



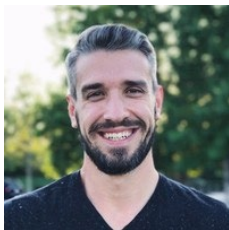
**2023 RNL NATIONAL
DONOR ENGAGEMENT
WORKSHOP** July 26-27

WELCOME



Trends in Boosting Leadership or Mid-Level Giving

Nick Herman



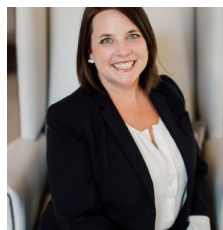
**RNL, Vice President &
Consultant,**
RNL

Kathleen Howley



Senior Consultant,
RNL

Brittany Kicklighter

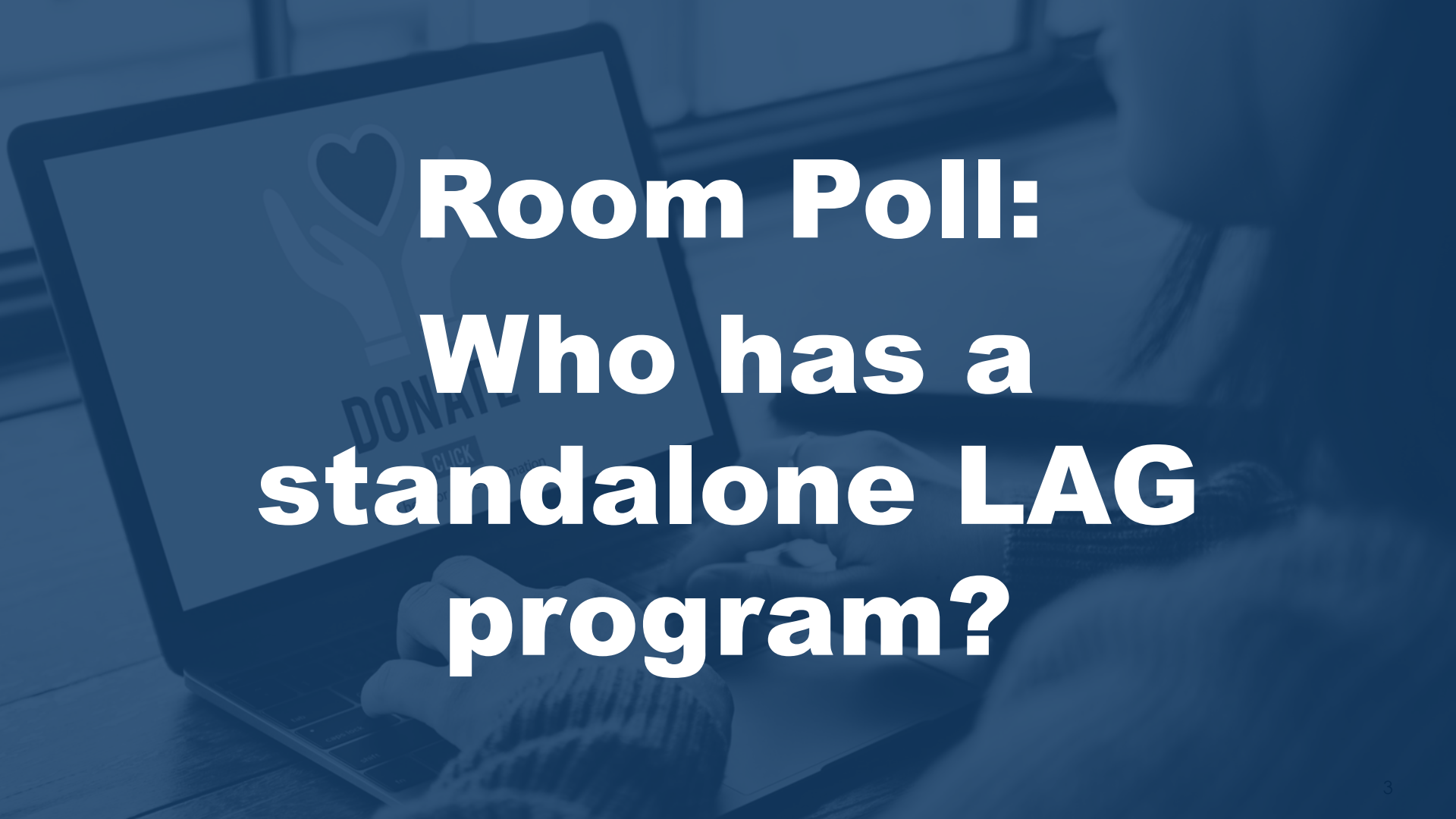


**Director of Leadership
Giving Development,**
UNC Charlotte


Sharon Horinka



**Assoc. Director of
Annual Giving & Donor
Experience,**
UNC Charlotte

The background is a dark blue-tinted photograph of a person's hands typing on a laptop keyboard. On the laptop screen, there is a graphic of a hand holding a heart, with the word 'DONATE' and a 'CLICK' button visible. The text is overlaid in large, white, bold font.

**Room Poll:
Who has a
standalone LAG
program?**

A person is shown from the side, wearing a dark sweater, using a laptop. The laptop screen displays a graphic of two hands holding a heart, with the text 'DONATE' and 'CLICK' overlaid. Below the hands, it says 'click here for more information'. The entire image has a blue tint and a semi-transparent white text overlay.

**And, who's
looking to build
one?**

1



Pipeline Development National Trends

Major Gifts Take Time - and Cultivation

Activity prior to the first \$25,000+ gift

**11.9
years**

time lapsed
from first gift

**7.3
years**

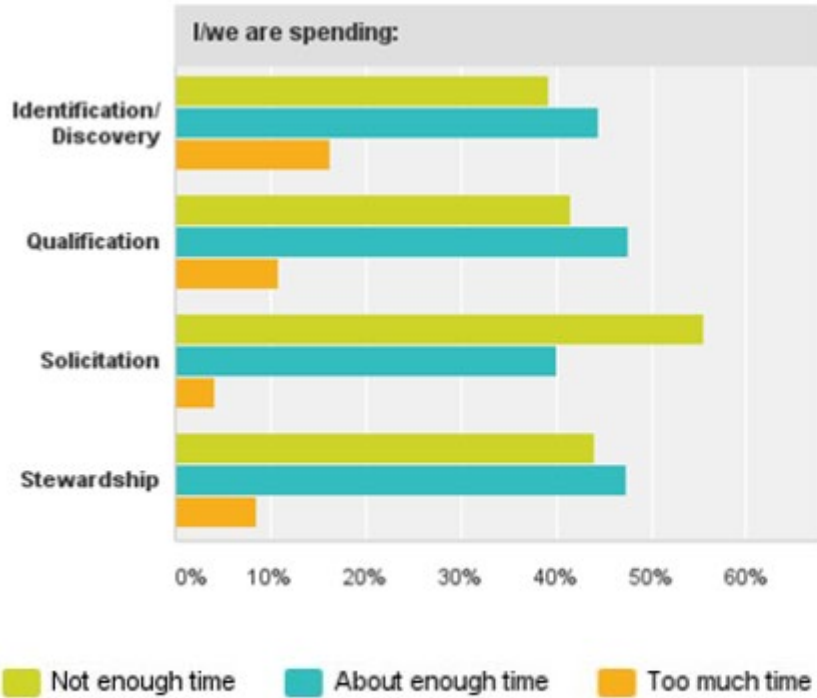
average years
giving

**13.8
gifts**

average number
of gifts

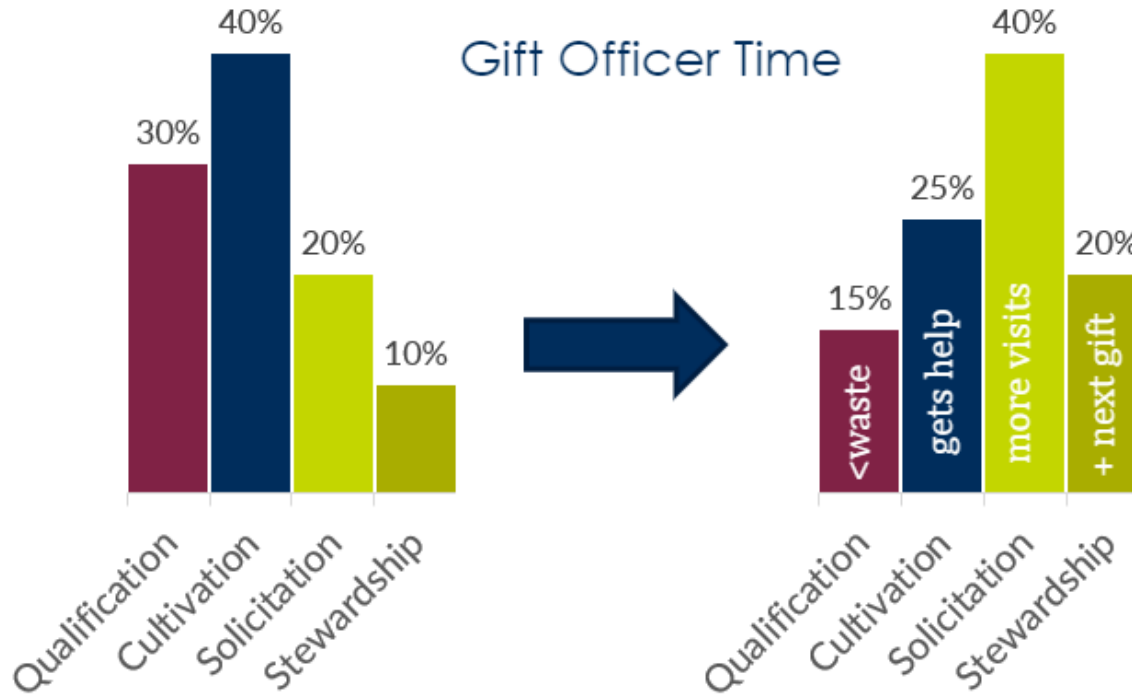
Source: RNL analysis of 3,044 major givers

MGO Time Management & Reality



55%
of gift officers
feel they don't
spend enough
time in solicitation

Officer Time Management & Reality



Result:
2x
gifts.

Annual Giving is Pipeline Development

*Leadership Annual Giving builds
the middle of the hourglass...*

from Annual Giving

to Major Gifts



2



The Stage and Case for LAG at Charlotte

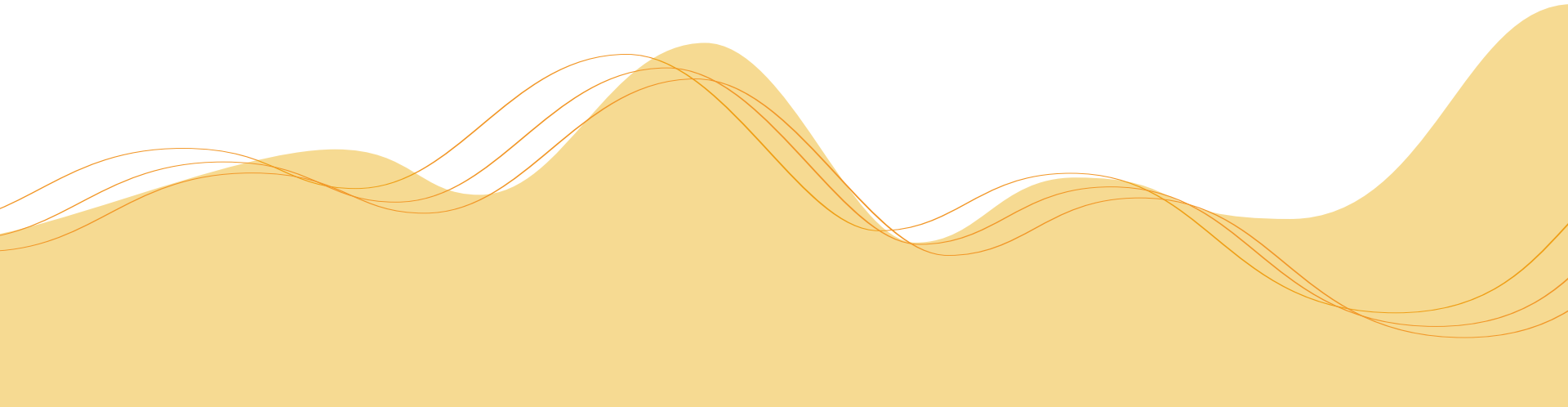
The “Why” at UNC Charlotte

- What were the catalysts for beginning to focus on this section of the pipeline?
- What internal factors played a role in determining your initial strategy? (staffing, database demographics, etc.)
- What were the initial goals for the program – what did UNC Charlotte want to accomplish?

3



Where & How Did You Start?



A person is shown from behind, sitting at a desk and using a laptop. The laptop screen displays a website with a heart icon and the word 'DONATE' in large letters. The background is a blurred office setting. The entire image has a blue tint.

Room Poll:
Do your “lapsed donors” know they are “lapsed?”

Pathway to Leadership Gifts

- Many leadership givers are **intermittent**.
- Many are **multi-gift annual givers**.
- Many are giving to **multiple, potentially untracked** buckets (athletics, arts, associated organizations).
- Pulling a list of “last three years in a row” **only gets you so far**.

Leadership Level	Average Years Elapsed	Average Giving Years	Average Gifts
\$1,000	7.1	3.5	8.0
\$5,000	9.5	4.9	10.6
\$10,00	10.6	5.6	11.8

RNL review of 45,371 leadership donors at 10 institutions in 2022.

Getting Started

- How did you determine your target prospects/parameters?
- How did you action engagement? Channels, staff, tools?
- What challenges did you run into in Year 1?

4



Refining your strategy

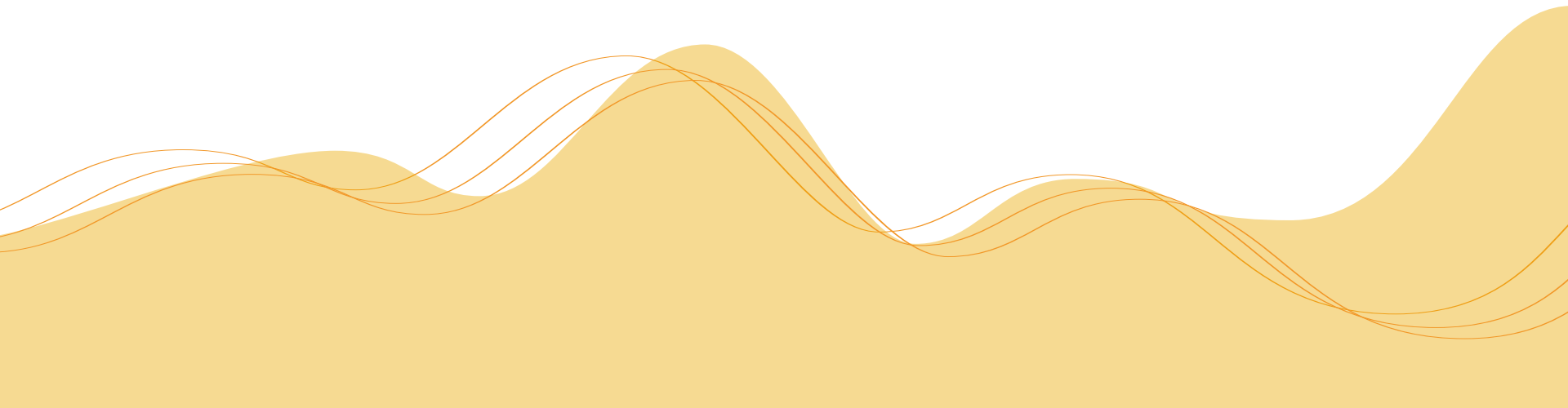
Adjusting & Fine-tuning

- How did the first year go?
- What revisions to process came after that first year?
- Have your goals changed?
- What metrics did you employ to measure outcomes?
- Generally, who have turned out to be some of the program's best prospects?
- Other “surprises” along the way?

5



The Way Forward



FY24 & Beyond

- Has LAG replaced your Engagement Center?
- What are UNC- Charlotte's goals with the new system?
- Do you have your own goals for this year?
- How has it changed the nature of the program?



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!

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