The Council of Independent Colleges

Creating **Tomorrow's Institutions,** Together

2026 Institute for Chief Academic Officers with Chief Advancement, Enrollment, Financial, and Marketing Communication Officers

November 7–10, 2026 ■ Baltimore, Maryland

From Academic Vision to Philanthropic Impact

Building effective partnerships with advancement

The Council of Independent Colleges

Creating **Tomorrow's Institutions,** Together

2026 Institute for Chief Academic Officers with Chief Advancement, Enrollment, Financial, and Marketing Communication Officers



Presenters

- *Brian Flahaven*
  Vice President, Strategic Partnerships
  Council for Advancement and Support of Education (CASE)
- *Matthew Eynon*
  Chair
  CASE Commission on Advancement Insights & Operations
- Session Chair: *Jeffrey Frick*
  Vice President for Academic Affairs and Dean of the College
  Washington & Jefferson College



OUR HOUR TOGETHER

How we will spend the time

Minutes	Segment	Led by
0–10	Why this partnership matters now	Matthew and Brian
10–30	Three moves: align, engage, govern	Brian
30–35	Where trust breaks down	Matthew and Brian
35–50	Table case: the unexpected gift	Matthew
50–60	Commitments and questions	All of us

BEFORE WE BEGIN

Think of the last major gift on your campus that touched an academic priority. When did you first hear about it or play a role in any way?

While the idea was forming? When the proposal went out? At the signing? In the press release?

WHY THIS MATTERS NOW

Donors give to specific purposes. Ideas with impact, reach, and scale are required. Academic leaders define which ideas and purposes are worth funding.

$78.8B

given to U.S. colleges and universities in fiscal year 2025, up 4% from the year before

81%

of those contributions were designated (restricted) by donors for specific uses, such as student success, financial aid and research. The balance were mostly "unrestricted" or flexible.

Source: CASE, Insights on Voluntary Support of Education 2025 (April 2026)

THE PARTNERSHIP GAP

Faculty and fundraisers often work side by side without working together

34%

of faculty reported no collaboration with advancement in a typical year

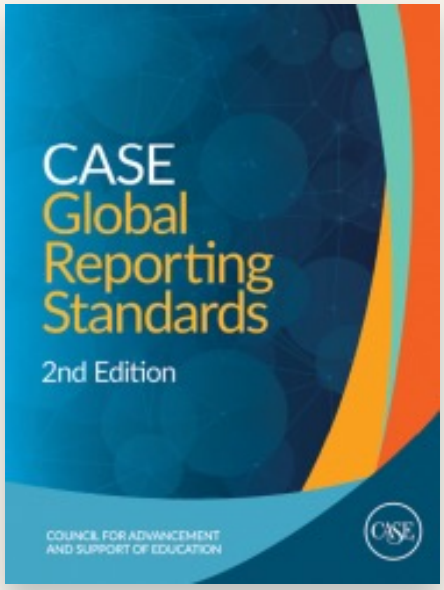
73%

of faculty said advancement staff were only slightly or not at all aware of their work

61%

of advancement staff said the same about faculty awareness of fundraising

Source: HEDS Consortium, 2022 Survey on Collaboration between Advancement and Academic Affairs (31 institutions, 1,848 respondents)



SHARED STANDARDS · SINCE 1982

CASE Global Reporting Standards

Educational philanthropy, defined

Voluntary private support given solely to advance an institution's mission and social impact, with no expectation of return beyond recognition and stewardship.

What the standards guide

Gift counting	Funds received	New funds committed	**Donor control and influence**

Donors

Expect their gifts to be stewarded ethically and transparently

Institution leaders

Want advancement to follow professional standards, in service of mission

Gift agreements

Grow more complex; monitor them so they stay consistent and viable

Source: CASE Global Reporting Standards, 2nd Edition (formerly the CASE Reporting Standards and Management Guidelines)

TWO WAYS OF WORKING

From transaction to partnership

	Transactional	Partnership
When academics join	At the ask, if at all	When priorities are set
What shapes the gift	Donor interest, then a search for a home	The academic plan, matched to donor interest
Faculty role	Speaker at a donor event	Co-author of the case and a thought partner
Measure of success	Dollars booked	Dollars booked and priorities funded

THE CORE OF THE SESSION

Three moves toward partnership

01 · Align

Turn academic priorities into fundable ideas that donors can see themselves in.

02 · Engage

Bring faculty in early as partners, in roles that respect their time.

03 · Govern

Draw clear lines that protect shared governance and donor trust.

MOVE 1 · ALIGN

From strategic plan to fundable idea

Academic priority

Provost and deans set it, grounded in the academic plan

→

Case for support

Faculty and advancement write it together

→

Gift opportunity

Scoped, priced, and tied to outcomes a donor can follow

→

Donor match

Advancement leads; academic leaders join the right conversations

The provost's levers: set priorities with the deans, reward ideas that cross departments, and convene the people who can shape them.

MOVE 2 · ENGAGE

Give faculty real roles, then protect their time

Thought partner

Shapes the case and the gift design before any donor sees it

Storyteller

Shows donors the work: a lab, a seminar, a student project

Host

Opens a door for a prospect who shares an academic interest

Steward

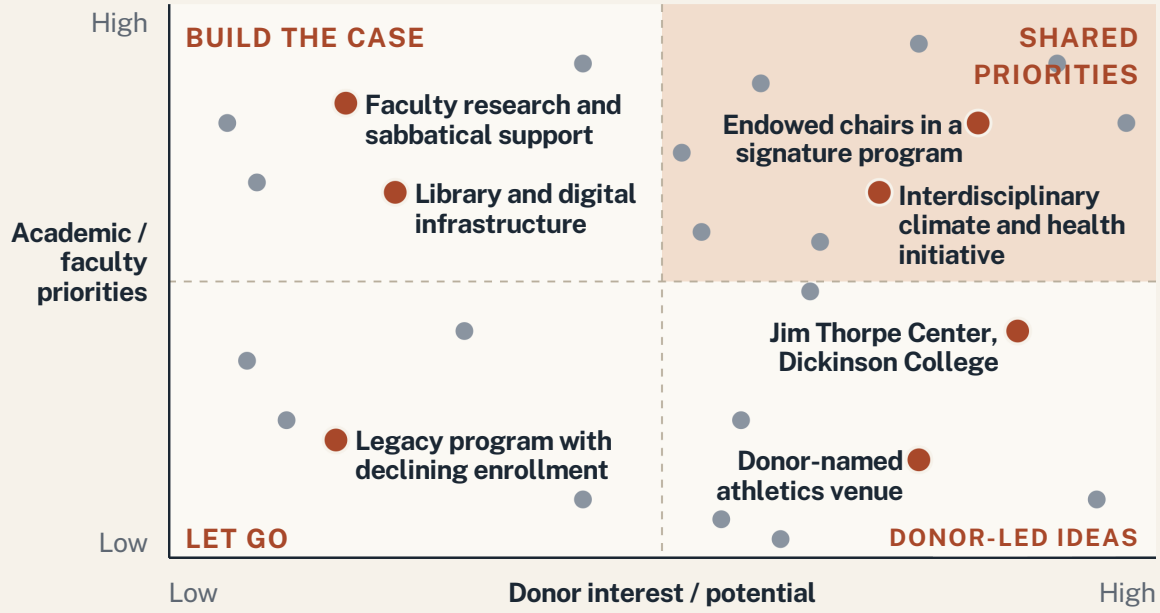
Reports back, in their own words, on what a gift made possible

What faculty need from us

- A clear, specific request
- A briefing before they meet a donor
- Credit in the room and afterward
- A report on what happened next

WHERE INTERESTS AND PRIORITIES MEET

Donor interest and academic priority rarely line up on their own



Reading the matrix

- Named example
- Other ideas and priorities

Shared priorities: move fast, together.

Build the case: real needs donors don't yet see.

Donor-led ideas: test fit with faculty; reshape or decline.

Let go: neither side is asking.

Illustrative placements for discussion. Jim Thorpe Center: $20M gift announced by Dickinson College, October 2025.

MOVE 3 · GOVERN

Respect shared governance, and say so early

Donors can

- Fund priorities the institution has set
- Name programs, spaces and positions
- Receive regular reports on impact
- Offer ideas, networks and expertise

The faculty and institution decide

- Curriculum and degree requirements
- Hiring, tenure and promotion
- Research questions and findings
- Whether a gift fits the mission

Put it in writing: a gift acceptance policy, a standard gift agreement, and a named academic sign-off for any gift that touches curriculum or faculty lines.

FROM PRACTICE

Three campuses, three lessons

Franklin & Marshall College

A $225M+ campaign at a leading residential liberal arts college

A seven-figure endowment fund for the Philosophy Department and a new $35M visual arts building

MIT

Innovative principal-gift proposals built with academic leaders

Designing and launching major interdisciplinary goals as grand challenges for philanthropy including for climate, health, and the humanities

Boston College

Board chair partnership on a vital capital project for BC

At its core, Boston College is a liberal arts university. The President worked with the Board Chair to name a new $78M, 180,000 sq. foot humanities building.

JUST ANNOUNCED · CARNEGIE MELLON UNIVERSITY · SEPTEMBER 30, 2026

A $3 billion bet on what faculty can build

$2B
CMU Miami: a new campus organized around societal challenges rather than academic majors

$500M
School of Computer Science

$500M
Flexible support, Pittsburgh

~300
faculty positions planned for CMU Miami, plus 600+ staff

3,500+
undergraduate, master's and PhD students, with research and teaching equally central

4
research areas: health and biology, national security, energy and climate, advanced manufacturing

#1
School of Computer Science ranking in CS, AI, cybersecurity and software engineering

Source: Carnegie Mellon University News, September 30, 2026. Miami enrollment from 2028, pending approvals.

WHERE TRUST BREAKS DOWN

Six habits that undermine the partnership

The late invitation

Faculty meet the donor on the day of the ask, or the day of the stewardship event to celebrate the gift

The endless wish list

Every unit's list becomes the campaign's list, so nothing stands out, it funds operations, and there are no big ideas

The side deal

Someone promises a donor what the faculty never agreed to, or something impossible to achieve

The gift that doesn't fit

Money accepted for a program no one planned to run or sustain, or sometimes not even "fully" funded by the donor

Credit that stops short

Faculty contributions go unacknowledged once the gift closes, or are minimized as a part of the gift

Silence after the gift

No one tells faculty or donors what came of it – an egregious breach of trust and stewardship for the donor and faculty colleagues

TABLE DISCUSSION · 15 MINUTES

The unexpected gift

A longtime trustee offers $5 million to create a center in a field your academic plan does not mention. The center will bring visibility to the institution and help highlight teaching and research excellence.

She wants it named for her late husband, asks to sit on the search committee for its director, create and serve on a center advisory board, and hopes to announce the gift at commencement in six weeks.

At your table

1. Who needs to be in the room, and when?
2. Is the timeline possible, in any shape or form?
3. Who is responsible to manage the donor's interest in influence and involvement?
4. How is the $5M amount connected to costs, budget, and financial sustainability?
5. What can you say "yes" to today?
6. What has to go through faculty governance?
7. How do you keep her goodwill if the answer is "not like this", or within this timeframe?
8. What other key academic questions are critical to ask and resolve?

A composite case. Details are illustrative.

MAKING IT ROUTINE

An operating rhythm to adapt

How often	Who	Purpose
Every two weeks	Provost and chief advancement officer	Top prospects, emerging gifts, open questions
Monthly	Each dean and their development lead	Progress on that school's funding priorities
Each term	Faculty forum with advancement	Share donor interests; surface new ideas
Annually	President's cabinet	Refresh funding priorities from the academic plan

WHEN YOU GET HOME

Five commitments for chief academic officers

1. Put a standing meeting with your chief advancement officer on the calendar.
2. Name three academic priorities you would be proud to see funded, and why.
3. Ask each dean for one faculty partner ready to meet donors this year.
4. Agree in writing on who signs off on gifts that touch curriculum or faculty lines.
5. Close the loop: tell faculty what their time with donors produced.

KEEP LEARNING TOGETHER · CASE

Development for Deans and Academic Leaders

February 16–18, 2027 | Ft. Lauderdale, FL

CASE's standard of excellence in training for deans, provosts, presidents and other academic leaders with fundraising responsibility.

Most effective when academic and development colleagues attend together, as a pair or team.

Learning objectives

- Apply practical tools to your fundraising role
- Strengthen academic and development partnerships
- Design creative, effective development initiatives
- Sharpen interpersonal skills for strong relationships
- Use active listening and strategic thinking
- Bring collaboration strategies home to colleagues and faculty
- Build a successful donor pipeline

A Valuable and Meaningful Session

To prepare academic leaders for the changing landscape of advancement, this has become the standard of excellence in training for deans, presidents, provosts and other academic leaders with fundraising responsibility. Designed to engage learners, the program provides opportunities for sharing of best practices, reflection and networking and has been found most effective when academic and development colleagues attend together.

Details and upcoming sessions: case.org, Conferences and Training

THANK YOU

Questions and conversation

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Sources: CASE, Insights on Voluntary Support of Education 2025 (2026) · HEDS Consortium, 2022 Survey on Collaboration between Advancement and Academic Affairs · Carnegie Mellon University News (September 30, 2026) · Grenzebach Glier and Associates, "Leveraging Provosts as Key Advancement Partners" (2023)

Thank you for attending this session!