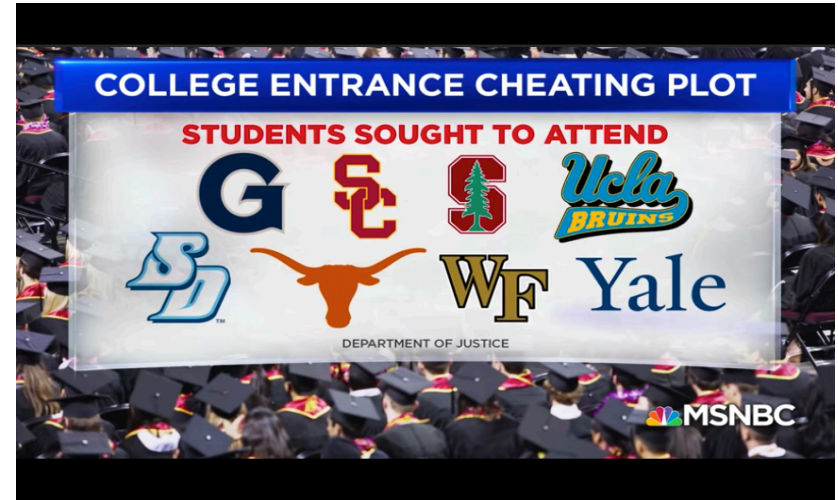


# The Changing Landscape of Advancement Technology

**PLEASE ASK LOTS OF QUESTIONS  
USING Q&A**

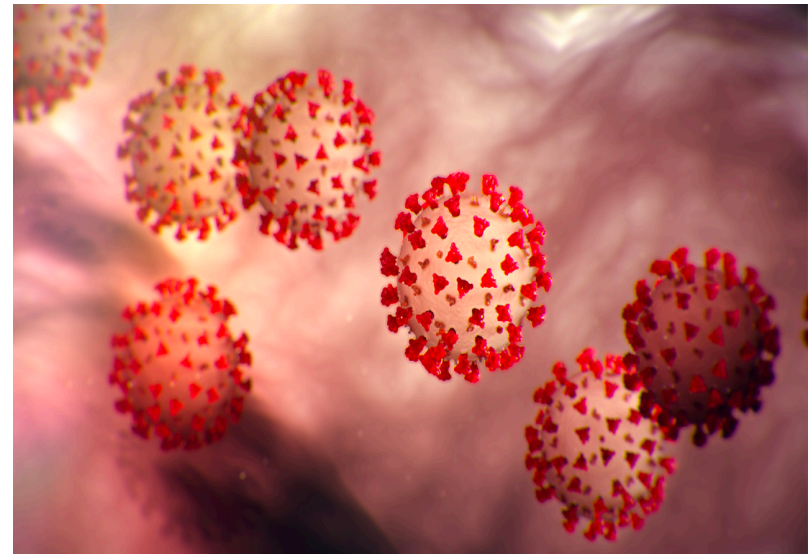
Deb Cunningham, Executive Director of Strategic Information, MIT

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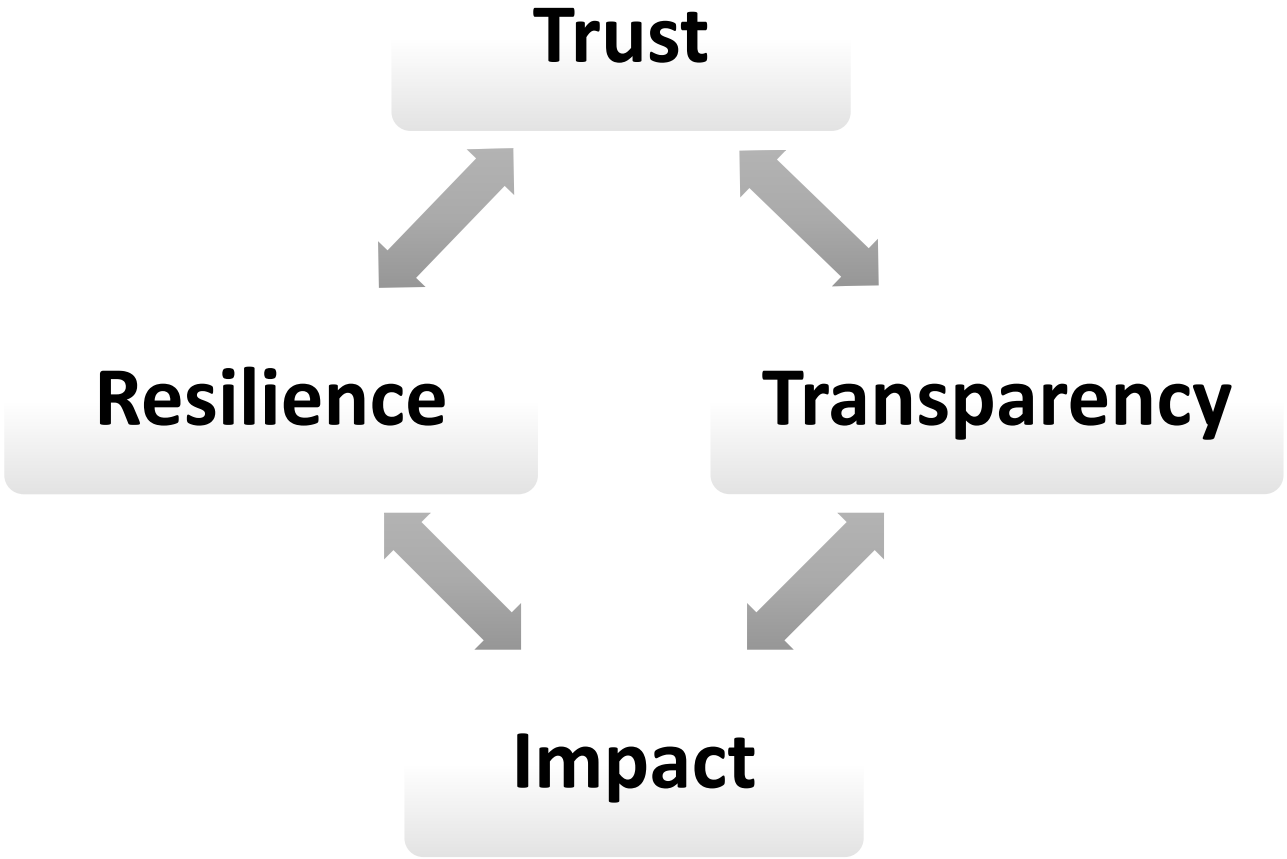


# Higher Ed's Dirty-Money Problem

Colleges claim to use tainted money for noble ends. Does anyone believe them?



# PHILANTHROPY TODAY



# ADVANCEMENT TECHNOLOGY TODAY

**Data  
Governance**

**User  
Experience**

**People  
First**

**BI &  
Reporting**

**Software as a  
Service**

PEOPLE FIRST

# Our teams are the key to success!

- How do we help them to be resilient?
- Where will they come from in the future?
- How will we keep them and help them grow?
- How will we prepare them for changing roles and technology?

# The 3 “E’s

## Effective

Investment

Clear  
Expectations

## Efficient

Process

Tools

Metrics

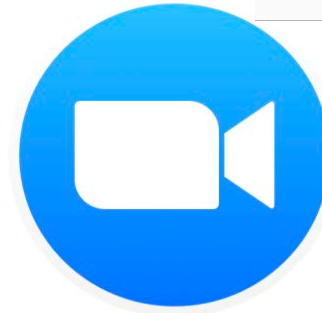
## Economics

Cost of Staff

Cost of  
Services

Cost of  
Technology

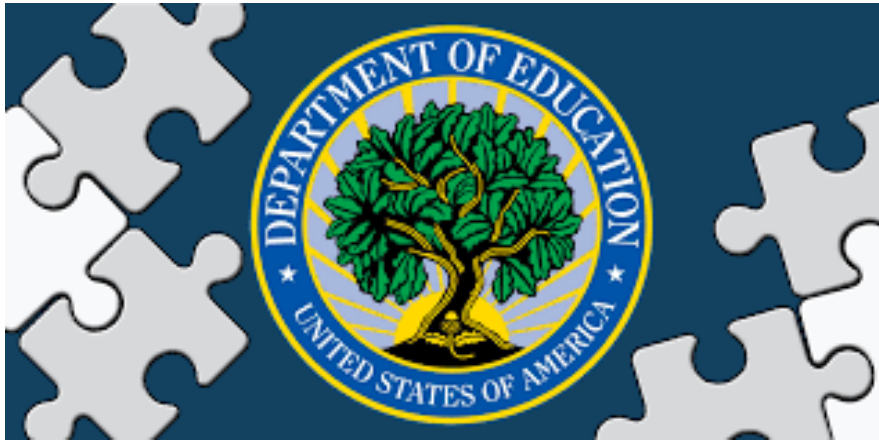
# Resilience is critical!





**GOVERNANCE**

# Can we meet expectations?



# Governance – its super hard work!

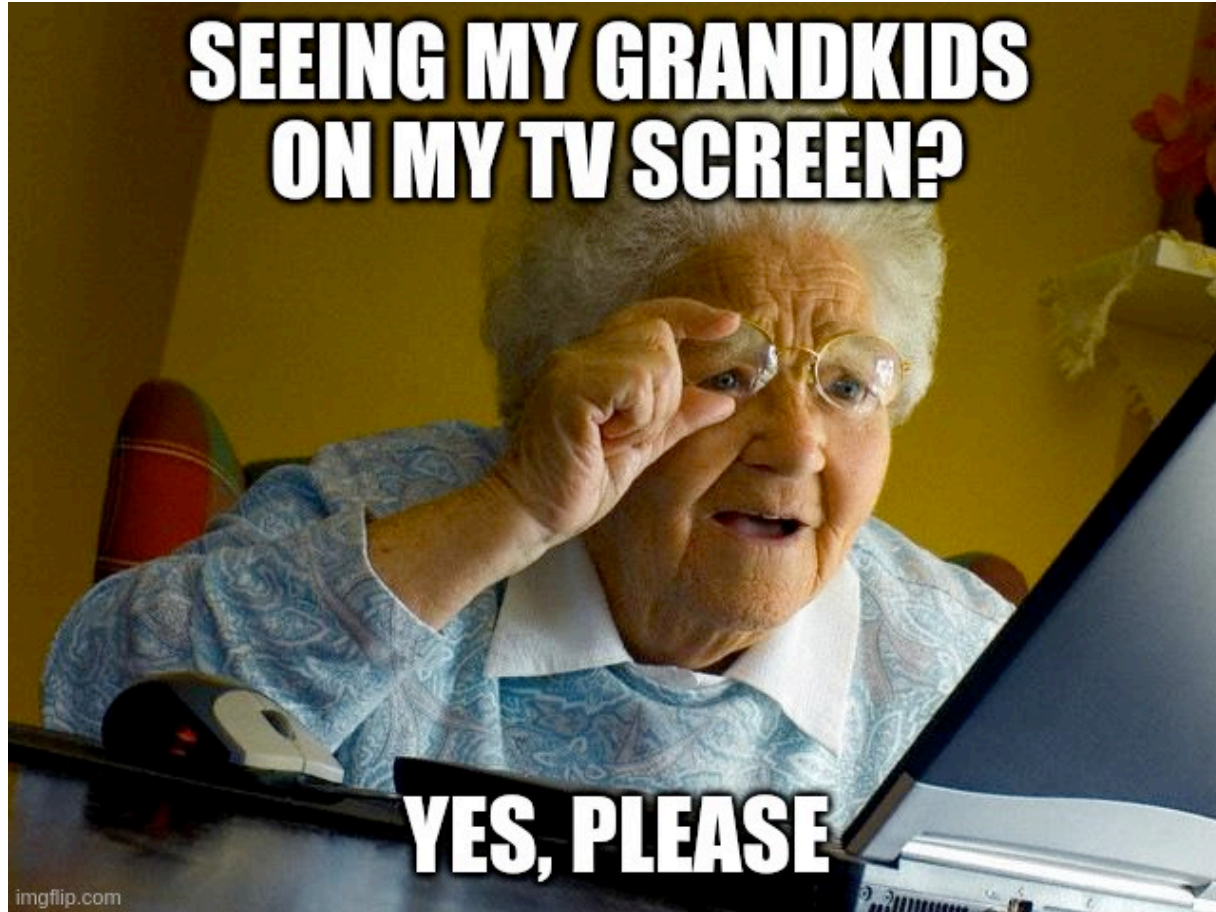
- Data Integrity
- Cross organization collaborations
- Trust
- Technology

# USER EXPERIENCE



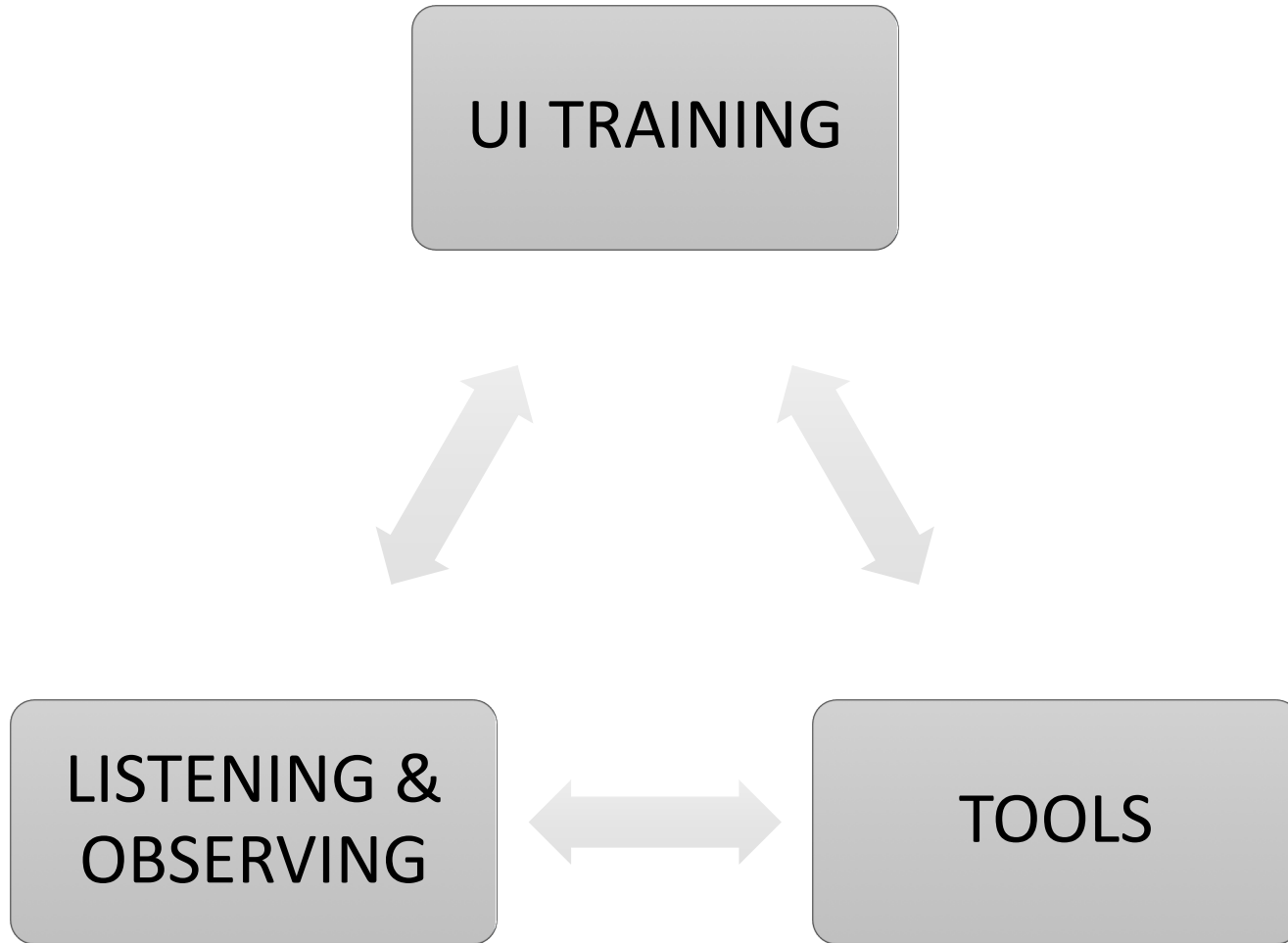
**Alexa, make a donation.**

**SEEING MY GRANDKIDS  
ON MY TV SCREEN?**



**YES, PLEASE**

# Our we investing enough in UI?



# Can we be better listeners?

## Contacts and Cultivation

Prospects without Recent Contacts

9



Recently Contacted Prospects without a Plan

52



Prospects without Recent Stage Movement

55



## Open Proposals and Solicitation Plans

Past Due Proposals and Plans

11



Upcoming Proposals and Plans

2



Proposals and Plans Requiring Review

6





**BUSINESS  
INTELLIGENCE  
& REPORTING**

# It is all about our data -

- Integrity
- Consistency
- Privacy

# Are we asking the right questions?

- How does COVID-19 spread?
- How many people already had COVID-19?
- Can people become re-infected?
- Is it seasonal?
- When is OK to stop social distancing?

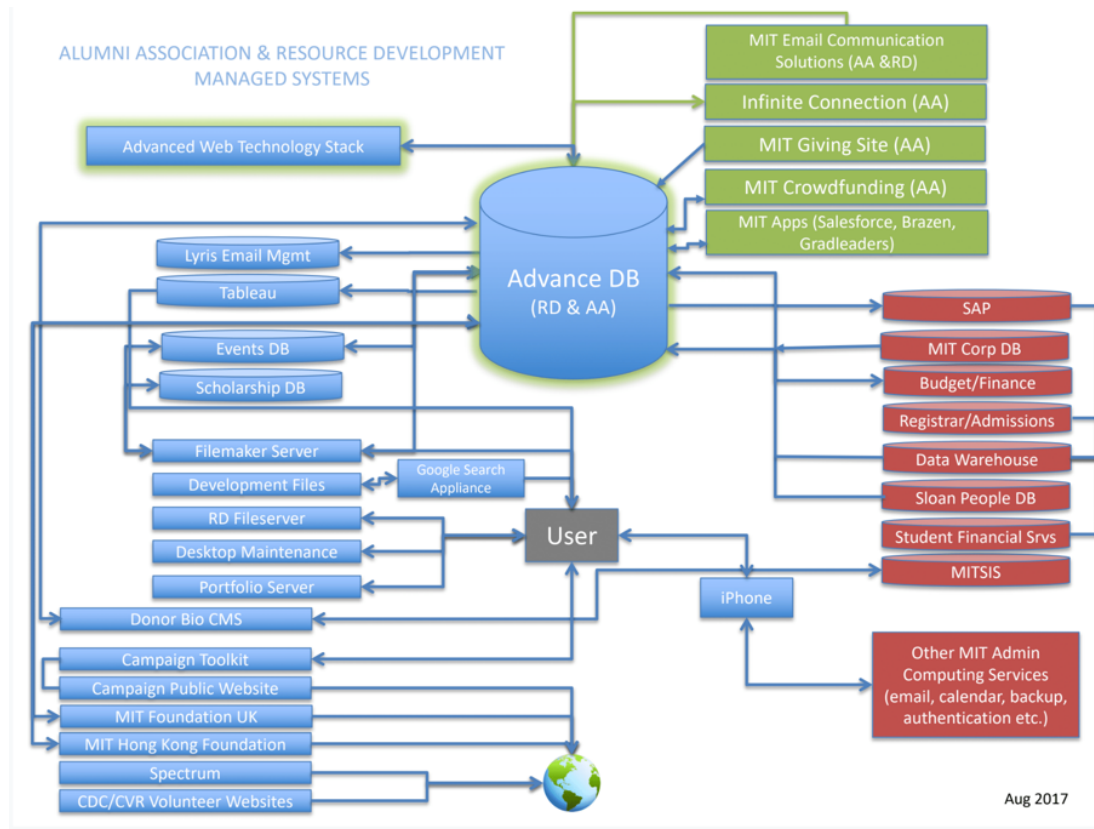
# What do we know about our donors?

- How many major gifts do our donors give us over how many years?
- How long does it take to secure the first major gift?
- At what age do our donors start and stop making major gifts?
- How many areas do donors support?
- Are financial aid recipients likely to be more philanthropic?

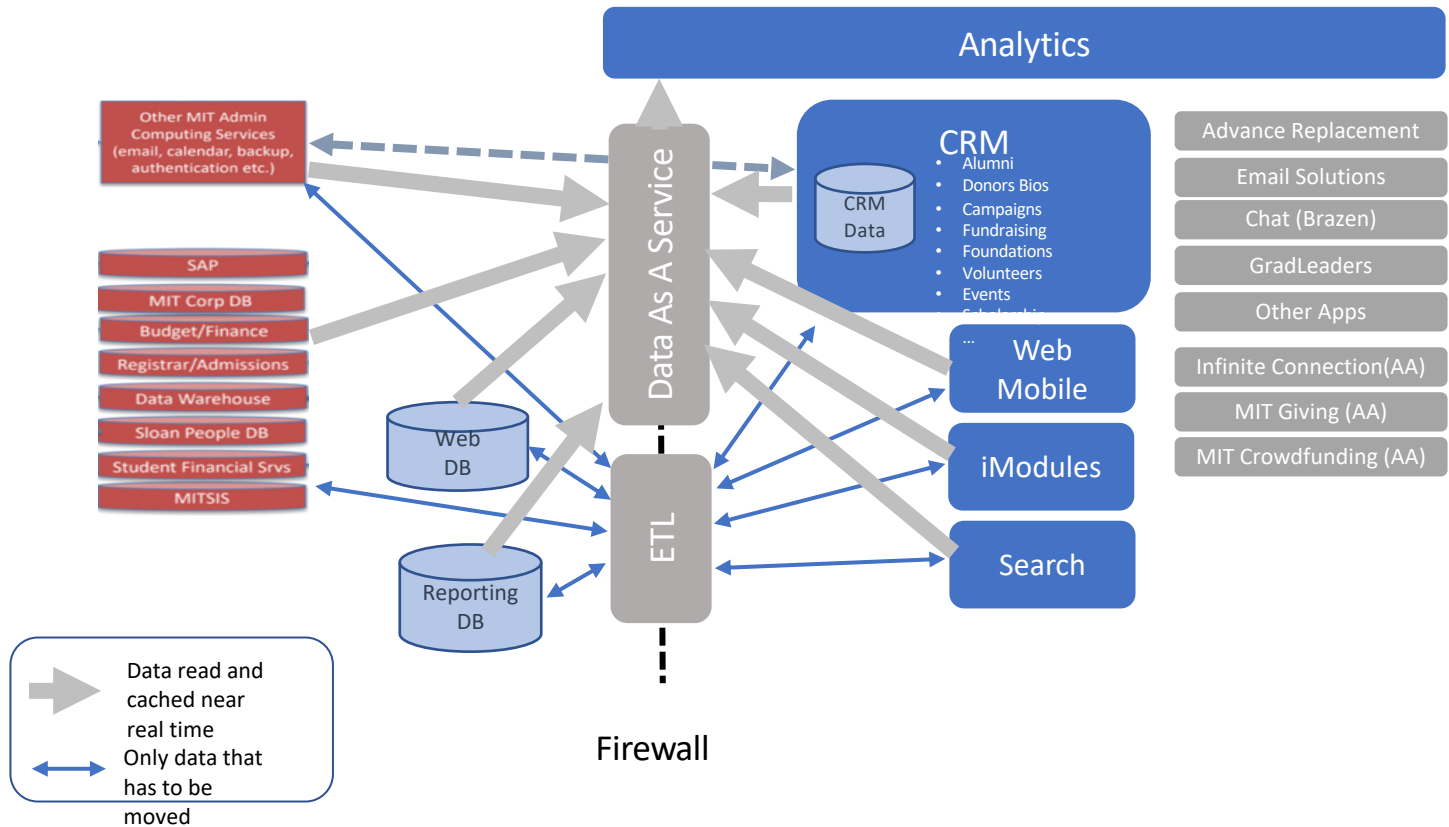
# Efficiency: Are we doing it right?

- Does the office of the relationship manager impact where donors give?
- What is our proposal close rate?
- How impactful were Campaign events on stage movement and giving?
- What is the relative importance of outreach – personal visits, virtual visits, e-mail, calls, in-person events?

# SOFTWARE AS A SERVICE (SAAS)



**It's complicated.**



# More Complicated?



# So many challenges!

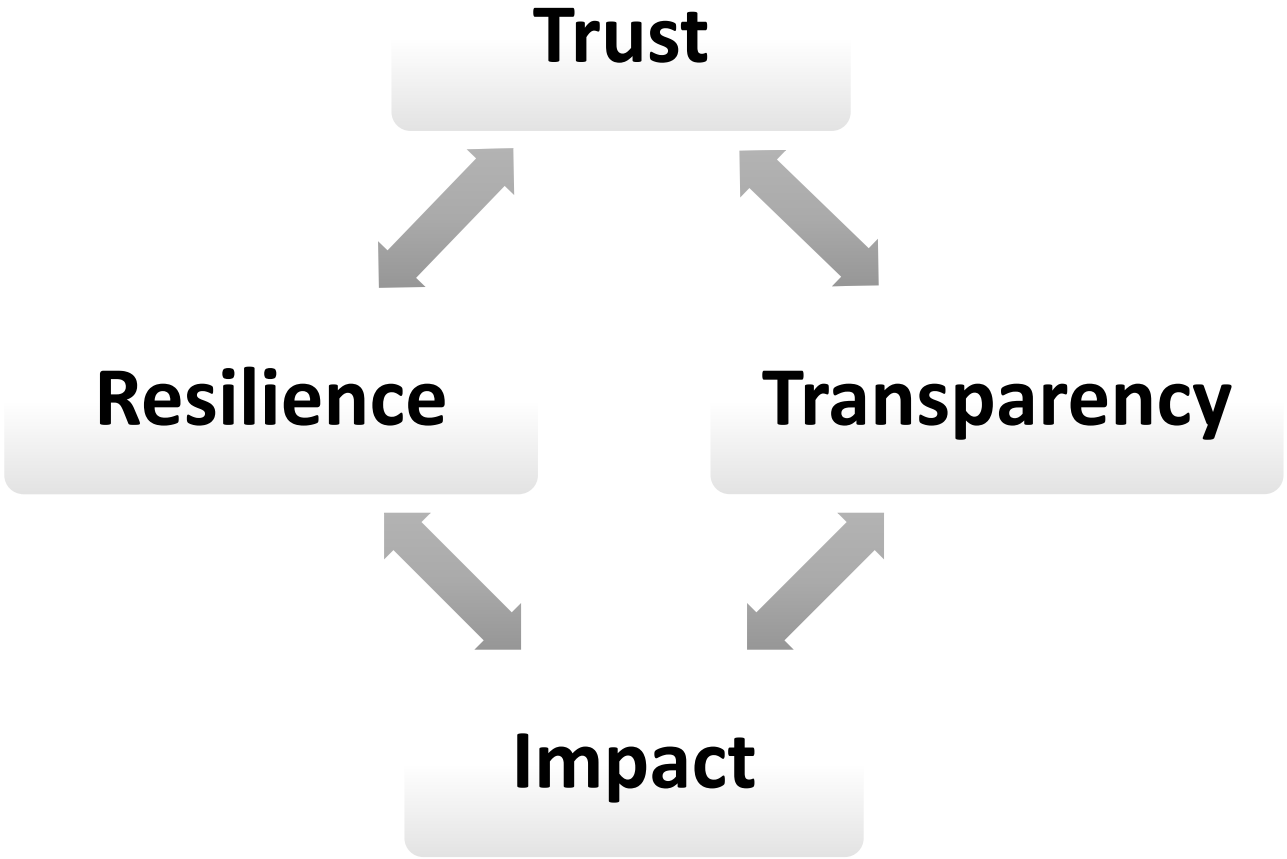
- Resource Skill Shift
- Reporting
- Integration
- Data Governance
- User Interface
- Cost



# Why should we do it???

- Efficiency
- Access ANYWHERE
- Transparency (Client Facing)
- Recruiting & Retention
- Governance, Integration and more!!

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case.org/drive



# DRIVE/*Cast*

May 28–29, 2020

Online



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