Advancement Dashboard Summary and Background

Over the last year, the USM Offices of Institutional Research and Advancement have worked with institutional vice presidents for advancement to create and refine a USM Advancement Dashboard, which will be presented to the Board of Regents on an annual basis. The exercise was a useful one, allowing the group to identify a set of meaningful performance measures that will be reflected in our strategic focus in the years to come.

Data – Sources and Peers

- Data are compiled through the Council for Aid to Education's Voluntary Support of Education (VSE) survey, a national survey of higher education institutions that measures fundraising results in a variety of categories. USM institutions all participate in this survey and submit their fundraising goals to the USM office on an annual basis.

- Institutions had the option of using their academic peers (used in other dashboard measures) or to submit alternatives that were more in line with the history and maturity of their advancement programs. These peers were reviewed by the USM office. All peers used are included as an appendix to this report.

- Some peer data, in particular in the advancement operations category, are difficult to obtain (this section of the VSE survey is optional, so it is hit-or-miss as to whether a given institution will get multiple peers reporting). In other cases, some of our institutions are so specialized that it is difficult to obtain valid peer data.

Results and Analysis

The dashboards reveal a number of key trends and provide an overview of the relative position of USM's Advancement operations at present.

- Each institution has "red" areas—the areas identified as needing improvement. This is expected, given the relative immaturity of our programs and level of investment currently committed. Three themes in particular stand out:

    - **Operations** – In terms of staffing and expenditures, we are behind our peers in terms of resources dedicated to advancement. As we close this gap, we should see all performance measures improve.

- **Endowment Value** – Almost universally, endowment market value as measured against peers is low. We know this—it is why endowment building will be such a future focus to the System as a whole. At the same time, many of our campuses are moving the right direction, which is heartening.
- **Alumni giving** – Alumni giving also lags at many of our institutions—another measure of the relative youth of our programs.

- In terms of the giving as percentage of total category, the Board should see a rebalancing of that distribution in the years to come as our campuses focus more on individual, alumni, and planned giving. Those percentages are likely to increase as we build the pipeline of giving through stronger alumni and annual giving programs.

These dashboards can serve as an effective management tool for the Board as we work toward dedicating more resources to advancement efforts, building more endowment, and ensuring that the pipeline of alumni and individual donors expands.