack of satisfaction in their ability to effectively use technology, prevents advancement offices from achieving their strategic goals. However, technologies and tactics for engaging constituents are spreading to other parts of the institution, and there is significant opportunity for advancement practitioners to collaborate with their peers and take advantage of shared resources and technologies in support of shared goals.

Many advancement professionals have also reported that the recession forced more cross-disciplinary work across advancement disciplines, including cross-training and support between fundraising and alumni relations offices. In many cases, these changes turned out to create additional efficiencies, collaboration and even capacity.

Growth of social media in advancement

Advancement professionals embraced social media in the last two years: Social media tools like Facebook, Twitter, blogs, and other tools are in use at more than 90% of higher education institutions and independent schools. In comparison, only 51% of higher education institutions and 35% of independent schools used social media in 2010. At the same time that social media tools are being adopted widely, advancement professionals are moving away from stand-alone online communities, another technology aimed at building and maintaining relationships with alumni and other constituents. In 2012, 66% of higher education institutions use online alumni communities compared to 87% in 2010. While these data are not conclusive about how institutions are using social media and online communities in relationship to each other, it is likely that social media is replacing online alumni communities for at least some institutions.

While social media expanded dramatically in the last two years, engaging alumni and constituents online and through social media continues to rank low among advancement's strategic priorities, especially in higher education. At the same time, these two areas continue to rank among institutions' top challenges.

- Higher education advancement professionals rank online alumni/constituent engagement 10th in strategic importance, out of a list of 12 activities. Participation in social media is the least strategically important activity assessed among higher education, with only 17% of higher education institutions ranking it as strategically important.

- Online alumni/constituent engagement continues to rank among higher education institutions' top challenges. Participation in social media is also among higher education's top five challenges.

- The widespread adoption of social media shows an interest in exploring the potential for social media, but its low strategic importance and ranking as a top challenge indicate that advancement professionals are in the relatively early stages of determining social media's role in alumni relations and development.

Recommendation: think strategically, not tactically

Elevating social media in strategic importance requires advancement offices to adopt social media with a purpose, and tie that purpose to a clearly-articulated strategy for constituent engagement. We recommend that advancement practitioners create a social media strategy, complete with goals and objectives tied to the overall goals of advancement (e.g., engagement, understanding the perspectives of and learning about constituents). We also recommend adoption of social media guidelines or policies that support the achievement of these goals (see samples at www.case.org). Advancement practitioners should evaluate social media content to ensure that they are providing valuable, relevant content that moves beyond promotional information and truly engages participants in the conversation. Advancement offices should also take stock of various social media platforms; determine where your constituents are, and take advantage of those platforms. As well, advancement offices should evaluate alternative ways to staff social media efforts; student workers could be a good option, or shared resources between departments. Increasingly, given the large numbers of constituents touched by social media, institutions are dedicating professional staff to managing their social media presence.

Technology proliferation creates management challenges

Institutions continue to be challenged by the rapid pace of technology change and adoption, and the proliferation of communication channels.

Institutions' use of telefundraising, mobile, core advancement systems and CRM systems has changed since 2010, which is a contributing factor to these management challenges.

As technology systems became more varied and complex, advancement professionals are increasingly facing barriers due to a lack of integration across different advancements systems. In 2012, 45% of higher education institutions cite lack of integration as a barrier compared to 36% in 2010. As their technology systems and communication channels proliferate, it becomes increasing challenging, but nonetheless important, to ensure systems are integrated and provide a holistic view of the alumni/constituent base.

- The use of telefundraising software also grew among advancement professionals. In 2012, 50% of higher education institutions use telefundraising software, up from 37% in 2010.

- Mobile continues to be on the periphery of institutions technology strategy, with fewer than one in five higher education institutions leveraging mobile devices or applications. Institutions are more satisfied with their use of mobile applications than with mobile devices for use beyond calls/emails. Looking to the future, institutions will be expanding their use of mobile. Use of mobile devices is projected to grow to as much as 37% by 2014, and use of mobile applications is projected to grow to as much as 26% by 2014.

- Fewer institutions have a core advancement system in place in 2012 (61%), compared to 69% in 2010.

- The use of CRM systems grew significantly in the last two years. In 2012, 47% of higher education institutions have a CRM system in place for advancement, up from 33% in 2010.

Recommendation: cultivate partner relationships and explore technology integration opportunities

Advancement offices are adopting more and different technologies in support of their strategic goals. But integrating these disparate technologies in a way that improves effectiveness is a challenge. We recommend that advancement offices talk with their technology partners/providers and encourage them to explore integration outside of their traditional partnerships. As well, advancement offices should reach out to peers across campus to determine how offices can collaborate and share technology and resources in support of shared goals.

Unmet need for strategic reporting and analysis

Reporting and analytics continues to be a strategic priority for many institutions, yet institutions made little progress since 2010 in improving their reporting and analysis capabilities. In 2012, higher education institutions rate "obtaining accurate information for planning and decision-making" and "reporting and analytics" among their top challenges to acting effectively as a department. The lack of ability to explore existing data sets to gain insight into trends remains a barrier to using technology effectively for the majority of institutions.

Despite the challenges that institutions face related to reporting and analysis, they are not investing in strategic reporting tools. In 2010, 41% of higher education institutions had strategic reporting tools in place, and an additional 19% predicted that they would implement these tools in the next 1-2 years. In 2012, only 45% of higher education institutions have strategic reporting tools in place—well short of the 60% projected in the 2010 survey.

There are a range of reasons that institutions have not invested in strategic reporting tools. The slow economic recovery makes it difficult to fund new technology investments; other constituent-facing technologies like social media and mobile have taken priority for budget and staff resources; institutions' appetite to implement and effectively use new technology is finite; and so on. While all of these are valid reasons for not having invested in strategic reporting tools, the need persists.

Recommendation: use data, don't just collect it

Having the right data is critical to understanding how you will allocate human and financial resources to support your strategic goals. But understanding your data – what you have, what you need, and where there are gaps in knowledge – can be a challenge. Our recommendation is for advancement offices to define a standard set of metrics tied specifically to advancement goals to help you measure performance, and to use this data to understand which programs are working, and which warrant improvement. Using this data, not just collecting it, will help you better allocate resources to efforts that return the best results.

5. Detailed findings

Strategic importance of development and alumni relations functions

When asked to rate the strategic importance of twelve activities, a large portion of advancement professionals from higher education institutions and independent schools view most of these activities as strategically important. This trend is consistent with 2010 results.

In higher education, major gifts from individuals and annual giving are widely seen as having a high degree of strategic importance to the institution, followed by stewardship and prospect management. Alumni clubs, chapters and travel programs, as well as participation in social media, are the least likely to be viewed as strategically important to the institution.

Notable changes from 2010 to 2012 include:

- Annual giving remains among the most strategically important activities, but it declined somewhat in importance (from 67% in 2010 to 60% in 2012).

Online alumni/constituent engagement also declined in strategic importance, from 37% in 2010 to 28% in 2012.

Figure 1. Strategic importance of development and alumni relations functions

Q8: Below is a list of various functions that an institution performs during the course of its day-to-day development and alumni/constituent relations operations. Please rate each function based on its strategic importance to the institution, where 1=not at all strategic and 5=strategically important.

1a. Higher Education (2010 n=267, 2012 n=244)

Chart notes: "Participation in social media" not asked in 2010. "Reporting and analytics" asked as "Reporting" in 2010. "Online alumni/constituent engagement" asked as "Online alumni engagement" in 2010.

Results for independent schools are similar to those for higher education: Annual giving and major gifts from individuals are most widely seen as having a high degree of strategic importance, followed by stewardship. This trend is consistent with 2010 results.

Some of these activities are viewed as less strategically important among independent school practitioners, compared to higher education. Specifically, independent school practitioners place less strategic importance on prospect research, prospect management, planned giving and corporate/foundation relations than do their higher education counterparts. Online alumni engagement is more important among independent school practitioners than among higher education practitioners.

Notable changes from 2010 include:

- Reporting and analytics increased significantly in strategic importance among independent school practitioners, from 29% in 2010 to 47% in 2012

- Online alumni/constituent engagement also increased significantly in strategic importance, from 27% in 2010 to 40% in 2012.

The strategic importance of other activities fluctuated somewhat since 2010, but none of these other changes are statistically significant.

1b. Independent Schools (2010 n=86, 2012 n=75)

Chart notes: "Participation in social media" not asked in 2010. "Reporting and analytics" asked as "Reporting" in 2010. "Online alumni/constituent engagement" asked as "Online alumni engagement" in 2010.

Areas of challenge for development and alumni-relations functions

Most of the development and alumni relations activities assessed in this study are considered to be strategically important to a large portion of advancement professionals, who are largely confident in their ability to perform them. None of these activities are considered to be significant challenges by a majority of those at higher education institutions or independent schools. This trend has strengthened since 2010.

To the extent they do see challenges, higher education institutions are most likely to focus on online alumni/constituent engagement and major gifts from individuals. Gift processing is their least challenging activity.

Compared to 2010, higher education institutions in 2012 are less likely to view online alumni/constituent engagement (down from 48% to 40%) as a challenge. This shift is likely related to increased adoption of social media tools like Facebook and Twitter: Use of these types of social media tools nearly doubled since 2010. Other activities that higher education institutions are less likely to see as challenges, compared to 2010 results, include alumni clubs/chapters/travel programs (down from 37% to 26%), and planned giving (down from 37% to 24%).

Figure 2. Development and alumni challenges

Q9: Please rate the degree to which each advancement function represents a challenge to your institution in terms of its ability to perform the function effectively, where 1=Not at all a challenge and 5=Significant challenge.

2a. Higher Education (2010 n=264, 2012 n=274)

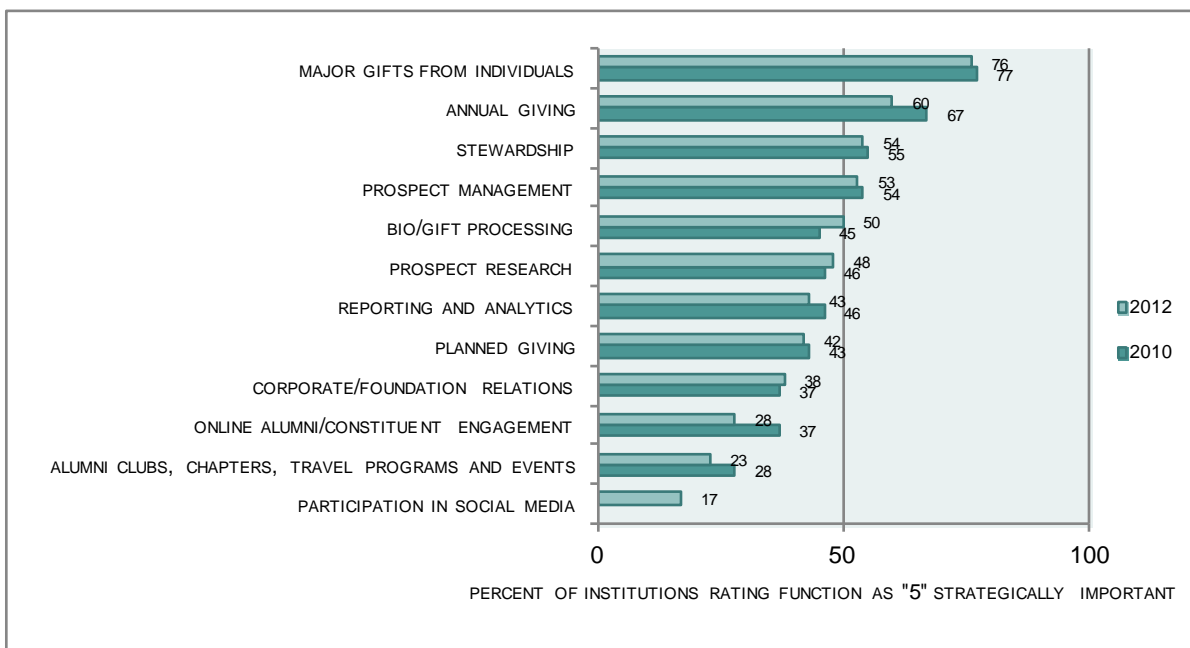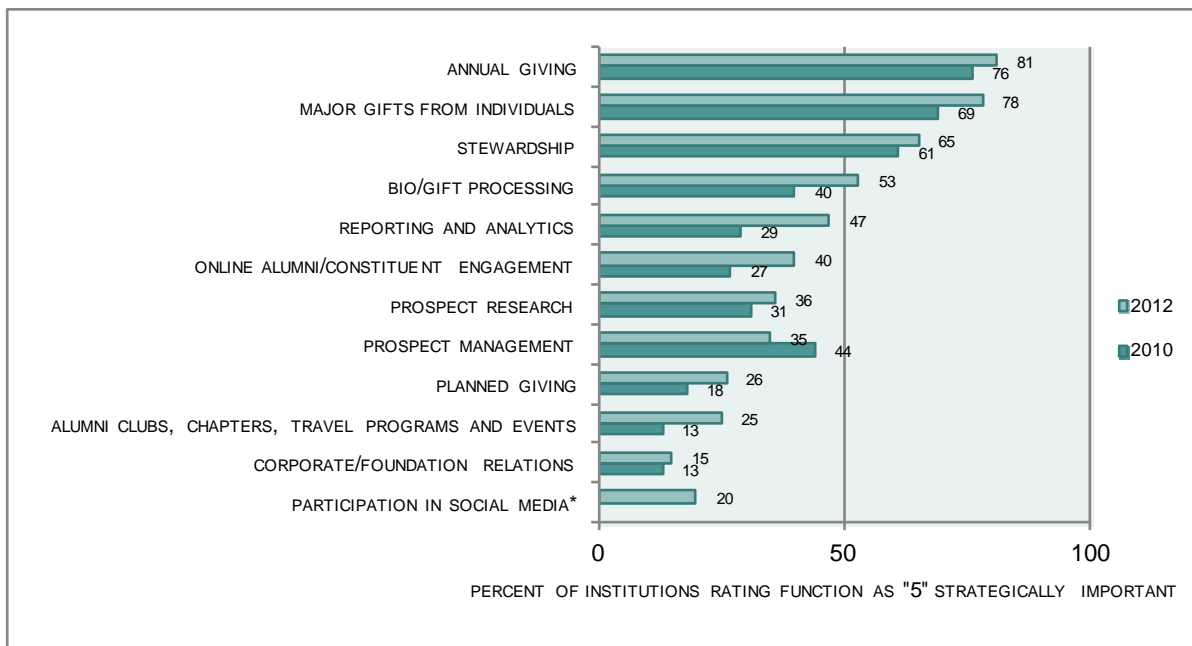PERCENT OF INSTITUTIONS RATING FUNCTION AS "4,5" A CHALLENGE

Chart notes: "Participation in social media" not asked in 2010. "Reporting and analytics" asked as "Reporting" in 2010. "Online alumni/constituent engagement" asked as "Online alumni engagement" in 2010.

The strategic importance and level of challenge associated with these activities varies somewhat by institutional characteristics.

- Public higher education institutions are more likely than private institutions to place strategic importance on many of these activities, including prospect management, prospect research, stewardship, corporate/foundation relations, bio/gift processing, and online alumni/constituent engagement. The degree to which these activities are a challenge is consistent across public and private institutions in all areas except reporting and analytics, which private institutions consider to be a more significant challenge than do the public institutions.

- Baccalaureate colleges place more strategic importance on annual giving, compared to other types of higher education institutions.

- Master's colleges and universities place less strategic importance on prospect research, compared to other types of higher education institutions.

- Small higher education institutions (with fewer than 4000 students) place more importance than larger institutions on annual giving, and less importance on prospect management and corporate/foundation relations. Small institutions see alumni clubs/chapters/travel programs as more of a challenge than do larger institutions.

- Institutions with more than 15,000 students place more importance than smaller institutions on prospect research, stewardship, and major gifts from individuals.

- Higher education institutions in the US and Canada place more strategic importance than institutions in other regions on annual giving, planned giving, prospect management, bio/gift processing, and reporting and analytics. Institutions in the US and Canada also express more challenges in the areas of planned giving, reporting and analytics, and alumni clubs/chapters/travel programs.

For independent schools, planned giving is their area of greatest challenge by a wide margin, followed by prospect research and online alumni/constituent engagement.

The extent to which stewardship is a challenge for independent school practitioners decreased significantly since 2010 (down from 35% to 15%). The level of challenge associated with prospect management and bio/gift processing also decreased since 2010, although the change is not statistically significant.

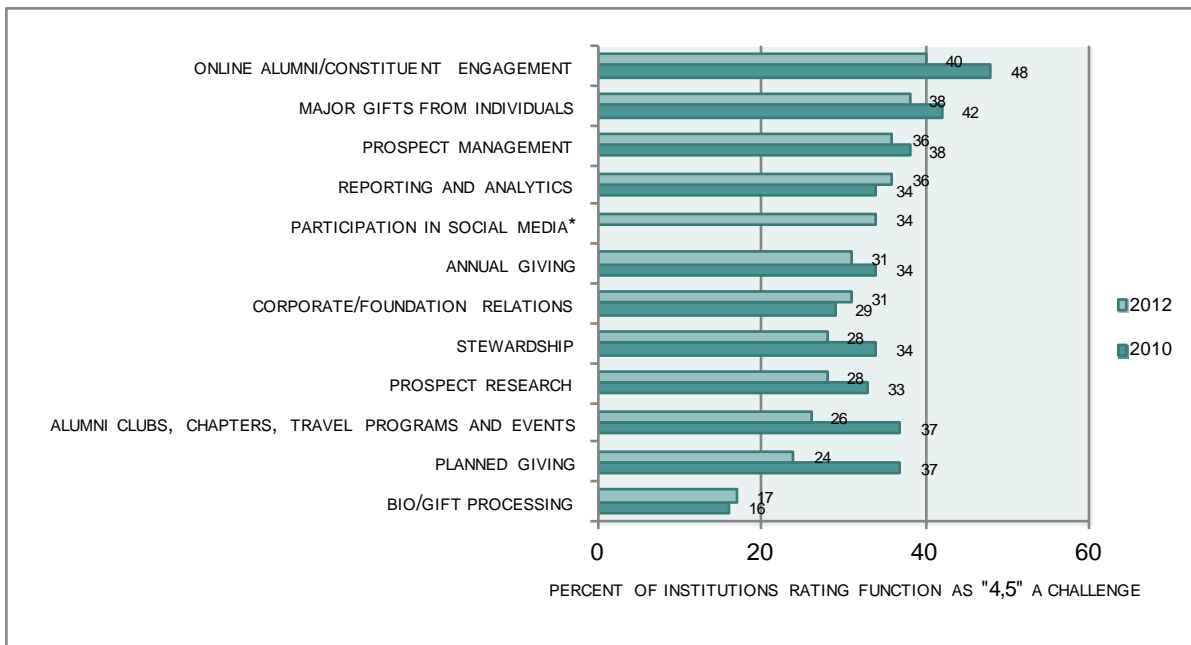## 2b. Independent Schools (2010 n=89, 2012 n=75)
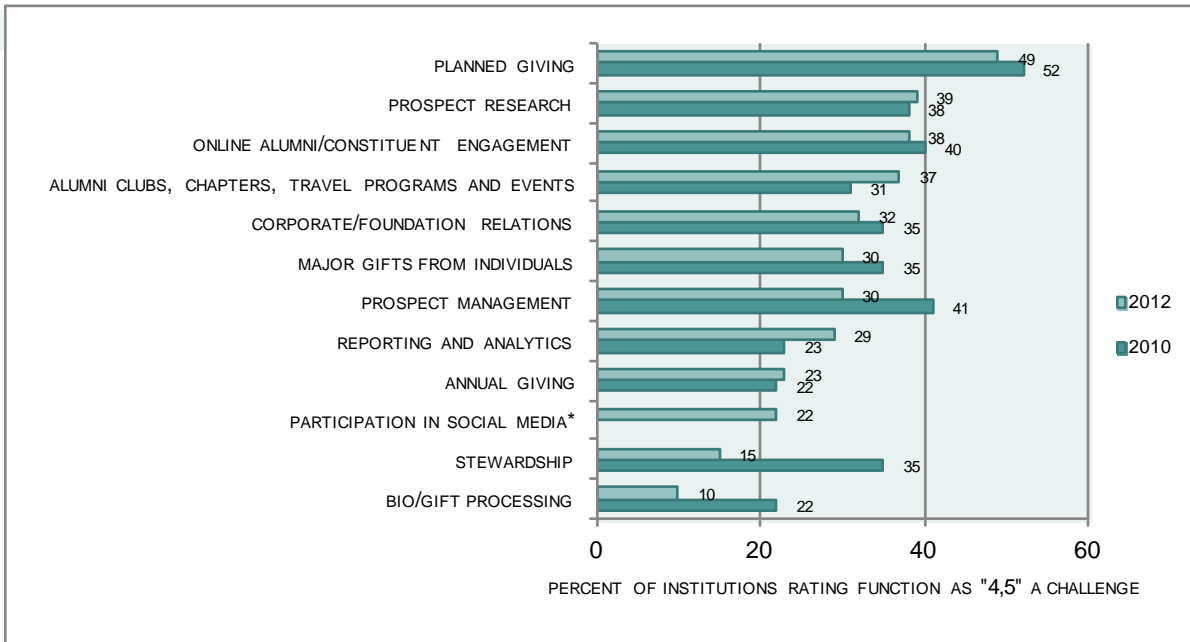
Chart notes: "Participation in social media" not asked in 2010. "Reporting and analytics" asked as "Reporting" in 2010. "Online alumni/constituent engagement" asked as "Online alumni engagement" in 2010.

Mapping strategic importance and challenge level for advancement activities

Mapping the strategic importance of advancement activities relative to the level of challenge associated with each activity provides a management tool for prioritizing advancement resources.

For higher education, the research indicates:

Focus for improvement: Major gifts, annual giving, prospect management and reporting and analytics warrant the most attention from higher education advancement practitioners. All of these areas are strategically important, and pose greater challenges for institutions.

Maintain current performance: Higher education institutions are confident in their ability to execute on many of their most strategically important activities such as stewardship, bio/gift processing, and prospect research and planned giving. Institutions should maintain their current performance in these areas.

Evaluate and prioritize: Online alumni/constituent engagement and participation in social media are not of top importance, but they are among higher education institutions' top advancement challenges. These activities need to be evaluated in terms of their role in supporting advancement's goals, and the level of resources devoted to each.

Safely ignore: Alumni clubs, chapters, travel programs and events are of relatively low strategic importance and do not pose challenges for most institutions.

Figure 3. Mapping strategic importance and institution's performance

3a. Higher Education
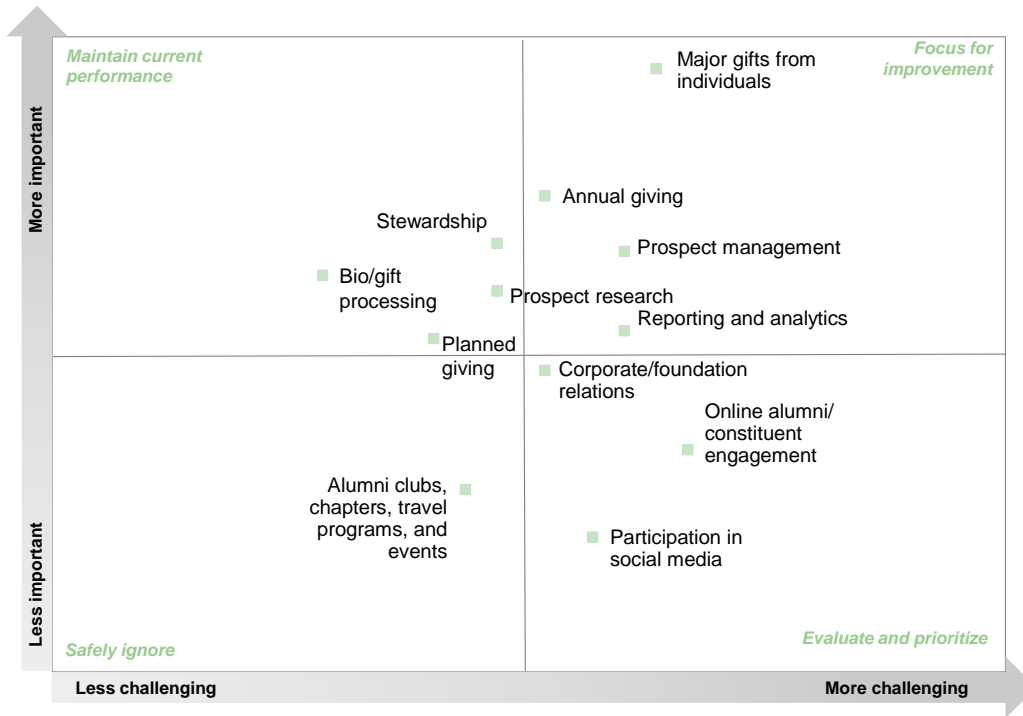
For independent schools, the research indicates:

Focus for improvement: Major gifts are strategically important, and an area where independent schools experience relatively greater challenges.

Maintain current performance: Independent schools are confident in their ability to execute on many of their most strategically important activities such as annual giving, stewardship, bio/gift processing, and reporting and analytics. Institutions should maintain their current performance in these areas.

Evaluate and prioritize: Many activities for independent schools that are not of top importance remain challenging for them to execute, such as online alumni/constituent engagement, planned giving, prospect research, and alumni clubs, chapters, etc. These activities need to be evaluated in terms of their role in supporting advancement's goals, and the level of resources devoted to each.

Safely ignore: Participation in social media is of low strategic importance to independent schools, and also does not pose challenges for them today. Note that social media's strategic importance may shift over time, and then require greater analysis and evaluation.

3b. Independent Schools

Maintain current performance — Annual giving, Stewardship, Bio/gift processing

Focus for improvement — Major gifts from individuals

Reporting and analytics

Safely ignore — Participation in social media

Evaluate and prioritize — Online alumni/ constituent engagement, Prospect research, Prospect management, Alumni clubs, chapters, travel programs, events, Planned giving, Corporate/ foundation relations

More important / Less important

Less challenging / More challenging

Collaboration

A lack of collaboration persists in 2012, particularly in higher education. Most institutions continue to describe relatively low levels of collaboration between development and alumni-relations functions and other campus functions such as enrollment management. Only 28% of higher education institutions have a high degree of collaboration between development and alumni relations, and other campus functions. Collaboration is more common among independent schools, and has improved since 2010: 48% of independent school practitioners report a high degree of collaboration, up from 39% in 2010.

In addition, 47% of higher education practitioners and 35% of independent school practitioners describe the lack of institutional collaboration as a challenge.

Figure 4. Level of collaboration between development/alumni relations and other functions

Q10: Please rate the extent to which the following statement describes your institution: "There is a high degree of collaboration across the campus between the development and alumni/constituent functions and other campus functions such as enrollment management." Use a scale of "1" to "5" where "1" means "does not describe at all" and "5" means "describes very well."

4a. Higher Education (2010 n-266, 2012 n=279)
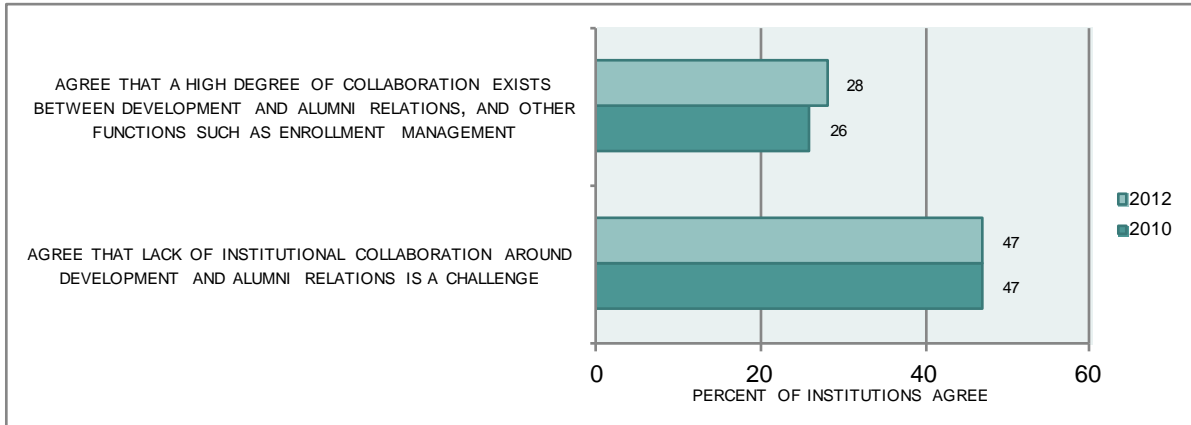
4b. Independent Schools (2010 n=89, 2012 n=77)
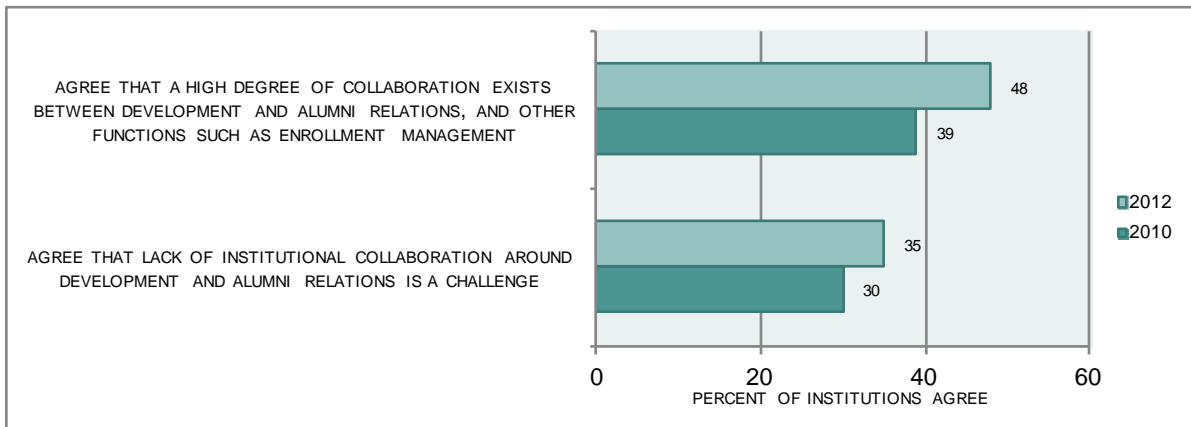
Tactical challenges and the role of technology

Institutions rated the degree to which a series of factors posed challenges to their success, from changes in the makeup of the alumni pool to institutional characteristics. The greatest challenge for both higher education institutions and independent schools, by far, continues to be a lack of staff and financial resources. Nearly three fourths (74%) of higher education institutions and 64% of independent schools rated this as a challenge.

15

Among higher education, other top tactical challenges include the rapid pace of technology change (49% rate as a challenge), the proliferation of communication channels (49%), lack of institutional collaboration around development and alumni relations (47%) and obtaining accurate information for planning and decision making (45%).

Compared to 2010, higher education institutions are significantly more likely to view the changing face of constituents (diversity, etc) as a challenge (up from 32% to 42%).

Figure 5. Tactical challenges

Q11: Below is a list of possible challenges that development and alumni/constituent relations departments may face. Please indicate the extent to which each of the following items represents a challenge for your institution. Use a scale of "1" to "5" where "1" means it is not at all a challenge and "5" means it is a significant challenge.

5a. Higher Education (2010 n=267, 2012 n=281)
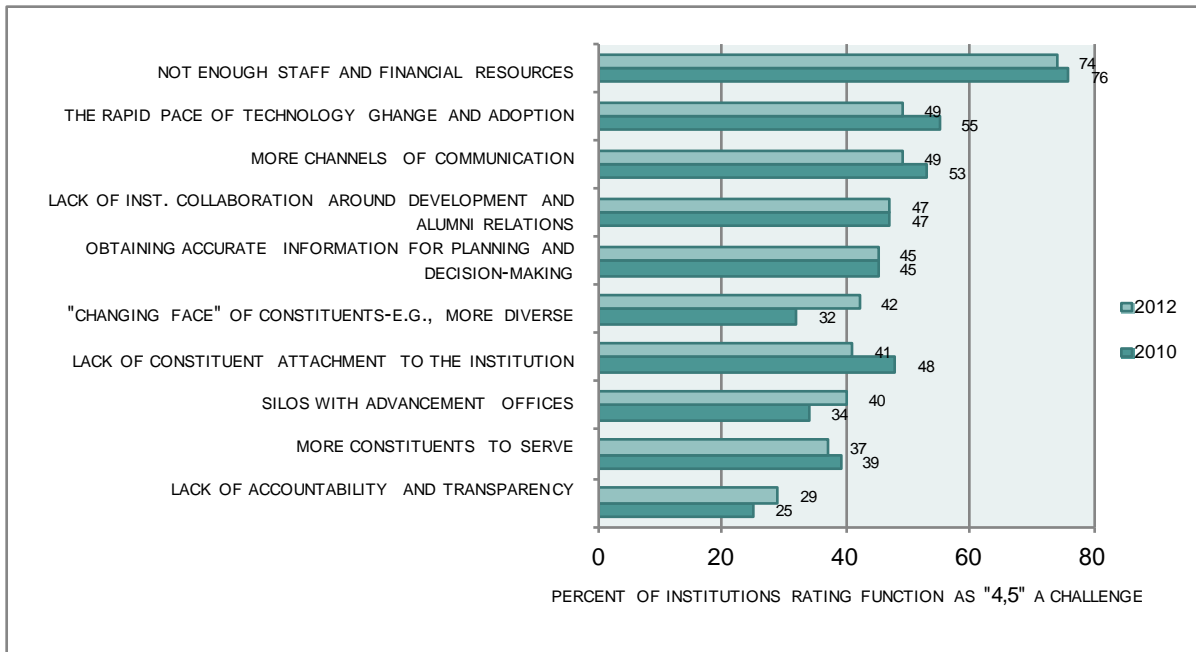
In addition to their top challenge of lack of staff and financial resources, other top challenges for independent schools include proliferation of communication channels (53% rate as a challenge) and the rapid pace of technology change and adoption (47%).

Although none of the changes are statistically significant, independent schools are slightly more likely to see challenges in most of these areas than they were in 2010.

16

5b. Independent Schools (2012 n=89, 2012 n=75)

Chart: PERCENT OF INSTITUTIONS RATING FUNCTION AS "4,5" A CHALLENGE

Challenge	2012	2010
LACK OF ACCOUNTABILITY AND TRANSPARENCY	26	11
SILOS WITH ADVANCEMENT OFFICES	29	19
LACK OF INST. COLLABORATION AROUND DEVELOPMENT AND ALUMNI RELATIONS	30	35
"CHANGING FACE" OF CONSTITUENTS-E.G., MORE DIVERSE	34	23
MORE CONSTITUENTS TO SERVE	34	27
LACK OF CONSTITUENT ATTACHMENT TO THE INSTITUTION	34	41
OBTAINING ACCURATE INFORMATION FOR PLANNING AND DECISION-MAKING	36	42
THE RAPID PACE OF TECHNOLOGY CHANGE AND ADOPTION	47	43
MORE CHANNELS OF COMMUNICATION	53	50
NOT ENOUGH STAFF AND FINANCIAL RESOURCES	64	62

Tactical challenges vary somewhat by institutional characteristics.

- Public higher education institutions are more likely to be challenged by silos within advancement offices, lack of staff and financial resources, having more constituents to serve, and more channels of communication.

- Baccalaureate colleges are less likely than other types of institutions to be challenged by lack of institutional collaboration around development and alumni relations, or by having more constituents to serve.

- Doctoral/research institutions are more likely to be challenged by the lack of constituent attachment to the institution.

- Higher education institutions in the US and Canada are more likely than institutions in other regions to be challenged by the rapid pace of technology change, lack of staff and financial resources, and obtaining accurate information for planning and decision making. Institutions in the US and Canada are less challenged by having more constituents to serve, compared to institutions in other regions.

- Higher education institutions with more than 4,000 students are more likely to be challenged by silos within the advancement function, compared to smaller institutions.

Role of technology in addressing tactical challenges

The large majority of higher education institutions and independent schools believe technology plays an increasingly important role in addressing the range of tactical challenges they face. Technology is most likely to be seen playing an important role in obtaining accurate information for planning and decision-making, managing the rapid pace of technology change and adoption, and dealing with more channels of communication.

Most institutions (64% among higher education and 59% among independent schools) see technology playing an important role in addressing their top challenge—a lack of staff and financial resources.

Compared to 2010, more higher education institutions in 2012 see technology playing a role in effectively addressing their challenges with the changing face of constituents (up from 47% to 61%), the lack of accountability and transparency (up 37% to 47%), and silos within advancement offices (up from 31% to 42%). Responses were similar for higher education institutions and independent schools.

Figure 6. Role of technology in addressing tactical challenges

Q13: How important is the role of technology in addressing each of the following challenges effectively? Use a scale of "1" to "5" where "1" means not at all important and "5" means it is very important.

6a. Higher Education (2010 n=267, 2012 n=274)

Challenge	2012	2010
SILOS WITH ADVANCEMENT OFFICES	42	31
LACK OF ACCOUNTABILITY AND TRANSPARENCY	47	37
LACK OF INST. COLLABORATION AROUND DEVELOPMENT AND ALUMNI RELATIONS	49	44
LACK OF CONSTITUENT ATTACHMENT TO THE INSTITUTION	49	50
"CHANGING FACE" OF CONSTITUENTS-E.G., MORE DIVERSE	61	47
NOT ENOUGH STAFF AND FINANCIAL RESOURCES	62	60
MORE CONSTITUENTS TO SERVE	66	64
MORE CHANNELS OF COMMUNICATION	80	73
THE RAPID PACE OF TECHNOLOGY CHANGE AND ADOPTION	80	74
OBTAINING ACCURATE INFORMATION FOR PLANNING AND DECISION-MAKING	81	74

PERCENT OF INSTITUTIONS RATING TECHNOLOGY AS IMPORTANT ("4,5" ON A SCALE OF 1-5) TO EFFECTIVELY ADDRESS CHANGE

6b. Independent Schools (2012 n=89, 2012 n=75)

Chart: Percent of institutions rating technology as important ("4,5" on a scale of 1-5) to effectively address change. Legend: 2012, 2010.

Challenge	2012	2010
SILOS WITH ADVANCEMENT OFFICES	41	27
LACK OF INST. COLLABORATION AROUND DEVELOPMENT AND ALUMNI RELATIONS	46	36
LACK OF CONSTITUENT ATTACHMENT TO THE INSTITUTION	50	55
LACK OF ACCOUNTABILITY AND TRANSPARENCY	53	32
NOT ENOUGH STAFF AND FINANCIAL RESOURCES	59	55
"CHANGING FACE" OF CONSTITUENTS-E.G., MORE DIVERSE	60	43
MORE CONSTITUENTS TO SERVE	63	58
OBTAINING ACCURATE INFORMATION FOR PLANNING AND DECISION-MAKING	75	69
THE RAPID PACE OF TECHNOLOGY CHANGE AND ADOPTION	76	77
MORE CHANNELS OF COMMUNICATION	84	72

PERCENT OF INSTITUTIONS RATING TECHNOLOGY AS IMPORTANT ("4,5" ON A SCALE OF 1-5) TO EFFECTIVELY ADDRESS CHANGE

The importance of technology in addressing these challenges varies by institutional characteristics.

- Public institutions are more likely than private institutions to see technology as important for enabling them to serve more constituents and to communicate across more channels like social media.

- Higher education institutions in the US and Canada are more likely than those in other regions to see technology as important for addressing their challenges related to the lack of constituent attachment to the institution, lack of staff and financial resources, and obtaining accurate information for planning and decision making.

Importance of technology for the strategic vision of the institution and for advancement

The majority of higher education and independent-school practitioners believe technology plays an important role both in the strategic vision of their departments and, more broadly, at their institutions.

Results in 2012 are largely consistent with 2010 results: none of the changes on this metric are statistically significant.

Figure 7. Role of technology in strategic vision of advancement and institution

Q10: Please rate the extent to which the following statement describes your institution: "Technology plays an important role in the strategic vision of the institution / development and alumni/constituent relations." Use a scale of "1" to "5" where "1" means "does not describe at all" and "5" means "describes very well."

7a. Higher Education (2010 n=266, 2012 n=274)

7b. Independent Schools (2010 n=88, 2012 n=76)

The role of technology in an institutions' strategic vision is largely consistent across different types of institutions. The only notable difference is that baccalaureate colleges are less likely than other types of higher education institutions to agree that technology plays an important role in the strategic vision of the institution or for development and alumni/constituent relations.

Technology in use by advancement

Consistent with technology's importance to their strategic vision, the majority of higher education institutions use a diverse range of technology tools and applications and the mix of technology in use has evolved since 2010.

- Use of social media tools (Facebook, Twitter, etc.) is nearly universal in 2012, with 92% of institutions using social media. Use of social media grew significantly since 2010 (51%). At the same time, higher education institutions are moving away from online alumni communities (down from 87% in 2010 to 66% in 2012).

- Email marketing tools continue to be very widely used in higher education: 85% of institutions have an email marketing tool in place, compared to 84% in 2010.

- Use of CRM and telefundraising also increased since 2010. In 2012, 47% of institutions use CRM and 50% use telefundraising software.

- A minority of higher education institutions leverage mobile devices (18%) or mobile applications (14%) in 2012.

- Although a majority of higher education institutions have a core advancement system in 2012 (61%), usage of these systems decreased since 2010 (69%).

- Similar to higher education, the large majority of independent-school practitioners uses social media (97%) and email marketing (81%).

- Independent schools report the same trends for social media and online communities as higher education. Use of social media grew significantly (up from 35% in 2010 to 97% in 2012), while use of online communities fell (down from 92% to 66%).

- Mobile application usage is higher among independent schools than in higher education (23% vs. 14%).

- Compared to higher education, use of most of these technology tools and applications is less prevalent in independent schools. The greatest difference between the institution types is the use of telefundraising software (50% in higher education vs. 1% in independent schools).

Figure 8. Technology tools and applications currently used

Q18: Please indicate which technology tools and applications are currently being used by your advancement office. Please check all that apply.

8a. Higher Education

Chart notes: *Social media tools asked as "other social media tools (e.g., blogs, wiki's, etc) in 2010. "Mobile applications (foursquare, etc)" not asked in 2010. Base size: 2010: base size ranges from 232-268 institutions. 2012 base size = 284 institutions.*

8b. Independent Schools

Chart notes: *Social media tools asked as "other social media tools (e.g., blogs, wiki's, etc) in 2010. "Mobile applications (foursquare, etc)" not asked in 2010. Base size: 2010: base size ranges from 76-89 institutions. 2012 base size = 77 institutions.*

Satisfaction with existing technology tools and applications

Although they view technology as playing an important role in addressing their challenges, respondents are only moderately satisfied with their ability to effectively use technology to do so.

In higher education, 53% of institutions are "somewhat" satisfied with their ability to effectively use technology while only 5% are "very" satisfied. Although room for improvement remains, higher education institutions report higher satisfaction levels in 2012, compared to 2010 (58% very or somewhat satisfied, compared to 50% in 2010).

Independent schools are similarly tepid in their satisfaction. One-half are "somewhat" satisfied, and an additional 11% are "very" satisfied. Satisfaction among independent schools is similar to 2010 (61% very or somewhat satisfied, compared to 62% in 2010).

Figure 9. Satisfaction with existing technology tools and applications

Q15: How satisfied are your institution's development and alumni/constituent relations departments with their ability to effectively use technology to overcome these types of challenges?

9a. Higher Education (2010 n=262, 2012 n=279)

9b. Independent Schools (2010 n=88, 2012 n=74)

Note: due to rounding, figures may not total 100%.

Institutions were also asked about their satisfaction with the specific technologies they use.

Consistent with their moderate satisfaction with their ability to use technology to address challenges, less than one half of higher education institutions are satisfied with the applications they rely on most: 45% are satisfied with social media tools and 46% are satisfied with email marketing.

Higher education institutions are much more satisfied with their use of mobile applications (44%) than with mobile devices for use beyond calls/emails (27%). Satisfaction with mobile devices declined significantly since 2010 (down from 49% to 27%).

Independent school practitioners are also not highly satisfied with the applications they rely on most: Their satisfaction levels range from 46% to 65%, depending on the application. In general, independent school practitioners tend to be more satisfied with their technology than their counterparts in higher education.

- Satisfaction with CRM systems among independent schools increased significantly from 2010 (up from 47% to 65%).

- For mobile, independent schools' satisfaction with mobile applications is relatively high (61%) while satisfaction with mobile devices for uses other than email and calls decreased from 69% to 57%.

Figure 10. Satisfaction with technology tools and applications currently used

Q19: Overall, how would you rate your organization's satisfaction with your current technology tools and applications? Please use the following scale where 1=not at all satisfied and 5=very satisfied.
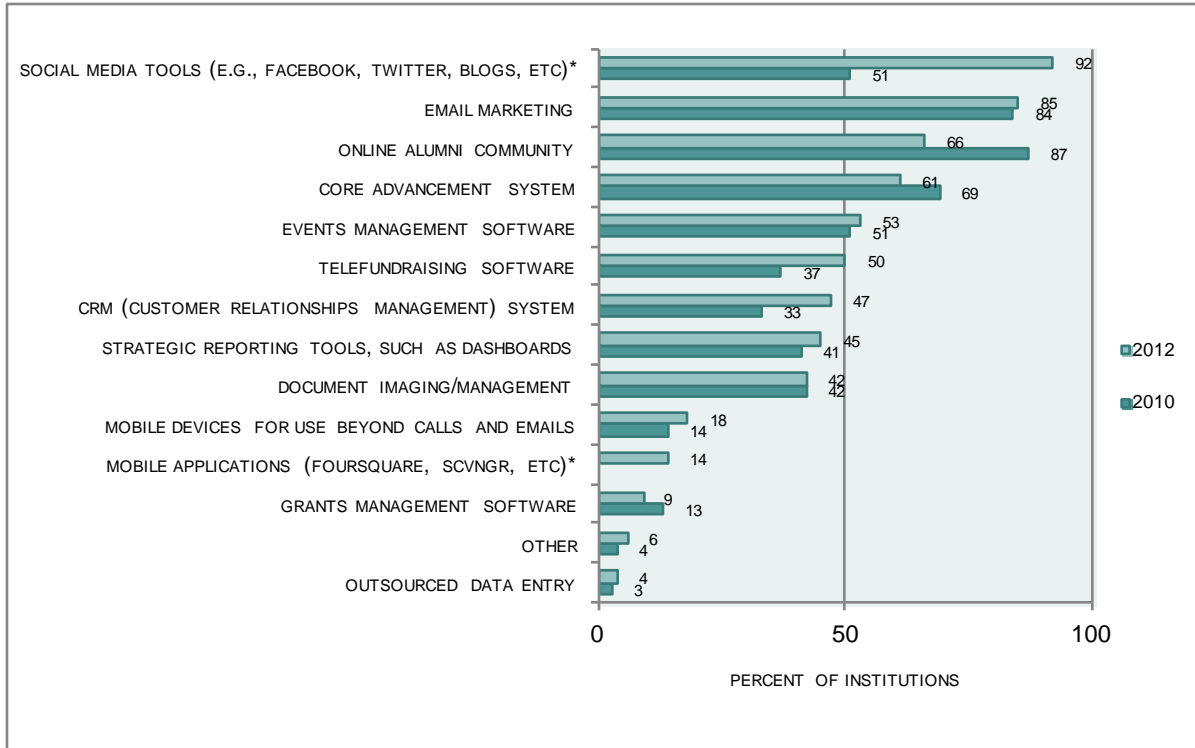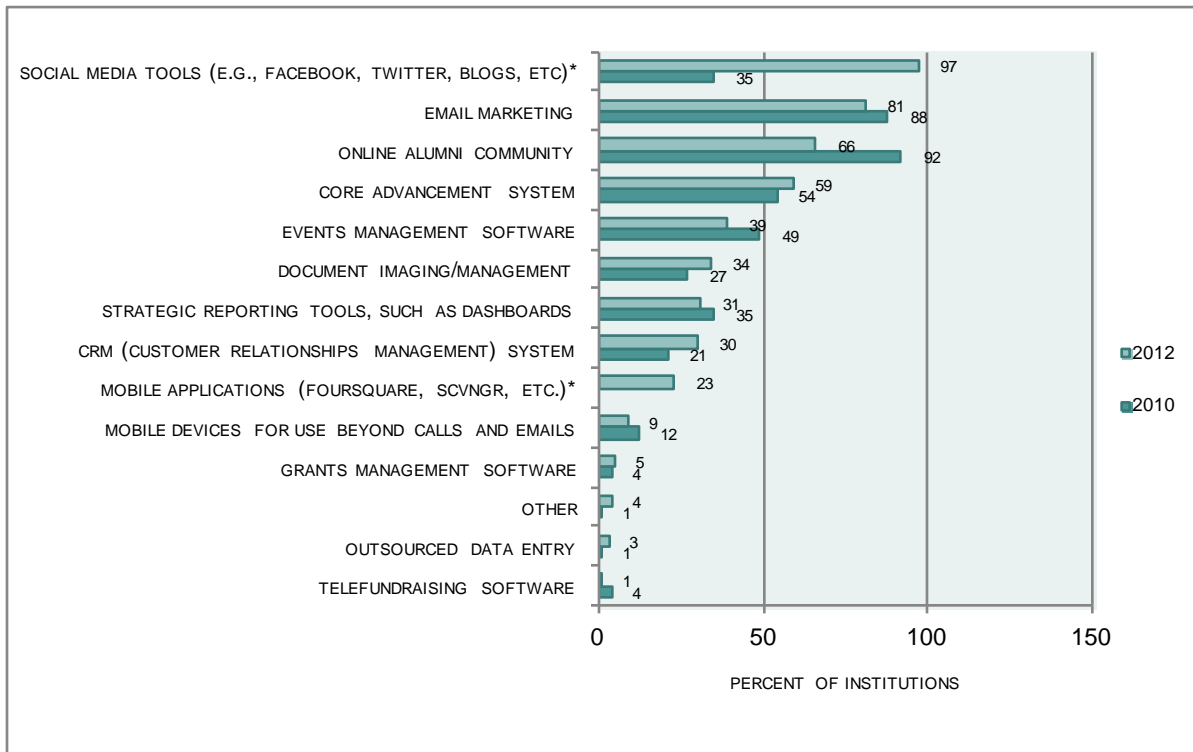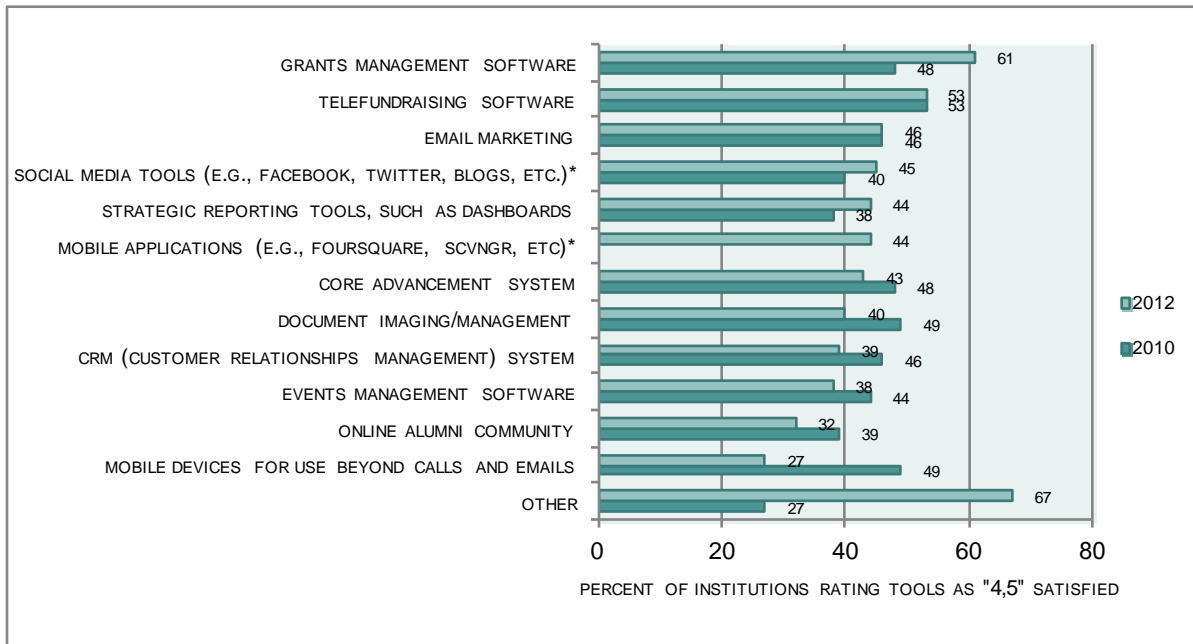
10a. Higher Education

Chart notes: *Social media tools asked as "other social media tools (e.g., blogs, wiki's, etc) in 2010. "Mobile applications (foursquare, etc)" not asked in 2010. Results not shown for "outsourced data entry" due to small sample (n=11 in 2012). Base size: 2010: base size ranges from 11-235 institutions. 2012 base sizes range from 18-259.*

10b. Independent Schools

Tool	2012	2010
CORE ADVANCEMENT SYSTEM	65	72
CRM (CUSTOMER RELATIONSHIPS MANAGEMENT) SYSTEM	65	47
MOBILE APPLICATIONS (E.G., FOURSQUARE, SCVNGR, ETC)*	61	
SOCIAL MEDIA TOOLS (E.G., FACEBOOK, TWITTER, BLOGS, ETC.)*	58	50
DOCUMENT IMAGING/MANAGEMENT	58	64
MOBILE DEVICES FOR USE BEYOND CALLS AND EMAILS	57	69
EVENTS MANAGEMENT SOFTWARE	52	43
EMAIL MARKETING	49	49
ONLINE ALUMNI COMMUNITY	47	50
STRATEGIC REPORTING TOOLS, SUCH AS DASHBOARDS	46	38

PERCENT OF INSTITUTIONS RATING TOOLS AS "4,5" SATISFIED

*Chart notes: Data only included for applications with 10 or more users [removed "grants management software," "telefundraising software," "outsourced data entry", and "other"]. *Social media tools asked as "other social media tools (e.g., blogs, wiki's, etc) in 2010. "Mobile applications (foursquare, etc)" not asked in 2010. Base size: 2010 base size ranges from 13-93 institutions. 2012 base size ranges from 18-74 institutions.*

Barriers to using technology effectively

The most common barriers to using technology effectively, for both higher education and independent schools, are a lack of staff to support advancement-enabling technology and the inability to explore existing data sets to gain greater insights into trends.

Notable changes in higher education since 2010 include:

- Institutions are more likely to cite "lack of integration across different advancement systems" as a barrier (up from 36% to 45%).

- Institutions are less likely to cite a "lack of time to learn about technology or how to use it effectively" as a barrier (down from 55% to 47%).

Notable changes among independent schools since 2010 include:

- Schools are more likely to cite as a barrier their ability to explore existing data sets to gain greater insight into trends (up from 49% to 61%).

- Schools are more likely to cite as a barrier their ability to coordinate/collaborate communications effectively across campus functions and departments (up from 29% to 48%).

Figure 11. Barriers to using technology effectively

Q16: Below is a list of possible barriers that development and alumni/constituent relations departments may encounter in effectively using technology to support efficient operations. Please indicate the extent to which each of the following issues represents a barrier for your institution's advancement operations? Use a scale of "1" to "5" where "1" means it is not at all a barrier and "5" means it is a significant barrier.
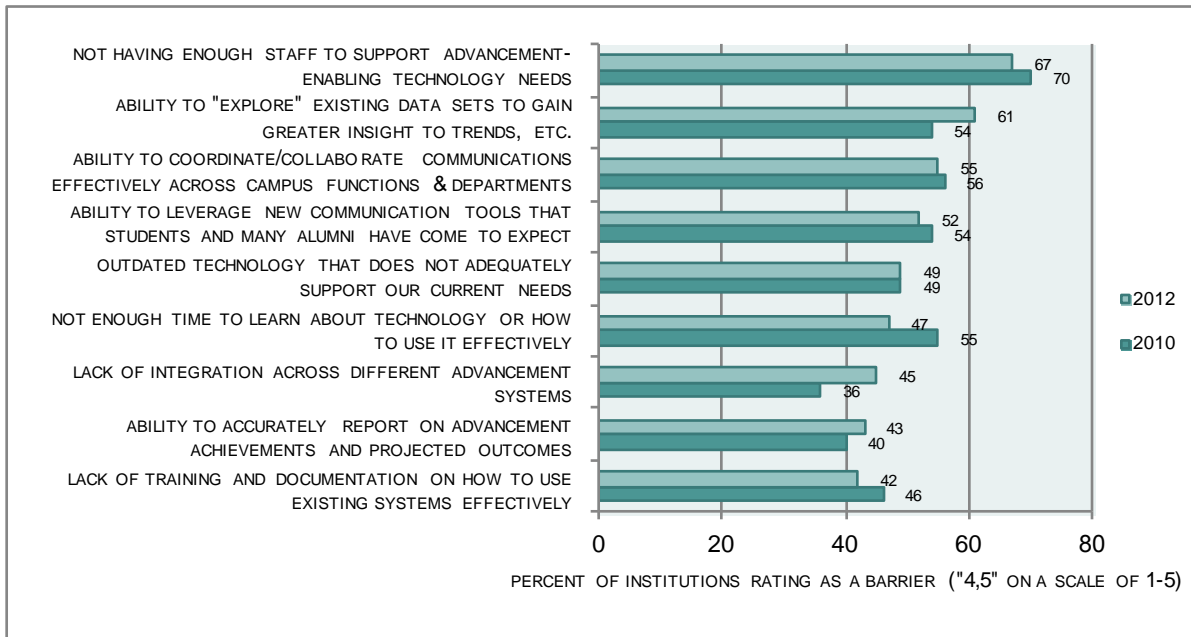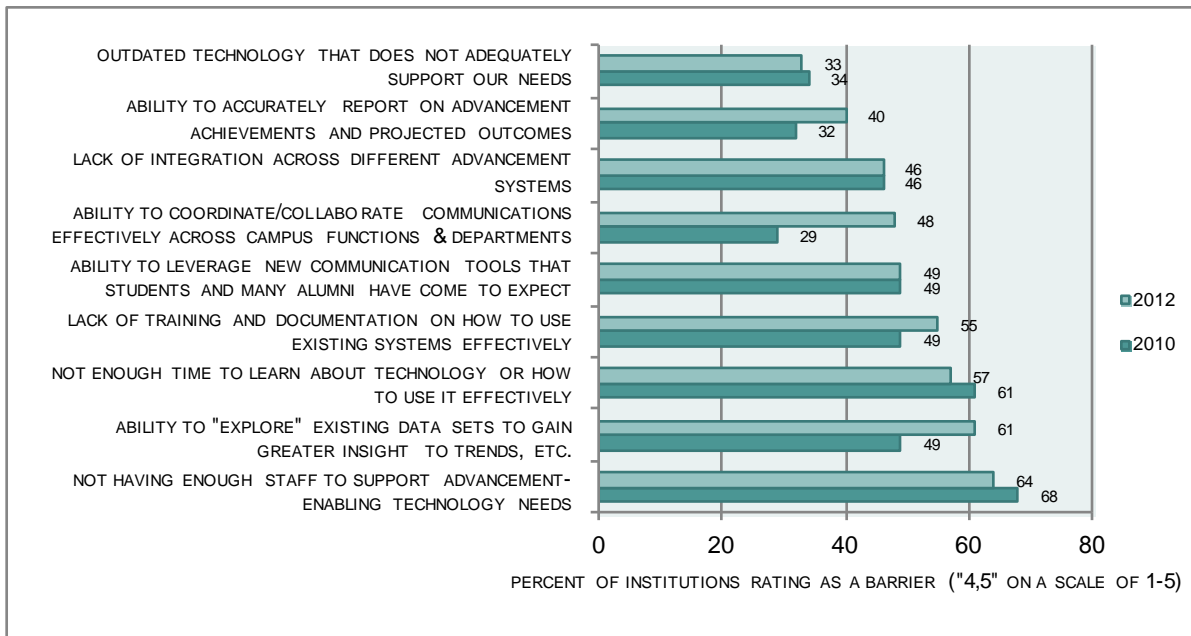
11a. Higher Education

Barrier	2012	2010
NOT HAVING ENOUGH STAFF TO SUPPORT ADVANCEMENT-ENABLING TECHNOLOGY NEEDS	67	70
ABILITY TO "EXPLORE" EXISTING DATA SETS TO GAIN GREATER INSIGHT TO TRENDS, ETC.	61	54
ABILITY TO COORDINATE/COLLABORATE COMMUNICATIONS EFFECTIVELY ACROSS CAMPUS FUNCTIONS & DEPARTMENTS	55	56
ABILITY TO LEVERAGE NEW COMMUNICATION TOOLS THAT STUDENTS AND MANY ALUMNI HAVE COME TO EXPECT	52	54
OUTDATED TECHNOLOGY THAT DOES NOT ADEQUATELY SUPPORT OUR CURRENT NEEDS	49	49
NOT ENOUGH TIME TO LEARN ABOUT TECHNOLOGY OR HOW TO USE IT EFFECTIVELY	47	55
LACK OF INTEGRATION ACROSS DIFFERENT ADVANCEMENT SYSTEMS	45	36
ABILITY TO ACCURATELY REPORT ON ADVANCEMENT ACHIEVEMENTS AND PROJECTED OUTCOMES	43	40
LACK OF TRAINING AND DOCUMENTATION ON HOW TO USE EXISTING SYSTEMS EFFECTIVELY	42	46

PERCENT OF INSTITUTIONS RATING AS A BARRIER ("4,5" ON A SCALE OF 1-5)

11b. Independent Schools

Barrier	2012	2010
OUTDATED TECHNOLOGY THAT DOES NOT ADEQUATELY SUPPORT OUR NEEDS	33	34
ABILITY TO ACCURATELY REPORT ON ADVANCEMENT ACHIEVEMENTS AND PROJECTED OUTCOMES	40	32
LACK OF INTEGRATION ACROSS DIFFERENT ADVANCEMENT SYSTEMS	46	46
ABILITY TO COORDINATE/COLLABORATE COMMUNICATIONS EFFECTIVELY ACROSS CAMPUS FUNCTIONS & DEPARTMENTS	48	29
ABILITY TO LEVERAGE NEW COMMUNICATION TOOLS THAT STUDENTS AND MANY ALUMNI HAVE COME TO EXPECT	49	49
LACK OF TRAINING AND DOCUMENTATION ON HOW TO USE EXISTING SYSTEMS EFFECTIVELY	55	49
NOT ENOUGH TIME TO LEARN ABOUT TECHNOLOGY OR HOW TO USE IT EFFECTIVELY	57	61
ABILITY TO "EXPLORE" EXISTING DATA SETS TO GAIN GREATER INSIGHT TO TRENDS, ETC.	61	49
NOT HAVING ENOUGH STAFF TO SUPPORT ADVANCEMENT-ENABLING TECHNOLOGY NEEDS	64	68

PERCENT OF INSTITUTIONS RATING AS A BARRIER ("4,5" ON A SCALE OF 1-5)

Barriers to using technology effectively are largely consistent across different types of institutions. The differences that do exist include:

- Public institutions are more likely than private institutions to face barriers related to a lack of staff to support advancement-enabling technology needs.

- Baccalaureate institutions are more likely than other types of institutions to face barriers in the areas of lack of training and documentation on the use of existing systems and lack of time to learn about technology or how to use it effectively.

Future investments in technology

Higher Education

Higher education institutions are most likely to invest in replacing or implementing new systems in the next two years for strategic reporting (25%), mobile devices (23%), events management (21%), email marketing (20%), and online communities (20%).

- Investments in strategic reporting tools and mobile devices will be made largely from institutions implementing these systems for the first time, rather than by institutions replacing existing tools.

- Investments in email marketing and online alumni communities will be made largely by institutions that are replacing existing systems, rather than by institutions investing in these systems for the first time.

Based on planned investments in the next 1-2 years, mobile and strategic reporting tools will see the most overall growth in penetration among higher education.

- Use of mobile devices for purposes other than for calls and emails is projected to grow to as much as 37% penetration among institutions (compared to 18% in 2012).

- Use of mobile applications is projected to grow to as much as 26% penetration among institutions (compared to 14% in 2012).

- Use of strategic reporting tools is projected to grow to as much as 61% penetration among institutions (compared to 45% in 2012).

Higher education institutions do not plan to abandon any existing tools or applications: Less than 1% plan to stop using any tool or application in the next one to two years.

Figure 12a. Higher education: current usage of and future adoption plans for technology tools and applications

TOOLS AND APPLICATIONS (N)	CURRENTLY USED TECHNOLOGY					TECHNOLOGY NOT IN USE CURRENTLY			
	TOTAL CURRENT USE	PLANS FOR TOOLS/APPLICATIONS CURRENTLY USED				TOTAL NOT CURRENTLY USING	PLANS FOR TOOLS/APPLICATIONS NOT IN USE		
		CONTINUE TO USE EXISTING	ABANDON IN 1-2 YEARS	REPLACE IN 3-5 YEARS	REPLACE IN 1-2 YEARS		NO PLANS TO IMPLEMENT	IMPLEMENT IN 3-5 YEARS	IMPLEMENT IN 1-2 YEARS
SOCIAL MEDIA TOOLS	92%	84%	0%	2%	6%	8%	4%	0.40%	3%
EMAIL MARKETING	85%	57%	0.40%	10%	18%	15%	11%	2%	2%
ONLINE ALUMNI COMMUNITY	66%	45%	1%	7%	13%	34%	24%	3%	7%
CORE ADVANCEMENT SYSTEM	61%	47%	0%	6%	8%	39%	37%	1%	1%
TELEFUNDRAISING SOFTWARE	50%	40%	1%	4%	5%	50%	42%	4%	4%
EVENTS MANAGEMENT SOFTWARE	53%	35%	0.40%	7%	11%	47%	33%	4%	10%
CRM SYSTEM	47%	34%	0%	5%	8%	53%	41%	4%	8%
STRATEGIC REPORTING TOOLS	45%	34%	0%	2%	9%	55%	35%	4%	16%
DOCUMENT IMAGING/MANAGEMENT	42%	33%	0%	3%	6%	58%	42%	7%	9%
MOBILE DEVICES	18%	13%	0%	1%	4%	82%	52%	11%	19%
MOBILE APPLICATIONS	14%	11%	0%	1%	2%	86%	68%	6%	12%
GRANTS MANAGEMENT SOFTWARE	9%	8%	0%	0%	1%	91%	84%	5%	2%
OUTSOURCED DATAENTRY	4%	3%	0%	0.40%	1%	96%	94%	1%	1%

Figure 13a. Higher education: plans to adopt or replace technology tools and applications in the next 1-2 years

TOOLS AND APPLICATIONS (N)	CURRENTLY USE AND WILL REPLACE IN 1-2 YEARS	DO NOT USE CURRENTLY AND PLAN TO IMPLEMENT IN 1-2 YEARS	TOTAL REPLACE/ IMPLEMENT IN 1-2 YEARS
SOCIAL MEDIA TOOLS	6%	3%	9%
EMAIL MARKETING	18%	2%	20%
ONLINE ALUMNI COMMUNITY	12%	7%	20%
CORE ADVANCEMENT SYSTEM	8%	1%	9%
TELEFUNDRAISING SOFTWARE	5%	4%	9%
EVENTS MANAGEMENT SOFTWARE	11%	10%	21%
CRM SYSTEM	8%	8%	16%
STRATEGIC REPORTING TOOLS	9%	16%	25%
DOCUMENT IMAGING/MANAGEMENT	6%	9%	15%
MOBILE DEVICES	4%	19%	23%
MOBILE APPLICATIONS	2%	12%	14%
GRANTS MANAGEMENT SOFTWARE	1%	2%	3%
OUTSOURCED DATA ENTRY	1%	1%	2%

Independent Schools

Independent schools are most likely to invest in mobile in the next two years, including both mobile devices and mobile applications.

- Twenty-three percent of independent schools plan to invest in mobile applications in the next two years, and most of this investment will be from institutions implementing new systems (rather than replacing existing systems). With these projected investments, penetration of mobile applications could nearly double in the next two years to reach 41%.

- Twenty-four percent of independent schools plan to invest in mobile devices in the next two years, and most of this investment will be from new implementations (rather than replacing existing systems). With these projected investments, penetration of mobile devices could more than double in the next two years to reach 32%.

- Although use of online communities decreased significantly in the last two years, 16% of independent schools plan to replace or invest in new online community tools in the next two years.

- Independent schools do not plan to abandon any existing tools or applications: Less than 1% plan to stop using any tool or application in the next one to two years.

Figure 12b. Independent schools: current usage of and future adoption plans for technology tools and applications

TOOLS AND APPLICATIONS (N)	CURRENTLY USED TECHNOLOGY					TECHNOLOGY NOT IN USE CURRENTLY			
	TOTAL CURRENT USE	PLANS FOR TOOLS/APPLICATIONS CURRENTLY USED				TOTAL NOT CURRENTLY USING	PLANS FOR TOOLS/APPLICATIONS NOT IN USE		
		CONTINUE TO USE EXISTING	ABANDON IN 1-2 YEARS	REPLACE IN 3-5 YEARS	REPLACE IN 1-2 YEARS		NO PLANS TO IMPLEMENT	IMPLEMENT IN 3-5 YEARS	IMPLEMENT IN 1-2 YEARS
SOCIAL MEDIA TOOLS	97%	91%	0%	5%	1%	3%*	2%	0%	1%
EMAIL MARKETING	81%	69%	0%	5%	7%	15%	14%	1%	4%
ONLINE ALUMNI COMMUNITY	66%	49%	0%	8%	9%	34%	24%	3%	7%
CORE ADVANCEMENT SYSTEM	60%	54%	0%	1%	5%	40%	40%	0%	0%
EVENTS MANAGEMENT SOFTWARE	39%	31%	0%	7%	1%	61%	44%	8%	9%
DOCUMENT IMAGING/MANAGEMENT	34%	30%	0%	3%	1%	66%	57%	0%	9%
STRATEGIC REPORTING TOOLS	31%	28%	0%	0%	3%	69%	58%	3%	8%
CRM SYSTEM	30%	29%	0%	1%	0%	70%	64%	1%	5%
MOBILE APPLICATIONS	23%	17%	0%	1%	5%	77%	55%	4%	18%
MOBILE DEVICES	9%	8%	0%	0%	1%	91%	62%	5%	23%
GRANTS MANAGEMENT SOFTWARE	5%	3%	1%	1%	0%	95%	88%	4%	3%
OUTSOURCED DATA ENTRY	3%	2%	1%	0%	0%	97%	95%	1%	1%
TELEFUNDRAISING SOFTWARE	1%	1%	0%	0%	0%	99%	98%	0%	1%

Figure 13b. Independent schools: plans to adopt or replace technology tools and applications in the next 1-2 years

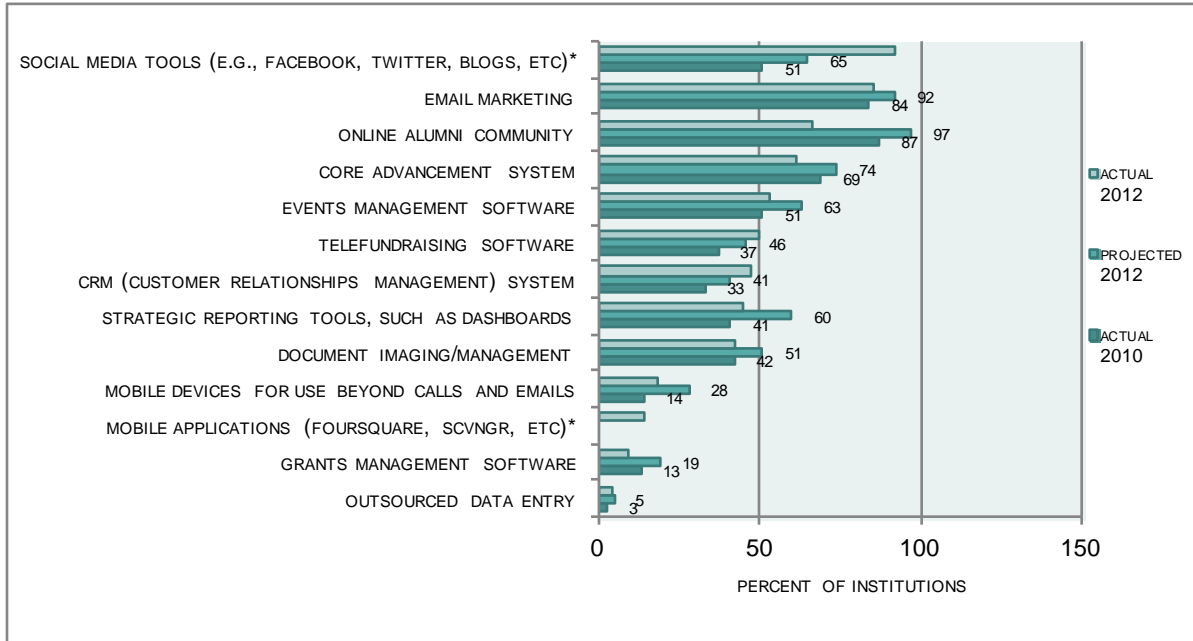| TOOLS AND APPLICATIONS (N)	CURRENTLY USE AND WILL REPLACE IN 1-2 YEARS	DO NOT USE CURRENTLY AND PLAN TO IMPLEMENT IN 1-2 YEARS	TOTAL REPLACE/ IMPLEMENT IN 1-2 YEARS
SOCIAL MEDIA TOOLS	1%	1%	2%
EMAIL MARKETING	7%	4%	11%
ONLINE ALUMNI COMMUNITY	9%	7%	16%
CORE ADVANCEMENT SYSTEM	5%	0%	5%
EVENTS MANAGEMENT SOFTWARE	1%	9%	10%
DOCUMENT IMAGING/MANAGEMENT	1%	9%	10%
STRATEGIC REPORTING TOOLS	3%	8%	11%
CRM SYSTEM	0%	5%	5%
MOBILE APPLICATIONS	5%	18%	23%
MOBILE DEVICES	1%	23%	24%
GRANTS MANAGEMENT SOFTWARE	0%	3%	3%
OUTSOURCED DATA ENTRY	0%	1%	1%
TELEFUNDRAISING SOFTWARE	0%	1%	1%

Projections of future technology adoption

Comparing institutions' projections for technology adoption in 2010 to their actual usage reported in 2012 shows that most higher education institutions overestimate their likelihood to adopt new technology systems. Compared to what they predicted in 2010 for the next 1-2 years, higher education institutions' predictions typically fell short of their actual usage in 2012. The biggest shortfall is for strategic reporting tools: In 2010, 60% predicted they would be using strategic reporting tools by 2012 but actual usage in 2012 grew only slightly to 45%.   Higher education underestimated their technology adoption in one area: Social media tools were expected to grow modestly from 51% in 2010 to 65% in 2012 and actual usage in 2012 is 92%.
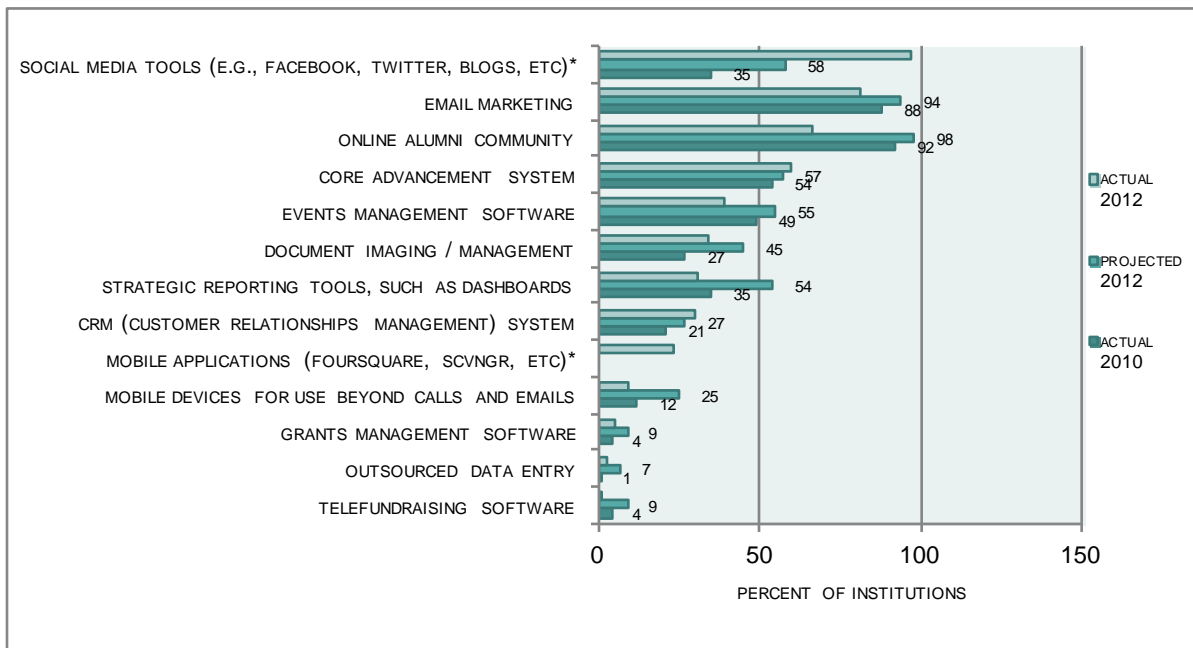
Like higher education institutions, independent schools in 2010 overestimated their future adoption of strategic reporting tools and underestimated their adoption of social media tools. Independent institutions also overestimated their adoption of mobile devices.

Figure 14. Comparison of 2010 projections for future usage and 2012 actual usage

14a. Higher Education

Chart categories (top to bottom):
- SOCIAL MEDIA TOOLS (E.G., FACEBOOK, TWITTER, BLOGS, ETC)* — 51, 65
- EMAIL MARKETING — 84, 92
- ONLINE ALUMNI COMMUNITY — 87, 97
- CORE ADVANCEMENT SYSTEM — 69, 74
- EVENTS MANAGEMENT SOFTWARE — 51, 63
- TELEFUNDRAISING SOFTWARE — 37, 46
- CRM (CUSTOMER RELATIONSHIPS MANAGEMENT) SYSTEM — 33, 41
- STRATEGIC REPORTING TOOLS, SUCH AS DASHBOARDS — 41, 60
- DOCUMENT IMAGING/MANAGEMENT — 42, 51
- MOBILE DEVICES FOR USE BEYOND CALLS AND EMAILS — 14, 28
- MOBILE APPLICATIONS (FOURSQUARE, SCVNGR, ETC)*
- GRANTS MANAGEMENT SOFTWARE — 13, 19
- OUTSOURCED DATA ENTRY — 3, 5

Legend: ACTUAL 2012, PROJECTED 2012, ACTUAL 2010

X-axis: PERCENT OF INSTITUTIONS (0, 50, 100, 150)

14b. Independent Schools

Chart categories (top to bottom):
- SOCIAL MEDIA TOOLS (E.G., FACEBOOK, TWITTER, BLOGS, ETC)* — 35, 58
- EMAIL MARKETING — 88, 94
- ONLINE ALUMNI COMMUNITY — 92, 98
- CORE ADVANCEMENT SYSTEM — 54, 57
- EVENTS MANAGEMENT SOFTWARE — 49, 55
- DOCUMENT IMAGING / MANAGEMENT — 27, 45
- STRATEGIC REPORTING TOOLS, SUCH AS DASHBOARDS — 35, 54
- CRM (CUSTOMER RELATIONSHIPS MANAGEMENT) SYSTEM — 21, 27
- MOBILE APPLICATIONS (FOURSQUARE, SCVNGR, ETC)*
- MOBILE DEVICES FOR USE BEYOND CALLS AND EMAILS — 12, 25
- GRANTS MANAGEMENT SOFTWARE — 4, 9
- OUTSOURCED DATA ENTRY — 1, 7
- TELEFUNDRAISING SOFTWARE — 4, 9

Legend: ACTUAL 2012, PROJECTED 2012, ACTUAL 2010

X-axis: PERCENT OF INSTITUTIONS (0, 50, 100, 150)

33

Profile of survey respondents

Figure 15. Titles of survey respondents

Q3: Which of the following best describes your job title/position?
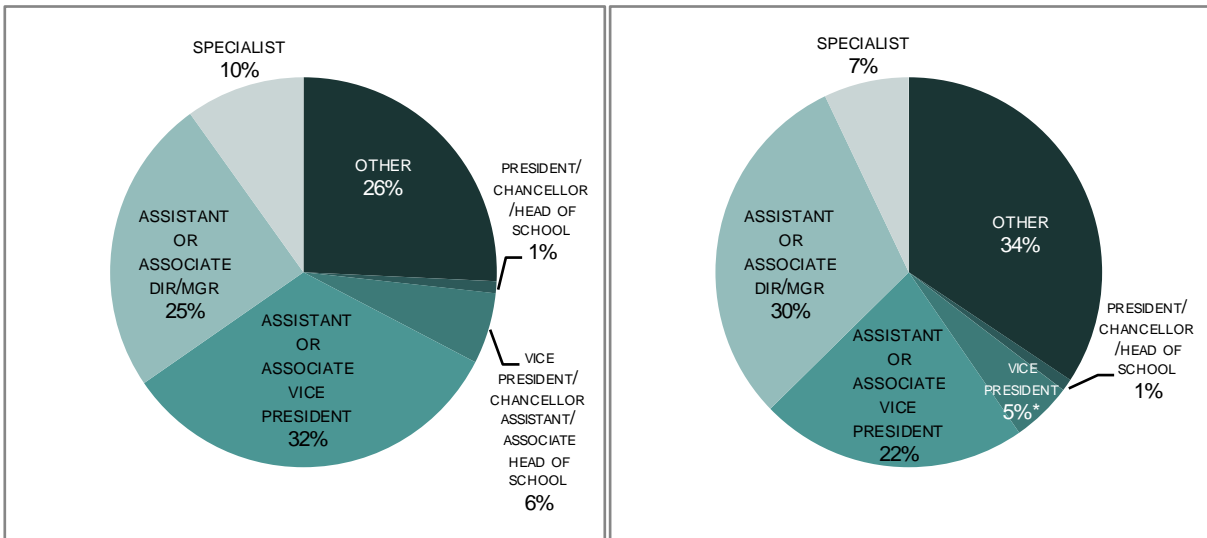
15a. Higher Education (n=280)

SPECIALIST 10%
OTHER 26%
PRESIDENT/ CHANCELLOR /HEAD OF SCHOOL 1%
ASSISTANT OR ASSOCIATE DIR/MGR 25%
ASSISTANT OR ASSOCIATE VICE PRESIDENT 32%
VICE PRESIDENT/ CHANCELLOR ASSISTANT/ ASSOCIATE HEAD OF SCHOOL 6%

15b. Independent Schools (n=76)

SPECIALIST 7%
ASSISTANT OR ASSOCIATE DIR/MGR 30%
OTHER 34%
ASSISTANT OR ASSOCIATE VICE PRESIDENT 22%
VICE PRESIDENT 5%*
PRESIDENT/ CHANCELLOR /HEAD OF SCHOOL 1%

Chart Notes: Vice President category also refers to Vice Chancellor and Assistant/Associate Head of School.

Figure 16. Disciplines of survey respondents

Q4: What is your primary advancement discipline?

16a. Higher Education (n=284)

OTHER 4%
OVERALL MANAGE-MENT OF MULTIPLE FUNCTIONS 18%
ADVANCE-MENT SERVICES 28%
DEVELOP-MENT 26%
ALUMNI/ CONSTITU-ENT RELATIONS 24%

16b. Independent Schools (n=77)

OTHER 4%
OVERALL MANAGE-MENT OF MULTIPLE FUNCTIONS 30%
ADVANCE-MENT SERVICES 18%
DEVELOP-MENT 26%
ALUMNI/ CONSTITU-ENT RELATIONS 22%
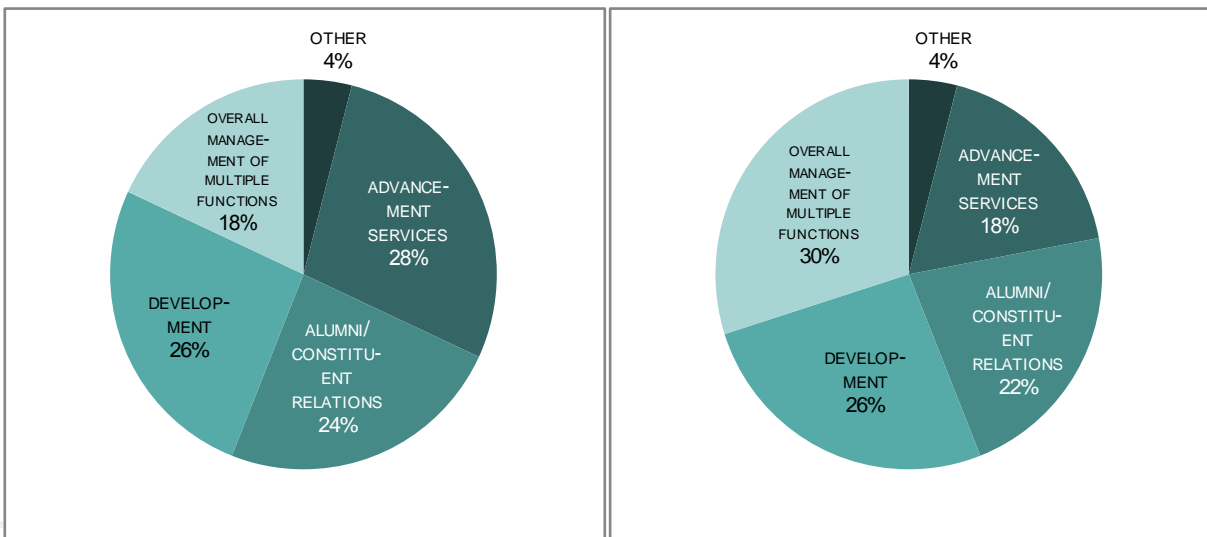
Figure 17. Management of current advancement system

Q5: Is the current advancement system – your institution's primary repository of alumni/constituent and donor data – managed by…

17a. Higher Education (n=283)

17b. Independent Schools (n=77)
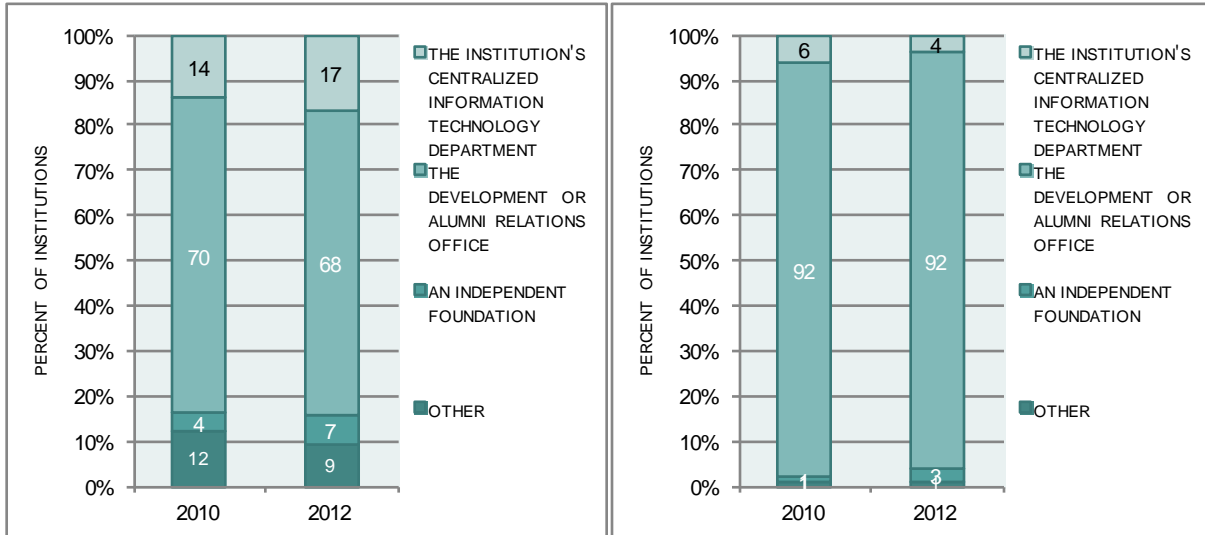
Figure 18. Technical support for current advancement system

Q6: Who provides technical support for your current advancement system?

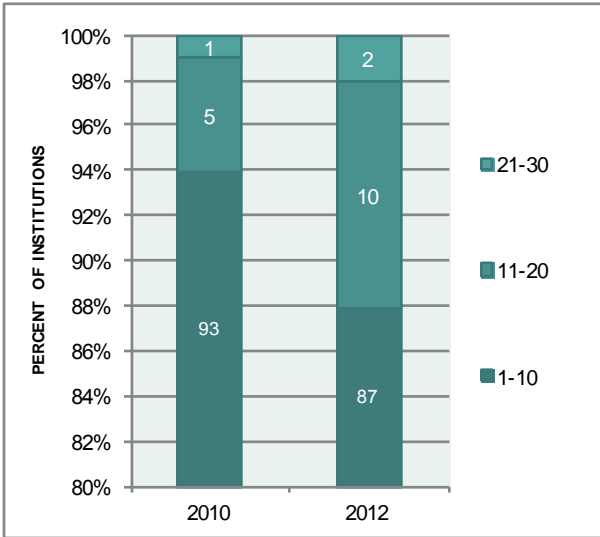### 18a. Higher Education (n=279)

18b. Independent Schools (n=76)
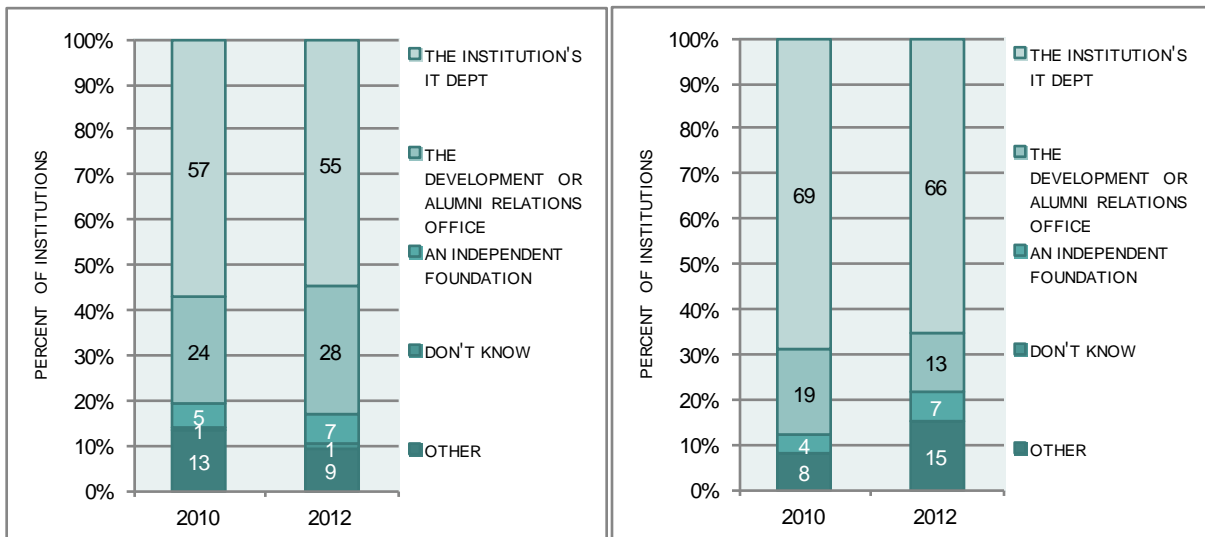
Figure 19. Department size

Q7: In total, how many full-time-equivalent (FTE) employees work in advancement services, development and alumni/constituent relations, in any affiliated foundations, and in any affiliated alumni associations? To the degree possible, please do not include staff whose primary role is communications and marketing.

19a. Higher Education
(2010 n=245, 2012 n=251)

19b. Independent Schools
(2010 n=74, 2012 n=63)

Note: due to rounding, figures may not total 100%.

Figure 20. Institution size

Q22: What was the total number of full-time-equivalent (FTE) students enrolled at your institution in Fall 2011?

20a. Higher Education
(2010 n=268, 2012 n=284)
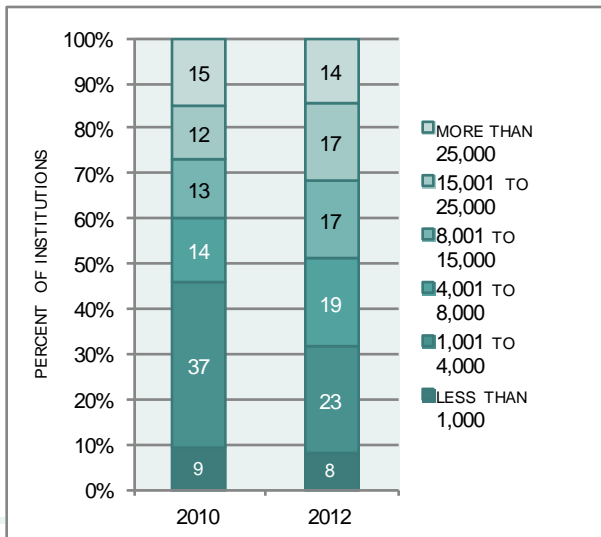
20b. Independent Schools
(2010 n=88, 2012 n=77)
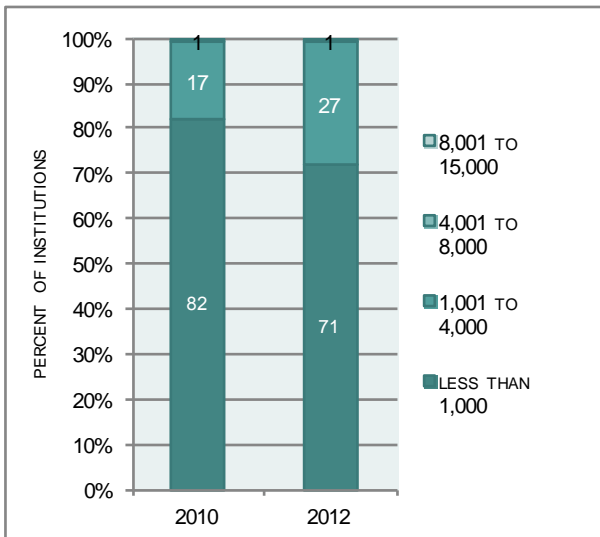
Figure 21. Total annual fundraising

Q23: Into which of the following categories does the total amount your institution raised in the last fiscal year fall? Please enter in U.S. dollars. (Conversion to a single currency allows for benchmarking of institutions in multiple countries. Click here to access a currency converter online.)

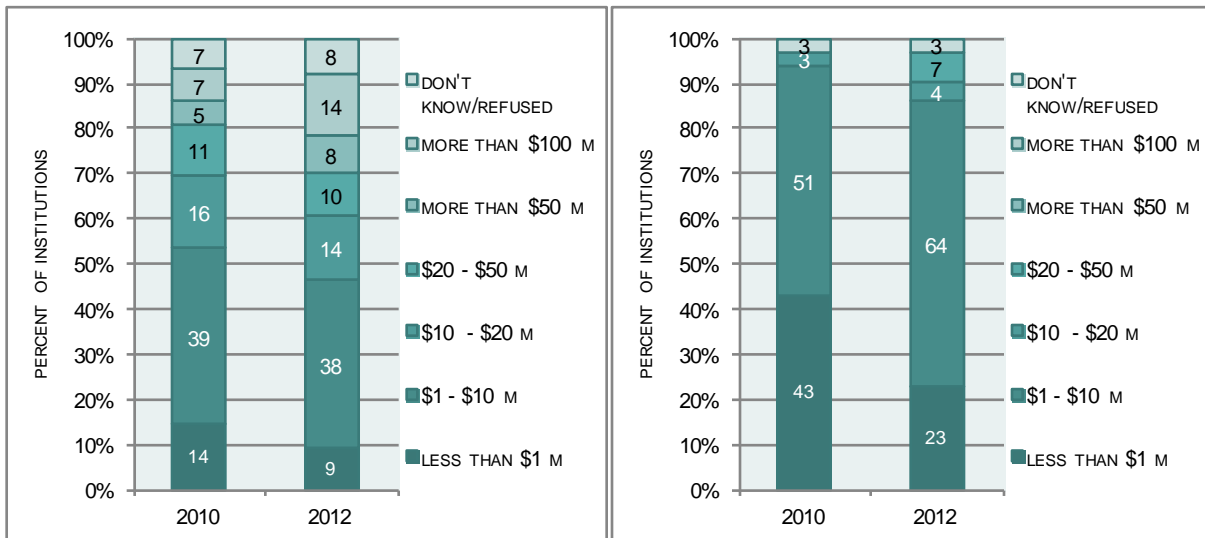### 21a. Higher Education (n=284)

21b. Independent Schools (n=77)

Figure 22. Public vs. private status of institution

Q24: Your institution is:

22a. Higher Education (n=284)

22b. Independent Schools (n=77)
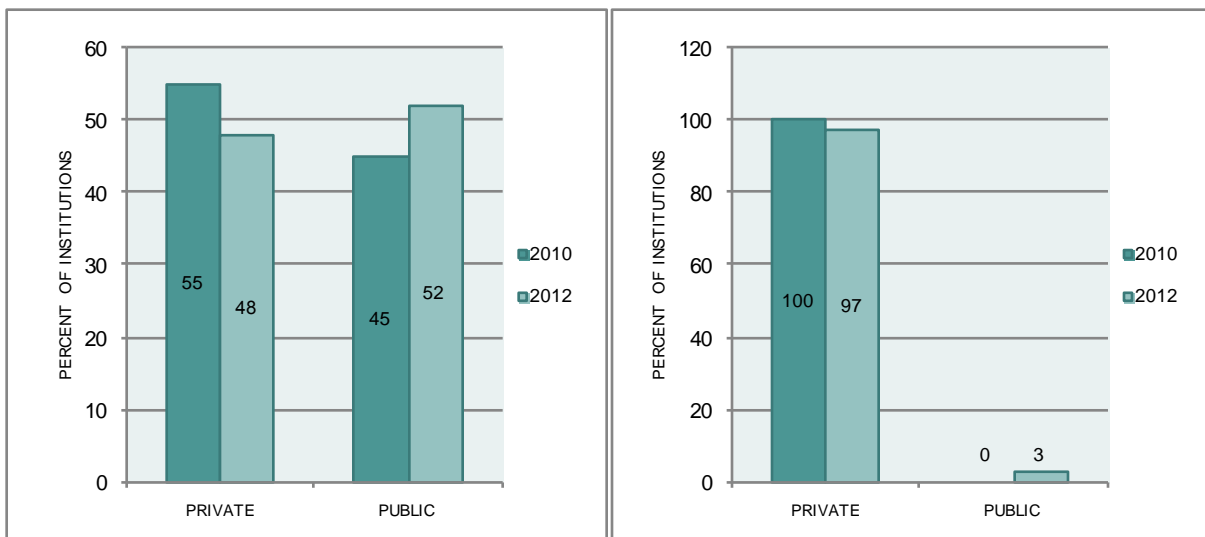
Figure 23. Institution type
Q25: Which of the following best describes your institution type? Select one.

Higher Education (n=283)
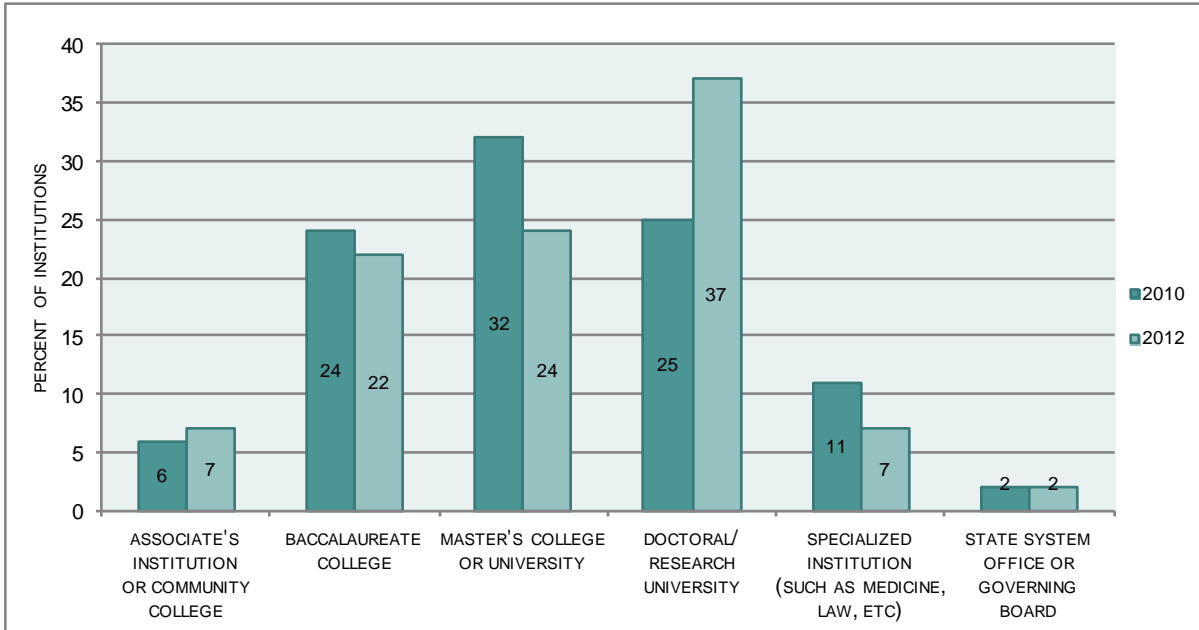
Figure 24. Geographic region
Q26: In what region of the world is your institution located?

24a. Higher Education (n=284)
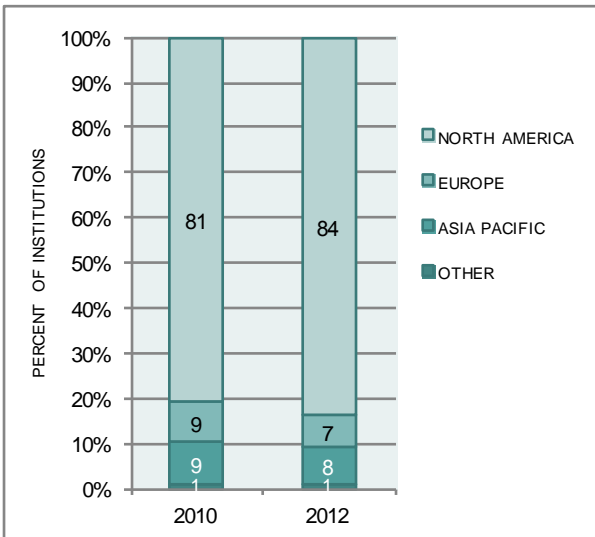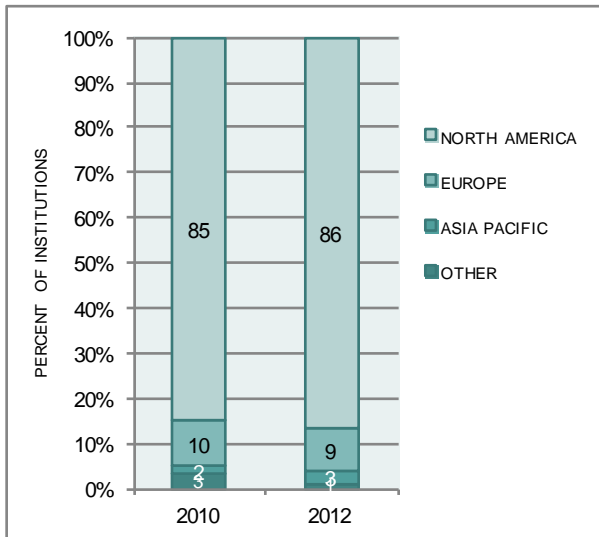
24b. Independent Schools (n=77)

Figure 25. CASE district
Q27: In which CASE district is your institution's central campus located?

25a. Higher Education (n=284)
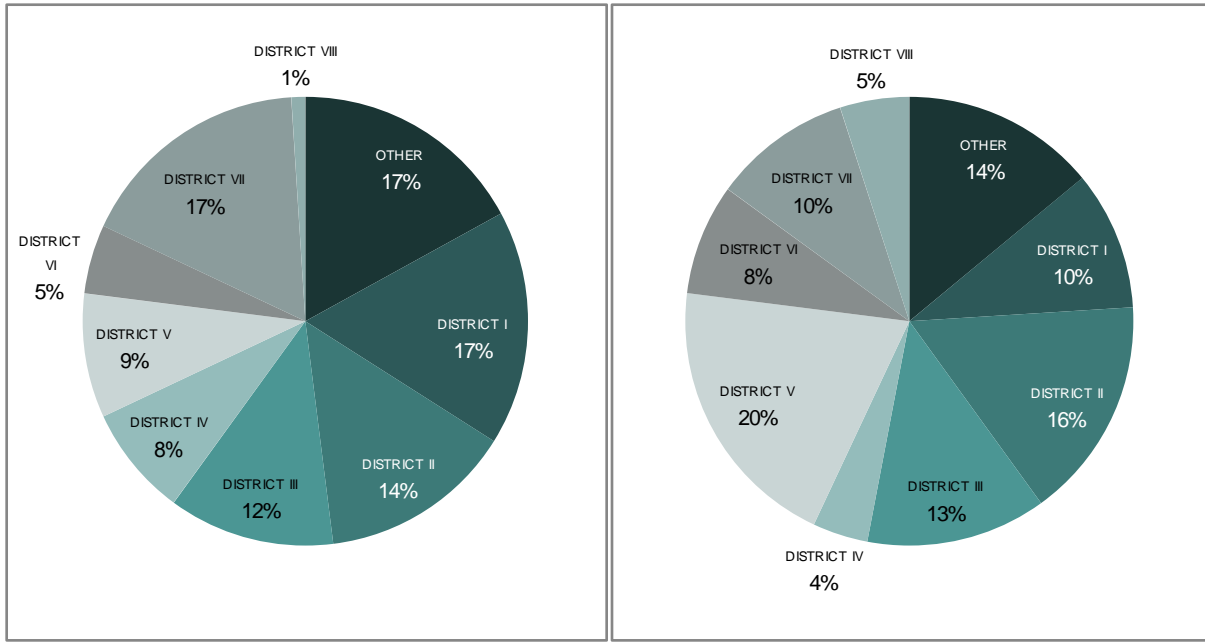

25b. Independent Schools (n=77)

Chart notes: District I: CT, ME, MA, NH, RI, VT, NB, NL, PE, QC; District II: DE, DC, MD, NJ, NY, PA, WV, ON, PR, US VI; District III: AL, FL, GA, KY, MS, NC, SC, TN, VA; District IV: AR, LA, NM, OK, TX, Mexico; District V: MN, WI, IL, IN, MI, OH; District VI: CO, IA, KS, MO, NE, ND, SD, WY; District VII: AZ, CA, HI, NV, UT, Guam; District VIII: AK, ID, MT, OR, WA, Western Canada.

Appendix A: List of participating institutions
Q28: What is the name of your institution?

Higher Education (n=284)
Note: Institutions for which more than one person responded have the number of respondents from that institution in parenthesis. Fifty-one higher education respondents chose not to reveal the names of their institutions.

- Aarhus University
- Albion College
- Albright College
- Alma College
- American University
- American University in Bulgaria
- Amherst College
- Ancilla College
- Anderson University
- Anglia Ruskin University
- Auburn University
- Bainbridge Graduate Institute
- Ball State University
- Baltimore City Community College
- Bay Path College
- Beloit College
- Bethel University
- Bournemouth University
- Brandeis University
- Brigham Young University
- Broward College
- Bucknell University (2)
- California State University, Fullerton
- California State University, Sacramento
- Cardiff Metropolitan University
- Carnegie Mellon University (2)
- Carroll College
- Christopher Newport University
- Cleveland State University
- College of Charleston
- Colorado State University
- Connecticut College (2)
- Cornell University
- Cottey College
- Creighton University
- Cumberland University
- Davenport University
- Del Mar College
- Duquesne University
- Eastern Michigan University
- Eastern University
- Elon University
- Emory University (2)
- Fairleigh Dickinson University
- Frostburg State University
- Geneva College (2)
- Georgia Tech
- Glasgow Caledonian University
- Goodwin College
- Gordon College
- Hampshire College
- Harding University
- Harrisburg Area Community College
- Hartwick College
- Harvard - Faculty of Arts and Sciences
- Hollins University
- Hong Kong Baptist University
- Houghton College
- Humber College
- The International Association for the Exchange of Students for Technical Experience (IAESTE)
- Indiana University of PA
- Iowa State University
- Iowa State University Foundation

- James Madison University (2)
- John Carroll University
- Johns Hopkins University (2)
- Kansas State University
- Kentucky Wesleyan College
- Kettering University
- King's College London
- Kingston University
- La Sierra University
- Lake Forest College
- Lake Superior State University
- Le Moyne College
- London School of Economics
- Loma Linda University
- Loyola University Chicago (2)
- Lutheran School of Theology at Chicago
- Manchester Business School
- Mansfield University
- Marshall University
- McGill University
- McIntire School of Commerce Foundation
- Meridian Community College
- MGSM
- Michigan Technological University (3)
- Middle Tennessee State University
- Morningside College
- Nanyang Polytechnic
- National University of Singapore Business School
- National University of Technology
- Nazareth College (2)
- New College, University of Oxford
- Norfolk State University
- North Dakota State College of Science
- Northeast Ohio Medical University (2)
- Northeastern University
- NorthWest Arkansas Community College

- Northwest State Community College
- Northwestern University (2)
- Oakland University
- Occidental College
- Ohio Wesleyan University
- Oklahoma State University
- Old Dominion University
- Olin College
- Otis College of Art and Design
- Otterbein University
- Pace University
- Pacific University
- Palo Alto University
- Pepperdine University
- Philadelphia University
- Pitzer College
- Plymouth State University
- Portland State University
- Purdue University
- Queen's University Belfast
- Queensland University of Technology
- Radford University
- Randolph-Macon College
- Rensselaer Polytechnic Institute
- Robinson College, University of Cambridge
- Roosevelt University
- Saint Louis University
- SAIT Polytechnic
- Sam Houston State University
- Santa Clara University (2)
- Schenectady County Community College
- Schoolcraft College
- Seattle University
- Selkirk College
- Shawnee State University
- Simmons College

- Southern Illinois University Carbondale
- Southern Illinois University Edwardsville
- Southern Methodist University
- St. Catharine's College, Cambridge
- St. Luke's College
- Stanford University
- Stonehill College
- Suffolk University
- Swarthmore College (2)
- Syracuse University
- The Catholic University of America
- The Courtauld Institute of Art
- The Hong Kong Polytechnic University
- The United States Military Academy
- The University of Toledo
- Thunderbird School of Global Management
- Tilburg University
- Trevecca Nazarene University
- Union College
- University of Reading
- Universidad de los Andes
- University College London (UCL)
- University of Aberdeen
- University of Alberta
- University of Arizona
- University of British Colombia
- University of California, Irvine
- University of California, Santa Cruz
- University of California, San Diego
- University of Cambridge
- University of Central Florida
- University of Central Florida Foundation
- University of Chicago
- University of Georgia
- University of Gloucestershire
- University of Illinois at Urbana-Champaign (3)

- University of Massachusetts Amherst (2)
- University of Miami
- University of Michigan
- University of Missouri (2)
- University of Missouri - St. Louis
- University of Navarra (Spain) (2)
- University of Nevada - Las Vegas
- University of Nevada - Reno
- University of North Carolina - Asheville
- University of North Dakota Foundation
- University of Notre Dame
- University of Ottawa
- University of Port Harcourt, Nigeria, Choba
- University of Rochester
- University of Saint Francis
- University of South Florida
- University of Southern Maine
- University of St. Thomas
- University of Sussex
- University of Texas - Dallas
- University of the Pacific
- University of Virginia
- University of Warwick (2)
- University of Washington (2)
- University of Wisconsin - Madison
- University of Wisconsin - Milwaukee (3)
- Victoria University, Australia
- Wartburg College
- Webster University (2)
- Western Connecticut State University
- Western Kentucky University (2)
- Westmont College
- Willamette University
- WPI
- York College

Independent Schools (n=77)

Note: Institutions for which more than one person responded have the number of respondents from that institution in parenthesis. Twelve respondents chose not to reveal the names of their independent schools.

- Abington Friends School
- Alexander Dawson School
- American School of Milan
- Baylor School
- Blair Academy
- Brewster Academy
- Bridgton Academy
- Brother Rice HS
- Canadian International School of Hong Kong
- Catholic Memorial High School (2)
- Colorado Academy
- Columbus School for Girls
- Episcopal High School
- Far Hills Country Day School
- Fay School
- Friends Academy
- Friends Select School
- Geelong Grammar School
- Greens Farms Academy
- Holderness School
- Hong Kong International School Hutchison
- International School of Kenya
- Latymer
- Loomis Chaffee
- Marian High School
- Marin Horizon School
- Marymount High School (2)
- Moses Brown School
- North Shore Country Day School
- Pacific Ridge School
- Prospect Sierra
- Ridgefield Academy
- Sacred Heart Schools
- Saint Andrew's Episcopal School

- Schools of the Sacred Heart San Francisco (2)
- South Carolina Governor's School for Science & Mathematics
- St. Agnes Academy
- St. James Episcopal Day School
- St. John's Prep
- St. Paul's School
- St. Stephen's & St. Agnes School
- St. Stephen's Episcopal Day School
- St. Xavier High School
- Taipei American School
- The American College of Greece
- The Barstow School
- The Center for Early Education
- The Hockaday School (2)
- The Internatioanl School of Kuala Lumpur
- The John Carroll School
- The Lovett School
- The Madeira School
- The Overlake School
- The Spence School
- Thomas More College
- Upper Canada College
- Ursuline Academy, Wilmington
- Western Academy of Beijing
- Worcester Academy
- Xaverian Brothers High School

Appendix B: Verbatim responses to open-ended questions

Verbatim responses for Q12: Other tactical challenges

Participants were also invited to write in their own responses about what challenges their departments are facing if it was not captured in the list of items in the survey. No other challenge was named by more than 2% of higher education respondents or 3% of independent- school respondents. In total, 15% of higher education respondents and 20% of independent- school participants provided additional challenges, suggesting that the list in the survey captures the range of the greatest challenges facing institutions.

Q12: Are there any other significant challenges facing your development and alumni/constituent relations departments that were not mentioned above? Please specify here.

Higher Education (n=284)

Not satisfied with current software: 8 mentions, 3%

- "A database that is not intuitive and user friendly, i.e., lack of reporting and analysis capabilities."

- "Campus wide system does not meet the needs of development/alumni relations but there is no option to see new technology vendors due to pushback from other departments."

- "The software we use is used by the entire university and does not necessarily give us what we need in terms of storing data. We do not have a data warehouse anywhere either, which hurts significantly when keeping records."

Staff turnover/recruitment: 3 mentions, 1%

- "Significant turnover and staff reduction in the Advancement Office over the last 10 years."

- "Recruitment of experienced fundraisers."

- "Recruitment and retention of qualified colleagues."

Other staff or training problems: 3 mentions, 1%

- "Solid training. Accountability matrix."

- "Inability to find quality (competent) development officers."

- "One can't expect to implement new technology without considering the human capital needed. We often rely on a few people to learn new software, then train the rest of us while still expecting them to do their normal day-to-day tasks."

Need to embrace technology: 2 mentions, 1%

- "It's really hard to get some Advancement professionals to embrace technology. I don't expect them to be computer scientists, but I do want them to use the database instead of spreadsheets."

- "Business users perspective on the importance of technology to perform their functions."

Other: 13 mentions, 5%

- "Ability to focus on more strategic vs. operational activities/tasks."

- "Determining definitive ROI for alumni events/giving trends."

- "Total support from the university community."

- "There is more information available than ever before. The challenge is applying the right information at the right time in the right context to maximize its strategic value."

Independent Schools (n=77)

Other staff or training problems: 2 mentions, 3%

- "Skill development and project management for small staff."

- "Too much to do, not enough resources."

Other financial constraints/economy: 2 mentions, 3%

- "Economy."

- "Cost of database management, cost of database itself."

Collaboration with other depts: 2 mentions, 3%

- "Lack of collaboration with marketing and communications office."

- "Central IT and other departments sharing information in a timely, efficient manner."

Other: 3 mentions, 4%

- "Ethical review of worldwide prospects."

- "Being an international high school, alumni disperse to all corners of the globe, making it difficult to organize large reunions, monthly events, etc. Homecomings are a prime example."

- "Alumni base changed from military, men's boarding to coed day school."

Verbatim responses for Q14: Role of technology in addressing other challenges

Respondents provided a handful of responses about additional challenges. Management solutions were the commonly cited challenge met by technology in higher education; no additional single solution stood out among independent-school respondents.

Four respondents, all in higher education, took this occasion to point out limitations of technology in meeting challenges.

Q14: Does technology play an important role in addressing any other challenges? Please specify any changes not listed above.

Higher Education (n=284)

Other: 7 mentions, 2%

- "Technology creates as least as many challenges as it addresses."

- "Finding young alumni still using their parents addresses, finding 'lost' alumni."

- "Makes work easy and access to information."

Independent Schools (n=77)

Other (total): 2 mentions, 3%

- "Volunteer management."

- "Stewardship."

Verbatim responses for Q17: Other significant barriers to effectively using technology

Q17: Are there any other significant barriers that your development and alumni department encounters in effectively using technology that are not listed above? Please specify

Respondents provided few additional barriers, suggesting that the barriers in Q15 mostly cover the range of advancement barriers.

Higher Education (n=284)

Not satisfied with current software: 8 mentions, 3%

- "The campus uses multiple databases and software systems—it is not integrated."

- "Database and reporting software is often 'down' and not functioning correctly at all."

- "Donor database with audit trail that is integrated accurately and effectively with financial software so that both CASE and GAAP can be accounted for and reduce the duplication in human resources."

- "The technology tool does not support the business process and is not user friendly in any way. Reporting is very difficult."

Not prioritized/appreciated: 2 mentions, 1%

- "Lack of support from IT staff."

- "Staff coordinating our database have not kept up with technology and are unwilling to work hard to meet gift officer and alumni relations needs."

Other: 5 mentions, 3%

- "Old or not mainstream tools can impede sharing with colleagues in other institutions."

- "Database controlled by one person...database access rights also a huge issue (not to mention a user-unfriendly system)!"

- "I'd say a lack of understanding on both sides, between IT folks like myself and fundraisers, about what the other person's job is."

- "Development arm often driving alumni relations and communications efforts and sometimes ineffectually so. Less of a "top-down" approach would be more effective."

Independent Schools (n=77)

Other (total): 2 mentions, 3%

- "Experience and training of support staff, high turnover in these positions is costly in terms of lost time for reporting, research."

Appendix C: Background information on survey sponsors and research company

About CASE

The Council for Advancement and Support of Education (www.case.org) is the professional organization for advancement professionals at all levels who work in alumni relations, communications and marketing, development and advancement services.

CASE's membership includes more than 3,400 colleges, universities and independent elementary and secondary schools in 61 countries. This makes CASE one of the largest nonprofit education associations in the world in terms of institutional membership. CASE also serves more than 60,000 advancement professionals on the staffs of member institutions and has more than 22,500 individual "professional members" and more than 230 Educational Partner corporate members.

CASE has offices in Washington, D.C., London, Singapore and Mexico City. The association produces high quality and timely content, publications, conferences, institutes and workshops that assist advancement professionals perform more effectively and serve their institutions.

For more information, visit www.case.org or call 202-328-2273.

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Ellucian helps education institutions thrive in a dynamic world. We deliver a broad portfolio of technology solutions, developed in collaboration with a global education community, and provide strategic guidance to help education institutions of all kinds navigate change, achieve greater transparency, and drive efficiencies. More than 2,300 institutions in 40 countries around the world look to Ellucian for the ideas and insights that will move education forward, helping people everywhere discover their futures through learning.

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About Isurus Market Research and Consulting

Isurus Market Research and Consulting specializes in custom market research on behalf of clients in business-to-business markets. Our roots are in research for enterprise technology firms; however, we do significant work in the areas of education, healthcare, and business services. We regularly conduct qualitative and quantitative research in North America, Europe, and Asia.

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