

Proudly part of the DRIVE/Cast ToGather series



AMAtlas

Advancement Metrics and Research for Education

CASE AMAtlas: Advancement Research,
Data and Analytics at Your Fingertips
Presented by Jenny Cooke Smith, Sr. Strategic Consultant

Challenges CASE is hearing*

63%

Of advancement staff do not routinely apply data to make informed decisions.

25%

Of North American members indicate using Data Miner at least “sometimes” within the year

86%

Of institutions surveyed identified the need for an **independent organization** to serve as a comprehensive resource for advancement-related metrics, benchmarks and analytics.

*market research conducted by Isurus, 2018



The Solution: AMAtlas

CASE's broad data initiative, created in 2018. Our goal is to be *the* global resource for advancement metrics, benchmarks and analytics



Meet the AMAtlas team



Richard Banks, Interim Chief
Research and Data Officer



David Bass, Sr. Director,
Research



Jacob Drew, Lead Software
Engineer



Kimberly Kane, Manager,
Voluntary Support of
Education



Ann Kaplan, Sr. Director,
Voluntary Support of
Education



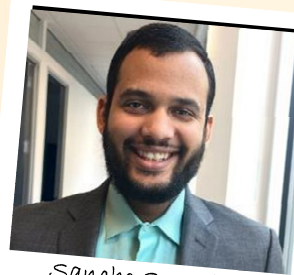
Anna Koranteng, Research
Specialist



Divya Krishnaswamy,
Sr. Research Analyst



Sheeleah Prince, Manger,
Operations Projects



Sancho Sequeira,
Sr. Research Analyst



Jenny Cooke Smith, Sr.
Strategic Consultant



AMAtlas Volunteer Leadership

Charlie Phlegar, Vice President for Advancement, Virginia Tech University, Co-Chair

Chris Cox, Vice Principal Philanthropy and Advancement, The University of Edinburgh, Co-Chair

Donna Arbide, Vice President for Development and Alumni Relations, George Washington University

Monique Dozier, Vice President for Advancement, Morehouse College

Mike Eicher, Senior Vice President and President, The **Ohio State** University Foundation

Lori Houlihan, Fmr. Vice-Provost Advancement, University College London

Sharon Marine, Vice President for Alumni Relations and Development, University of Chicago

Megan Morey, Vice President for College Relations, Williams College

Marc Weinstein, Vice Principle of University Advancement, McGill University

Joanna Watts, Director, Operations, University of Melbourne

John Glier, CEO, GG+A

Phil Hills, President and CEO, Marts & Lundy



Support from panels of expert witnesses, beta testers, and regional volunteer committees





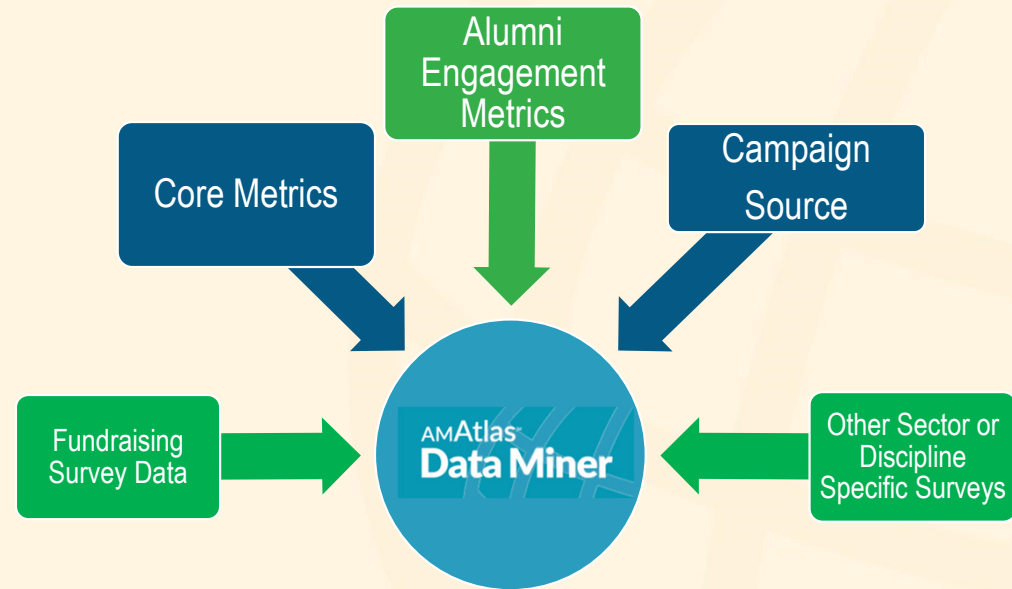
CASE's Global Data Sources:

- Regional Fundraising Surveys
 - Voluntary Support of Education, North America
 - CASE-CCAE Support of Education Survey (Canada)
 - CASE Ross Support of Education Survey (UK and Ireland)
 - CASE Support of Education for Australia and New Zealand
- Global Alumni Engagement Metrics Survey (new in 2019)
- Upcoming Global Project: Core Philanthropy Metrics; Core Alumni Relations Metrics; Core Marketing and Communications Metrics
- CASE-Marts and Lundy CampaignSource survey
- Other Sector/Discipline Specific Surveys
- Appended Data from third-party sources

Imagine a one-stop data shop:

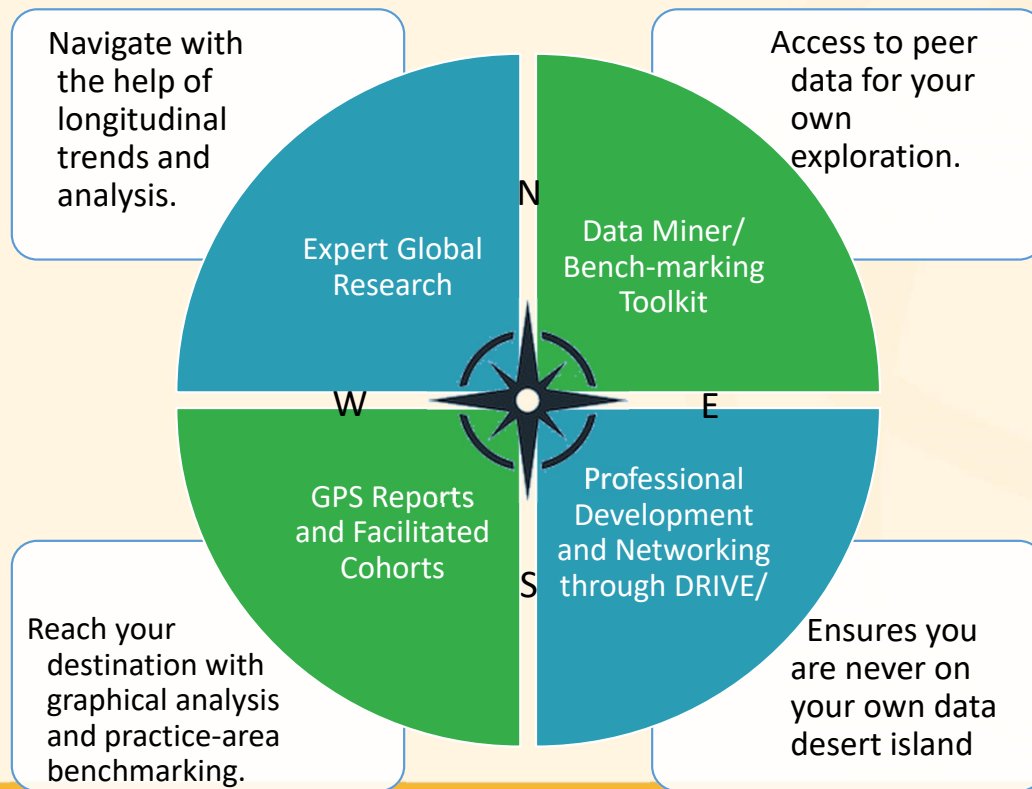
Advancement data will be collected via multiple surveys but stored in a single database available free of charge to all CASE members via [Data Miner](#).

To the degree possible, similar variables from different surveys will be brought together to allow for benchmarking across regions/surveys.



Friendly PSA – please make plans to take part in these surveys for increased future benchmarking!

Helping members make data-driven decisions through AMAtlas services:



Expert Global Research



	Current Availability:	How to access	Included as Member benefit?	Add-on fee (member rate)
Regularly Released Research Briefs	All Global Regions	https://www.case.org/resources	✓	
CASE <i>Currents</i>	All Global Regions	Print issue due out July/Aug. https://www.case.org/currents-mayjune-2020	✓	
One-off surveys to gather and report timely research – ex: Innovations in Alumni Relations	All Global Regions	http://case.az1.qualtrics.com/jfe/form/SV_9Mt2fVwwQNtFmBL	✓	
New e-book: <i>VSE 2019 Support of Findings</i>	Contains US and Canadian data but can be purchased by any region	https://store.case.org/PersonifyEbusiness/Store/Product-Details/productId/1265836826		✓



Data Miner/ Benchmarking Toolkit



	Additional Details	Current Availability:	How to access	Included as Member benefit?	Add-on fee (member rate)
Data Miner	Houses VSE and Global AEM data;	All Global Regions	https://www.case.org/resources/amatlas-data-miner	✓	
Benchmarking Toolkit	Houses non- US Fundraising Surveys; Sector specific Surveys	All Global Regions	https://www.case.org/resources/case-benchmarking-toolkit	✓	
Training/Help with a specific need	Connect with AMAtlas staff to help you get started or solve a problem.	All Global Regions		✓	
Research On Demand	CASE helps with custom research needs	Future (Let us know your needs)			✓



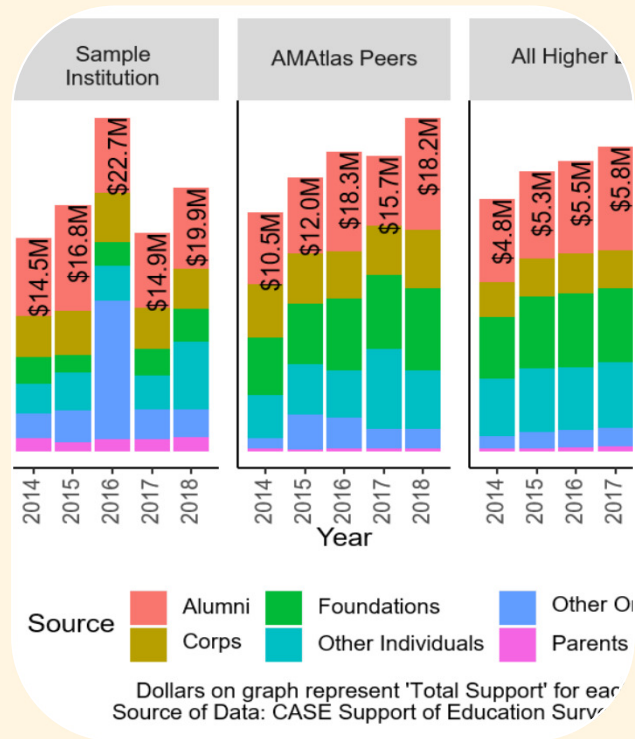
GPS Reports and Facilitated Cohorts



	Current Availability:	How to access	Included as Member benefit?	Add-on fee (member rate)
GPS Reports	US Higher Ed Canadian Higher Ed Coming Soon: All AEM participants.	Log into Data Miner: "Downloadable Reports" (sent directly to Canadian Institutions)	✓	
Made-to-Order GPS Reports	US Higher Ed for VSE; AEM and Canadian Higher Ed Coming Soon	Created specifically for your institution and delivered as a static HTML file. Choose your own peers for comparison.		✓
AMAtlas Facilitated Cohorts	US Higher Education; will roll out to other sectors and locations in future	Includes Made-to-Order GPS Reports + peer groups for philanthropy, alumni relations, and marketing and communications facilitated by CASE.		✓



Solution: Graphical Program Summary (GPS) Reports



All members who complete the post-secondary Voluntary Support of Education and/or Alumni Engagement Metrics (AEM) surveys receive a GPS Report(s).



Visual representation of year-over-year trends compared to both peers and all Higher Education institutions who take part in the VSE and/or AEM surveys.



The GPS report identifies “AMAtlas Peers” using an algorithm based on the data. (see following slide) and are a new CASE member benefit accessible within Data Miner

Sample using VSE: AMAtlas Peers

AMAtlas peer groups are based on a combination of core data points from the Voluntary Support of Education Survey and additional appended variables¹. An algorithm is used to select the ten institutions most similar to yours based on data for fiscal year 2019. The following slides show trends in your institution and institutions similar to yours based purely on the selected data points. Your peer group is not necessarily an academic or aspirational peer group².

Variables and Weights

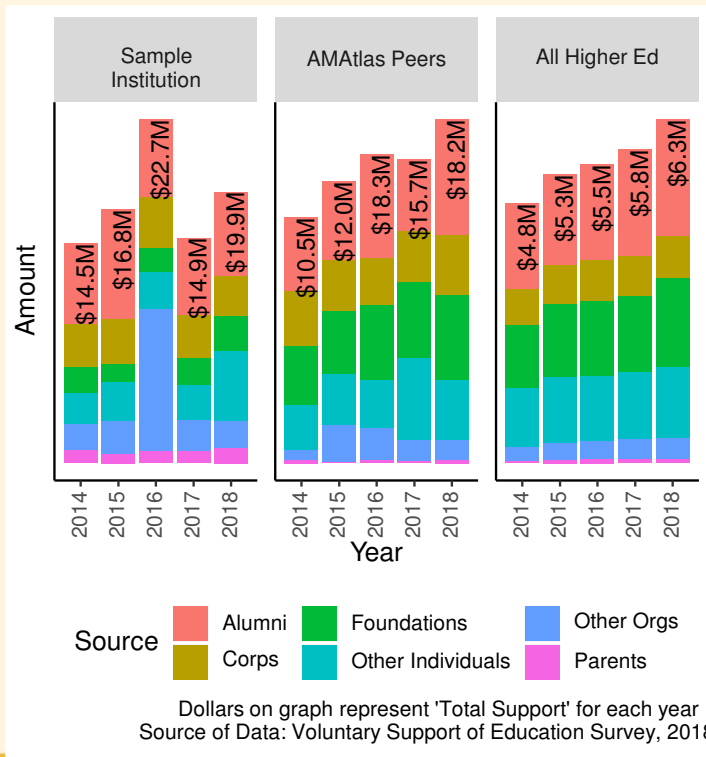
Carnegie Classification		Public or Private?	
Presence of Hospital?		Support (\$) from each Source	% change in Total Support from Previous Year
Size of Endowment			Alumni of Record
Support to each Purpose	Total Support in most recent year		

Your school's 10 closest peers based on the algorithm are noted here

¹ Appended variables come from Integrated Postsecondary Education Data System (IPEDS) and the Carnegie Classification of Institutions of Higher Education by Indiana University Center for Postsecondary Research.

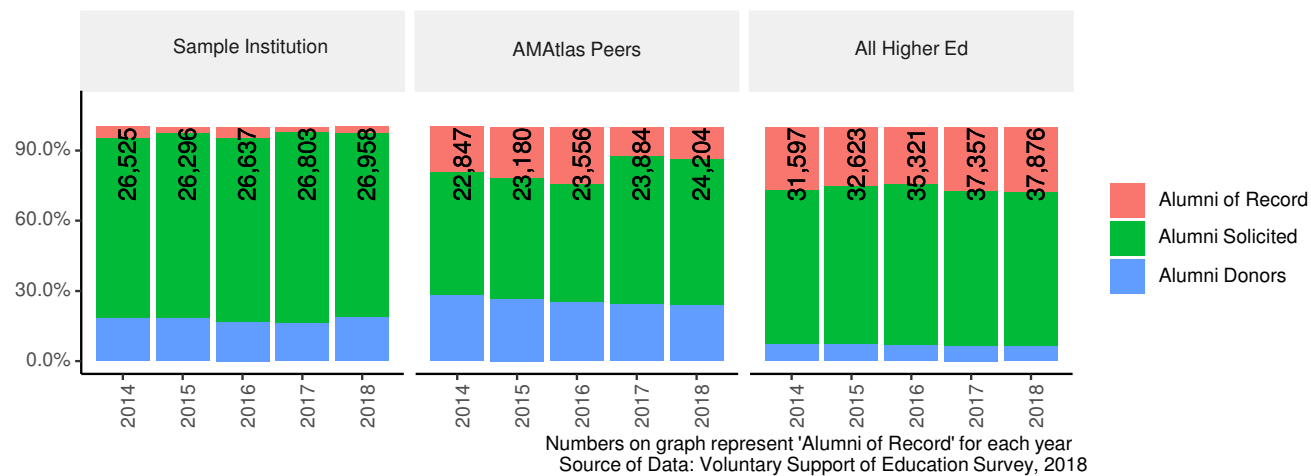
² See slide 10 for information about selecting your own peer institutions for comparison.

Sample Data – Excerpt from VSE: Philanthropic Support by Source



	Your Inst. 2018 \$	Your Inst. 1 yr % change	AMAtlas Peers 1 year % change	All Higher Ed 1 year % change
Alumni	\$6.6M	9%	61.4%	9.0%
Corps	\$2.7M	-6%	18.8%	6.0%
Foundations	\$2.7M	26%	11.1%	17.8%
Other Individuals	\$4.7M	103%	-26.9%	4.7%
Other Orgs	\$2.0M	-12%	-1.2%	8.6%
Parents	\$1.2M	24%	11.3%	-3.0%
Total	\$19.9M	20%	13.1%	9.6%

Sample Data: Excerpt from VSE: Alumni Donors



In 2018, your institution had **4,875** Alumni Donors. Your AMAtlas peers had a median of **5,732** Alumni Donors, and all Higher Education institutions had a median of **2,376**.

1 Year Percentage Change in Alumni Donors			
	Your Institution	AMAtlas Peers	All Higher Ed
% Change from Last Year	16.7%	0.526%	-1.76%



Alumni Engagement Metrics GPS Report



- Will show comparisons for pre-determined peers (algorithm to find those most like your institution), region/country, world
- Visuals for:
 - Program Size and Expenditures
 - Counts of Alumni across seven categories (see survey site for lots of details!)
 - Capturing Modes of Engagement (Philanthropic, Volunteer, Experiential, Communication)
 - Engagement by Mode
 - Alumni engaged by ANY mode
- Available in Data Miner (next month) for *any* institution who participated in Year 1.

<https://www.case.org/case-global-alumni-engagement-metrics-survey>

Next steps: using your GPS Report

Data Miner
Conduct further research in *Data Miner*, the online application included as part of CASE membership. Access online tutorials to learn more about how to create comparison groups and reports.

Research Briefs
Review AMAtlas' regularly released research briefs to gain a wider perspective on the advancement landscape within higher education.

Made-to-Order GPS
Members can purchase an interactive, in-depth version of the GPS Report that includes up to 20 peers selected by AMAtlas, the member, or a combination of both. This includes a 60-minute, web-based session with the institution.

Facilitated Cohorts
Learn the stories behind the data—receive the Bespoke Analysis as well as attend in-person meetings for Philanthropy, Alumni Relations, and Communications and Marketing practice areas.

Members can access for their own additional research

Add-on services, special member pricing



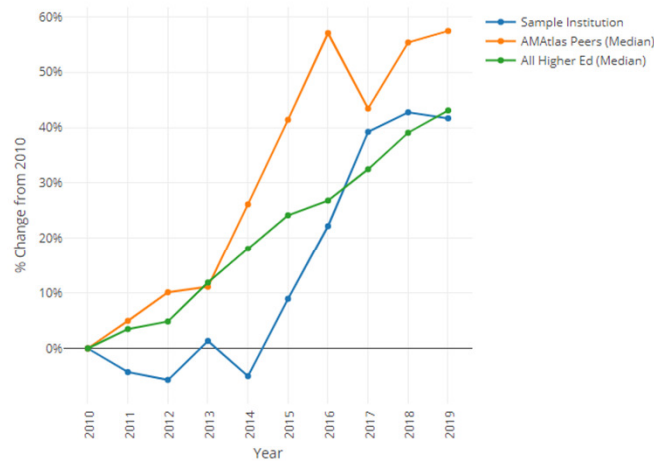
Made-to-Order GPS Report

- About The Voluntary Support of Education (VSE) Survey
- AMAtlas Peers
- Cumulative Annual Growth
- Capital Campaign Y/N
- One Year Change in Total Support (Details)
- Largest Gifts as a % of Total Support
- Cumulative Annual Growth Minus 3 Largest Gifts**
- One Year Change in Total Support Minus 3 Largest Gifts (details)
- Outstanding Pledges
- Outstanding Pledges (Details)
- Philanthropic Support by Source
- Alumni Donors
- Revenue per Donor (Alumni)
- Family Foundation Giving
- Family Foundation Giving (Details)
- Donor-Advised Funds
- Donor-Advised Funds (Details)
- Philanthropic Support by Purpose
- Purposes of Gifts to
- Endowment: Income Restricted
- Purposes of Gifts to
- Endowment: Income Restricted

Cumulative Annual Growth Minus 3 Largest Gifts

This graph shows trends excluding the three largest gifts from any source. This view is simply to examine trends excluding the outliers.

Hover over graph to see details.



Sample Institution decreased gift income by -0.76 percent in 2019 over the previous year. Using this same percent of institutions within your AMAtlas peers and 47.37 percent of all Higher Education Institutions had from the previous year. Cumulative annual growth for your institution was calculated by setting the first year participation since 2010 as the baseline. If your institution first submitted data in any year after 2010, that year. Percent change was calculated relative to the first year baseline. For AMAtlas peers and All Higher Ed, the first year baseline is always 2010.

Includes:

- Ability to download images of graphs
- Exportable data tables to destination of your choice
- Configurable graphs; Isolate metrics within graphs to learn more about a specific area
- Tooltips when you hover over data to provide additional information
- Results as medians and specific peers
- Deeper analysis on Source and Purpose



Introducing Facilitated Cohorts:

*Understanding the stories behind the data for the three practice areas:
philanthropy, alumni relations, and communications and marketing*

Participation Includes:

- Made-to-Order GPS Report for Philanthropy based on VSE Survey*
- Made-to-Order GPS Report for Alumni Relations based on AEM Survey*
- Two sixty-minute sessions to review the results of each report* with separate preview session to ensure accuracy in reporting.
- Invitation for three seats at each session (can be the same three individuals or unique attendees for all three meetings)
- Visual Results Presentations for each meeting featuring detailed results and medians from cohort participants
- Quarterly check-in calls with cohort members, including a call devoted to standards specifically for those reporting data to CASE prior to survey submission in the summer.



*can also be purchased as standalone



Facilitated Cohort Deliverables: Practice-Area Meetings



Joining a cohort secures **three seats** at each of the **three meetings**. We recommend one seat for all three cohorts is reserved for **key analytics or advancement services leaders**.



Participants receive a **visual results presentation** in advance of each meeting, designed to spark conversations about the stories behind the data.



In addition to results from cohort members, CASE will share aggregate trends from its **broad global base**

Sample Meeting Agenda - Philanthropy

Cohort meetings are facilitated conversations as opposed to a lecture or conference setting. Throughout the sample agenda, participants will be sharing and discussing results.

Day 1:

- 12:30 Lunch, Welcome, and Introductions (including key topics from participants)
- 1:00 Overall Giving Trends, including breakouts by Source and Purpose
- 2:30 Break
- 2:45 Horizon Issues and CASE Global Trends
- 3:45 Break
- 4:00 Program Updates, Sample Sharing and Key Topics
- Adjourn at 5:00 – Reception/Dinner to Follow

Day 2

- 8:30 Breakfast
- 9:00 Emerging Trends including updates on Core Metrics for Philanthropy and reporting standards
- 10:15 Break
- 10:30 Trends in Alumni Giving and a report on Alumni Engagement
- 11:30 Wrap Up, Next Steps, Evaluations



Sample Meeting Agenda – Alumni Relations

Cohort meetings are facilitated conversations as opposed to a lecture or conference setting.

Throughout the sample agenda, participants will be sharing and discussing results.

Day 1:

- 12:30 Lunch, Welcome, and Introductions (including key topics from participants)
- 1:00 Overall Alumni Engagement and Giving Trends, including top-line results from the 2019 VSE results
- 2:15 Break
- 2:30 Spotlight on each Mode: Philanthropic, Volunteer, Experiential, Communication
- 3:45 Break
- 4:00 Program Updates, Sample Sharing and Key Topics

- Adjourn at 5:00 – Reception/Dinner to Follow (Marketing and Communications Participants are invited to take part)

Day 2

- 8:30 Breakfast
- 9:00 Engagement Goals – Conversion, Campaigns, Lifetime Value, Scoring, etc.
- 10:15 Break
- 10:30 Core Metrics for Alumni Relations and Survey Next Steps
- 11:30 Wrap Up, Next Steps, Evaluations



Sample Meeting Agenda – Marketing and Communications

Cohort meetings are facilitated conversations as opposed to a lecture or conference setting. Throughout the sample agenda, participants will be sharing and discussing results.

Day 1:

- 12:30 Lunch, Welcome, and Introductions (including key topics from participants)
- 1:00 Review of Outcomes from both meetings, as well a top-line review of data from VSE and AEM results, focusing on Communications mode from AEM
- 2:15 Break
- 2:30 Core Metrics for Marketing and Communications
- 3:00 Focus Group session on survey information needed for future cohort meetings
- 4:00 Program Updates, Sample Sharing and Key Topics
- 5:00 Adjourn for the day



Professional Development and Networking through DRIVE/



	Current Availability:	How to access	Dates	Included as Member benefit?	Add-on fee (member rate)
DRIVE/Cast ToGather: Changing Landscape of Advancement Services	All Global Regions	https://webinar.ringcentral.com/webinar/register/WN_2UtSPshtQzKFyAq8uSTVGw	May 21 st at 4:00 PM ET	✓	
DRIVE/Cast (two days virtual conference + Social and DRIVE/Farewell Events)	All Global Regions	https://www.case.org/conferences-training/drivecast	May 28-29		✓



DRIVE/Cast - May 28-29

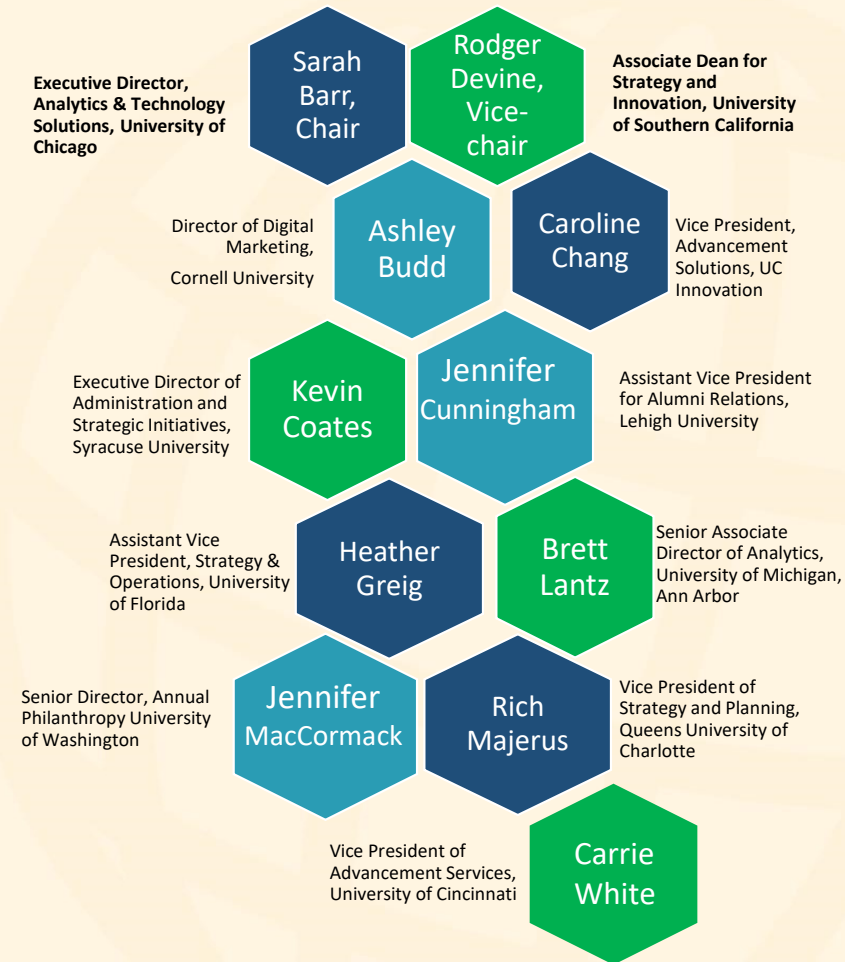
\$100 off for webinar attendees
case.org/drive



DRIVE/Cast

May 28-29, 2020
Online

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