Building an Integrated Annual Giving Program

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Karen LaMalva, Vice President, Consulting, Ruffalo Noel Levitz

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

RNL Advancement Leaders Speak
Survey of 300 Annual Giving Professionals, released January 2018
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.
“Heavy multi-screeners find it difficult to filter out irrelevant stimuli — they’re more easily distracted by multiple streams of media,” the Microsoft report read.
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

Define Goals

What’s Working
What’s Not Working
What’s Missing
Budget
Staffing
Data Quality
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 Cilliam’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...
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)
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, MFA ’19

What will you make possible today?
Channel Consistency

Giving Tuesday Email and Digital Ads
Channel Consistency
Sample Multichannel Timelines
## Sample Multichannel Timeline

### Anniversary Campaign

<table>
<thead>
<tr>
<th>Touchpoint</th>
<th>Channel</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Email</td>
<td>6 weeks prior to anniversary</td>
</tr>
<tr>
<td>2</td>
<td>Direct Mail</td>
<td>4 weeks (1 month) prior to anniversary</td>
</tr>
<tr>
<td>3</td>
<td>Email</td>
<td>First day of anniversary month</td>
</tr>
<tr>
<td>4</td>
<td>Phonathon</td>
<td>Anniversary month</td>
</tr>
<tr>
<td>5</td>
<td>Text</td>
<td>Anniversary date (if possible)</td>
</tr>
<tr>
<td>6</td>
<td>Direct Mail</td>
<td>1 month post anniversary</td>
</tr>
<tr>
<td>7</td>
<td>Email</td>
<td>6 weeks post anniversary</td>
</tr>
</tbody>
</table>
# Sample Multichannel Timeline

**Giving Day**

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

<table>
<thead>
<tr>
<th>One Time Gift Made</th>
<th>Stewardship with Story on Impact of Monthly Giving</th>
<th>Email #1 @ +/- 60 days</th>
<th>Email #2 @ +/- 70 days</th>
<th>Direct Mail @ +/- 100 days</th>
<th>Phone Call @ +/- 120 days</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>August</td>
<td>September 15</td>
<td>September 25</td>
<td>October 28</td>
<td>November 15</td>
</tr>
<tr>
<td>August</td>
<td>September</td>
<td>October 15</td>
<td>October 25</td>
<td>November 28</td>
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<td>September</td>
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<td>January 15</td>
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<tr>
<td>October</td>
<td>November</td>
<td>December 15</td>
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<td>January 28</td>
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<tr>
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<td>December</td>
<td>January 15</td>
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</table>
Advanced Channels
Crowdfunding

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

### First-Year Results for Crowdfunding

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projects</td>
<td>8.3</td>
<td>5</td>
</tr>
<tr>
<td>Giving Total</td>
<td>$83,360</td>
<td>$38,858</td>
</tr>
<tr>
<td>Online Total</td>
<td>$45,524</td>
<td>$23,188</td>
</tr>
<tr>
<td>Total Gifts</td>
<td>525</td>
<td>311</td>
</tr>
<tr>
<td>Total/Project</td>
<td>$10,071</td>
<td>$7,771</td>
</tr>
</tbody>
</table>

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?
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

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

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

UML Surprise Countdown

UML Days of Giving

April 10-11 | 2018

#UMLGives

uml.edu/umlgives
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

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

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