

Building an Integrated Annual Giving Program

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RNL National Conference
July 24-26, 2018
Walt Disney World Swan & Dolphin Resort, Orlando, Florida



Agenda

- Introductions
- The Landscape
- Evaluating Your Program
- Define Your Messaging
- Channel Consistency
- Sample Multichannel Timelines
- Advanced channels: Crowdfunding, Giving Day, Texting

Introductions



Deidra Miles



Chris Brooks

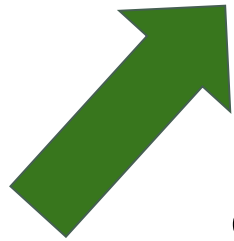


Karen LaMalva



The Landscape

The Landscape

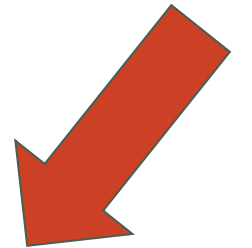


88%

of institutions indicate that
dollars are steady or increasing

75%

of institutions indicate that
alumni giving % is steady or declining



AG Goals Include:

- 75% meeting dollar goals (primary goal for 41%)
- 69% donor or alumni participation (primary goal for 30%)
- 61% increasing dollars raised
- 43% building pipeline to planned and major gifts
- 21% are measured on cost-per-dollar-raised

The Landscape

A Digitized Lifestyle

According to a 2015 study from [Microsoft Corp.](#), people now generally lose concentration after **eight seconds**. The average attention span of a goldfish is **nine seconds**.



The Landscape

“Heavy multi-screenerers find it difficult to filter out irrelevant stimuli — they’re more easily distracted by multiple streams of media,” the Microsoft report read.



Facebook

Instagram

LinkedIn

YouTube

Podcasts

Netflix

iTunes

Smartphone

Tablet

Laptop

Snapchat

Twitter

FitBit

Pinterest

The Landscape

August 25, 2017: Hurricane Harvey makes landfall

October 1, 2017: Las Vegas shooting

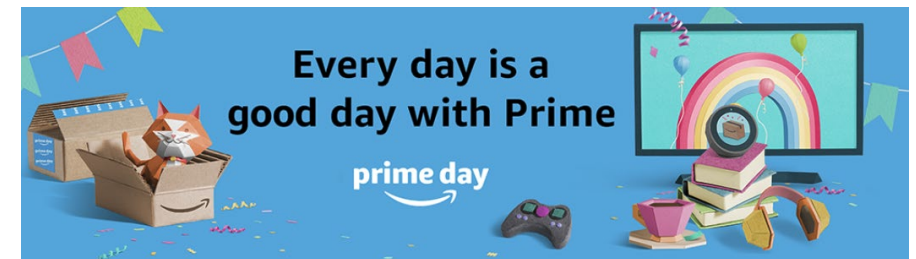
November 24, 2017: Black Friday deals

November 27, 2017: Cyber Monday deals

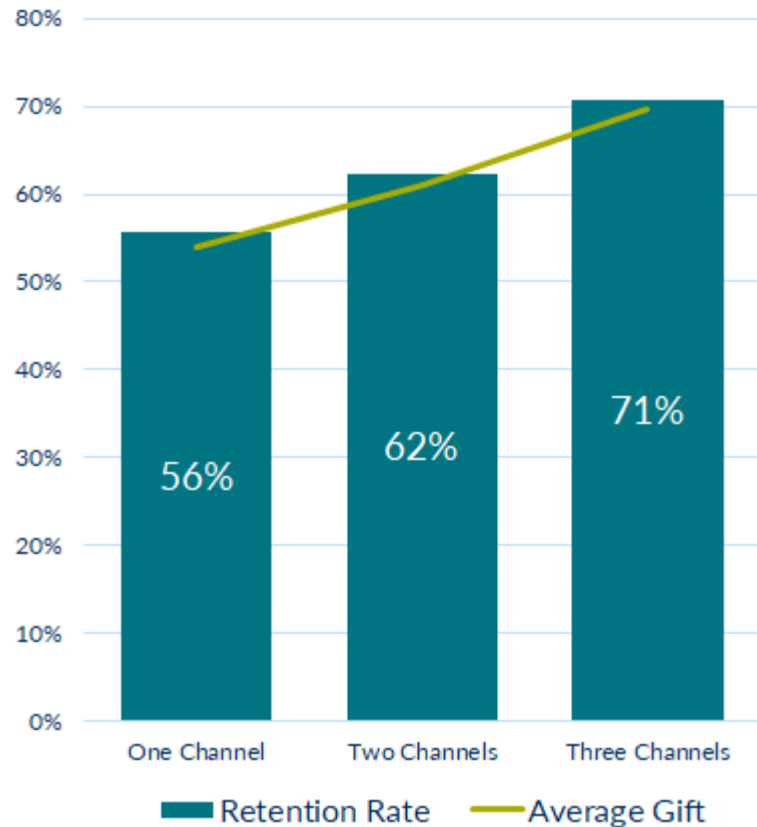
April 23, 2018: New royal baby

June 25, 2018: 12 boys and soccer coach go missing

July 16/17, 2018: Amazon Prime Day



The Landscape



Increased Competition for Attention

Case Study

- Tracking behavior of current year donors by channel availability, the prospects with more channels were retained at a higher rate and contributed a higher average gift.

Consumer Behavior*

- 65% of consumers admit to responding to a direct mail appeal through an online method.

Marketing Behavior*

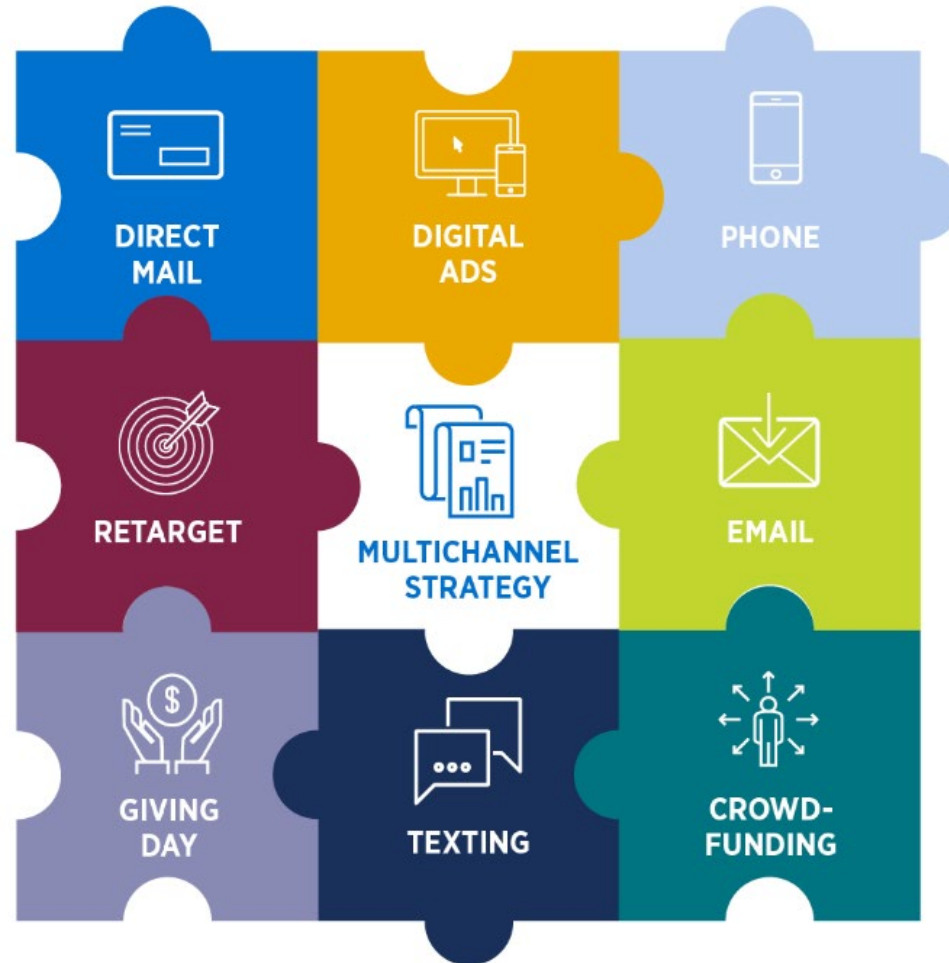
- 44% of marketers are using three or more channels.

*Source: Digital Marketing Association, 2015 and 2016

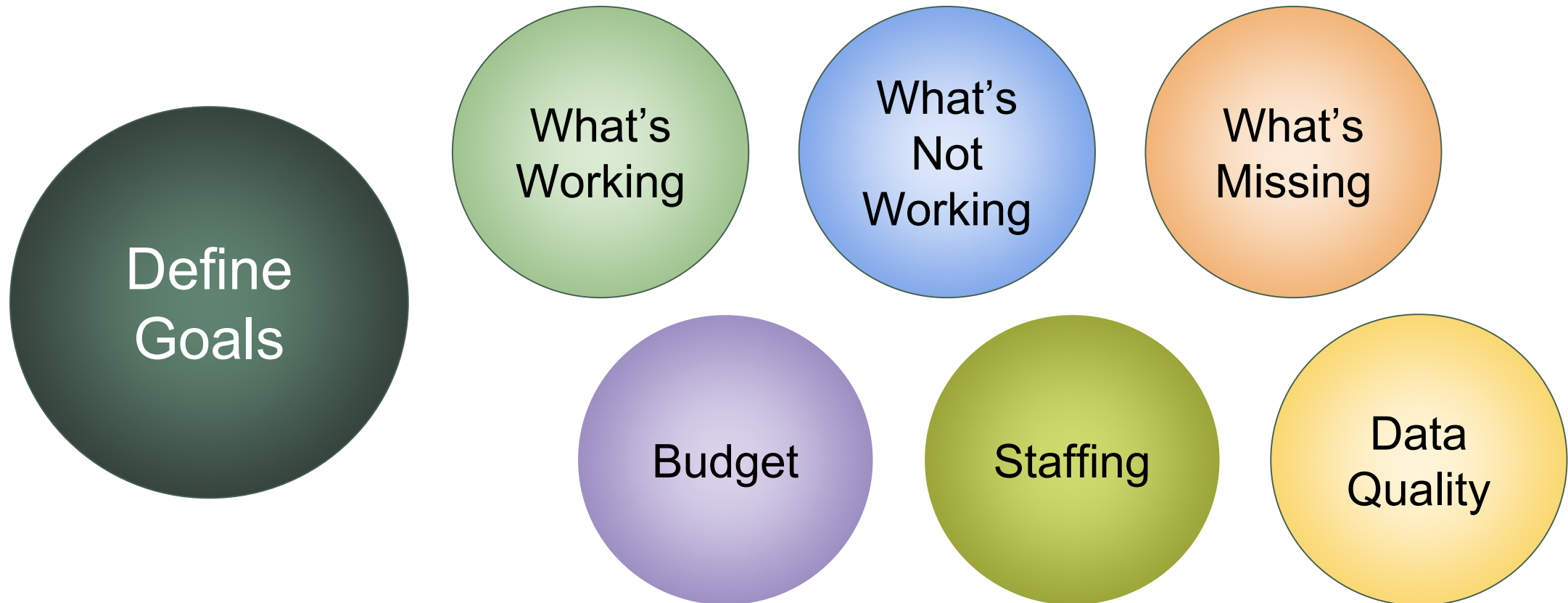


Evaluating Your Program

Evaluating Your Program



Evaluating Your Program



Evaluating Your Program

- Evaluate the donor journey across channels
 - Design
 - Messaging
- Use a variety of formats
 - Infographics
 - Easily digestible bites
 - Conversation
 - Substantial pieces
 - Video





Define Your Messaging

Define Your Messaging

- Impact
- Storytelling
 - Student Stories
 - On-campus Stories
- Integrating Video
 - Thank View
 - Animated Video



Edwin Naranjo, Scholarship Recipient

"For the most part, I am paying tuition by myself. Because of the scholarship I am receiving, I can reduce my 25-hour-a-week workload and better focus on my classes and growing my leadership skills through my role as vice president of the UMass Lowell chapter of the Association of Latino Professionals for America."



Turning lives right-side up

In 2006, Christine Cillian's life changed forever. She wouldn't know how severely for another two years. Christine, then 29, suffered a severe neurological attack that she had thought pointed to multiple sclerosis. Her arms fell limp. She couldn't walk. Her body failed to function. "Everything turned upside down," she says...

[READ MORE](#)

Define Your Messaging

- Grab their attention - personalize across channels
 - Loyal Donor Messaging
 - Thank you for your gift last year of (FY18 Cash) to (Last Allocation).
 - Thank you for being a loyal donor for the last (Consecutive or # Years Giving)
 - First Time Donor Messaging
 - Thank you for making your first gift of (FY18 Cash) to (Last Allocation). I hope you'll join our loyal supports by renewing your gift today!
 - Lybunt Anniversary Messaging
 - Happy Anniversary! It's been a year since you last supported (institution name or student's like XYZ). You can continue to make a difference by renewing your gift today!
 - Leadership Donor Messaging
 - Your past leadership support has made a world of difference. Will you continue to support students like Chris by making a leadership gift today?

Define Your Messaging

- Meaningful and/or donor centered gift designations across channels
 - Scholarships
 - Last Gift
 - Largest Gift
 - School/College
 - Affinities
 - Unrestricted
- Data cautions
 - Fund names
 - Avoid duplicates
 - Avoid special funds
 - Inactive Funds

Fund Name in Data:

Engineering Restricted #50567 the Arthur & Elizabeth Johnson Fund for Academic Excellence in Biomedical Engineering

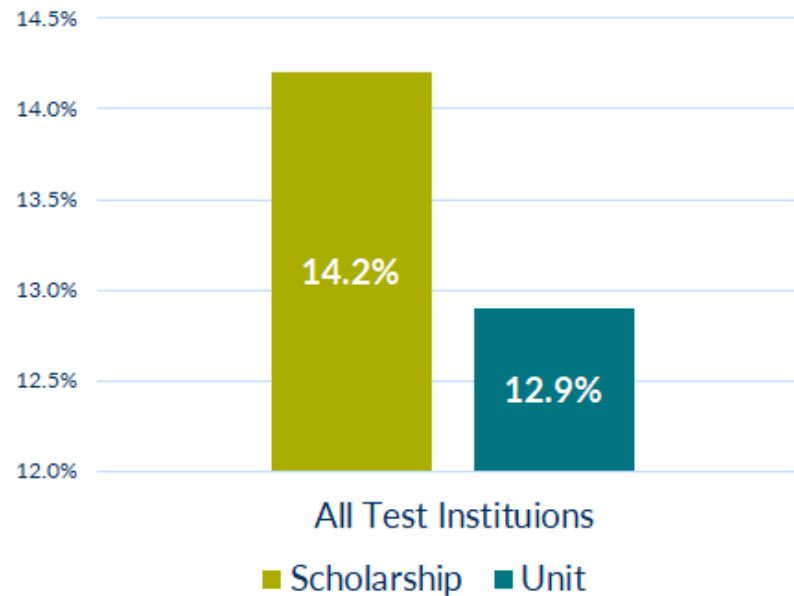
Change to:

The Arthur and Elizabeth Johnson Fund for Academic Excellence in Biomedical Engineering (50567)

Or

Johnson Fund, Biomedical Engineering (50567)

Define Your Messaging



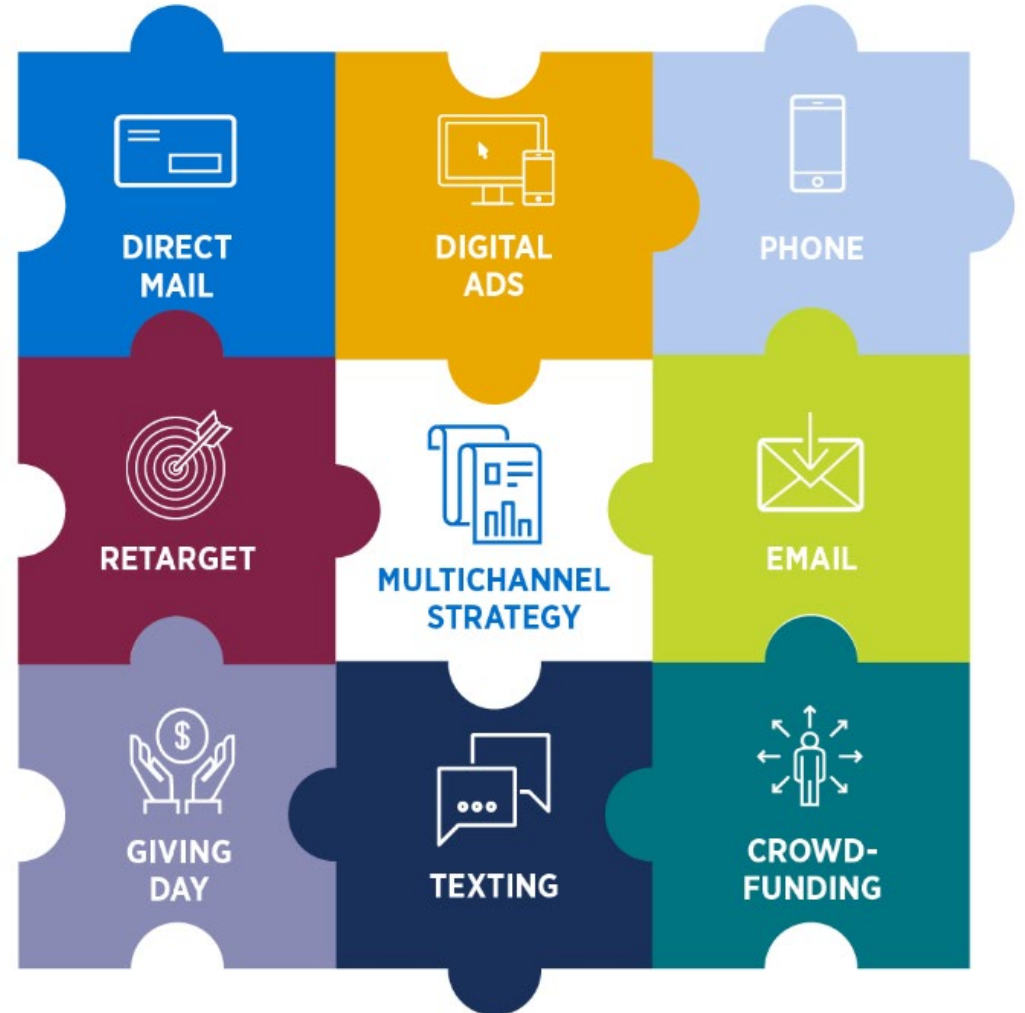
A test conducted by RNL with four institutions showed **increased participation** in **Alumni Future Donor** calling segments when the conversation and ask was for scholarship, instead of unit of graduation. All test institutions had ongoing marketing efforts through multiple channels about the need and impact of scholarship support.



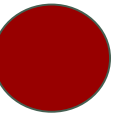
Channel Consistency

Channel Consistency

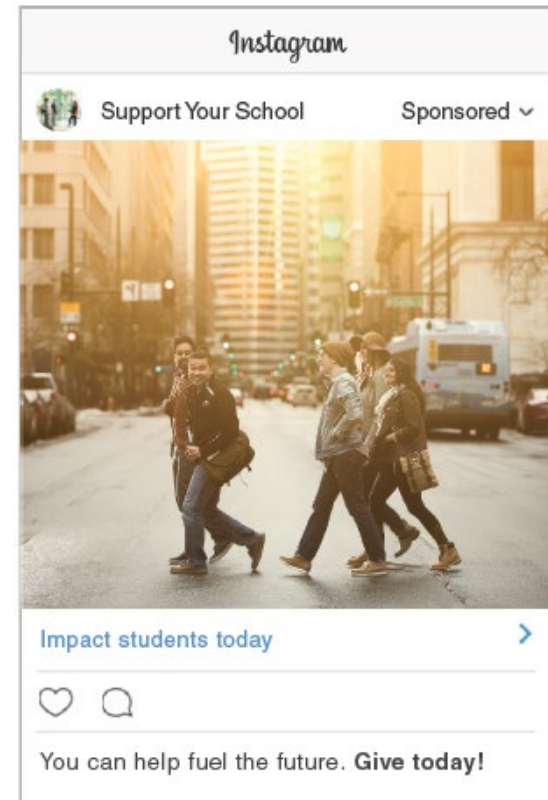
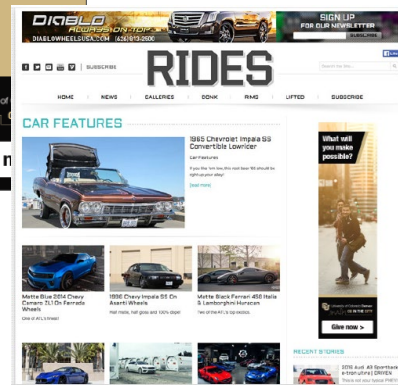
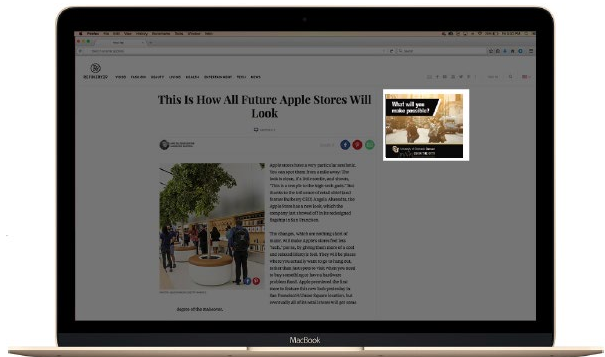
- Annual giving is a pipeline engine
 - Engage prospects
 - Solicit support
 - Provide meaningful stewardship
 - Solicit again
 - Continue to engage and steward
 - Create future planned and major donors



Channel Consistency



Animated and rotated between these two frames





Channel Consistency

"CU Denver really helped me become a well-rounded individual and community member that is not done growing. I'm a firm believer that growing is a lifelong thing."

Daniel Caballero, MPA '19

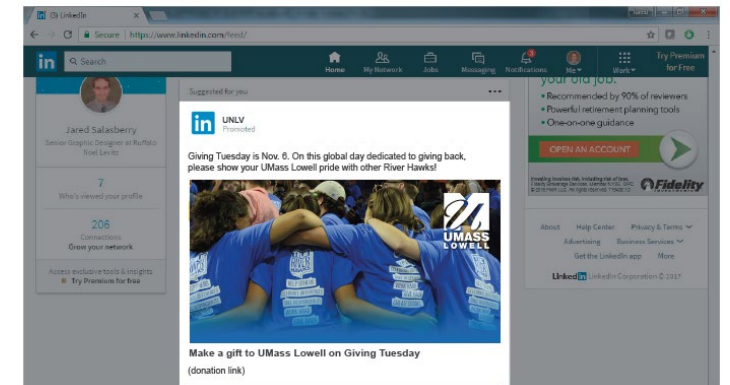
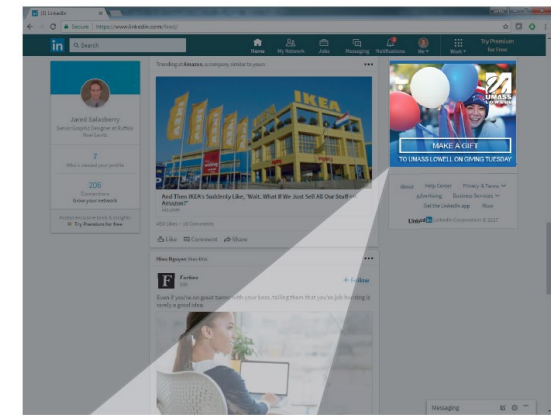
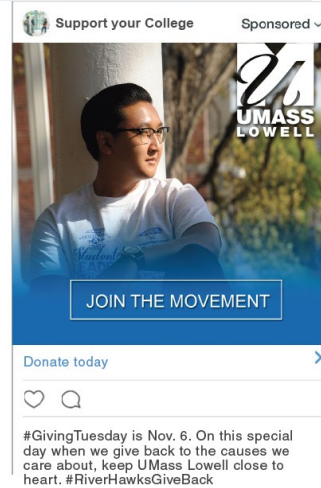
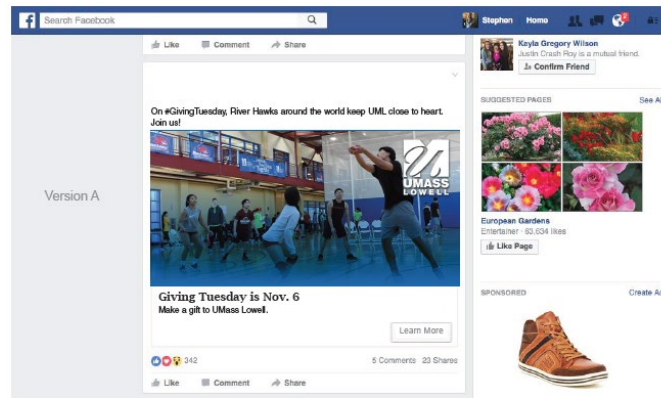
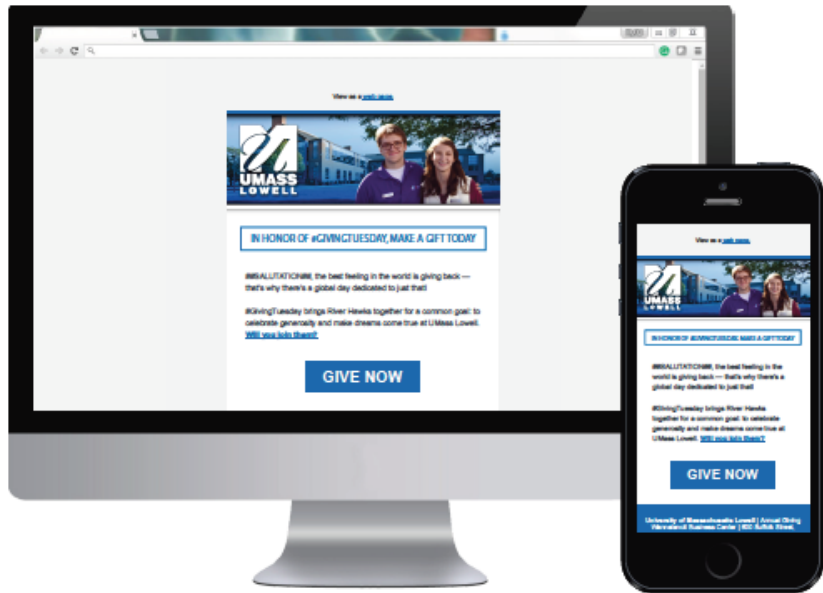
What will you make possible today?

 University of Colorado **Denver**
CU IN THE CITY
ghvng.cu.edu/denver

 University of Colorado **Denver**
CU IN THE CITY

Channel Consistency

Giving Tuesday Email and Digital Ads



Channel Consistency

THANK YOU FOR HELPING ME ACCOMPLISH
more than I thought possible!

October 16, 2017

Dear Sarah,

It always feels so surreal on Thanksgiving. To be the center of my family and friends' holiday love and support feels like a gift that I don't take for granted. Thank you for helping me accomplish more than I thought possible!

Please consider making a gift to support our athletes. Whether you give for the annual fund or athletic fund, your gift will help support our athletes and their families. Your gift will help support our athletes and their families. Your gift will help support our athletes and their families.

Yes, Sarissa! I'LL GIVE TODAY!

Donor Name: _____
 Address: _____
 City: _____
 State: _____
 ZIP: _____

Donor Name: _____
 Address: _____
 City: _____
 State: _____
 ZIP: _____

MORE SPECIFIC GIFT IN MIND?
Our colleges and schools need your support too!

Consider making a gift to one of our colleges or schools. Your gift will help support our athletes and their families. Your gift will help support our athletes and their families.

SCHOOL/COLLEGE	FUND NUMBER
College of Engineering and Science	1001
College of Fisheries and Ocean Sciences	1002
College of Health Sciences	1003
College of Natural Resources and Forestry	1004
College of Public Health and Community Development	1005
College of Science and Technology	1006
College of Social and Behavioral Sciences	1007
College of Business Administration	1008
College of Education	1009
College of Health Sciences	1010
College of Natural Resources and Forestry	1011

WE CHANGE LIVES. YOU MAKE IT HAPPEN.
 Thank you for making a difference in our lives!
www.uafoundation.org

Update your CONTACT INFORMATION

LET'S STAY IN TOUCH

Name: _____
 Address: _____
 City: _____
 State: _____
 ZIP: _____

GIVE NOW

Dear SARISSA,

How do I make my most cherished UAF memories? I'm excited to share your story with our community. Your gift will help support our athletes and their families. Your gift will help support our athletes and their families.

HOW TO GIVE:

ONLINE:
 Make a payment gift in minutes!

PHONE:
 Call us at 907-485-4333

MAIL:
 UAF Foundation, PO Box 750000, Fairbanks, AK 99775



Instagram

Give to change lives.

"I've accomplished more than I ever thought possible — thanks to donors!" Change lives like Sarissa's. #NanookNation #uaf100

YOUR SUPPORT *pushes me toward my goals*

UNIVERSITY OF ALASKA
 UNIVERSITY OF ALASKA
 400 W. BRIDGE, FAIRBANKS, AK 99775

SARISSA SHARPLEY
 APT X
 1000 MAIN ST
 ANCHORAGE, AK 99501

HELP STUDENTS ACCOMPLISH
more than they ever thought possible.

GIVE NOW →



Sample Multichannel Timelines

Sample Multichannel Timeline

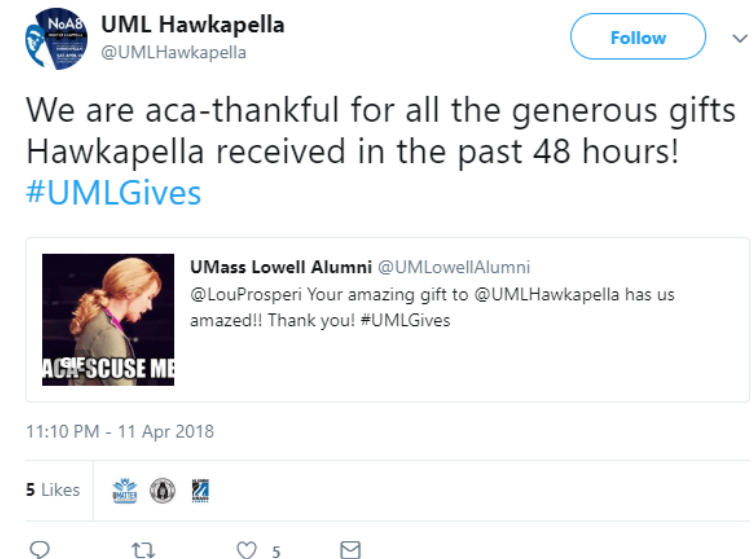
Anniversary Campaign

<u>Touchpoint</u>	<u>Channel</u>	<u>Timing</u>
1	Email	6 weeks prior to anniversary
2	Direct Mail	4 weeks (1 month) prior to anniversary
3	Email	First day of anniversary month
4	Phonathon	Anniversary month
5	Text	Anniversary date (if possible)
6	Direct Mail	1 month post anniversary
7	Email	6 weeks post anniversary

Sample Multichannel Timeline

Giving Day

<u>Touchpoint</u>	<u>Date</u>	<u>Channel</u>
1	March 4:	Postcard Direct Mail
2	March 9:	Teaser Email
3	March 9:	Teaser Social Post
4	April 2:	One Week Out Email
5	April 2:	One Week Out Social Post
6	April 9/10:	Emails/Social
7	April 11:	Thank You Email
8	April 11:	Thank You Social
9	May 1:	Thank you postcard



Sample Multichannel Timeline

Monthly Giving Campaign

Multichannel solicitations should include a monthly giving option.
Where possible, boost results with a digital ad campaign targeted to your entire prospect base.

One Time Gift Made	Stewardship with Story on Impact of Monthly Giving	Email #1 @ +/- 60 days	Email #2 @ +/- 70 days	Direct Mail @ +/- 100 days	Phone Call @ +/- 120 days
July	August	September 15	September 25	October 28	November 15
August	September	October 15	October 25	November 28	December 15
September	October	November 15	November 25	December 28	January 15
October	November	December 15	December 26	January 28	February 15
November	December	January 15	January 25	February 28	March 15
December	January	February 15	February 25	March 28	April 15
January	February	March 15	March 25	April 28	May 15
February	March	April 15	April 25	May 28	June 15
March	April	May 15	May 25	June 28	July 15
April	May	June 15	June 25	July 28	August 15
May	June	July 15	July 25	August 28	September 15
June	July	August 15	August 25	September 28	October 15



Advanced Channels

Crowdfunding

- Create rules and guidelines
 - Timelines
 - Assessing opportunities
- Training
- Supporting volunteers
- Evaluate and evolve

First-Year Results for Crowdfunding

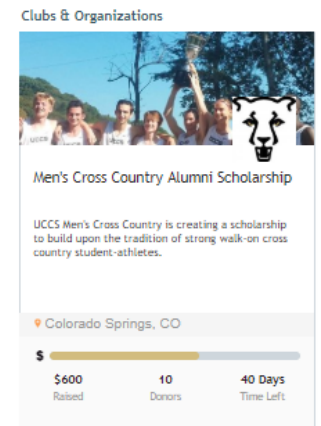
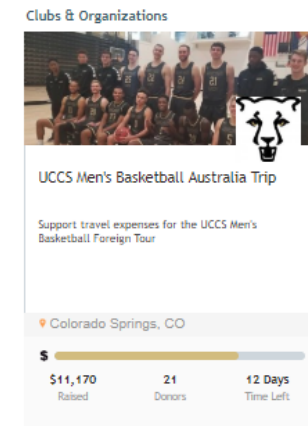
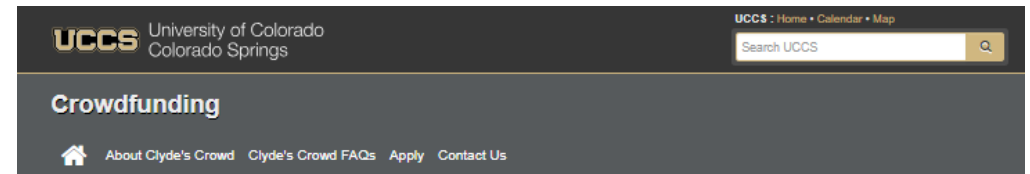
	Average	Median
Projects	8.3	5
Giving Total	\$83,360	\$38,858
Online Total	\$45,524	\$23,188
Total Gifts	525	311
Total/Project	\$10,071	\$7,771

Statistics from 120 first-year RNL Crowdfunding partners that launched at least three campaigns in their first year.

Crowdfunding

University of Colorado

- Pre-Campaign: 30+ days prior to launch
 - Complete application
 - Gather copy, creative, fund, etc.
- Campaign: 30 - 60 days
 - SM and Email outreach
 - Regular stewardship
 - Crowdsourcing
- Post-Campaign: 10-15 days
 - Stewardship
 - Final update/results



Crowdfunding

RNL Insights: The most successful campaigns deployed these strategies:

- Name the organization or group being supported in their project title
- Have a creative or witty title that still makes it clear what's being supported
- Use active language such as support, help, or send, and mention a challenge in the project title

Emotion and immediacy are crucial. Why do gifts matter?

The image displays two examples of successful crowdfunding campaigns on the GoFundMe platform. The first campaign, titled "CU DENVER DRAGON BOAT IN HONG KONG" by CU Denver Dragonboat Team in Denver, CO, is marked as "Community Funded" and shows 31 supporters have raised \$22,910. The second campaign, titled "The Michael Carry, PhD Honorary Scholarship Fund" by The Anschutz Office of Advancement in Aurora, CO, shows 17 supporters have raised \$36,200 out of a \$50,000 goal. Both campaigns feature a video thumbnail, a progress bar, and a list of donors. The first campaign includes a "CAMPAIGN HEROES" section listing donors like API Vote, J.W. Lee, and Joe Kim. The second campaign includes a "CAMPAIGN HEROES" section listing donors like Steve Hovan, Vick Williams, M.D., Ph.D., Shibley Carry, Donald Temple, MD, and Steven Ringel, MD. Both campaigns have a "Share this Campaign" section with a URL and "Embed" and "Share" buttons.

RNL Crowdfunding Index



Download this and other white papers under RNL Resources > Fundraising Management at www.ruffalonl.com

RNL recently analyzed 5,382 crowdfunding projects totaling \$73 million raised through RNL Crowdfunding *powered by ScaleFunder*.

Download this index to discover:

- Successful strategies for faculty, student, and institutional campaigns
- Insights into average campaign success and fundraising totals
- Averages of total fundraising in the first year of crowdfunding and how institutions raise 4x or more on their investment
- The impact of optimized and customizable giving pages for campaigns beyond crowdfunding

Giving Day

- Campus wide involvement
- Education and solicitation
- Volunteer engagement
- Giving priorities
- Challenge grants
- Integrating multiple channels
- Counting gifts

Days of Giving



2,584
donors

103% of 2,500 donor goal

\$220,942
donated

This campaign ended on April 11, 2018, but you can still make a gift to University of Massachusetts-Lowell by clicking here!

UMASS LOWELL'S *2nd Annual* **DAYS OF GIVING**

LAST YEAR
we made history...

TOGETHER, WE CAN DO IT AGAIN. During our first-ever Days of Giving, 2,286 alumni, parents, students, friends, faculty and staff rallied together and donated to change students' lives. This year, our goal is 2,500 donors in 48 hours to support our students and unlock more than \$40,000 in challenge funds for the university.

WHEN: April 10 & 11
GOAL: 2,500 donors in 48 hours
HOW: On April 10 & 11, make a donation at uml.edu/umlgives

CHALLENGE: Make your gift. Challenge friends. Share on social media. Encourage everyone you know to give back to the university you love.

[f](#) [t](#) [in](#)

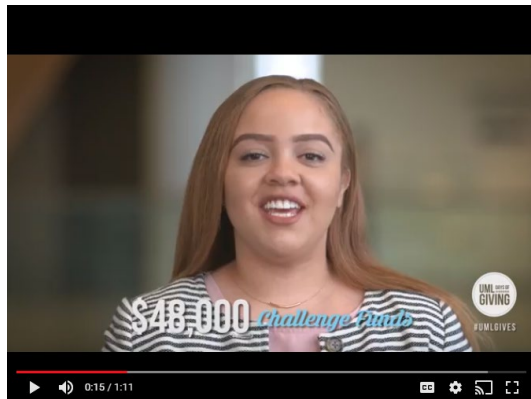
UML DAYS OF GIVING
* APRIL 10-11 2018 *

TOGETHER . . .
we made history

Your excitement, generosity and River Hawk spirit helped us to surpass our 2018 Days of Giving goals! 2,614 donors contributed, unlocking more than \$50,000 in challenge funds.

Your gifts mean more than just dollars—they're a celebration of UML's mission and your dedication to our students. Thank you to all who gave, encouraged others to give, shared on social media and went above and beyond for UML.

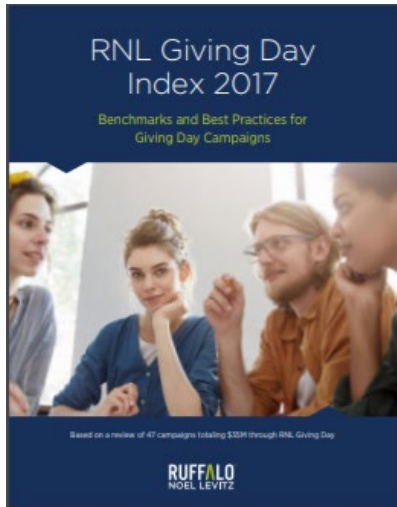
Giving Day



Giving Day



RNL Giving Day Index



Download this and other white papers under RNL Resources > Fundraising Management at www.ruffalonl.com

RNL recently analyzed 47 campaigns totaling \$35 million through RNL Giving Day.

Download this index to discover how to:

- Design an experience that creates a community of giving for students, faculty, alumni, and beyond
- Combine ambassador-driven outreach, challenges, and major gifts to boost giving
- Maximize your giving day results with an optimized donation platform, integrated multichannel marketing, and real-time insights

Texting

- 1 The number of texts sent monthly increased 7,700% over the last decade
- 2 15,220,700 texts are sent every minute of every day worldwide
- 3 81% of Americans text regularly
- 4 95% of texts will be read within 3 minutes of being sent
- 5 33% of American adults prefer texts to all other forms of communication.

Texting



How many text messages do you send & receiving each month?



18-24 Year Olds
3,853



25-34 Year Olds
2,240



35-44 Year Olds
1,557



45-54 Year Olds
998



55+
491

Source: [Experian Marketing Services](#)

Texting

- Starring role, supporting cast, or promoter
 - Monthly reminders (phone pledge fulfillment)
 - Solicit renewals
 - CYE, FYE, Anniversary
 - Support fulfillment
 - Event promotion
 - Giving day ping
 - “We’ve been trying to reach you”
 - General engagement

Hi Deidra, this is Ashtyn, a student from CU Boulder! Thanks again for your last gift of \$100 on 7/25/17 to the CU Scholarship Fund. Can we count on you to make a similar gift this year?

Hi Ashtyn. Sure, I'll make a gift.

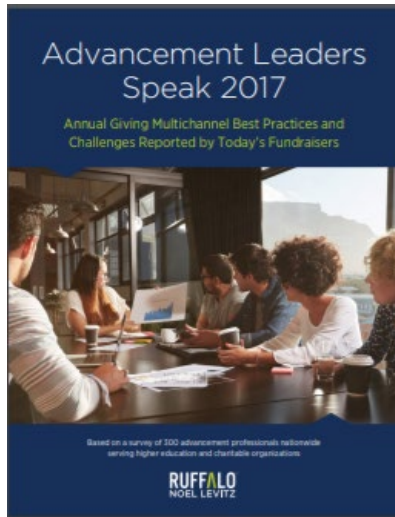
Great! Thanks so much for your support, Deidra! Here's a secure link to complete your gift:
<https://bit.ly.2K0LBze>



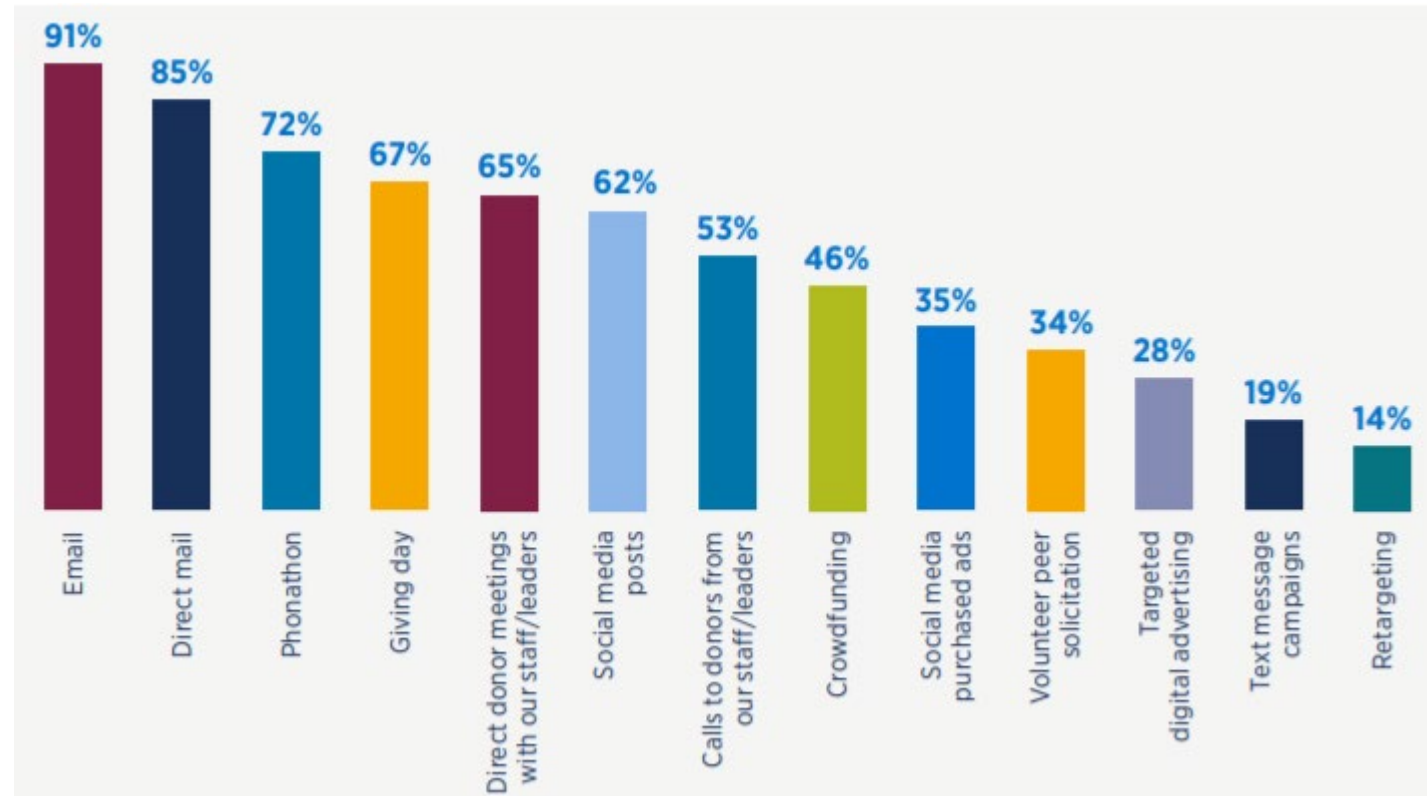
Building Your Integrated Program

Building Your Integrated Program

Annual Giving Multichannel Best Practices and Challenges: Channel usage in annual giving programs



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Summary

- Attention spans are short
- Evaluate your current program and set goals
- Use emotion to share impact
- Personalize outreach
- Use multiple channels to get your message noticed
- Integrate a new channel (or two!)
- Engage donors in a lifetime of support



Questions

Would you like a copy of this slidedeck?

karen.lamalva@ruffalonl.com