



# The Mid-Year Tune Up: Boosting Fundraising Results for FY23

*With results from a recent RNL Survey*

*Sarah Myksin, Rebecca Widmer and Brian Gawor*

# Today's Commentators



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# RNL's First Advancement Leaders Speak 2023

- Anonymous survey
- Conducted January 2022
- Multiple choice and open answer questions
- Higher education predominates
- Respondents had a high level of responsibility for direct solicitation
- 82% on a July 1 fiscal year
- Survey seems to match with other market intel, including CASE and AFP Fundraising Effectiveness Project

## 88 Responses

Public higher education, up to 5,000 enrollment	<b>4%</b>
Public higher education, 5,000 to 10,000 enrollment	<b>5%</b>
Public higher education, over 10,000 enrollment	<b>47%</b>
Private higher education, up to 5,000 enrollment	<b>24%</b>
Private higher education, 5,000 to 10,000 enrollment	<b>8%</b>
Private higher education, over 10,000 enrollment	<b>6%</b>
Charity with a budget of over \$1 million	<b>2%</b>
Charity with a budget of under \$1 million	<b>1%</b>
Healthcare organization	<b>4%</b>

# What are your priorities, and where is leadership?

*From your perspective, which of the following are a high priority for you as a fundraiser, and which are a high priority for your organization's top leadership? (check all that apply)*

	High Priority For Me	High Priority From leadership
Booking major gifts	20%	99%
Booking planned gifts	14%	95%
Increasing the number of donors giving on an annual basis	95%	63%
Growing total annual giving dollars	91%	68%
Growing budget relieving or unrestricted dollars	72%	77%
Growing alumni participation	89%	76%
Improving our communications across channels like mail, email and digital	95%	34%
Improving the donor experience	93%	50%
Making it easier to give	97%	28%
Recruiting/retaining key talent on our team	66%	74%
Providing gift officers with better tools to increase their effectiveness/ productivity	53%	65%



# What did we miss?

*“Retention and stewardship - they go hand-in-hand and are a top priority for me. Leadership focuses a lot on alumni (undergraduate) giving participation and I think there is a lot more giving opportunity beyond this group. “*

*“Better underlying and connected systems, e.g., Student Information System, Scholarship Accounting, mass communication platforms”*

*“Developing a consistent inclusive donor pipeline strategy”*

*“Shift to Recurring Gift asks rather than one time gifts”*

- Giving culture
- Young alumni
- Campaign readiness

# How are you trending?

*How do you stand, for the current fiscal year, in regard to key metrics?*

	We are up compared to last year this time	We are about even compared to last year this time	We are down compared to last year this time
Total fundraising (all gifts and commitments)	36%	22%	42%
Total annual giving dollars	25%	29%	46%
Total donor count	19%	20%	61%
Total alumni donor count (if applicable)	17%	25%	58%
Alumni participation (if applicable)	16%	35%	49%
Total unrestricted, budget-relieving dollars	26%	35%	38%



# Is anything up that surprises you?

*“Our total fundraising is up by about 20%.  
This is expected because we booked a major 7-  
digit gift in the early part of the year.  
Controlling for that, we're down about 25%.”*

- Non-alumni
- Campaign impact
- Day of giving
- Engagement centers

*“We had a challenge this fall for young  
alumni, and we are slightly up there, which is  
good news.”*

*“We are 6 percentage points ahead for current parents  
compared to this time last year. This is a happy surprise  
and a clue that our new strategies are working.”*

# Where are you down and it concerns you?

*“Undergraduate alumni donors - particularly those from 1980-2014.”*

*“Total donor count is most concerning to me, as my work involves pipeline development. Leadership is greatly concerned with total fundraising, followed closely by a healthy pipeline (and thus, donor count).”*

*“Cash attainment is significantly down, although this is concerning, our bottom line is still up. “*

- Major gifts
- Young alumni
- Gift amounts
- Direct mail response
- Down compared to remarkable campaign last year
- Pre-campaign push



# What do you think has impacted results?

*What things that going on in the world or within your organization do you believe have contributed most to where you stand on these key metrics?*

	This has impacted results a lot	This has impacted results some	This has not impacted results
Donor uncertainty about the economy, in general	41%	49%	10%
Inflation/increased costs for donors	39%	53%	8%
The stock market	37%	51%	13%
Staff transitions or turnover	36%	39%	25%
Rising interest rates	27%	52%	21%
Leadership transition at our organization or institution	16%	29%	54%
Major changes or layoffs at key employers for our donors/alumni	11%	39%	50%
Public opinion about higher education	9%	45%	45%
Organizational or campus controversy	8%	39%	53%
Other causes are attracting our donors	8%	55%	37%
Changes in event strategy this year or in recent years	6%	43%	51%
Public opinion about our cause area	5%	20%	75%



# What are your key challenges?

- Young alumni, the next generation
- Systems and data flow
- Understaffing
- Staff not organized around goals
- Low phone contact
- Consistent leadership messaging
- Turnover/interim leadership
- Inflation and uncertainty
- Admission changes (legacy)

*“We do not have a budget for strategic communications, which is like trying to grow crops without water.”*

*“As a public university, our salaries are not competitive enough to attract and retain talent. Candidates are also looking for fully remote work, which we cannot typically offer.”*

# What do you believe holds the biggest promise?

- Personalization
- AI, digital fundraising
- New hiring and onboarding for staff
- Increasing reach
- 1:1 contact
- Giving Day
- Reducing friction
- Recurring Giving
- Giving-related swag

*“Also, improving our stewardship of annual donors so that all donors feel they've been thanked in a personal/targeted way.”*

*“Promoting student stories, donor impact and funds that impact the majority of students on campus like the student emergency fund and food pantry.”*

# A changing relationship

*Before:*

Major Gifts  
↑  
Annual Giving

*Now:*

Major Gifts  Annual Giving

# The Omnichannel Impact:

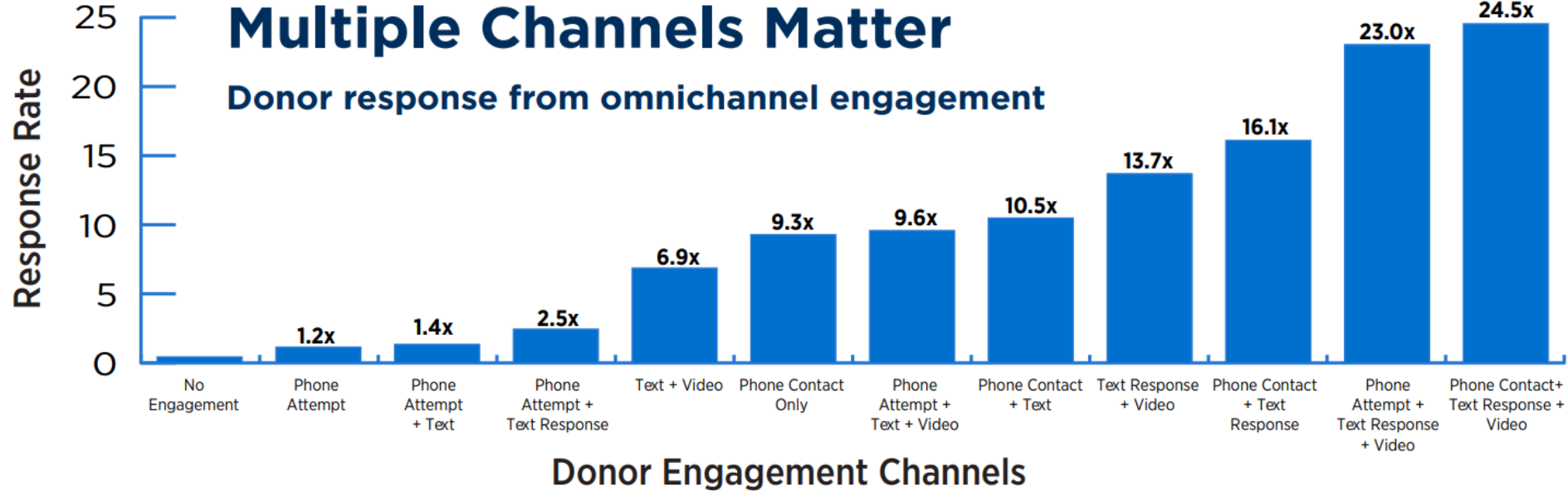
**25x**  
giving rate



*video + text response + call*

# Multiple Channels Matter

Donor response from omnichannel engagement



*RNL review of over 500,000 donor records in FY22. All contact prior to gift received.*

# Final Advice



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