# RNL Regional Workshop Series Columbus October 24

Transforming Donor Engagement | Fundraising



# Workshop Welcome

Greta Daniels, CFRE Senior Vice President Scott Kruger Vice President and Consultant Autumn Horton Senior Consultant

# Housekeeping items

#### Introductions

- Name
- Title
- Institution

### Agenda Review

### Round Table Lunch Topics

- Emerging Trends in Philanthropy (continued)
- Hyper-Personalized Donor Engagement
- Mining Your Annual Giving Program for Major Prospects

### Wi-Fi Network Info On Tables

# Goals for today

3

Connect with other university leaders

2 We want you to leave today armed with additional context and research focused on:

- National philanthropic, financial, economic trends that impact giving
- Key characteristics of high-quality donor pipeline building strategies
- Successful strategies that are moving the needle for RNL partners
- We want you to leave today energized with at least one actionable idea you take back to campus

# Today's Agenda





As Seen on Campus: Tactical Recommendations From Your Peers for Donor Acquisition, Retention, Giving Days, Digital Engagement, and More







# Emerging Trends in Philanthropy

# **Today's Themes**

**Emerging Trends** 



#### ECONOMIC BEHAVIORAL TECHNOLOGICAL MYTHICAL



# Economic

## Wall of Worry





10

# Key market forces

- Total giving declined in 2022, 3.4% in current dollars down 10.5% after adjusting for inflation vs. \$516.65 billion in 2021.
- A 19.4% drop in the S&P 500 (-25.4% adjusted for inflation)
- Flat growth in disposable personal income (-0.1% in current dollars or -7.5% adjusted for inflation)
- 40-year-high inflation rate of 8.0%

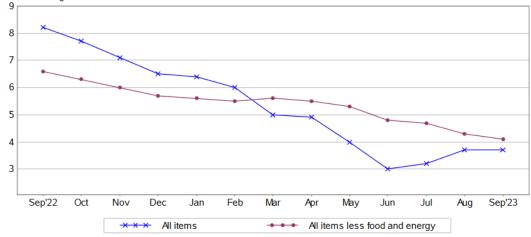
RN

• The S&P 500 experienced steep declines toward the end of the year.



## The economy is...

### Getting better? A little?



- Chart 2. 12-month percent change in CPI for All Urban Consumers (CPI-U), not seasonally adjusted, Sep. 2022 Sep. 2023 Percent change
- **Unemployment** still at historic low.
- Wages are relatively **stagnant**.
- Loan cancellation and payment pause ends, but SAVE plan helps lower income payers.
- Remember, CPI is national, and weighted heavily by major commodities.
- Consumer confidence is **low.**



### Bob Dimeo, CEO and Founder Fiducient Advisors:

"Uncertainty is more of a momentum killer than a truly bad economic report." QUESTIONS TO CONSIDER How have economic trends impacted your work?

Are extenuating economic circumstances taken into account when setting goals?

# Behavioral



#### **Giving by Individuals**

+ declined by 6.4% over 2021



increased 2.5% over 2021

**9%** \$45.60 billion

#### **Giving by Bequest**

increased 2.3% over 2021



↑ increased 3.4% over 2021

While **giving by individuals** continues to grow over time, it has fallen below 70% of all giving for the fourth consecutive year.

Foundations are growing as a share of giving over time. In 2022, over \$1 out of every \$5 that went to charity came from a foundation.

> \*All figures on this infographic are reported in current dollars unless otherwise noted. Inflation was especially high in 2022, at 8.0%, and results may differ when adjusted for inflation. Learn more in the chapters.

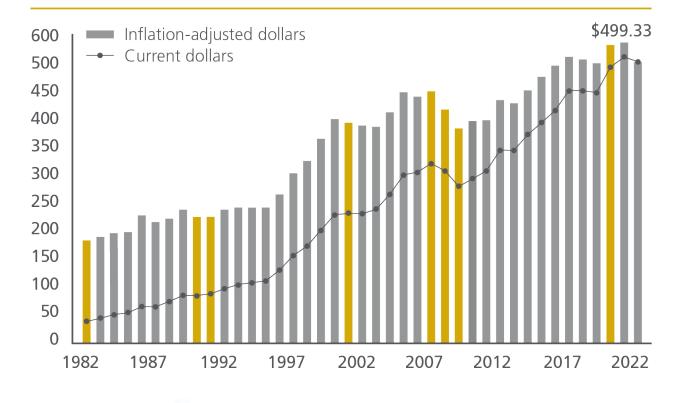


# Total giving, 1982-2022

(in billions of dollars)

Giving USA<sup>™</sup>

Giving Institute<sup>\*\*</sup>





Researched and written by III IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

## **Trust on Decline Across Organizations**

#### Confidence/trust in higher education fell from 57% in 2015 to 36% in 2023.

Gallup Education; July 11, 2023

# Trust in nonprofits is also in decline.

- Gen Z trusts nonprofits half as much as Baby Boomers



Chronicle of Philanthropy; Aug 2, 2022

#### **Recent Trend in Americans' Confidence in Institutions**

% Great deal/Quite a lot of confidence in each institution

	June 1-July 5, 2021	June 1-20, 2022	June 1-22, 2023
	%	%	%
Small business	70	68	65
The military	69	64	60
The police	51	45	43
The medical system	44	38	34
The church or organized religion	37	31	32
The U.S. Supreme Court	36	25	27
Banks	33	27	26
The public schools	32	28	26
The presidency	38	23	26
Large technology companies	29	26	26
Organized labor	28	28	25
Newspapers	21	16	18
The criminal justice system	20	14	17
Television news	16	11	14
Big business	18	14	14
Congress	12	7	8

Get the data • Download image

GALLUP

# A shift toward strategic, social giving

- Grants from donor advised funds to qualified charities totaled an estimated \$45.74 billion in 2020, growing by 27.3 percent.
- In 2022, foundation giving was one of few methods up in Giving USA tracking, due largely to DAFs and Family Foundations.
- **Giving circles** have tripled in the last decade, and will reach 3,000+ by 2025



Are you adapting to new giving preferences?



Sources: National Philanthropic Trust, Lily School of Philanthropy, Grapevine and Philanthropy Together.

## **State of Advancement**

### So, how's that young alumni giving?

#### Figure 7: Alumni Support and Participation by Graduation Cohort, 2022

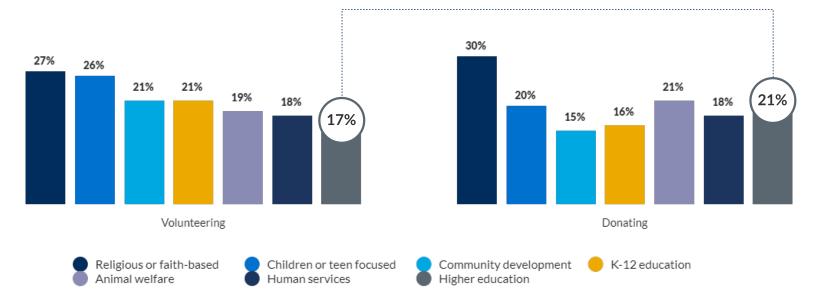
	Percentage of \$	Percentage Who Gave
0-5 Years Out	0.6%	6.4%
6-10 Years Out	0.9%	5.3%
11–20 Years Out	4.7%	5.5%
21-30 Years Out	8.1%	8.1%
31-40 Years Out	20.8%	10.1%
41-50 Years Out	22.2%	12.5%
50+	37.8%	14.6%
Non-Degreed	5.0%	2.1%
N = 200	CASE VSE 2023	

**3/4** of young alumni give to some charity.

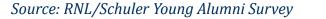
> RNL Surveys, Pew and Gallup Data



# Looking ahead: Where do alumni <u>plan</u> to volunteer and donate?

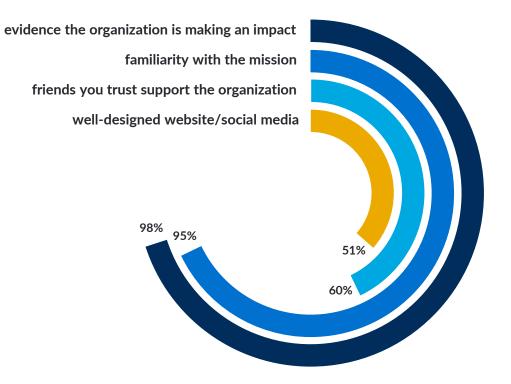


Higher ed ranks #7 when it comes to volunteering and is tied at #2 for donating





## What motivates alumni to donate?





Source: RNL/Schuler Young Alumni Survey

QUESTIONS TO CONSIDER What new behavioral trends have you observed at your organization?

# Fundraising is changing

**Before:** 

# LOYALTY BRAND TRADITION PARTICIPATION



IMPACT LIFESTYLE CONNECTION INVESTMENT

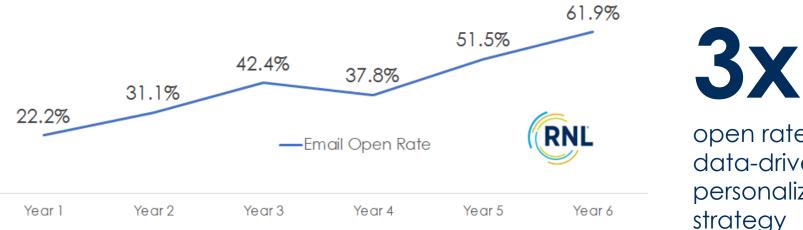


# Technological



## Personalization Matters

#### Impact: RNL QuadMail Email Personalization Strategy



open rates using data-driven personalization

4 educational institutions, with a total of 49.4M emails sent. Combined statistics over group, platform partners varied in total years usage.



QUESTION TO CONSIDER How is your organization utilizing Al to amplify fundraising work/success?

What are the opportunities/risks?

# **Omnichannel coordination make a difference**



Donor Engagement Channels

RNL Analysis of 506,050 constituents during 2022, with engagement completed in the RNL Engage platform and integrated technologies across phone call attempts, completed calls, texting and response, along with views of video messaging.





**QUESTION TO CONSIDER** What new tools/technology are you using (or want to use) to improve your donor engagement efforts?

# Mythical

**Debunking the** myths that are preventing you from moving the fundraising and donor engagement needles today



### Myth: Gender doesn't matter when it comes to fundraising

85% of philanthropic decisions in high-net-worth households are made by womenBut occupy only 28% of board seats in US universities and colleges

Women control 85% of consumer spending the US, make 70% of the financial decisions for their families and control \$36T in total wealth

Single women are more likely than similarly situated single men to give to charity

Women give significantly more than similarly situated men at almost all income levels

Women give more when it aligns with their values, they are engaged as volunteers/board members, or in response to unexpected/emergent needs



Source information: Association of Governing Boards; Increasing Diversity on the Boards of Colleges and Universities Gender Matters: A Guide to Growing Women's Philanthropy

# Myth: Millennials and Gen Z don't have philanthropic capacity or power

39% Soung alumni give \$500 or more

annually

Four out of five younger affluent households (underage of 42) gave to charity in 2022.

• Two and half times more likely than older donors to cite climate change as one of top three causes

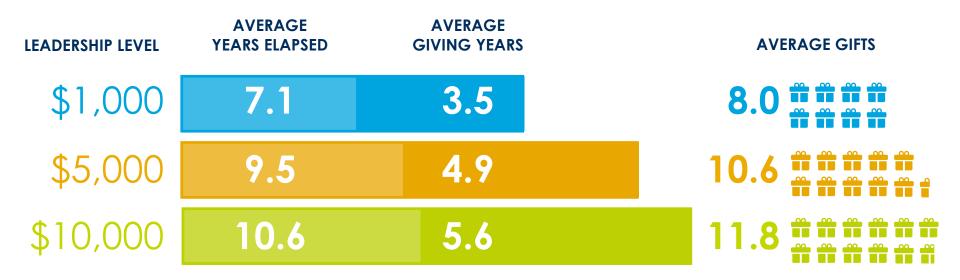
81% of all Millennial and Gen Z Americans gave to charity in 2021

Millennials and Gen Z make up more than  $\frac{1}{2}$  of living US population

\$73 Trillion will be transferred to this group in next 10-20 years

# Myth: YoY Loyalty is the Best Indicator for Leadership or Major Giving Potential

Average activity **before** a leadership gift:





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

# QUESTION TO CONSIDER What other myths have been or need to be debunked?

# Myth: Our leadership is stable and will see vision/campaign to the finish line

1/3 of University Presidents have turned over in last four years



36% of all CBOs expect their financial condition to worsen over next year



Senior advancement leaders turn over on 3-5 year average





Leadership Giving: Cultivating Major Donors at Scale

### **Redefining our Focus**



**QUESTIONS TO CONSIDER** Is your institution implementing new metrics that look at leadership level giving or pipeline movement?

What do they look like?

### Today's Landscape

State of Donor Decline

over the LAST DECADE 70% of institutions experienced a decline in donor counts, with an average loss of 30%



EDUCATION GIVING DOWN

**3.6%** since the postpandemic **record highs**  SINCE THE PANDEMIC 80% of institutions remain down on donors

Source: CASE VSE Data

### What does your donor base look like?





### The Donor Pipeline is Running Dry...

The problem with raising more money from fewer donors.



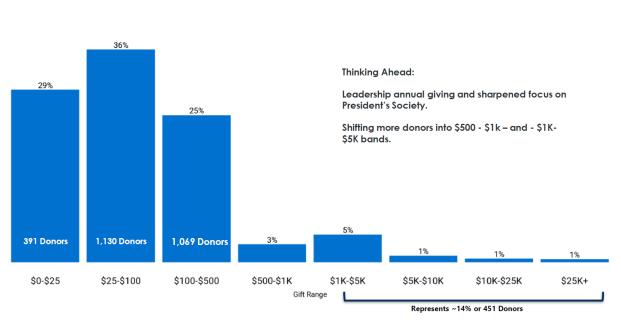


### What do we mean when we say "pipeline"

### The Missing Mid-Level Donors

 $\mathbf{\nabla}$ 

RNL 360 Sample Analysis



### Distribution of FY21 Gifts across Gift Ranges

**QUESTIONS TO CONSIDER** How is "leadership" giving defined at your institution?

How does leadership level giving factor into goals, planning, staffing and fundraising strategy?

### Leadership Giving – The Moving Target

# Where does leadership live?

### What does "leadership gift" mean?

Who "owns" a leadership gift, and when?





### **Building the Foundation**

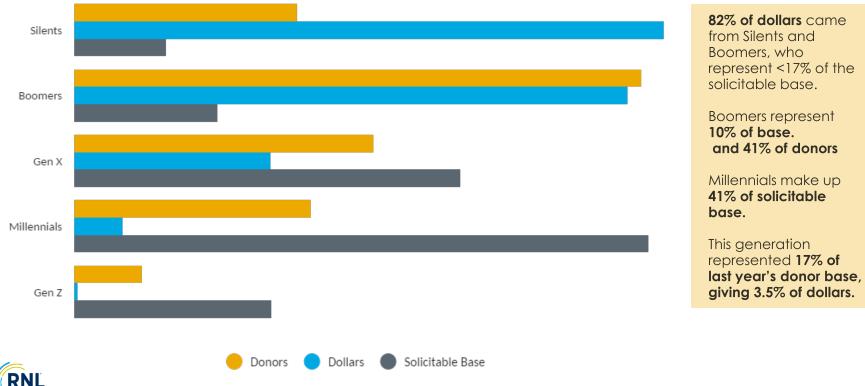
Leadership-level annual gifts serve as the cornerstone of any successful fundraising strategic plan

- Substantial Annual Financial Support
- Flexibility and Unrestricted Funding
- Diversification of Funding
- Demonstrates Commitment

- Fundraising Momentum for Appeals
- Long-term Engagement
- Strengthening Relationships



### **Generational Shifts** *Percentage of donors, dollars, and solicitable base*



### Gen Z and Millennials will Change Philanthropy

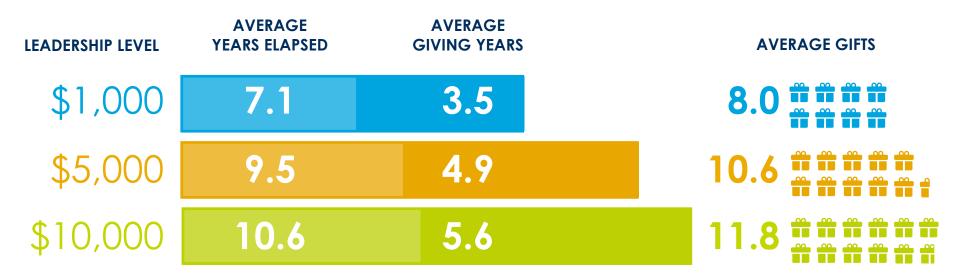
# 40% ~

### Increase in giving since 2016



### Where do leadership gifts come from?

### Average activity **before** a leadership gift:





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

**QUESTIONS TO CONSIDER** What challenges has your organization encountered with establishing or growing a leadership giving program?



### Staff Turnover

# Reporting on performance

Inadequate Tech





Annual giving is (or should be) pipeline development.

Big gifts don't grow on trees.

While we want to accelerate the path to major giving, it takes time and investment.



### How to Maximize Leadership Gifts

- Tools to **engage donors at scale**, effectively.
- Integration, and friction reduction for gift officers.
- Using smart data to identify donors who are ready, now.
- **Carefully tracking** of productivity and impact.





## How RNLEngage Transforms Leadership Gift Outreach



**B**aylor University

- **3 Leadership Officers**
- 3,570 Touch Points
- 43 Visits Scheduled



Result: **30%** pool movement



within 90 days



### Priming the Pump for Sustainable Giving **Challenges Opportunities**

- The pipeline is running dry. ٠
- More donations, fewer donors.
- Missing middle between annual and major giving.
- Missing out on Millennial and Gen Z donations.
- Too much data.
- Not enough people or time. ۲

- Millennials and Gen Z are a significant giving force.
- The data is there to guide us with • new, intentional campaigns.
- Peers are paving the way with • new strategies.
- New solutions and platforms will • allow us to scale up cultivation.

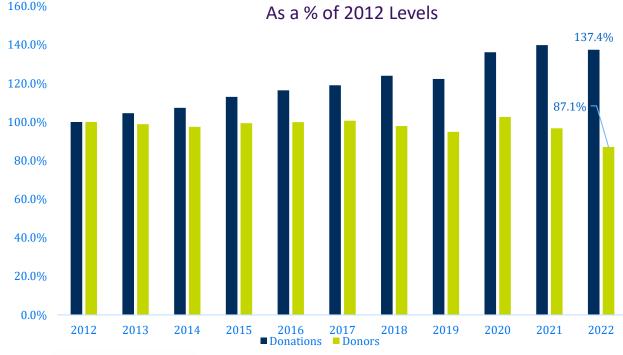




# As Seen on Campus

Tactical Recommendations From Your Peers for Donor Acquisition, Retention, Giving Days, Digital Engagement, and More

### Long Term Trend in Dollars and Donors



⇒FUNDRA SING EFFECTIV NESS

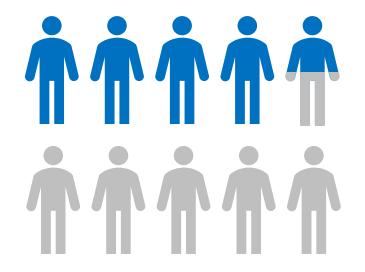
#### **Key Takeaways**

There is a long-term trend of fewer donors donating more money

#### **Contributing Factors:**

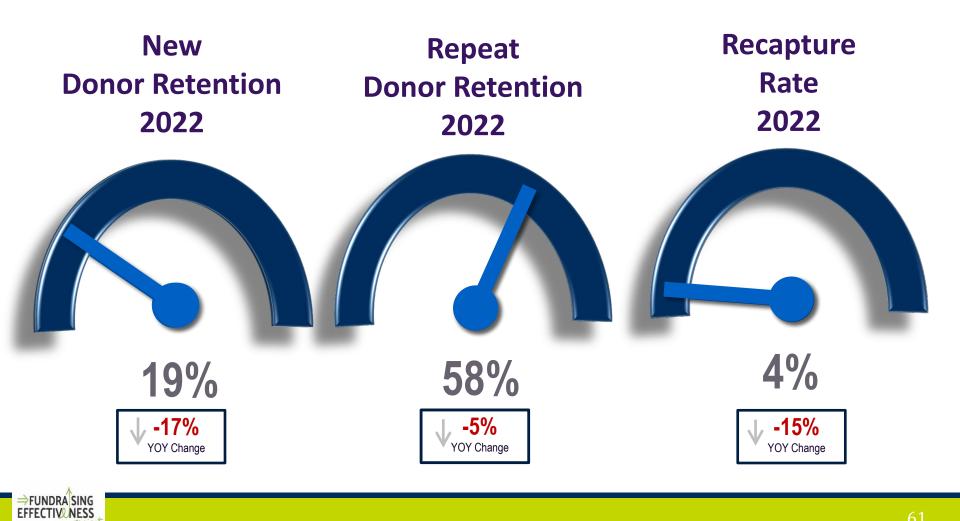
- Continued widening of the wealth gap
- Continued Expansion of the number of nonprofits
- Expansion of ways to give
- Cost to acquire and retain donors has risen

## **2022 Overall Donor Retention**









QUESTIONS TO CONSIDER How do we move beyond the single-year ask, gift, thank and repeat cycle?

### The start of something that lasts

### Ask to acquire <u>and</u> retain



### Set the Expectation of Retention

Does the ask seem like a one-and-done or will giving be a long-term, important relationship?

Are your ask amounts meaningful and not under-estimating the prospect?



### Mix up and Multiply the Ask Strategy

Use natural retention builders like giving days/challenges, anniversary outreach, loyalty societies, and recurring/sustaining gifts. 3

### Steward Quickly and Often

Prepare to <u>quickly</u> celebrate and acknowledge gifts in meaningful and consistent ways.



### **Engagement + Urgency**





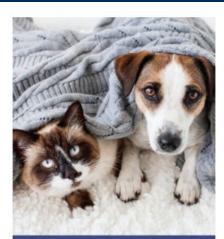


#### TRANSFORM TWICE AS MANY LIVES

YOUR GIFT

MATCHED







#### TRANSFORM TWICE AS MANY LIVES

YOUR GIFT MATCHED





#### TOGETHER, WE TRANSFORM LIVES

**Double Your Impact** 

#### ##SALUTATION##,

Lorem Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna elit tempor aliqua.

Nec sagittis aliquam malesuada bibendum arcu vitae elementum curabitur vitae. Mauris commodo quis imperdiet massa tincidunt.

Lorem donec massa sapien labore maura faucibus et molestie.

Auctor eu augue ut lectus arcu bibendum. Nulla porttitor massa id peque aliquam **Give Now** 



Tag, You're It!

Take a picture of you with your pet and tag us at @dumbfriendsleague on Facebook and Instagram.

While you're there, follow **@nellieethetripod** on to meet Nelliee and Courtnee, one of the sweetest matches we've ever made!

f 🛛 🗞



2080 S. Quebec St.

### ...wrapped in impact

### Last Year, the Dumb Friends League...



Changed the lives of **46,000** animals and even more people who love them.



Planned our **2023** legislative agenda focusing on the veterinary workforce crisis, today's biggest threat to animal welfare.



RNL





#### THANK YOU for Transforming Animals' Lives

Your partnership enables our success

#### {Salutation},

Your generosity to the Dumb Friends League makes the world a better place through healing and protecting animals, and by bringing pets and people together. Thank you for your trust and support last year — gifts from partners like you are essential to our mission, and we could not do this work without you.

I am writing today to share how your contribution is helping animals in Colorado this year:

 Dog overpopulation is at its highest level in 10 years. We are working with communities and mobilizing new adopters to improve outcomes for all dogs.

 Horses need a safe haven from abusive situations. We are supporting local law enforcement and caring for these horses at the Dumb Friends League Harmony Equine Center™.

 Demand for subsidized veterinary care is overwhelming. We are providing accessible and high-quality urgent care, spay and neuter surgeries, community vaccine clinics, and other services for pets and people in need.

 Families need our help. We are providing temporary foster homes, donor-subsidized veterinary care, and behavioral support to keep families together when facing hardship, crisis, or animal behavior concerns.



Will you join us again this year and invest in the animals of Colorado?

With gratitude for the transformation you bring.

Speaking for those who cannot,



Dr. Apryl Steele President and CEO Dumb Friends League

#### Last Year, the Dumb Friends League ...

Changed the lives of **46,000** animals and even more people who love them.

Planned our **2023** legislative agenda focusing on the veterinary workforce crisis, today's biggest threat to animal welfare.

Placed **100%** of all healthy and safe animals we were entrusted with.



### Impact postcard at Bowie State

#### {Salutation},

Thank you for joining our community of Bowie State supporters! Together, donors like you help BSU change students' lives every year.

YOU make it possible for Bowie State students to discover their strengths, emerge as leaders and realize their dreams.

#### How Your BOLD Generosity Impacts Our Bowie Family:

You help fund the opportunities and resources that define BSU as one of the nation's top 20 HBCUs (U.S. News & World Report 2022–23).

The Martin Luther King Jr. Communication Arts &

Humanities Building will open in the fall of 2024, connecting students across different fields to collaborate and interact together.

Students make a BOLD impact outside the classroom through civic engagement, social justice activism and an entrepreneurial mindset. BSU Bolf

Office of Annual Giving 14000 Jericho Park Road Bowie, MD 20715-9465

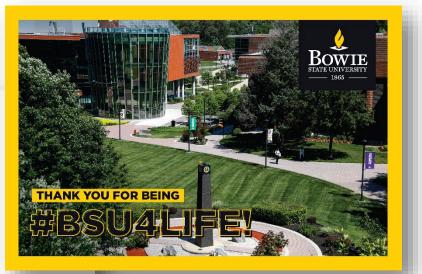
{Mail\_Name} {Address1} {Address2} {Address3} {City} (State) {Zip}

**BSU STUDENTS** 

**THANK YOU!** 

Your Support Shows You're #BSU4LIFE







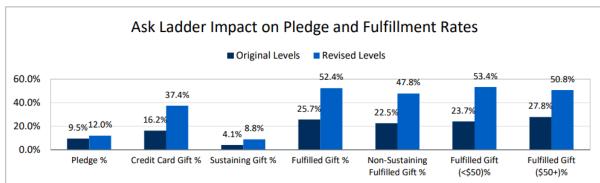
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**QUESTIONS TO CONSIDER** What KPIs are most important to you? To your leadership?

How is your engagement/solicitation strategy built to achieve goals?

### Intentionality with Asking

#### Impact



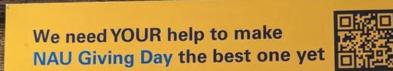
The revised levels generated a significant boost to the participation and fulfillment, including:

- A 26% increase in pledge rate
- **Doubling** the sustaining gift % (114% increase)
- **Doubling** the fulfilled gift % (104% increase), non-sustaining fulfilled gift % (112% increase) and <\$50 fulfilled gift % (126% increase).
- <u>**Tripling**</u> the fulfilled pledges per contact, compared to the original levels.

RNL created a data- informed ask strategy for phone contacts resulting in massive increases.



### Incentivizing Volunteers to Drive the Outcomes





ASK 5 friends to make a gift on Giving Day

**POST** 5x on social media using **#NAUGivingDay** —wear your gear and share your NAU story

### **SHOW YOUR PRIDE**

Wear your beanie, wave your pom, and tell the world **WE are Lumberjacks** on **3.29.23** 





### Leveraging Premiums and Avoiding the Pitfalls



## Lean into current conditioned behaviors



## Provide perceived "value" for donation



Build in secondary "ask" to increase engagement/decrease transaction



Create tradition and build long-term stewardship/engagement strategy around this group



### **Plus One Approach**

#### Tiffin + You, We Make a Great Pair! Give. Invite. Celebrate.



**Tiffin University** 

155 Miami St Tiffin, OH 44883

Dear {Salutation},

Fan the flames of philanthropy at TU! Pair up with a fellow Dragon for #KnockTUSocksOff and give to Tiffin University between March 1 and April 30.



Give: Make a gift and sign up as an ambassador at URL

Invite: Ask a TU alum to participate in #KnockTUSocksOff with a gift to TU.

Celebrate: When you both give back to TU, we'll send you a pair of Tiffin Dragon Socks to say thank you!

{Address1} {Address2} [Address3] {City} {State} {ZIP}

Every gift helps us continue to put our best foot forward by providing the modern classrooms and labs, student scholarships and hands-on learning that Dragons depend on. Thank you for transforming TU.

{Mail\_Name}

**Knock TU's** Socks

> **Fan the Flames** <u>March 1 – April 30</u>

*Campaign focused on giving + encouraging* another Tiffin community member to give.

### Setting Goals with Data

RNL 2023 Giving Day Insights – review of 195 FY22 Giving Days

# Key giving day stats in 2022:



*average online gift*  73%

of gifts made online 77%

of total dollars from offline gifts



**QUESTIONS TO CONSIDER** How are you demonstrating impact in your appeals strategy?

How do you make the ask feel "personal?"

## Personalization Matters

### Impact: RNL QuadMail Email Personalization Strategy

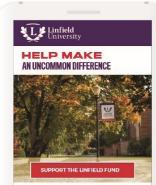


data-driven personalization strategy

4 educational institutions, with a total of 49.4M emails sent. Combined statistics over group, platform partners varied in total years usage.



### Linfield University: Impact + Omnichannel Strategy



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#### This is a link.

#### Jacob Straessle



" Your gift is making a huge impact. It enables people to grow and learn and experience new things. You are directly making a difference in the lives of Linfield students and are allowing people to get a higher education."

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#### This is a link.



" Your gift is making a huge impact. It enables people to grow and learn and experience new things. You are directly making a difference in the lives of Linfield students and are allowing people to get a higher education."

Signer

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> LEARN MORE ABOUT THE LINFIELD FUND

Linfield University 900 SE Baker St. McMinnville, OR 97128 | 503-883-883-2217

### LINFIELD STUDENTS GIVE BACK, TOO

#### YOUR SUPPORT EMPOWERS **OUR WILDCATS TO LEARN** THROUGH SERVICE.

Just like you, Linfield University students understand the importance of giving back.

Isabella Dixon is a junior international business major from Missoula, Montana. Even in high school. Isabella was active in fighting food insecurity.

#### LINFIELD'S FOOD PANTRY

Linfield's food pantry gives students 24/7. ID-card access to supplemental food so no student goes hungry. As coordinator, Isabella makes sure snacks, non-perishable goods and hygiene products are always available.

"When a call went out for a food pantry coordinator at Linfield, I thought it would be a wonderful way to give back to the community."

**ISABELLA DIXON** JUNIOR. INTERNATIONAL BUSINESS MAJOR

### Has any of your contact information changed? Stay

#### MATCHING GIFTS:

Your aift could be doubled or tripled! Please visit matchinggifts.com/linfield to find out if your, or your partner's, employer matches gifts.



Name Title

HELP US STAY IN TOUCH!

connected by providing your most up-to-date details.

Name:

# Using National Doctor's Day to focus on impact



THANK YOUR DOCTOR TODAY

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ul tabore et dolorer magna aliqua. Quis ipsum suspendisse <u>ultrices</u> gravida. Risus commodo viverra maecenas accumsan lacus vel facilists.

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GIVE TO HONOR DOUR DOCTOR

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Two Woodward Center 700 Lomas Blvd. NE Albuquerque, NM 87102 505.313.7600

### THANK YOUR DOCTOR



#### Celebrate National Doctors' Day | March 30, 2023

{Salutation},

The dedicated doctors of UNM Health work tirelessly to ensure patients like you receive the best possible care, often under challenging circumstances.

Will you help us celebrate them this National Doctors' Day? Show your appreciation for their hard work and support the future of healthcare in our state with a gift today.

Your gift of {ASK1}, {ASK2}, or {ASK3} will help fund vital resources for our doctors to continue providing the highest quality care to you, your loved ones, and our neighbors across New Mexico.

Thank you for sharing your gratitude with your doctor on this Doctors' Day.

#### Yes, I Want to Honor My UNM Doctor!

#### ENCLOSED IS MY GIFT OF:

□ {ASK3} □ {ASK2} □ {ASK1} □ Other: \$ \_\_\_\_

#### DESIGNATE MY GIFT TO:

- UNM Hospital Greatest Needs (201022)
- UNM Comprehensive Cancer Center General Support Fund (200029)
- UNM School of Medicine Prism Fund (203446)
- Other:

You may opt out of receiving future fundraising communications for UNM Health and Health Sciences by emailing <u>optout@unmfund.org</u> or calling 505.277.2000.

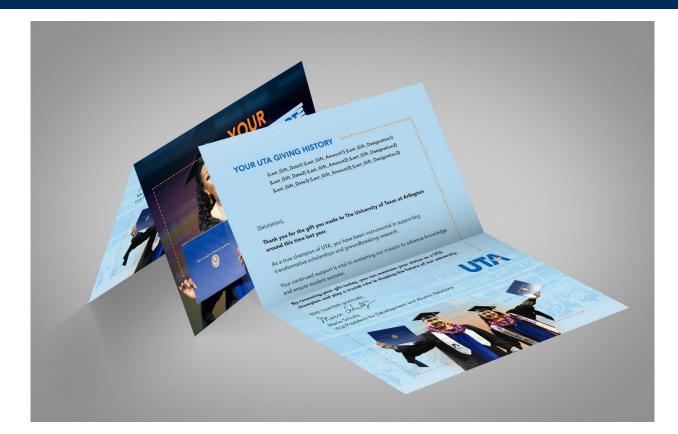
- {Mail\_Name} {Address1} {Address2}
- Address3}
- City) {State} {ZIP}
  - {APROD ID} {APPEAL\_CODE}

#### PAYMENT OPTIONS:

Give Online: unmfund.co/DoctorsDay			
Credit Card:	Discover	American Express	
Card #:			
Exp. Date:		CVV:	
Name on Card:			
Signature:			
Email:			
If you recently made a gift –	- thank you!		<sequ ance&gt;</sequ 



### Tell the donor's story back to them





# **QUESTIONS TO CONSIDER** How are you taking your Giving Day to next level?

# Meet Donors on Their Turf

"We found student philanthropy success by providing an ask that met students where they are- at the lunch table," says Grant Condon at the UNM Foundation.

"Our student participation during UNM Big Give was the springboard towards a successful giving day, and **1,155 students** proudly supported the Lobo Food Pantry. Students gave, we simply had to ask."







### **Engage and Educate**

### Find a hidden buffalo, then spread the giving at University at Buffalo

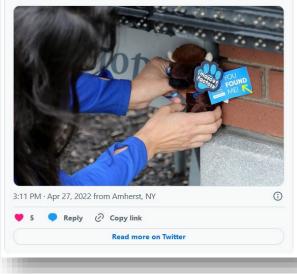




UBuffalo Student Experience @UBStudentExp · Follow

You did it! All of the mini buffalo have been found!

If you were lucky enough to find one, remember to post a pic and tag us! (or DM us) We'll make a donation on your behalf to an area of your choosing! #UBGivingDay #UBuffalo





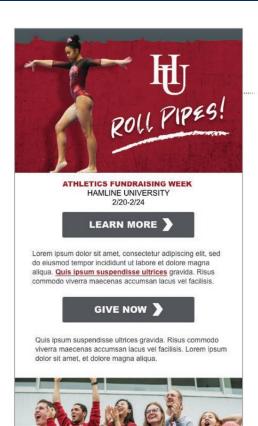
## **Capture and Hold Attention**



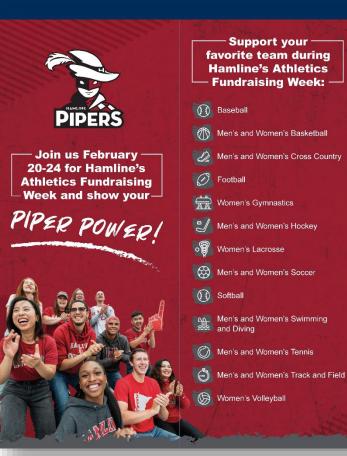
Vince Anter (CDM '10) from Amazon Prime's *V is for Vino* 



## **Create Competition**



RNL





20((

### Leverage Influencers

#### Abreu Challenge for the Center for Latino and Latin American Studies



The director of NIU's Center for Latino and Latin American Studies (CLLAS), Dr. Christina Abreu, is encouraging friends to support the CLLAS during Huskies United. When 10 gifts of \$20 or more are made, it will unlock her gift of \$200.

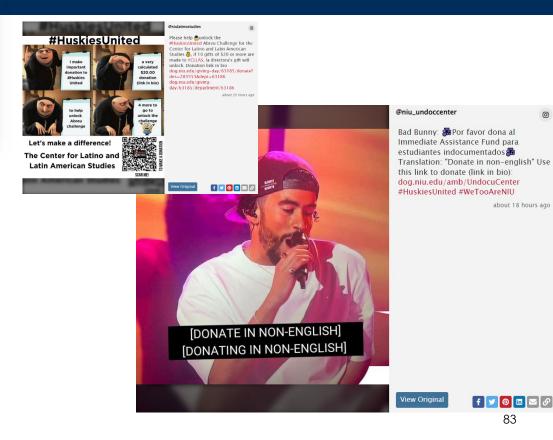
@ 10 / 10 GIFTS

COMPLETED

about 18 hours ago

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Curated Coworking Groups

# **Action and Inquiry Planning**



Move to table with your pre-assigned group

# Use conversation guides/questions on the table to drive conversation



Complete worksheet with your actionable next steps and/or lingering questions to follow up on when returning to the office

