



**2023 RNL NATIONAL
DONOR ENGAGEMENT
WORKSHOP** July 26-27

WELCOME

A person is seen from behind, sitting at a desk and using a laptop. The laptop screen displays a graphic of two hands holding a heart, with the word 'DONATE' and a 'CLICK' button visible. The background is a blurred office setting. The entire image has a blue tint.

Survey:

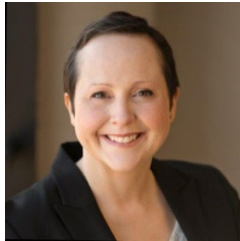
How many of your advancement shops have Alumni Volunteer programs?



Leveraging Your Volunteers

Activating, Motivating, and Containing Your Boards

Dayna Carpenter, CFRE



Senior Consultant
RNL

Gabrielle Kulcsar



**Executive Director of
Annual Giving Programs**
United States Naval Academy
Alumni Association and
Foundation

Daniel Quattrini



**Director of
Class Legacy Gifts**
United States Naval Academy
Alumni Association and
Foundation

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Current State of Alumni Engagement

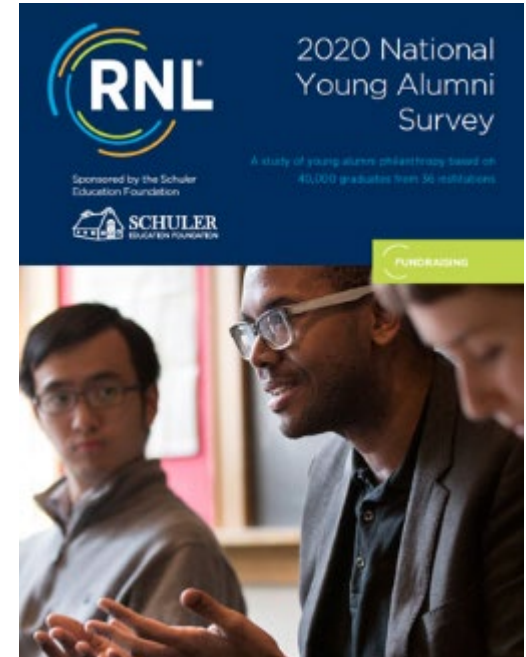
COVID & Impacts on Volunteerism

Quick Facts from the U.S. Census Bureau

- Nearly 51% of the U.S. population age 16 and over *informally* helped their neighbors between September 2020 and 2021 – at the height of the pandemic.
- 23% of people in that age group said they *formally* volunteered through an organization in the same period.
- Generation X (ages 41 to 56 in 2021) had the highest rate of all generations.
- Parents with children under 18 formally volunteered at a higher rate (30%) than those without children.
- Pandemic Volunteerism Drops – Women dropped by 8 percent and men by 5 percent.

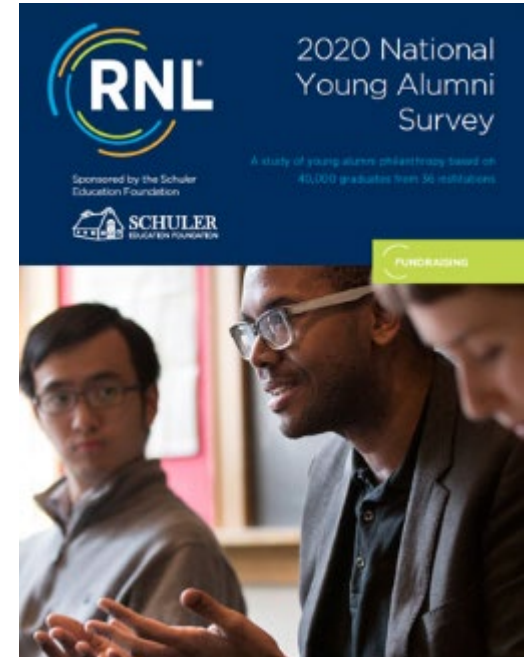
National Young Alumni Survey

- Young alumni frequently volunteer and donate
- Young alumni are focused on mission and impact
- Student satisfaction and current connectivity matter
- Potential Pipeline Problem



National Young Alumni Survey

- Of the 87% who reported volunteering or making financial contributions, 76% made charitable donations and 58% volunteered.
- Alumni who volunteer do so frequently. Fifty-nine percent of volunteers reported monthly engagements.
- When asked about volunteering specifically to their institution – the number fell significantly to only 16%.
- Young alumni are social. More than 88% of those who volunteered shared their activity with others.



National Young Alumni Survey

TOP 5 VOLUNTEER ACTIVITIES

CURRENTLY VOLUNTEER FOR THESE CAUSES/ORGANIZATIONS



WOULD LIKE TO VOLUNTEER FOR THESE CAUSES/ORGANIZATIONS⁴



CASE Statement on U.S. News & World Report Shift on College Ranking Methodology

May 24, 2023
Washington, DC

We are pleased to see that *U.S. News & World Report* has updated its 2024 Best Colleges methodology and removed alumni giving as a ranking indicator. We have **long held** that the percentage of undergraduate alumni who donate does not capture the depth and breadth of the relationships between all alumni and their alma mater, and have engaged with U.S. News in important dialogues on this issue throughout the years.

Advancement professionals treasure their relationships with alumni and engage with them in creative, strategic ways. Alumni are engaged through volunteerism, experiences and events, communications, and philanthropic support. Recognizing the need for a more comprehensive tool to track alumni activity, we created the Alumni Engagement Metrics framework in 2018 (now called **CASE Insights on Alumni Engagement**) to better capture the breadth of alumni engagement. In addition to engaging in philanthropy, which encompasses 19% of engagement between institutions and their alumni, the vast majority of engagements (81%) take other forms. Indeed, it is more

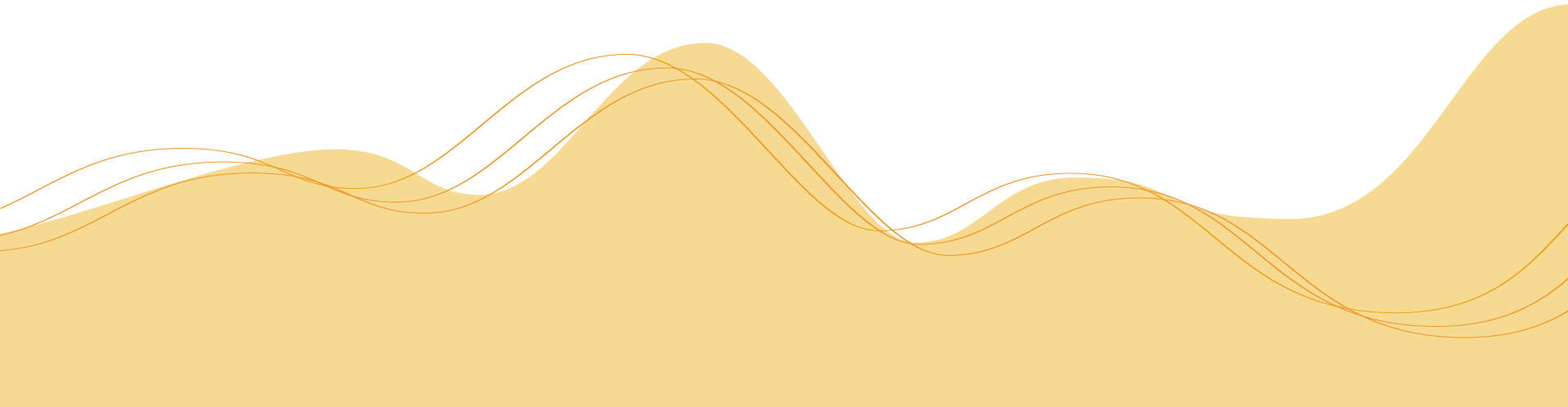
Survey:

How many of your programs will change your approach to engagement post-U.S. News APR Shift?

2

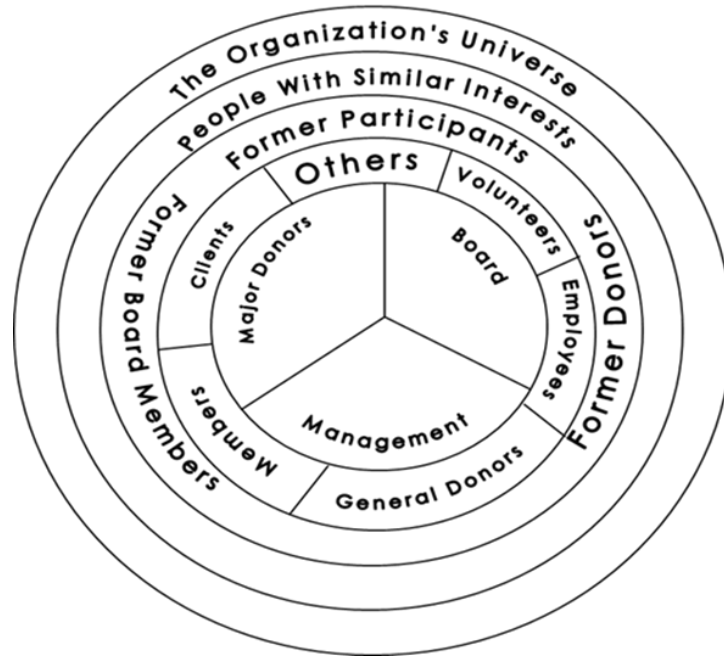


The Value in Activating Alumni Volunteers



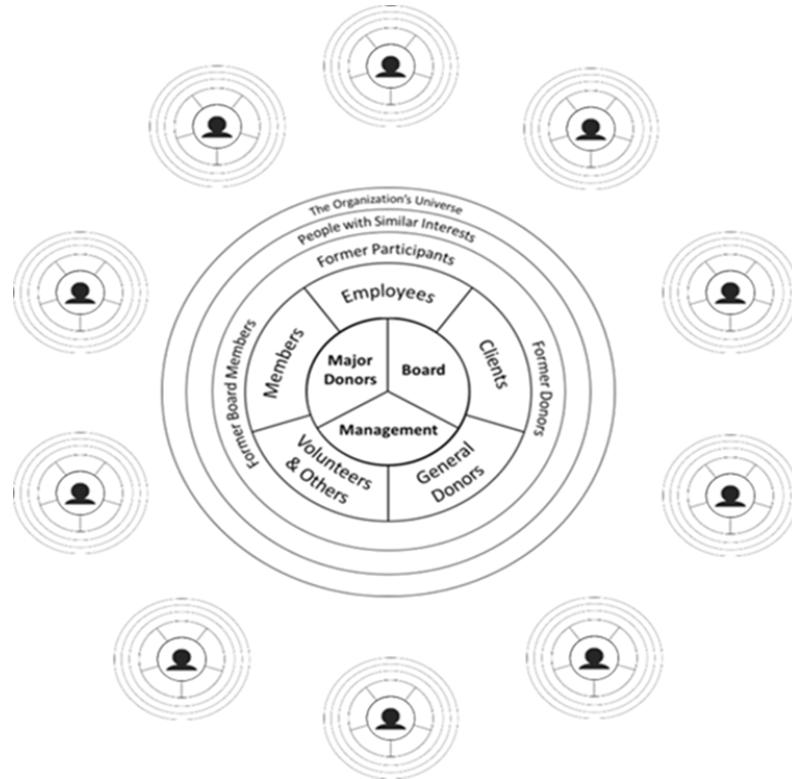
Leveraging Alumni Networks

Rosso's Concentric Circle Constituency Model



Leveraging Alumni Networks

Rosso's Concentric Circle Constituency Model



The Value of Engaging Alumni Volunteers



Acquiring New Donors



Growing Social Media Presence



Spreading Brand Recognition



Promoting and Hying Campus Programs and Events



Building Engagement & Donor Loyalty



Empowering Donors

The Value of Engaging Volunteers

The Power of Tapping into Peer-to-Peer Fundraising



Based on a two-way relationship



Volunteers and fundraising partners are authentic messengers



The message is more personal and credible from a peer



People are motivated by social norm giving

3



CASE STUDY

***USNA Alumni Association & Foundation's
Volunteer Involvement – Class Leadership***

Background on Class/Volunteer Structure



UNITED STATES NAVAL ACADEMY
ALUMNI ASSOCIATION AND FOUNDATION

- Foundation created in 1999 but fundraising existed earlier due to Class Leadership
- Starts as Midshipmen – strong class affinity/classes organized by company
- Classes create bylaws and elect leaders upon graduation
 - Get classmates to vote: President, Vice President, Treasurer, Secretary, Fundraising Chair
 - Alumni Association relationship gets this information into CRM for Foundation to communicate with Class Leaders
- Class leaders have a portal to communicate with Class on USNA.COM and now myusna.com

Class/Volunteer Structure - Fundraising



UNITED STATES NAVAL ACADEMY
ALUMNI ASSOCIATION AND FOUNDATION

- Reunion Giving is driven by Classes; they pick areas of support from menu of strategic needs
- First Gift (10 years) - > 20 years -> 30 years -> 40 years -> 50 years
 - Planning for "zero year" Reunion Giving begins in the year of their "5 year" reunions
 - Example: in 2023, the Class of 1988 begins to plan for their 40th Reunion Class Project (held in 2028)
- Class presidents are informed by Class Legacy programs on needs of the Academy/areas of greatest impact and enter into an MOU
- Other class volunteers are looped in and communicated with if needed to get Class on board
- Since 2014, Giving Challenge is a great rallying effort for class fundraising

GREAT CLASS CHALLENGE



GREAT CLASS



CHALLENGE

75 Classes. 5 Days. 1 Mission.

Activating Your Volunteers



UNITED STATES NAVAL ACADEMY
ALUMNI ASSOCIATION AND FOUNDATION

- Great Class Challenge is great example of leveraging Class Leaders and other volunteers
- Use them for campaign videos, social media, emails, text messages, ThankViews



Activating Your Volunteers



UNITED STATES NAVAL ACADEMY
ALUMNI ASSOCIATION AND FOUNDATION

- Board members/major gift donors
 - Matching Gifts during Challenges
- Councils
 - Utilize ThankView for thank you videos/request for support
- Class leaders
 - Emails from portal, social media, individual text messaging

Motivating Your Volunteers



UNITED STATES NAVAL ACADEMY
ALUMNI ASSOCIATION AND FOUNDATION

- Bragging rights!
 - Emphasis is on determining which class is the **GOAT**
 - Our classes are motivated by recognition; top classes in Challenge get recognition in our magazine, on social media, in e-mail, special thank you from CEO, EVP. Classes are competitive by nature
- Empower them with data
 - Involved class presidents want lists multiple times a day of who has given during the Challenge and they make personal outreach to those who have not yet given

From: "USNA Class of 1965" <replies@smtp.usna.com>
Subject: '65 NEWS - GREAT CLASS CHALLENGE
Date: May 10, 2023 at 9:06:48 AM EDT
To: "CAPT James L. Minderlein, USN (Ret.)" <jimm65@verizon.net>
Reply-To: "USNA Class of 1965" <jimm65@verizon.net>

Classmates,

Day 3 and overnight we still remain in first place by a mere 4.46 % despite having gained only one donor since my last report while '84 picked up an additional 16!

Yesterday I received my SHIPMATE and the 2022 Donor Report. I was pleased to see that '65 was first in participation rate for the year with 53.1%. The other good news is that our Link in the Chain Class was 8th with 36.55%. Not surprisingly, our competitor '84 was in 2nd place with 49.41%.

The Donor report shows that we had 208 donors. A rough accounting of that number shows that 109 of those classmates are current participants in this year's challenge. That means that there are a lot of potential donors left out there who could help us win this challenge for the 10th year in a row.

If you have not donated yet, please get onboard. Just go to www.navalacademychallenge.com and donate just \$10 and we can make this happen - AGAIN!

All the Best,

Jim

Containing Your Volunteers vs. Empowering Your Volunteers

- Volunteers with autonomy should be empowered – not contained
 - The message is more personal coming from a peer
 - Based on a two-way relationship vs. from a top-down institutional voice
 - Fundraising partners are authentic messengers
 - People are motivated by social norm giving
 - Volunteers have reach into non-active alumni and networks
- Provide resources and statistics, trust your strong leaders, and collaborate through challenges with partners

Pushing Out Data

The screenshot shows a web browser displaying the USNA Challenge website. At the top right, it reports "DONORS: 6,314" and "TOTAL DOLLARS: \$2,356,721". The navigation menu includes "LEADERBOARD", "DONOR WALL", "CHALLENGES", "FAQS", and "GET SOCIAL". Below the navigation is a banner for "BZ to our new Great Class of 1984! - the Class of 1984!". The main heading is "Graduation Year Leaderboard 2023".

Rank	Grad Year	Donors	Class Participation %
1	1984	472	51.70%
2	1965	269	48.29%
3	1978	341	39.88%
4	1987	358	37.88%
5	1967	198	29.38%
6	1974	202	27.79%
7	1956	41	20.50%

Pre-Call Letter



CAPT Kevin F. Stone, USNR (Ret)
President, USNA Class of 1976
c/o U.S. Naval Academy Foundation
274 Wood Road
Annapolis, MD 21402



LET'S SUPPORT THE
NEXT LINK IN OUR
UNBREAKABLE CHAIN.

[JOINT_MAIL_NAME]
[Address1]
[Address2]
[Address3]
[City], [State] [ZIP]

JOIN OUR 50TH REUNION CLASS PROJECT



front letterhead



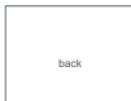
back

8.5" x 14" sheet
printed front/back



remit slip

front



back

8.5" x 7" sheet
printed front/back

#10 carrier envelope
closed face

#9 BRE

YES, KEVIN, I'LL JOIN OUR 50TH REUNION CLASS PROJECT!



I PLEDGE:

Quarterly payments of [QUARTERLY_AMOUNT]
over [NUMBER_YEARS] years for a total amount

OR:

A \$ _____ amount
to be paid: Annually Quarterly Monthly
over _____ year(s) beginning on _____ month/year

divided as I've instructed below to the following funds:

- _____ % Class of 1976 Experiential Leadership Fund (65760100/ Y22RNL76)
- _____ % Class of 1976 IPO Support (66760200/ Y22RNL76)
- _____ % Class of 1976 Athletic Excellence (68760100/ Y22RNL76)
- _____ % Class of 1976 AA&F Alumni Center Fund Support (72760100/ Y22RNL76)
- _____ % Naval Academy Fund (69000000/ Y22RNL76)

Appal Code: [SOL_CODE]

[FINDER_NUMBER]

UPDATE MY INFORMATION:

I want to receive updates on our upcoming reunion in 2026!

Cell Phone: _____

Home Phone: _____

Email: _____

Employer: _____

My (or my spouse's) employer's matching gift form is enclosed.

76



JOIN OUR 50TH REUNION CLASS PROJECT

LET'S HELP MIDSHIPMEN BECOME STRONG LINKS IN OUR UNBREAKABLE CHAIN.

Dear [Salutation],

After long and successful careers that started at the Naval Academy, it's time for the Class of 76 to help pave the way for the next generation of Midshipmen. Will you join me and help provide the Margin of Excellence with a gift to our 50th Reunion Class Project?

Our class representatives unanimously voted to support areas of the Academy we all care about:

Experiential Leadership transforms classroom theories into real-life leadership opportunities and prepares midshipmen to excel in leadership positions through practice and reflection.

International Naval Programs broaden students' horizons by helping them to step out of their comfort zones and give them different perspectives of the world they will enter as officers.

Athletic Excellence serves as an unrestricted annual fund for Navy Athletics, which provides Physical Mission resources to all 33 varsity programs and 16 club sports. More than 95% of Navy Athletics' annual budget is generated from external, non-government resources.

Alumni Center will offer premier facilities for staff, alumni, parents and friends and will provide the USNA community a physical space in which to celebrate and commemorate alumni success.

Naval Academy Fund is the most powerful and versatile way to support the Naval Academy and its alumni. It is the engine that fuels ALL Academy philanthropy, allows the Superintendent the flexibility to meet the emerging needs of the Academy, and provides support for Alumni Association programs.

Please join me for our final Class Project with a quarterly [QUARTERLY_AMOUNT] pledge for the next [NUMBER_YEARS] years, totaling [TOTAL_AMOUNT].

Thank you for contributing to our lasting legacy at the Academy. Go Navy!



Kevin F. Stone

CAPT Kevin F. Stone, USNR (Ret)
President, USNA Class of 1976




For more details, like how to be recognized in the new Alumni Center's, here is a link to the presentation I sent you: www.usna.edu/plav/uhdler/ and here is a link to the video I sent you: www.bit.ly/76campaign

U.S. Service is the touchstone of our unbreakable chain. By investing in the next link of leaders, we advance the Navy and the Marines; we serve our nation; and we show support to those following in our footsteps.



Pre-Call Letter



JOIN OUR 50TH REUNION CLASS PROJECT

LET'S HELP MIDSHIPMEN BECOME STRONG LINKS IN OUR UNBREAKABLE CHAIN.

Dear [Salutation],


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Our class representatives unanimously voted to support areas of the Academy we all care about:

- Experiential Leadership** transforms classroom theories into real-life leadership opportunities and prepares midshipmen to excel in leadership positions through practice and reflection.
- International Naval Programs** breaks students' horizons by helping them to step out of their comfort zones and give them different perspectives of the world they will enter as officers.
- Athletic Excellence** serves as an unrestricted annual fund for Navy Athletics, which provides Physical Mission resources to all 33 varsity programs and 16 club sports. More than 95% of Navy Athletics' annual budget is generated from external, non-government resources.
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Please join me for our final Class Project with a quarterly (QUARTERLY_AMOUNT) pledge for the next (NUMBER_YEARS) years, totaling (TOTAL_AMOUNT).

Thank you for contributing to our lasting legacy at the Academy. Go Navy!



CAPT Kevin F. Stone, USNR (Ret)
President, USNA Class of 1976


P.S. Service is the touchstone of our unbreakable chain. **By investing in the next link of leaders**, we advance the Navy and the Marines; we serve our nation; and we show support to those following in our footsteps.



FRONT

THE CLASS OF 1976'S LINKS IN THE ACADEMY'S UNBREAKABLE CHAIN

THE '76 LINK WAS FORGED AT USNA ...



... and polished in our retirement years through successive reunions, taglites, half-way dinners, and celebrations.

... hardened by years of service from the Cold War through the global war on terror

... and we will always honor our twelve fallen classmates.

The 34th Company during *Jeep Week*, 1976, with me in the middle.

Now the '76 link has the opportunity to show its greatest strength; **its legacy gift for the midshipmen to come.** Please join me and your classmates in giving to our 50th Reunion Class Project. www.usna.com/give/1976

YES, KEVIN, I'LL JOIN OUR 50TH REUNION CLASS PROJECT!

I PLEDGE:

Quarterly payments of (QUARTERLY_AMOUNT) over (NUMBER_YEARS) years for a total amount of (TOTAL_AMOUNT), following my class

leadership's recommendation:

- 20% Experiential Leadership
- 26% International Naval Programs (INP)
- 25% Athletic Excellence
- 8% Alumni Center
- 15% Naval Academy Fund

If you have recently made a gift, please accept our thanks.

OR:

A \$ _____ amount to be paid: Annually Quarterly Monthly over _____ year(s) beginning on _____ month/year

divided as I've instructed below to the following funds:

- _____ % Class of 1976 Experiential Leadership Fund (65760100/Y22RNL76)
- _____ % Class of 1976 INP Support (66760200/Y22RNL76)
- _____ % Class of 1976 Athletic Excellence (68760300/Y22RNL76)
- _____ % Class of 1976 AAKF Alumni Center Fund Support (72760400/Y22RNL76)
- _____ % Naval Academy Fund (69000000/Y22RNL76)

Appel Code: (SOL_CODE)

(FINDER_NUMBER)



I AM MAKING MY PAYMENT BY:

Check, enclosed and payable to **Naval Academy Foundation**

Visa Mastercard American Express Discover

Signature: _____

Name on Card: _____

Card Number: _____

Exp. Date: ____/____/____

UPDATE MY INFORMATION:

I want to receive updates on our upcoming reunion in 2026!

Cell Phone: _____

Home Phone: _____

Email: _____

Employer: _____

My (or my spouse's) employer's matching gift form is enclosed.

AVOID THE DELAY OF MAILING AND START YOUR IMPACT IMMEDIATELY BY GIVING ONLINE: USNA.COM/GIVE/1976



FRONT



PRESIDENT'S CIRCLE

The premier giving society recognizing all donors who contribute \$2,500 or more within a calendar year. For more information, please call 410.295.4138.

MATCHING GIFTS

Because the impact of your gift by requesting a matching gift form from your employer. Spouse and retiree gifts may also be eligible. Contact your Human Resources Office or the Foundation at 410.295.4116.

GIFTS OF SECURITIES OR ALLOTMENTS

To give notification of a stock gift prior to transfer or request information about giving through allotment, please call 410.295.4115.

LEGACY GIFT PLANNING

To learn more about the Foundation's Gift Planning services and the Robert Means Thompson Society, please call 410.295.4117.

A woman with curly hair is smiling and looking towards the camera while sitting at a desk with a laptop. In the background, other people are working in an office environment. The entire image has a blue tint.

Questions?

Thank you!

Gabrielle.Kulcsar@usna.com

Dan.Quattrini@usna.com

Dayna.Carpenter@ruffalonl.com



CASE Definition – Volunteer Engagement

“Volunteer engagement considers formal volunteer roles. These include, but are not limited to . . .

- *Serving on a governing or advisory board*
- *Recruiting students*
- *Serving as career mentors*
- *Doing public advocacy*
- *Volunteer Speaking*