

Survey Results:

Frontline Fundraising in a Virtual Environment

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AGN's Mission & Services

AGN helps educational institutions build exceptional advancement teams. Through our training and tools, we provide guidance and insight that empower staff and volunteers to improve their constituent engagement programs and achieve better fundraising results.

Our services include:

- Training & Structured Learning
- Program Assessments
- Job Advertising & Recruiting

AGN Member Benefits

AGN is proud to have supported over 600 institutions through our membership program, empowering advancement teams with guidance and insight from some of the industry's top subject matter experts. Membership applies to your entire organization, so everyone on your team has year-round access to the following benefits:

- **Free registration to all of our training webinars**—including hundreds of hours of on-demand recordings, plus new live events added weekly
- **Our member-exclusive library** filled with samples, templates, articles, reports, and other tools
- **Dedicated support and guidance** from our network of experts who can address questions, provide feedback, and share best practices
- **Discounts of 20% or more** on workshops, job board ads, program assessments, and other services

About the Survey

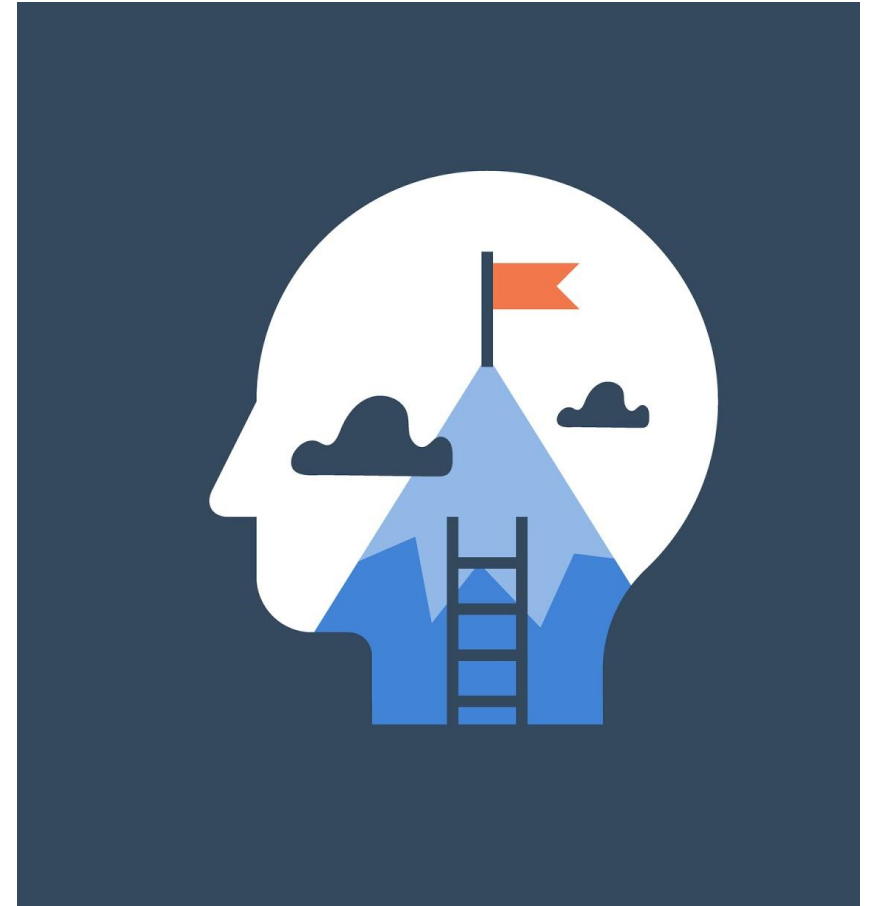
- In July 2020, AGN conducted a survey of frontline gift officers at educational institutions, including colleges, universities, and independent schools
- The goal of the survey was to gauge the impact of the COVID-19 pandemic and the resulting physical distancing recommendations on the work of frontline gift officers over the past several months, as well as their perspectives and opinions related to functioning in a more virtual environment
- More than 200 individuals responded to this anonymous survey – the key findings and response summary are included in this report

KEY FINDINGS

Key Finding #1: *Expectations are high*

Despite the significant amount of change and uncertainty brought on by the pandemic, expectations remain high for frontline gift officers to stay productive in prospect engagement and fundraising

- Nearly half of gift officers (47%) say their expectations have not changed since the pandemic began
- 18% of gift officers report that they have more aggressive fundraising expectations now compared to before the pandemic



Key Finding #2: *Gift officers are staying busy*



More than half of gift officers indicated that that their interactions with prospects have increased (37%) or remained the same (21%) since the pandemic began

- Nearly half of gift officers report that it's just as easy—or easier—to secure a virtual meeting as it is to secure a meeting face-to-face
- More than half of gift officers (58%) report that they have averaged between 5–15 phone or virtual meetings with prospects each month

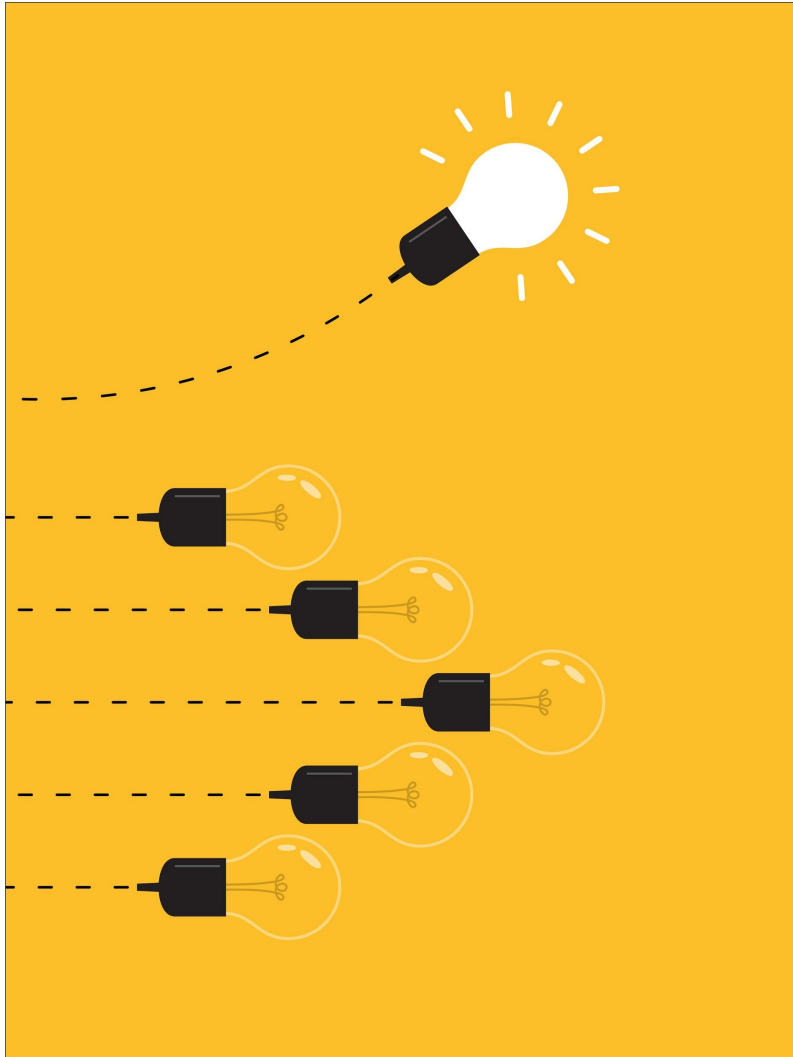
Key Finding #3: *Cultivation strategies have changed*

Despite increased awareness and use of video for meetings, only 10% of gift officers report that this is the most common way that they've engaged with prospects in recent months

- 47% say email is their preferred engagement tool
- 39% say phone is preferred
- Gift officers themselves note that they still prefer having face-to-face meetings to engage with prospects



Key Finding #4: *Institutional priorities have shifted*

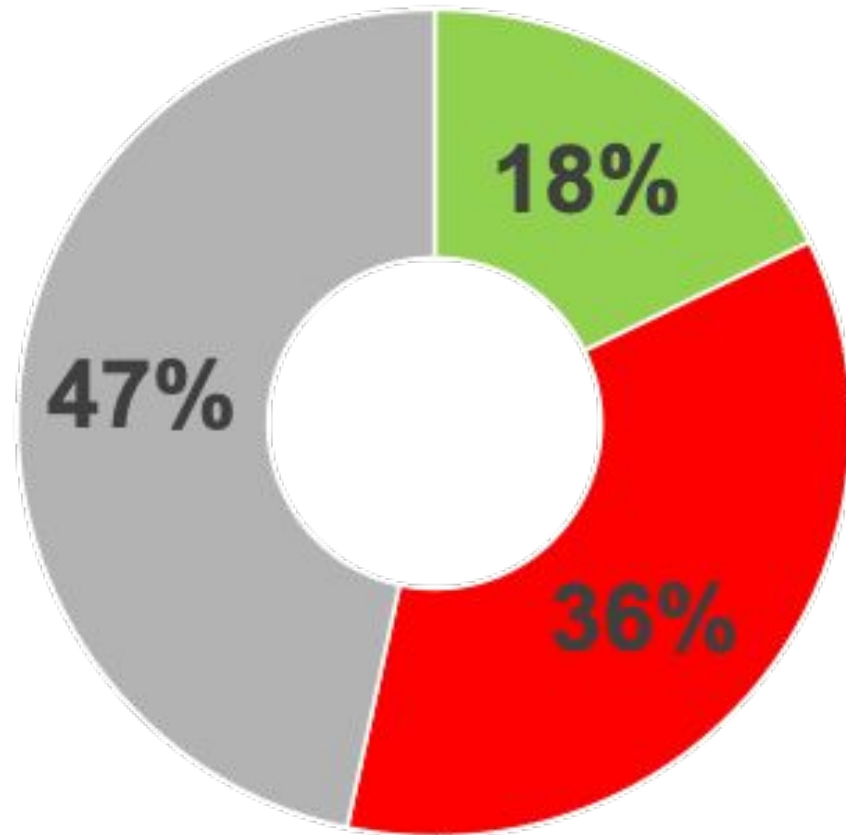


Although gift officers traditionally focus on cultivating and soliciting prospects for higher level gifts, the pandemic has resulted in a shift in some priorities. Over the past several months:

- 90% report an increased emphasis on stewardship
- 58% report an increased emphasis on securing student support
- 31% report an increased emphasis on securing annual gifts
- 31% report an increased emphasis on new prospect discovery

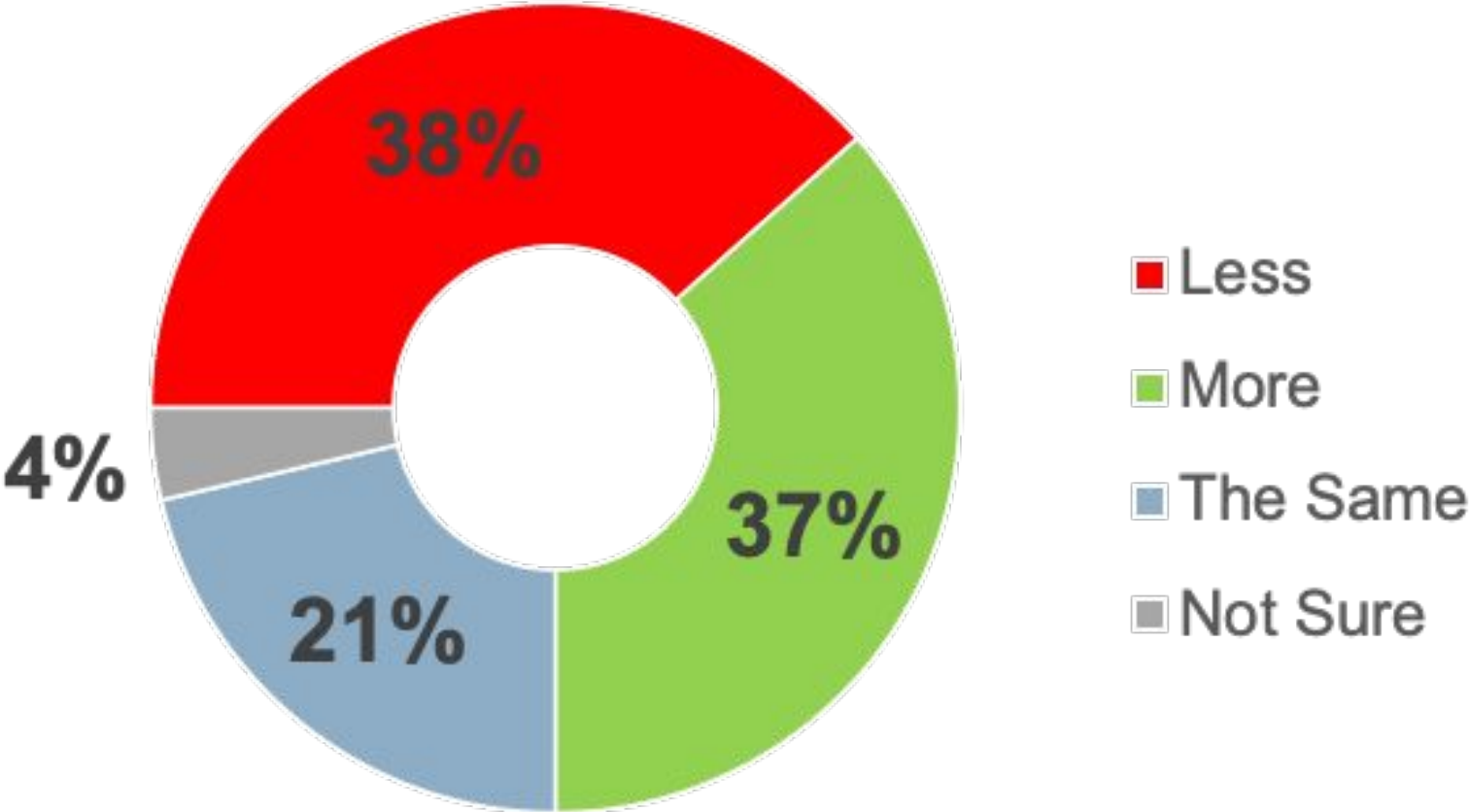
SURVEY RESPONSES

Have your goals/expectations as a gift officer changed since the pandemic began?

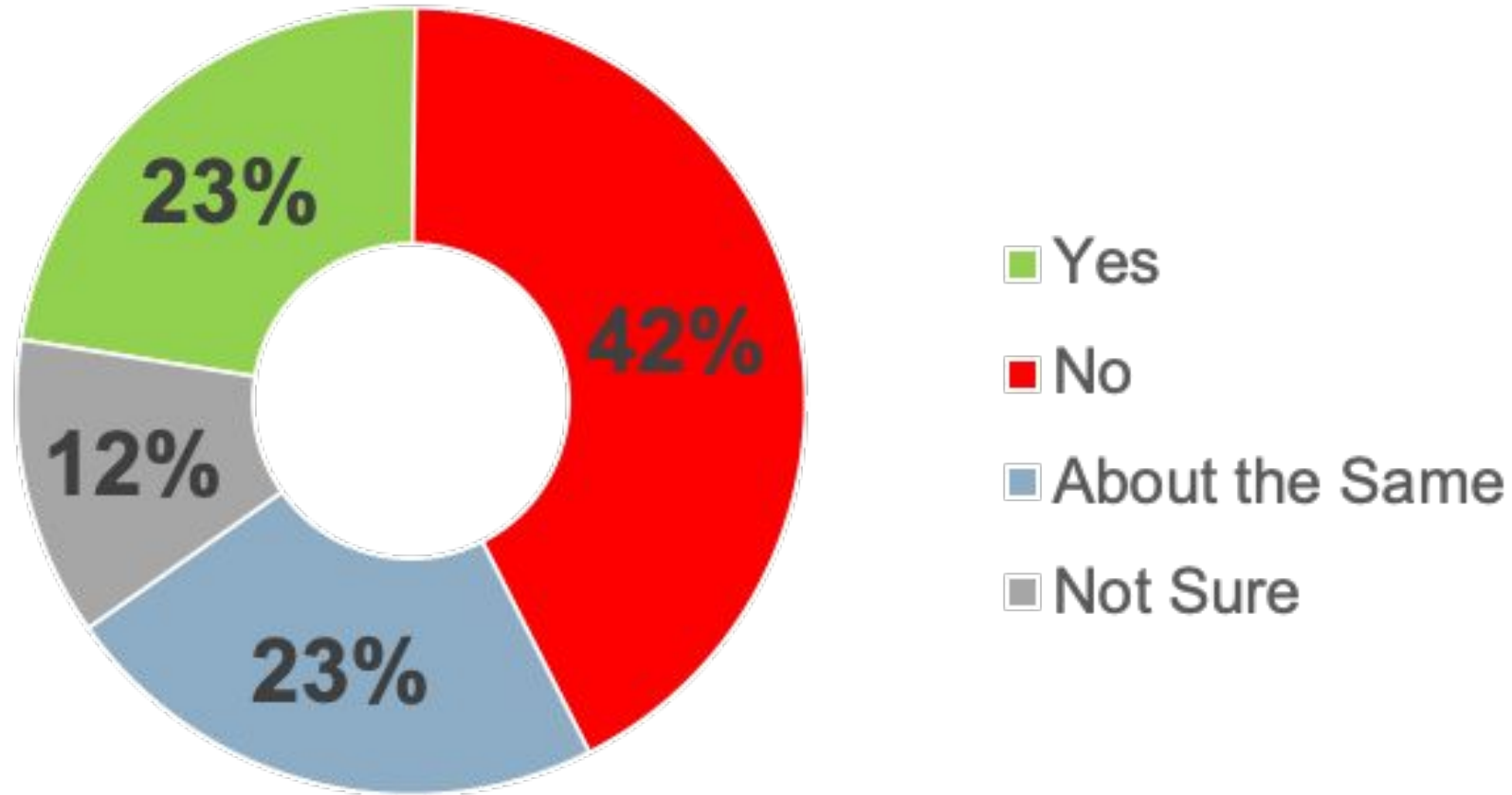


- Yes - they're more aggressive
- Yes - they're less aggressive
- No - they're the same

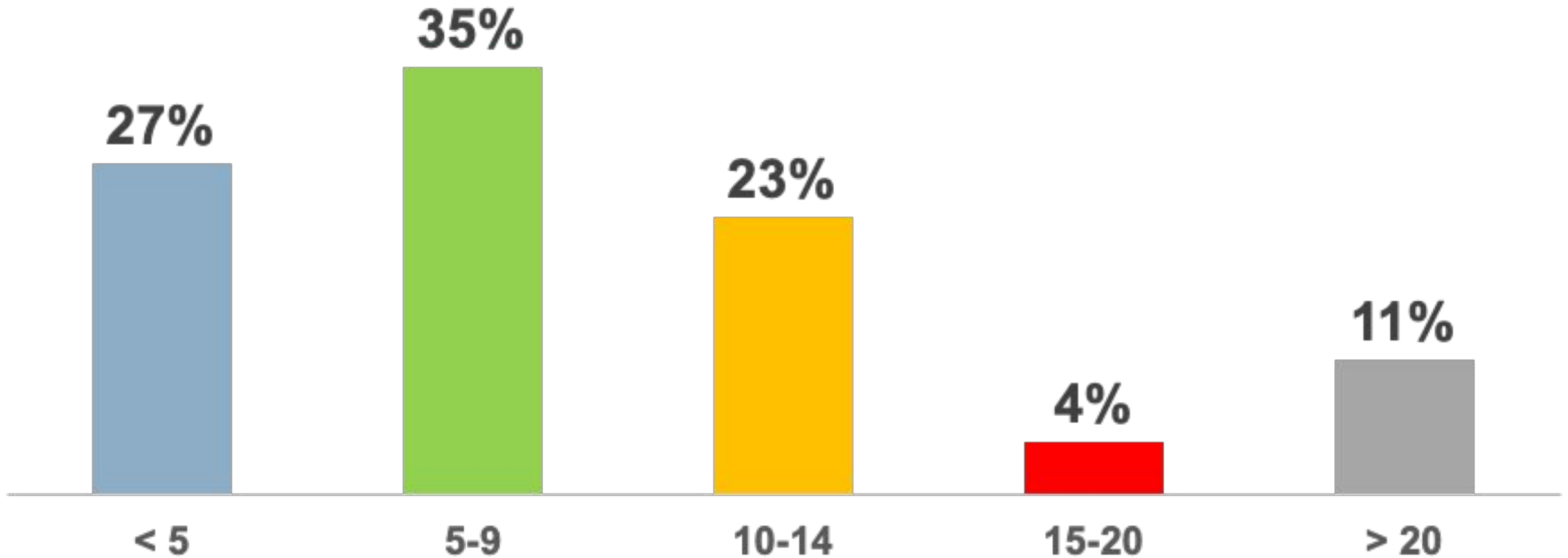
Since the pandemic began, have you had more or less interaction (virtual or otherwise) with your prospects?



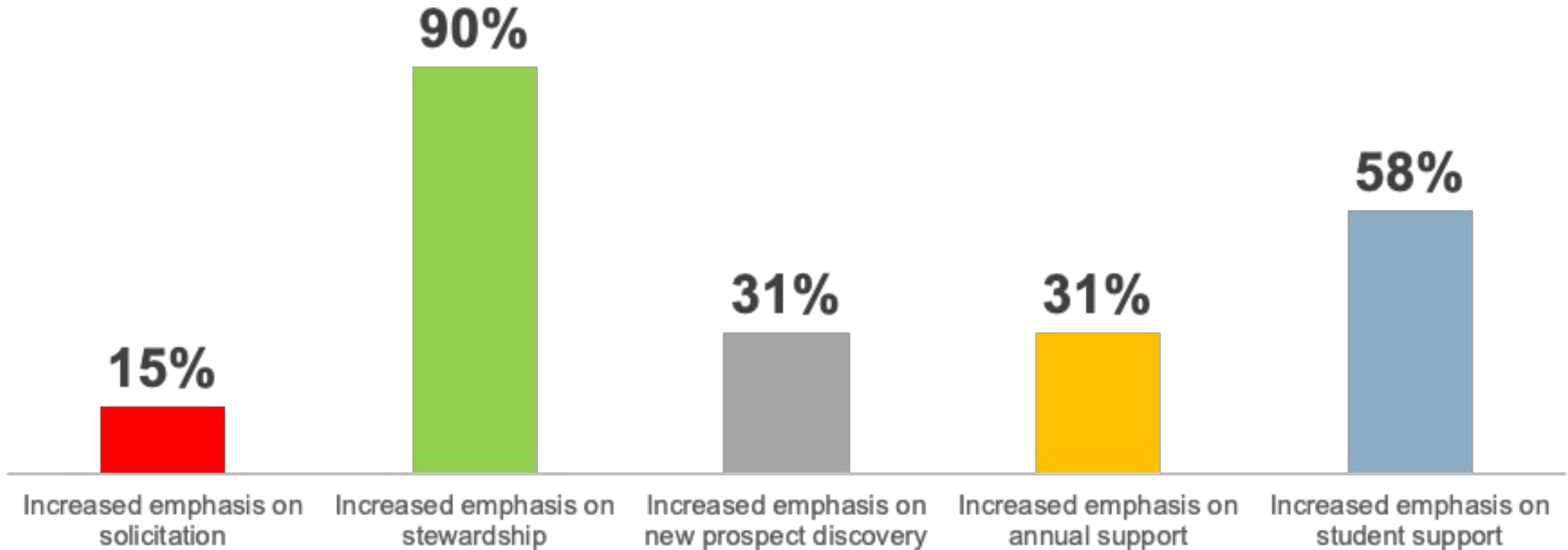
Compared to in-person meetings prior to the pandemic, have you found it easier to secure virtual meetings with prospects in recent months?



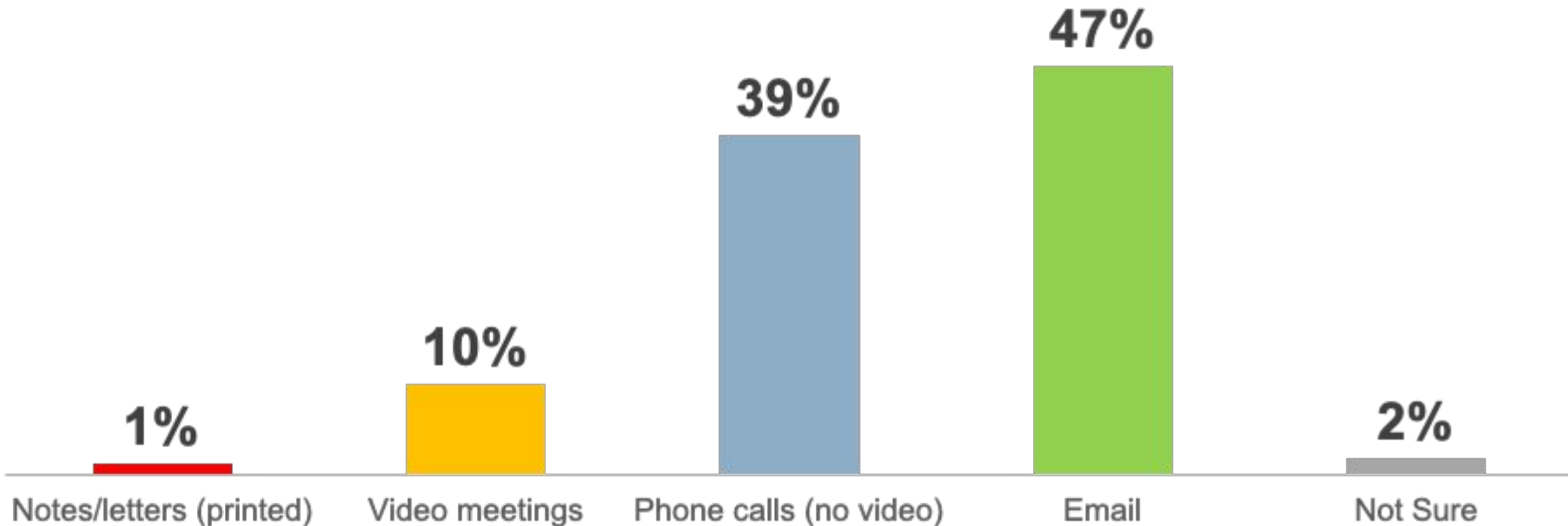
In an average month, how many prospect calls/video meetings have you done since the pandemic began?



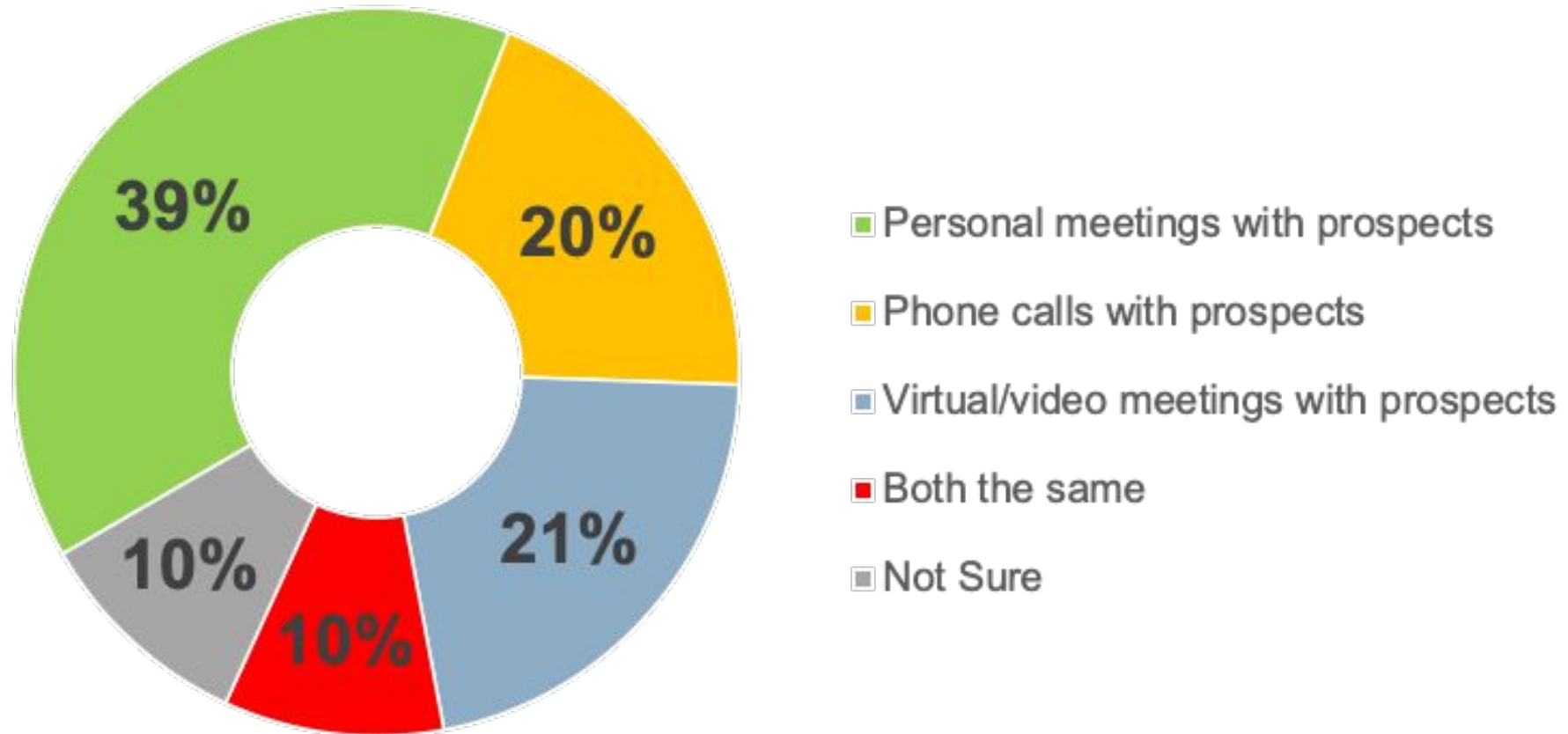
Since the pandemic began, how have your prospect interactions changed?



Which of the following channels have you used the most to communicate/interact with your prospects since the pandemic began?



Which type of interaction do you prefer more?



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