Digital Advancement 2018

How advancement tools, practices, and attitudes are evolving toward integrated, digitally enabled advancement

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Introduction

DESPITE ALL THE PIXELS, paper, and ink that have been devoted to the topic, there is no commonly accepted definition of "digital business." Nevertheless, the definition from Gartner, Inc., is a useful one—"Digital business is the creation of new business designs by blurring the digital and physical worlds"[1]—because it takes into account the necessity for companies to operate in what's often termed "the real world."

Regardless of whether we can define exactly what digital business is, one of the concerns that vexes contemporary business leaders is how to take advantage of various digital technologies and practices to become more dynamic, responsive, and competitive. As a report from *MIT Sloan Management Review* put it,

> *Adapting to increasingly digital market environments and taking advantage of digital technologies to improve operations are important goals for nearly every contemporary business. Yet, few companies appear to be making the fundamental changes their leaders believe are necessary to achieve these goals.[2]*

Like other organizations, higher education is grappling with exactly how to digitally enable our business. For us, much of the focus has been on experiments that *may* deliver our core product—learning and teaching—much more cheaply and at massive scale. This struggle with learning models and platforms is ongoing and occurring largely within the purview of the academic side of the house, as it should.

Meanwhile, other offices have begun adopting various digital technologies. And these now play an important role in helping staff manage the day-to-day business of higher ed. For example, admission offices are using predictive modeling to shape their classes. Many advancement offices are exploring how digital approaches and platforms can generate operating efficiencies, save money, and serve stakeholders more effectively. Marketing offices are using social listening tools to gauge constituent concerns about issues related to their institution.

In 2009, CASE and mStoner began a series of research initiatives that we called the Survey of Social Media in Advancement. In the resulting white papers, we reported on the results of these surveys and chronicled how higher ed advancement offices were leveraging social media and other digital channels.

We also explored some of the challenges involved in managing those channels and integrating them into various advancement strategies.

By now, most chief advancement officers (CAOs) know that social media can be successfully incorporated into advancement efforts. They've heard about how successful Columbia University has been in its socially powered Giving Day[3]—and maybe have even launched one at their institution. And presidents have paid attention, too. By 2019, most campus CEOs are aware of their peers who have successfully raised their profiles and engaged constituents effectively on various social channels.

We realized that it was time to consider what, if anything, would follow the Survey of Social Media in Advancement. To understand what new questions to ask, we began to explore where groundbreaking advancement offices were focusing their attention. We learned that some advancement offices were attempting to transform their business along digital lines. What innovative technologies were they using? What new types of programming were they creating? What new channels were they exploring? And what were common characteristics of an evolving digital model for advancement?

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1   Definition from Gartner IT Glossary, retrieved Aug. 22, 2018 (www.gartner.com/itglossary/digital-business).

2   G. C. Kane, D. Palmer, A. N. Phillips, D. Kiron, and N. Buckley, "Achieving Digital Maturity," *MIT Sloan Management Review* and Deloitte University Press, July 2017 (sloanreview.mit.edu/projects/achieving-digital-maturity), p. 3.

3   On Oct. 24, 2018, Columbia's seventh annual Giving Day brought in a record total of more than $20,155.293.

1. Toward Digital Advancement

EVERY INSTITUTION IS at some point on a continuum of adoption of a more digitally enabled approach to advancement. In this survey, we attempt to develop some benchmarks that indicate how far along institutions really are in adopting digital advancement on this continuum.

The authors of the report "Achieving Digital Maturity" note:

> Digital maturity is about adapting the organization to compete effectively in an increasingly digital environment. Maturity goes far beyond simply implementing new technology by aligning the company's strategy, workforce, culture, technology, and structure to meet the digital expectations of customers, employees, and partners. Digital maturity is, therefore, a continuous and ongoing process of adaptation to a changing digital landscape. For that reason, we intentionally use the term "maturing" instead of "mature" to describe the most advanced companies we study.[4]

We see evidence that this is happening in some advancement offices where leaders—many of whom are not CAOs, but serve in other capacities—are thinking about what transformation into a much more digitally enabled operation looks like. They are actively working to put in place people, practices, processes, and systems that would enable their offices and colleagues to operate in a much different way.

In preparation for our research, we conducted a series of interviews with a dozen advancement professionals, consultants, and vendors who are thinking about and implementing various digital initiatives. We wanted to know what attributes characterized a digital advancement operation. From their responses, we developed a set of characteristics.

A digital advancement operation:

- attempts to reach people where they are
- innovates in programming by using new approaches involving digital tools
- attempts to understand and track the loyalty of stakeholders
- relies on digital analytics in decision making
- emphasizes digital communications internally and with stakeholders
- operates from the perspective of a single institution rather than a siloed department
- empowers staff to experiment, innovate, communicate
- focuses on mobile experience for staff and stakeholders.

We kept these characteristics in mind as we developed a survey designed to ascertain how colleges and universities were faring in our social and digital media milieu. And we used some of these characteristics to measure the state of digital advancement across the profession.

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4   Kane et al., "Achieving Digital Maturity," p. 6.

2. Digital Advancement Tools and Practices in 2018

Social Media: Meeting Stakeholders Where They Are

One goal of a digital advancement operation is to meet people where they are.

That doesn't mean giving up reunions or other gatherings where alumni, donors, and stakeholders can interact in person. But it does mean asking hard questions about how valuable those events are. Are they worth the money and the amount of staff time required to pull them off? How can they be enhanced through digital channels? How can an institution offer alternatives for those who can't attend?

It also means acknowledging that contemporary stakeholders use an array of online communications channels in their personal and professional lives.

Email continues to be an important way to reach nearly everyone—except perhaps Generation Z.[5] And email outreach is a critical component in developing successful fundraising such as a Giving Day or crowdsourcing campaign.

But in 2018, social media provided a key outreach tool for stakeholder communications and engagement, as **Figure 1** shows. Nearly all institutions represented in the 2018 study rely on Facebook as the primary channel for these purposes. But more than 90 percent of these institutions also

use Instagram (96 percent), Twitter (95 percent), YouTube (94 percent), or LinkedIn (92 percent).

This is a recognition of the fact that those people the institutions are trying to reach and influence use social channels to share and consume different kinds of information, often in different facets of their lives. While Facebook remains more of a general-purpose channel, useful for reaching friends and family, LinkedIn is for professional use, appropriate for news about a job change or a new position. Instagram is useful for friend and family updates and also for keeping in touch with brands and companies that share visual content. YouTube is a video platform and serves as a search engine for finding movie trailers, clips from TV shows, and music videos. And, of course, users can post their own videos and comment on the videos that others have posted.

Goals for Social Media

We asked respondents to the survey to share what their goals were for social media activities. Because we were interested in seeing how broadly goals ranged, we provided a list of 25 possible choices. And we compared the goals for the entire institution with those from individual units within an institution.

From an *institutional perspective,* more than 70 percent of institutions selected these as important goals from among the choices we offered them:

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5   Although teens who responded to our surveys in 2015–2017 about how they wanted colleges to communicate with them overwhelmingly preferred email, a finding echoed by other researchers. See Gil Rogers and Michael Stoner, "Mythbusting Enrollment Marketing," published by mStoner, Inc., and NRCCUA®, February 2018 (mstnr.me/EnrollmentMyths). Data summarized in Figure 2, page 4, indicate that well over 70 percent of respondents preferred email to other types of communications throughout all stages of the college choice and admission process.

FIGURE 1

TYPES OF DIGITAL MEDIA INSTITUTIONS USE

Legend:
- Overall
- Unit
- Institution
- U.S. & Canada

Facebook

Twitter

Instagram

YouTube

LinkedIn

Blogs

Snapchat

Institutional website aggregator of social media

Streaming video

Vendor provided social communities (i.e., iModules)

Vimeo

Pinterest

In-house created community

WhatsApp

Tumblr

Other
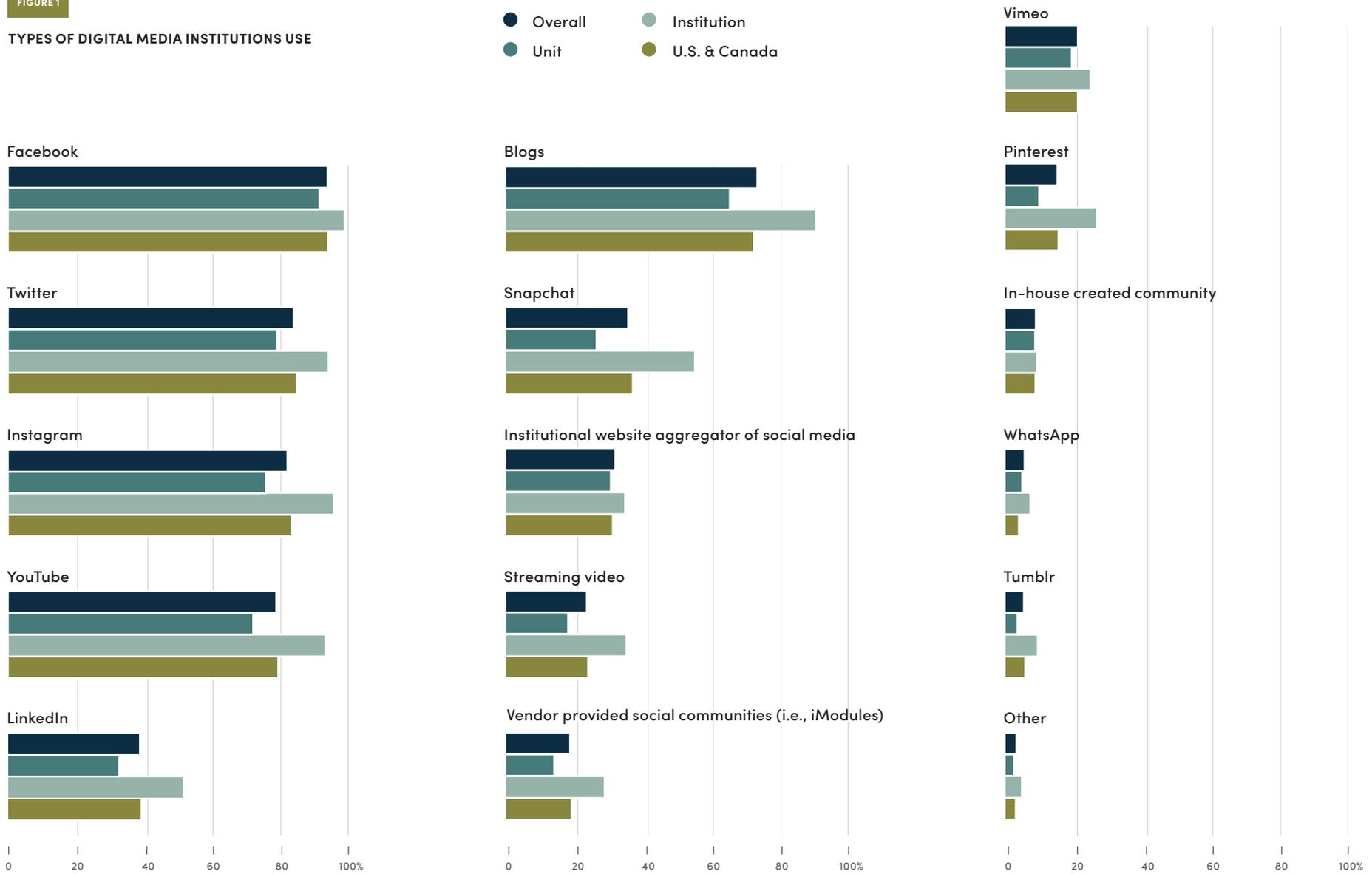
In response to the question, "Which types of social media does your [UNIT/INSTITUTION] use? Please select all that apply." n = 993

- create, sustain, and improve brand image: 95 percent
- encourage more engagement in general: 89 percent
- engage alumni: 88 percent
- increase awareness of campus initiatives: 80 percent
- increase attendance at an event: 78 percent
- monitor what people are saying about our institution on social media ("social listening"): 78 percent
- increase brand advocacy: 75 percent
- increase awareness of specific academic programs: 73 percent
- encourage engagement with posts connected to a specific event: 71 percent.

Not surprisingly, the picture looks a bit different if you ask people about goals *for their unit*. From a unit perspective, encouraging more engagement is the most important goal (81 percent) with "create, sustain, and improve brand image" next (74 percent of the units responding); "increase attendance at an event" ranking third (72 percent); and "engage alumni" fourth (71 percent).

Managing and Measuring Social Media

Since Facebook is almost universally used in higher ed, it shouldn't be a surprise that institutions are taking advantage of some of its more sophisticated features, including boosting posts, advertising, and Facebook Live streaming video.[6] A significant majority—80 percent—report boosting posts from their institution to bring this content to the attention of more people. Eighty-five percent are using Facebook advertising or promotion features. And 63 percent of institutions are using Facebook Live streaming. These features are being used widely

outside North America as well as within it, except that live streaming is used less in the rest of the world (38 percent) than in the United States and Canada (52 percent).

In general, institutions around the world manage social media similarly. Overall, 60 percent of units and 57 percent of institutions report that they have one or more staff members who manage social media. Only 10 percent of units—and 9 percent of institutions—say that "nearly everyone uses social media as part of their job." The proportion of institutions outside North America that report that this is true for them (14 percent) is slightly higher than in North America (10 percent). Fifty-one percent of institutions—and 30 percent of units— say they have a team that manages social media. A small percentage of institutions (5 percent) report working with an outside agency that manages their social media.

Are social media channels achieving results? The analytics tools built into the popular social media platforms make it easy to count things: friends or followers, shares, comments, etc. In the beginning of the social media age, those were useful measures of whether a social channel was helping to advance an institution's goals. Some of the most widely shared goals for social media (e.g., brand awareness and overall engagement) are difficult to measure online, but sophisticated institutions are looking for results and are focused on more meaningful measures of success—click-throughs to a form, attendance at an event, or a donation.

Figure 2 shows how institutions measure the success of their social media activities. While channel metrics (such as likes, retweets, and shares of content) are the most-used measure of success—by units and institutions in North America

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6 See Jennifer Mack and Michael Stoner, "Paying to Play: Social Media in Advancement 2016," published by CASE, Huron, and mStoner, Inc. (bit.ly/CASESM2016).

FIGURE 2 HOW INSTITUTIONS MEASURE SUCCESS OF SOCIAL MEDIA

● Unit ● U.S. & Canada ● Institution

Number of likes, retweets, or shares

Number of click-throughs to a website or microsite

Number of active friends, fans, followers

Social listening

Number of comments

Increased event attendance

Anecdotal success (or horror) stories

Number of individual participants

Completion of a form

Number of donations

Volume or proportion of complaints or negative comments

Updates to advancement database or CRM

Total money raised

Total number of donors

Other

We do not measure our social media activities

In response to the question, "How do you measure whether your social media activities achieve your [UNIT/INSTITUTION]'s goals?" n = 833

and outside the United States and Canada—an increasing number of institutions are focusing on more meaningful measures of success like form completions and donations.

In general, respondents believe that their institution is successful to some degree with social media: 65 percent say they are "somewhat successful" at using it to achieve their goals, and 25 percent say they are "very successful." Three percent consider themselves "models for the use of social media."[7]

Institutions are using an array of tools to gain insights into how successful they are at using social media to achieve their goals. While 11 percent of institutions don't use *any* software or services to measure the impact of their efforts, the majority (54 percent) are using the free tools that popular social channels provide—and we should note that some of these are quite robust. Facebook, especially, is known for how well its tools help those who use its various advertising and promotional services measure the impact and reach of these services. Other tools used include Hootsuite (at 44 percent of institutions); Meltwater (at 22 percent); and Sprout Social (at 17 percent).

A few institutions (7 percent) use marketing automation software such as Hubspot or Marketo, and even fewer (4 percent) license Social Mention. Only 2 percent rely on an external partner or agency to provide social listening services.

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7 Strikingly, among all respondents outside North America, 85 percent rate their institution or their individual unit only as "somewhat successful" in this regard, with just 7 percent choosing "very successful"; none view their institution or unit as a "model for the use of social media." In contrast, respondents in North America are more likely to say their institution or unit is "very successful" (22 percent) or a "model" (2 percent), with 64 percent saying it's "somewhat successful."

We were curious whether institutions use the intelligence gained from digital analytics—which we defined as social intelligence metrics, website, or email analytics—in making strategic decisions about advancement or marketing communications approaches. Just over half (52 percent) consider data provided by these tools sometimes or somewhat often in making strategic decisions. Nearly a third (32 percent) said they do so very often or all the time; and 16 percent of institutions admitted that they don't, or do so rarely.

Has Adverse Publicity about Facebook Affected Its Use in Advancement?

Facebook has received considerable adverse attention for the use of its platform by state-supported entities such as the Russian hackers who attempted to influence U.S. and European elections.[8] There have also been reports about companies downloading large amounts of personal data from Facebook, which has been portrayed as a privacy and security issue for the company. These events have led to reports that people are cutting back on their use of Facebook or leaving the platform altogether.[9]

We wanted to know whether overall engagement for institutions on Facebook had declined as a result of these concerns. Only 26 percent said that it had; 51 percent said that it had not, and 22 percent didn't know whether engagement had declined. A greater decline was reported in North America (26 percent) than the rest of the world (14 percent).

We also wanted to know whether these challenges would change how institutions use the platform. We asked whether "recent privacy concerns concerning Facebook's use of personal data impact you or your institution's plans to post or sponsor content." A majority (62 percent) said that it won't; only 11 percent said that it will, with 26 percent undecided.

Campus Leaders and Social Media

In the Survey of Social Media and Advancement in 2014, we asked questions about how many campus CEOs used social media in their official roles; we learned that 46 percent did.[10] And we noted, "The fact that CEOs are now convinced that this form of communication is important enough to spend their time on it indicates that social media have arrived." Four years later, slightly more than half of CEOs (51 percent) at responding institutions use social media in their professional roles—47 percent don't (2 percent of respondents didn't know).

In the past, if CEOs managed their own social presence, they were likely to focus on Twitter. Because tweets are short, Twitter allows them to establish an authoritative voice with less of a time investment and also enables them to engage with followers and others through retweets and other conventions of the channel. Today, Twitter is where the media and other influencers hang out, in part because Twitter has played a significant role in the ongoing political conversation in the United States. In fact, presidents have learned from

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8   This issue has been widely covered in the media; here's a useful summary from Vox: www.vox.com/policy-and-politics/2018/3/23/17151916/facebook-cambridge-analytica-trump-diagram.

9   In March 2018, Pew Internet reported that 68 percent of American adults use Facebook (www.pewinternet.org/2018/03/01/social-media-use-in-2018). Notably, teens are leaving Facebook: they prefer YouTube; Instagram (a Facebook product); and Snapchat. And in early September, Pew reported that 26 percent of those polled deleted Facebook's app from their phones and that Americans appeared to be changing their relationship with Facebook (www.pewresearch.org/fact-tank/2018/09/05/americans-are-changing-their-relationship-with-facebook).

10   See Jennifer Mack and Michael Stoner, "Social Media Enters the Mainstream: Report on the Use of Social Media in Advancement, 2014," published by CASE, Huron, and mStoner, Inc. (mstnr.me/2hfAftL).

FIGURE 3 — HOW CEOS AND THEIR STAFFS MANAGE SOCIAL MEDIA

● Solely Institution Leader   ● Primarily Staff Member
● Primarily Institution Leader   ● Solely Staff Member
● Both (about 50/50)

Twitter

| 41% | 16% | 15% | 13% | 15% |

Facebook

| 39% | 7% | 15% | 16% | 23% |

LinkedIn

| 37% | 4% | 7% | 18% | 35% |

Instagram

| 43% | 11% | 8% | 17% | 22% |

Blog

| 6% | 20% | 31% | 25% | 19% |
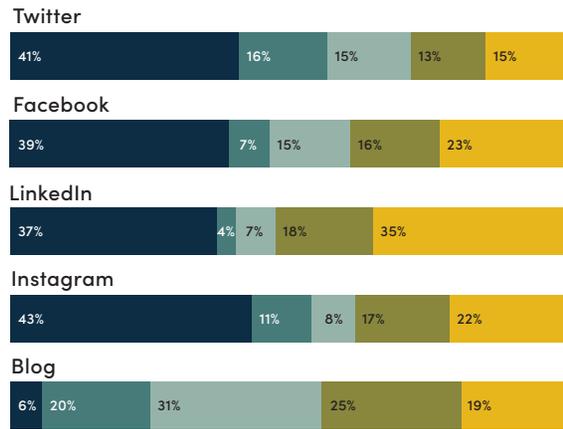
In response to the question, "[If leader uses social media in role] Please select the degree to which he/she manages Twitter/Facebook/LinkedIn/Instagram/blog on his/her own, or relies on other staff." n = 36–120

FIGURE 4

OTHER INSTITUTIONAL LEADERS WHO USE SOCIAL MEDIA

Chief Communications/Marketing/Public Affairs Officer	44%
Dean(s) of Professional or Graduate Schools	37%
Chief Alumni Officer	31%
Provost/Chief Academic Officer	21%
Chief Advancement Officer	20%
Other	20%
Not Sure	16%
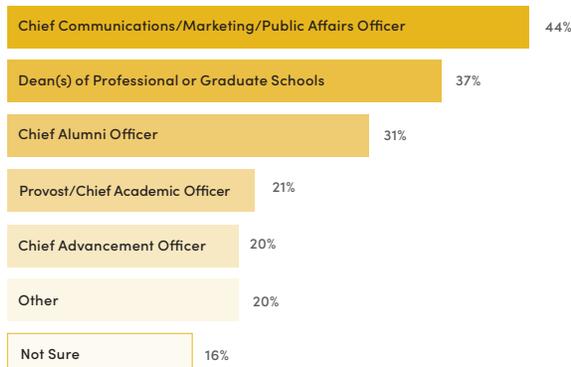
In response to the question, "What other institutional leaders are active on social media in their professional roles?" n = 226

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conference presentations and articles about such powerful examples as Santa J. Ono, who tweeted as @presono when he was at the University of Cincinnati and now tweets as @ubcprez as the president of the University of British Columbia; Walter M. Kimbrough, the president of Dillard University, who tweets as @HipHopPrez; and Anne M. Kress, @MCCPresident, the president of Monroe Community College.

Today, institutional leaders who engage on social media post on Twitter most frequently (63 percent); 17 percent post on Facebook most frequently; and 15 percent post on Instagram most frequently. When we asked this question in 2014, we didn't include Instagram, and at that time, 14 percent of CEOs were blogging. Now, few do.

How do campus CEOs manage their social presence? **Figure 3** presents the role of the CEO in developing content for and managing various key channels. A surprising number take responsibility solely or largely for managing their own output on Twitter, Facebook, Instagram, and LinkedIn.

And other institutional leaders are following their CEOs. **Figure 4** illustrates the range of senior leaders who are using social media overall, at public and private institutions. Marketing, communications, and PR leaders and senior academics seem to be out in front of others in their use of social media: overall, marketing and communications leaders at 45 percent of institutions are reported to use social media, and 37 percent of institutions have one or more deans who are active on social media.

Tracking Alumni and Donor Engagement

We've already explored how institutions measure the success of their social activity and use various methods to gauge how stakeholders and other social media users are conversing about the institution. We also wanted to know the extent to which institutions are scoring their alumni and/or donors and what activities contribute to those scores.

Why Would Institutions Develop Engagement Scores?

Developing a way to measure alumni engagement has been a goal of some alumni offices for years, and some advancement operations are now attempting to measure how engaged their donors are beyond simply tracking their giving. Some were inspired by the adoption of the "net promoter score" (NPS) concept by many businesses. As Wikipedia explains, "the tool aims to measure the loyalty that exists between a provider and a consumer. The provider can be a company, employer, or any other entity. The provider is the entity that is asking the questions on the NPS survey. The consumer is the customer, employee, or respondent to an NPS survey."[11] Net promoter scores are used to evaluate loyalty, and businesses can sometimes mobilize highly engaged promoters to advocate on their behalf. Combined with alumni attitudinal surveys, this approach can help to ensure that institutions are targeting their communications and activities to those who are actively responding, supporting, and promoting them.[12]

11 "Net Promoter," Wikipedia, retrieved Oct. 15, 2018 (en.wikipedia.org/wiki/Net_Promoter). The Net Promoter Score was introduced in "One Number You Need to Grow," by Frederick F. Reichheld, published in *Harvard Business Review*, December 2003.

12 A CASE task force is exploring how the industry can create an overall framework for measuring alumni engagement. For more information, see the white paper "Alumni Engagement Metrics," August 2018 (www.case.org/Documents/WhitePapers/CASEWhitePaper_AlumniMetrics.pdf).

## What Are Institutions Including in Their Engagement Scores?

First, we learned that two-thirds of institutions (65 percent) are *not* currently assigning scores to either alumni or donors, though 26 percent report that they are currently assigning scores to *both* alumni and donors.

We asked institutions that do assign engagement scores what kinds of activities are included. **Figure 5** shows the extent to which various measures contribute to alumni and donor engagement scores. Not surprisingly, many institutions—61 percent of those that assign scores—include "giving" in their scores for alumni, and 65 percent include "giving" in their scores for donors. In contrast, only 21 percent include "volunteering as a social media ambassador" in their alumni engagement scores, which is of great value to a digital advancement operation.

Using and Producing Video

It's no secret that internet users are inundated with online video. The interest in video has made YouTube the most popular online platform among teens,[13] and advertisers believe consumers love video so much that they force us to watch autoplay advertisements on websites and Facebook, even though these videos are

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13 According to Pew Internet, 32 percent of teens say the online platform they use most frequently is YouTube (www.pewinternet.org/2018/05/31/teens-social-media-technology-2018).

FIGURE 5 — ACTIVITIES THAT CONTRIBUTE TO ENGAGEMENT SCORES FOR DONORS AND ALUMNI

● Institution ● US & Canada

In response to the question, "[If donors/alumni assigned scores to indicate engagement level] What activities contribute most to your institution's engagement metrics for donors/alumni?" n = 83 (donors), n = 77 (alumni)
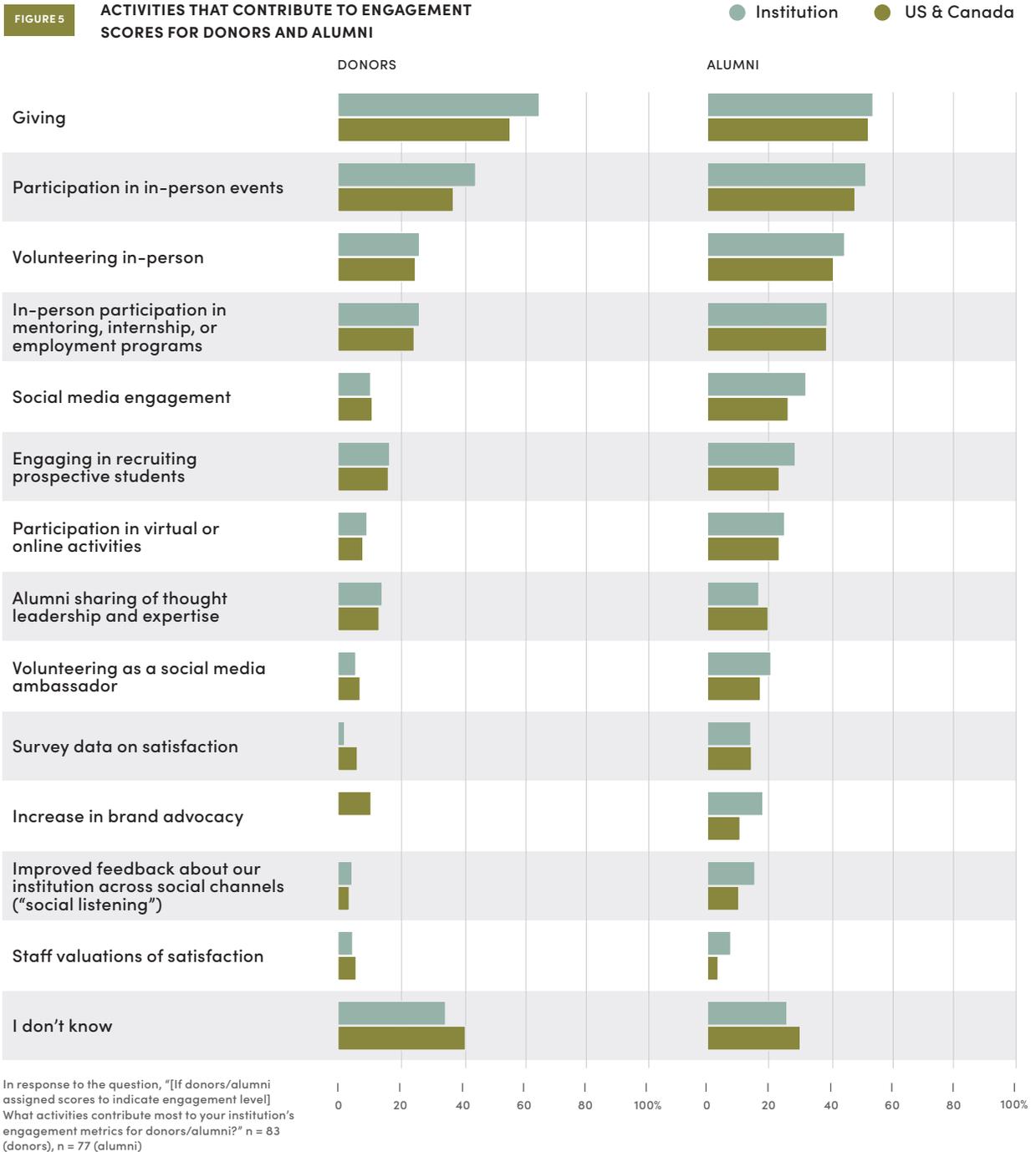
Perhaps not surprisingly, the most common use of video at the institutional level is for brand awareness.

universally despised and tech writers routinely offer advice on how to block them.[14]

Because the use of video is such a prominent online trend—and it's closely associated with digital business—we were curious about how many institutions use video in communication with donors and constituents and how they produce it.

As we suspected, a very large majority of institutions are using video for these communications (85 percent).

Among institutions that use video, 39 percent have a video production team, and a third (33 percent) of individuals responding on behalf of their units say they coordinate with that team. Another 19 percent of institutions engage an external team to produce their video. And 4 percent of institutions empower their staff—"nearly everyone"—to produce video.

Perhaps not surprisingly, the most common uses of video at the institutional level are for brand awareness (75 percent of institutions produce video for this purpose) and for student recruitment (67 percent of institutions). Sixty-one percent of institutions produce videos focused on giving. A full breakdown appears in **Figure 6**.

Institutions are also taking advantage of video streaming options: 36 percent are streaming video

to some extent (see Figure 1), and 63 percent of institutions using Facebook are taking advantage of its video streaming capability.

The Relationship of Advancement and Marketing

Given the relatively recent emergence of a strong emphasis in higher ed on brand development and management, and the increasing importance of the role of the chief marketing officer (CMO) on many campuses, we wondered about how institutions were structuring the relationship between their CMO and CAO and between marketing communications and advancement.

At a majority of institutions (60 percent), both the CAO and the CMO report to the CEO; there's no essential difference between institutions in the United States, Canada, and elsewhere in the world. At 21 percent of institutions, the CMO reports to the CAO; and at 14 percent of institutions, the CAO reports to the CEO while the CMO reports to another executive. This structure has been in place for five years or fewer at 48 percent of institutions, and for more than five years at 41 percent.

We were also curious about the relationship of the institution's brand platform to the brand platform that advancement uses. We asked whether the institution's brand platform served as the foundation for all

14   See, for example, "Autoplay Videos Are Not Going Away. Here's How to Fight Them," Brian X. Chen's "Tech Fix" column for Aug. 1, 2018, in the *New York Times*: www.nytimes.com/2018/08/01/technology/personaltech/autoplay-video-fight-them.html.

FIGURE 6

PURPOSES FOR WHICH INSTITUTIONS ARE PRODUCING VIDEO

Legend:
- Overall
- Unit
- Institution
- Public
- Private
- U.S. & Canada
- Everywhere Else

Categories (left column):
- Institutional brand awareness
- Giving (e.g., Annual Fund, Day(s) of giving)
- Engaging in recruiting prospective students
- Social media engagement
- Marketing a major campus event

Categories (middle column):
- Marketing a major unit event
- A capital campaign
- Other fundraising initiative(s) besides a capital and/or crowdfunding campaign
- A crowdfunding campaign
- Participation in in-person events
- Boosting stakeholder affiliation
- Alumni sharing of thought leadership and expertise

Categories (right column):
- Participation in mentoring, internship, or employment programs
- Participation in virtual or online activities
- Improved feedback about our institution across social channels (social listening)
- Volunteering as a social media ambassador
- Volunteering in-person
- Other
- Not sure

In response to the question, "[If use video] What is the video usually created for? Please select all that apply." n = 226

FIGURE 7

HOW ADVANCEMENT AND MARKETING DIVIDE KEY FUNCTIONS

Legend:
- Solely Advancement
- Primarily Advancement
- Both (about 50/50)
- Primarily Central Marketing
- Solely Central Marketing

Market research
| 14% | 15% | 26% | 24% | 21% |

University/alumni magazine
| 16% | 8% | 21% | 30% | 25% |

Campaign identity and communications
| 17% | 27% | 29% | 18% | 9% |

Development communications
| 31% | 35% | 21% | 10% | 3% |

Alumni communications
| 31% | 39% | 20% | 7% | 3% |

Website
| 12% | 15% | 21% | 27% | 25% |

Video production
| 9% | 9% | 20% | 31% | 31% |

Digital marketing
| 10% | 16% | 19% | 32% | 23% |

Email communications
| 21% | 30% | 35% | 9% | 5% |
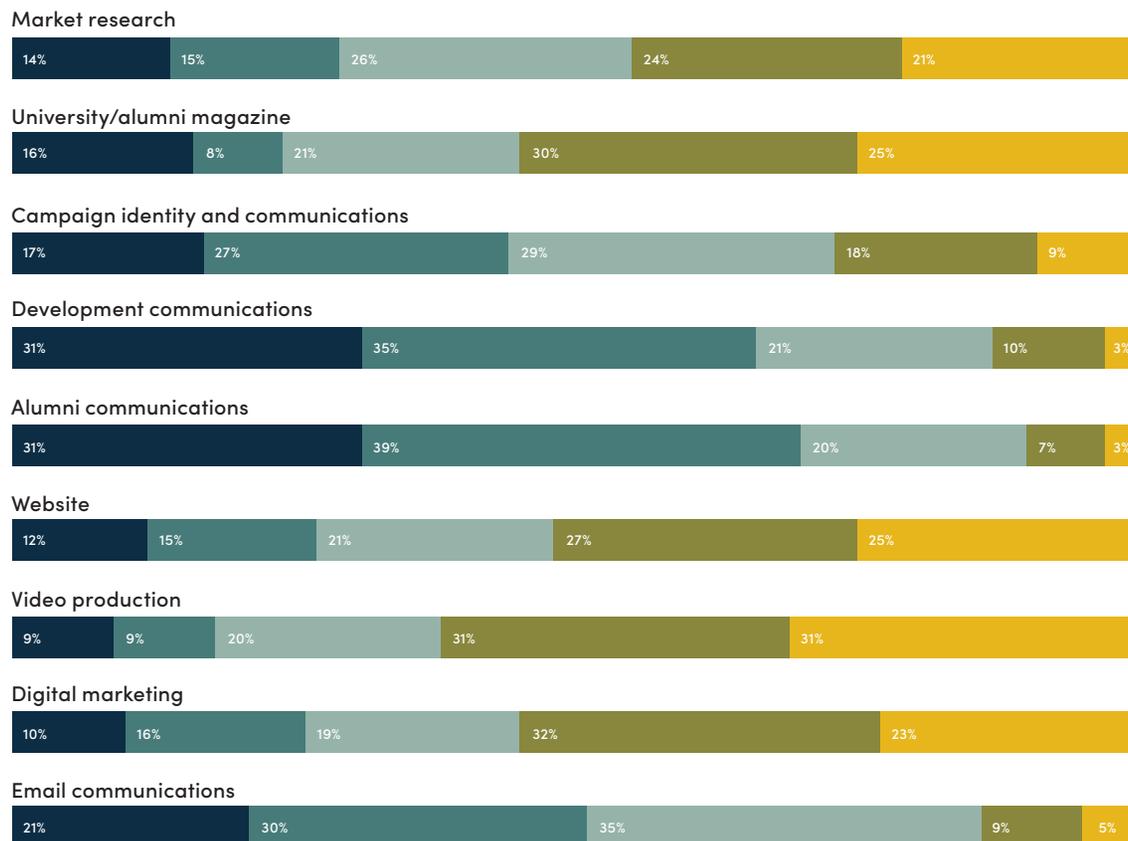
In response to the question, "Please select the degree to which advancement handles each of the following areas or functions on its own (through its own marketing staff, resources, and/or outside partners), or relies on the institution's central marketing team." n = 246–257

communications, including alumni, fundraising, and campaign communications, or whether advancement used a slightly different brand platform for these communications. In response, about half of institutions (51 percent) said they used a slightly different brand for advancement; at 49 percent of institutions, everyone used the same brand.

We asked an additional question about brand. Some institutions develop a special brand for their campaign; others leverage their institutional brand platform. At 57 percent of institutions responding, there was significant overlap between the two brands, and at 14 percent of institutions, they were essentially identical. But at 29 percent, the campaign brand was distinctive.

Finally, we wanted to know about how institutions handle critical functions like market research, alumni communications, and brand development. Do advancement offices do these things on their own or in partnership with a central marketing office? Does a central marketing office have responsibility for these functions?

We show the breakdown for these tasks in **Figure 7**. A clear majority of advancement offices take all or most of the responsibility for alumni communications (70 percent) and development communications (65 percent) without much interaction with central marketing. But 60 percent of central marketing offices take responsibility for video production.

3. Benchmarking Digital Advancement

AS WE BEGAN reviewing conversation and interview notes, research on digital business, and responses to our survey, we constructed a matrix of characteristics—the list presented in Chapter 1 of this white paper—and matched them with specific behaviors that might be present in a digital advancement operation. (Many of these were included in the 2018 survey, though some were not.) Then, we assigned scores to each of these behaviors. In our scoring, we assigned a value of 0.5 to behaviors that were common and greater values to those that were more difficult and more rare. For example, many institutions have seen the benefit of establishing accounts on multiple social media services, so we assigned a value of 0.5 to this behavior. But implementing a Customer Relations Management System (CRM) and integrating data across the institution is much more difficult, so we assigned that a value of 3.0. **Figure 8** illustrates how we matched overall characteristics of digital advancement with specific behaviors that indicate an institutional interest or investment in it.
Our data offer an opportunity to explore what institutions are doing in the areas we identified.

All the institutions in our survey are making efforts to "reach people where they are" and to use digital communications in reaching out to stakeholders. CEOs at slightly more than half the institutions in our survey use social media in their roles, as do other leaders. And 100 percent of the institutions we surveyed use multiple social media channels. A large majority have instituted opportunities for constituents to engage with the institution via social and digital channels—in addition to whatever other opportunities they offer.

Figure 8 also shows where we *don't* have insights into digital advancement. We didn't collect data for some of the specific behaviors in our survey. For example, this year we didn't try to ascertain how mobile-optimized an institution's website is, and we didn't ask questions about how institutions are taking advantage of mobile-optimized tools for advancement staff. So we can't say how mobile-optimized advancement is currently.

We also have little information about two other key areas. While two-thirds of institutions are sponsoring Days of Giving or crowdsourcing fundraising options or using digital tools such as EverTrue, we don't know about other ways in which advancement offices are innovating in their programming. For example, to what extent are they offering online and digital event options? Similarly, we lack information on how they're empowering their staff to take advantage of digital tools and other opportunities. While nearly all institutions offer multiple social channels, only 9 percent empower all their staff members to integrate social media as part of their jobs.

In addition, we didn't collect information about some of the more difficult behaviors to implement, such as working in partnership with other offices at the institution or implementing an institution-wide CRM. These sorts of behaviors, which are typical of digitally mature companies in general, indicate a true commitment to success in an era of digital advancement. We'll add these questions to our next survey. ■

FIGURE 8

BENCHMARKS FOR DIGITAL ADVANCEMENT

ATTEMPTS TO REACH PEOPLE WHERE THEY ARE

	Difficulty	Institutions Doing This
Multiple social media channels	◖○○	99%
CEO uses social/digital media regularly	●◐○	51%
Other leaders use social/digital media regularly	●◐○	66%
Online reunions and events	●○○	
Expanding opportunities for service	●○○	86%

INNOVATES IN PROGRAMMING BY USING NEW APPROACHES INVOLVING DIGITAL TOOLS

Initiating new types of fundraising	●○○	67%
Online reunions and events	●○○	
Strong alliances with other departments	●◐○	

ATTEMPTS TO UNDERSTAND AND TRACK THE LOYALTY OF STAKEHOLDERS

Scoring alumni and donors	●●○	26%
Social listening	●●○	83%
Expanding opportunities for service	●○○	86%

RELIES ON DIGITAL ANALYTICS IN DECISION MAKING

Measuring social/digital media	●○○	83%
Social listening	●●○	83%
Digital analytics to inform strategic decisions	●◐○	55%
CRM and integration at the institutional level	●●●	

EMPHASIZES DIGITAL COMMUNICATIONS INTERNALLY AND WITH STAKEHOLDERS

	Difficulty	Institutions Doing This
Multiple social media channels	◖○○	99%
Social/digital media is part of nearly everyone's job	●◐○	9%
Emphasis on social media, texting, email for stakeholder communications	●○○	
Measuring social/digital media	●○○	83%
Greater use of video, for more purposes	●◐○	70%
CEO uses social/digital media regularly	●◐○	51%
Other leaders use social/digital media regularly	●◐○	66%

OPERATES AS A SINGLE INSTITUTION RATHER THAN A SINGLE DEPARTMENT

CMO and CAO report to CEO	●○○	60%
One institutional brand	●●○	49%
Brand advocacy for the institution	●●○	69%
CRM and integration at the institutional level	●●●	
Work in cross-functional teams	●●○	

EMPOWERS STAFF TO EXPERIMENT, INNOVATE, COMMUNICATE

Social/digital media is part of nearly everyone's job	●◐○	9%
Work in cross-functional teams	●●○	
Strong alliances with other departments	●◐○	

FOCUSES ON MOBILE EXPERIENCE FOR STAFF AND STAKEHOLDERS

Mobile-optimized (or better, mobile-first) website	●●●	
Provides mobile-optimized tools for staff	●●●	

Note on scale: Ratings of difficulty range from .5 (fairly simple: a lot of institutions are doing it) to 3.0 (very difficult because it requires institution-wide roll-out and buy-in for implementation).

*Blank columns indicate we did not measure this in the 2018 survey.

Appendix: Demographics

WE CONDUCTED THIS survey using a random sample of 16,721 CASE members in the United States and around the world. We sent two emails to these individuals: on June 1, we emailed 16,673 recipients, with a 99.4% delivery rate, a 21.8% open rate, and a 6.7% click rate; on June 15, we emailed 16,572 recipients, with a 99.6% delivery rate, a 21.5% open rate, and a 3.47% click rate. We also used mailing lists and invited responses from Twitter followers of mStoner, Inc., and Higher Ed Live. We received a total of 1,030 responses to the survey; 958 were from the United States and Canada and 71 from countries outside North America.

Our dataset included responses from 704 individuals responding on behalf of their unit within a college or university (for example, an advancement office) and 326 individuals responding on behalf of an institution as a whole. For most of our reporting in this paper, we looked at data from the entire institution. There are cases in which we also present data from the unit perspective (for example, Figure 1 shows what digital media channels respondents from units within an institution use) and when we do, we clearly note it.

FIGURE 9

INSTITUTION TYPE FOR NORTH AMERICAN RESPONDENTS

Doctoral/research university	37%
Baccalaureate (four-year) college	30
Master's college or university	16
Associate's (two-year) college	6
Independent elementary/secondary school	3
Special focus institution (e.g., stand-alone law school, medical school)	3
Institutionally related foundation	1
Independent alumni association	1
System office	1
Other	3

In response to the question, "At what type of institution do you work? Please select the answer that best applies." n = 958

FIGURE 10

WHERE RESPONDENTS WORK

Communications	46%
Marketing	43
Alumni relations	20
Development (including annual fund)	19
Advancement services	2
Enrollment management or admission	12
Advancement management	10
Other	14

In response to the question, "Which of the following describes your unit, that is, your immediate department or division? Please select all that apply." n = 1,030

FIGURE 11

PROFESSIONAL LEVEL OF RESPONDENTS

Executive director, director, or manager	42%
Associate, assistant, or deputy director/manager	26
Specialist, coordinator, or administrative assistant	17
Vice president, vice chancellor, or assistant head of school	5
Associate or assistant vice president	5
Dean, associate dean, or assistant dean	2
President or head of school	1
Other	2

In response to the question, "Which of the following best describes the level of your professional role?" n = 1,030