

Integrating Online and Offline Appeals

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- Previously, AVP of The Ohio State University Alumni Association; annual giving positions at University of Dayton and Florida State
- M.B.A., Saint Leo University; B.S., University of Dayton; current doctoral student in Public Policy at UNLV

University of Nevada-Las Vegas

- Founded in 1957
- Located in Las Vegas
- 120,000 living alumni
- \$12,897,544 in annual giving
- 4% alumni participation
- *Mascot:* Hey Reb
- *Fun Fact:* Most Diverse University in the U.S. – two years in a row



ASSESSING INDIVIDUAL CHANNELS

Examine various annual giving channels

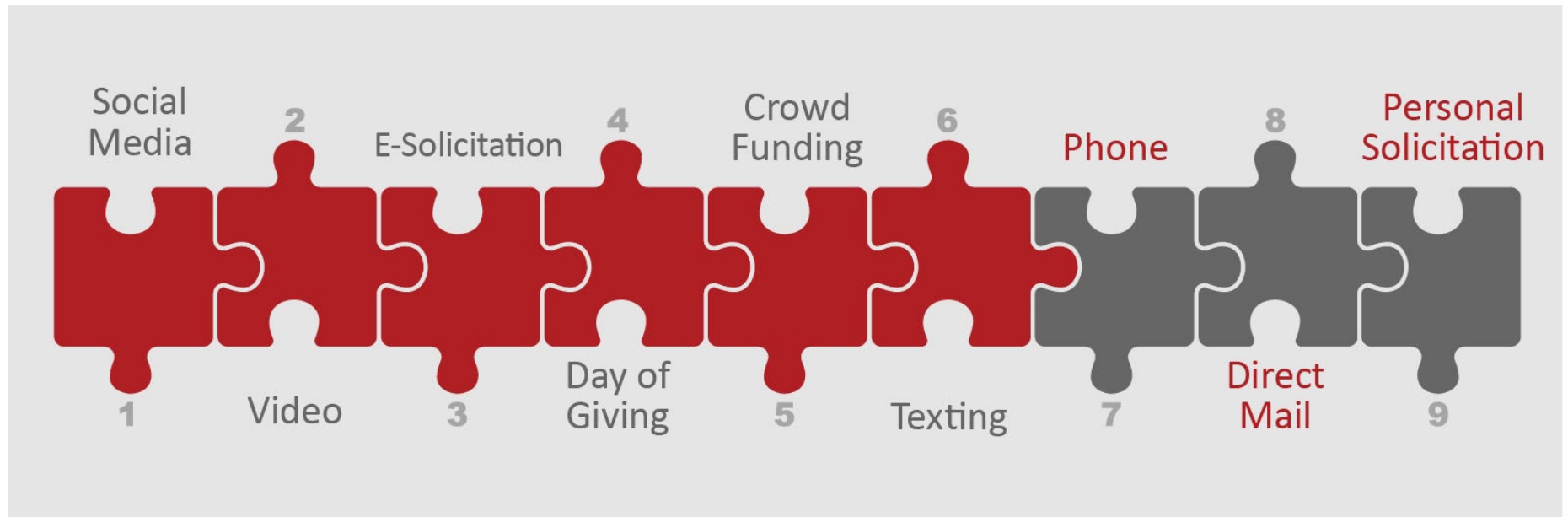
Past

- Phone
 - Acquisition
- Direct Mail
 - Retention
- Personal Solicitation
 - Retention
 - Reacquisition
 - Upgrades

Current and Future

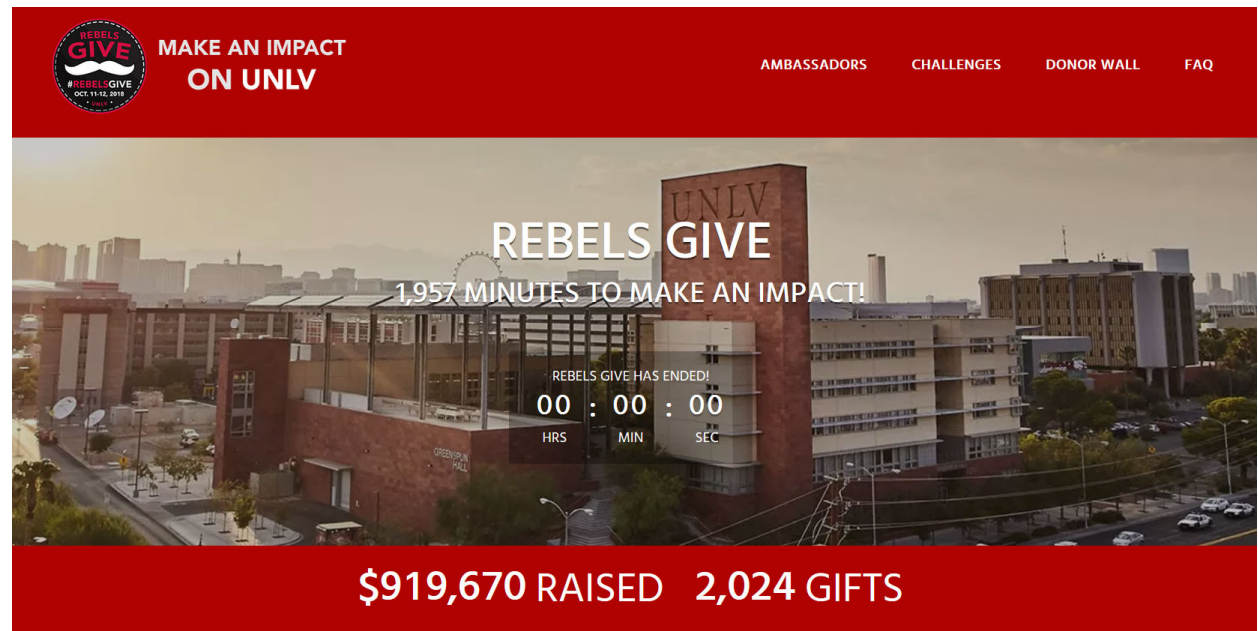
- Day(s) of Giving
- Crowdfunding
- E-solicitation
- Texting
- Social Media
 - Retargeting
 - Digital Ads
 - Social Sharing
 - Peer-to-Peer
- Video

Consider online and offline appeal channels



Encompass many channels through day of giving

- Pre-Campaign
 - Direct Mail
 - Email (with video)
 - Digital Ads
 - Social Media Posts
 - Personal Solicitation
- During Campaign
 - Phonathon
 - Email (with video)
 - Social Media Posts
 - Texting



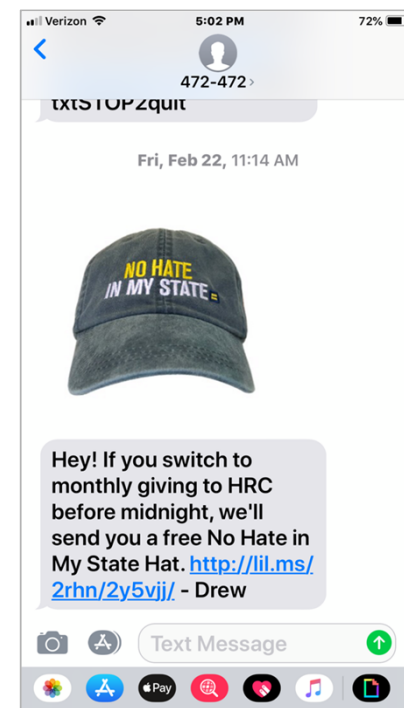
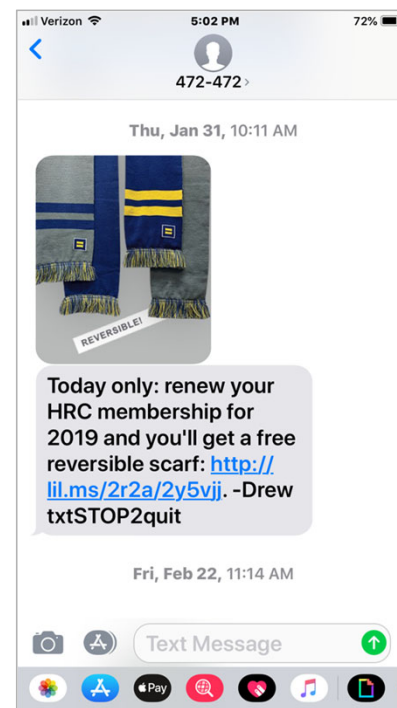
Day of giving 2.0

- Nearly 80% of us have participated in a giving day, but...*




Utilize texting in various ways

- Giving Day Campaign
 - Amplify your giving day messaging efforts
 - Build interest leading up to, on and after giving day
 - Make giving easy on the “go”
- Pledge Fulfillment
 - Reach prospects who have pledged with an easy-to-fill call to action
 - Enhance your existing fulfillment structure
 - Increase pledge fulfillment
- Stewardship



Incorporate crowdfunding

- Create rules and guidelines
 - Timelines
 - Assessing opportunities
 - Training
- Support volunteers
- Evaluate and evolve
- Develop a solicitation and stewardship plan




ALLEGRO Choral Funding Initiative

By Terry Dopson

With one of the largest choral programs in the history of the University of La Verne, the choir is seeking funds to propel an exciting program.

\$3,573

119% Funded **36** Donors **0** Days Left



Swim and Dive

By Alexis Smith

Please support our Leo Swim & Dive team to train with Olympians, in La Verne, during the upcoming winter break.

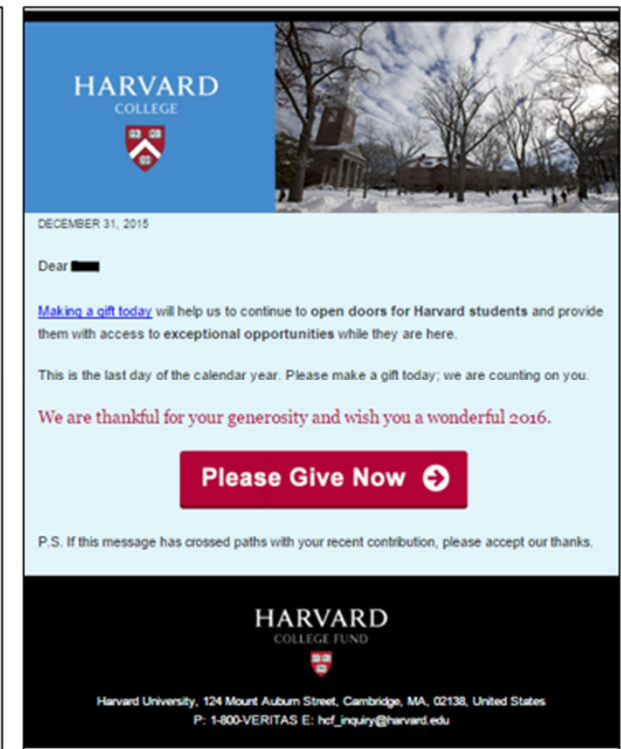
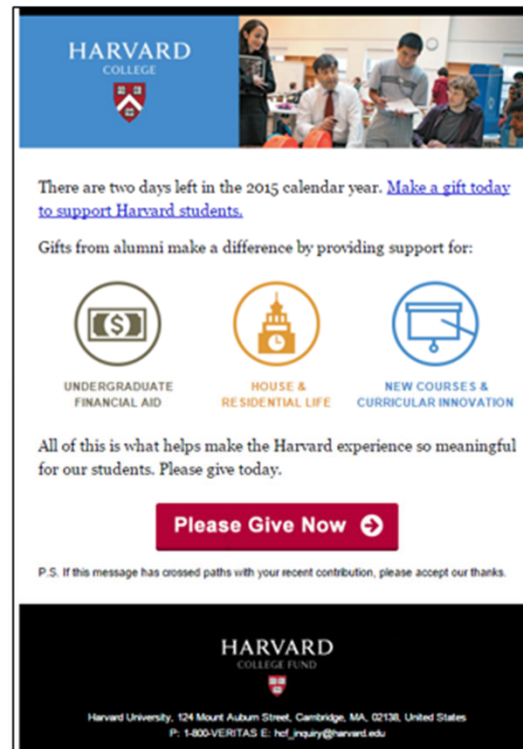
\$3,795

126% Funded **56** Donors **0** Days Left

Send e-solicitations

- Test repeatedly for content, sender, subject, time of day
- Hyper-segment
- Ensure they're data-driven

Date	Subject
December 17	"Make a gift, make a difference at Harvard"
December 22	"10 days left in the year"
December 30	"Two more days to make your year-end gift"
December 31	"Last chance to make your year-end gift"



Offer a simple online gift form

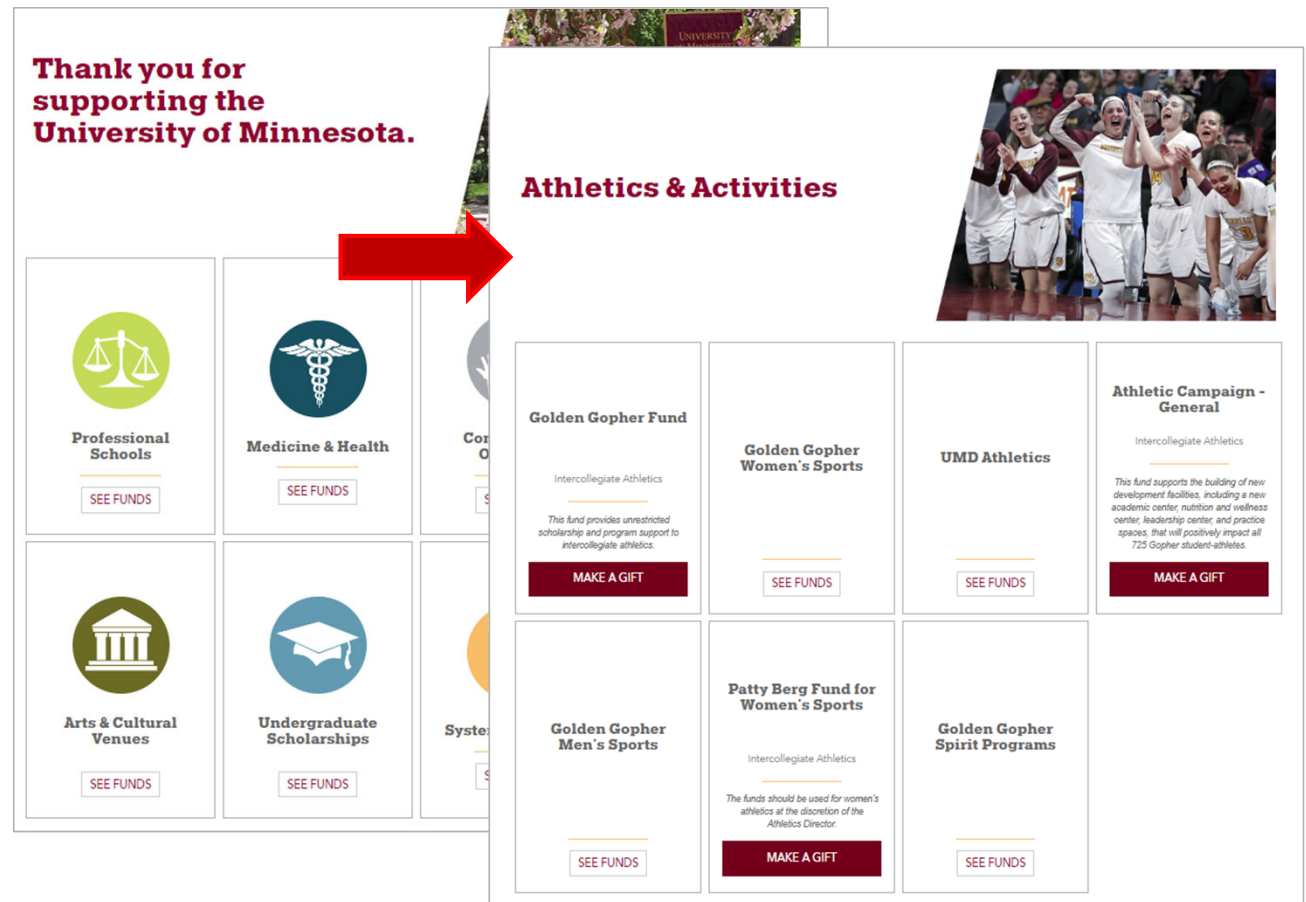
- Mobile-optimized
- Donor-friendly and easy to use – reduce giving page friction
- Visually connects with all other channels
- Continues the story started on other channels
- Remember...
 - The avg. online gift is \$96.40
 - The avg. first-time donation gift is \$110.67

Source: Blackbaud

The screenshot shows a web form titled "GIVING DETAILS" for UCLA. At the top, a progress bar indicates four steps: 1. GIVING DETAILS (current), 2. GIFT REVIEW, 3. YOUR INFORMATION, and 4. PAYMENT. Below the title, there are three tabs: "A SCHOOL" (selected), "THE CAMPUS", and "A CAUSE". Under "A SCHOOL", the question "Which School Are You Giving To?" is followed by a dropdown menu showing "UCLA COLLEGE OF LETTERS AND SCIENCE". Below this, the question "Which Fund Would You Like To Support?" is followed by a dropdown menu showing "CALIFORNIA CENTER FOR POPULATION RESEARCH". An "OR" separator is followed by a search bar labeled "Search Funds...". Below the search bar is a grid of donation amounts: \$50, \$75, \$100 (highlighted), \$250, \$500, \$1,000, \$2,500, \$5,000, and a "\$ OTHER" option. A blue "NEXT: REVIEW" button is at the bottom right. The footer contains links for UCLA.edu, UCLA Development, UCLA Foundation, Privacy Policy, and a copyright notice for 2018 UCLA.

Create customized giving pages

- Customize ask amounts
- Match theme to related appeals
 - CYE-Holiday
 - Phonathon Fulfillment
 - Recurring Giving Campaign
 - Matching Challenge



Don't forget recurring giving

- 25% renewal of new single-gift donors
- 80% renewal of new recurring donors
- Recurring giving shows strong gains, with 22.91% revenue growth this past year compared to the industry median of 18.37%

Source: Network for Good and Blackbaud



Social Media: Leverage retargeting & digital ads

1



You embed a retargeting pixel on your website.

2



An alumni supporter visits your site.

3



That supporter leaves your site without giving.

4



As they browse other websites and social media, your ads appear.

5



Your re-targeting grabs their interest and they click on the ad.

6

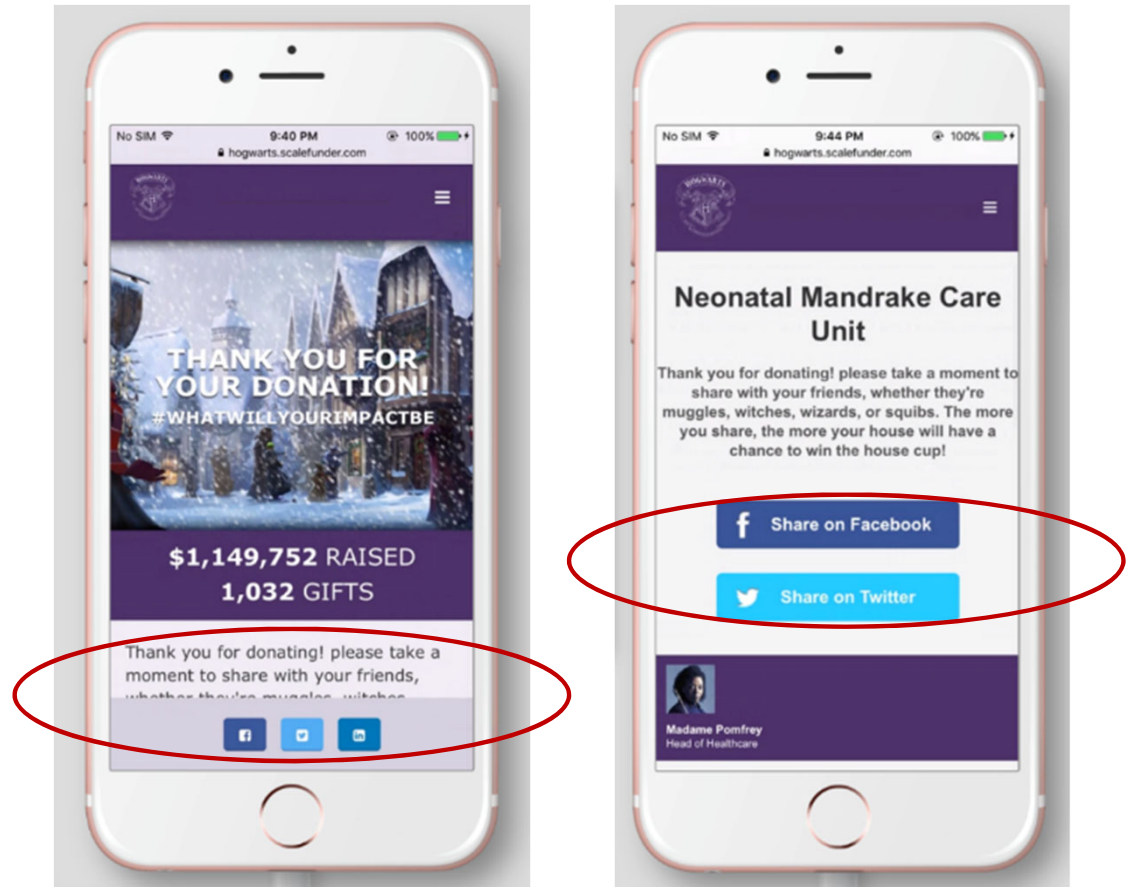


They return to your site to make a gift.

Source: Ruffalo Noel Levitz

Social Media: Enable social sharing

- *After online AND offline giving*

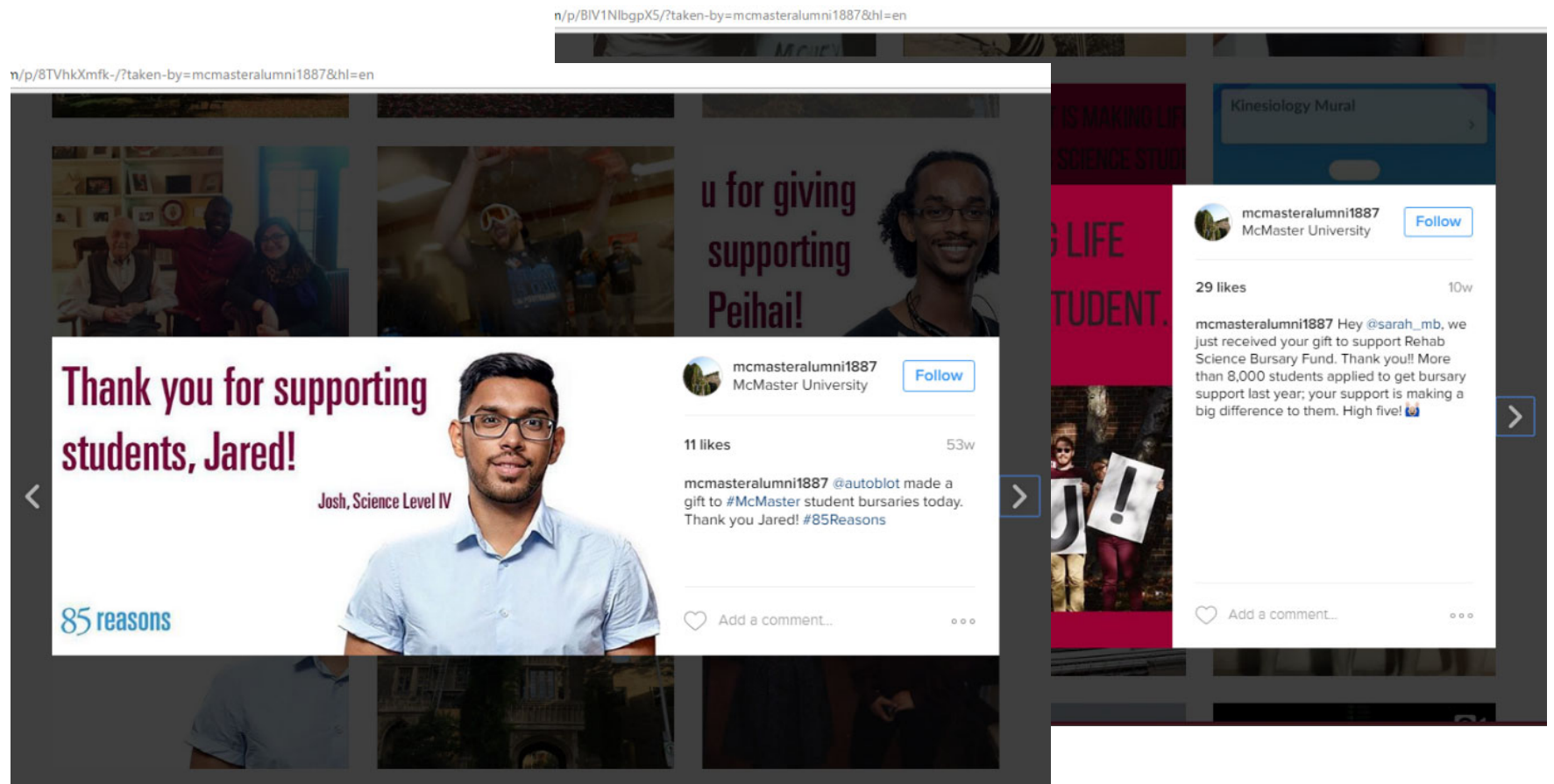


Social Media: Engage in peer-to-peer fundraising

- *Peer-to-Peer is the Millennial Authenticity Engine*



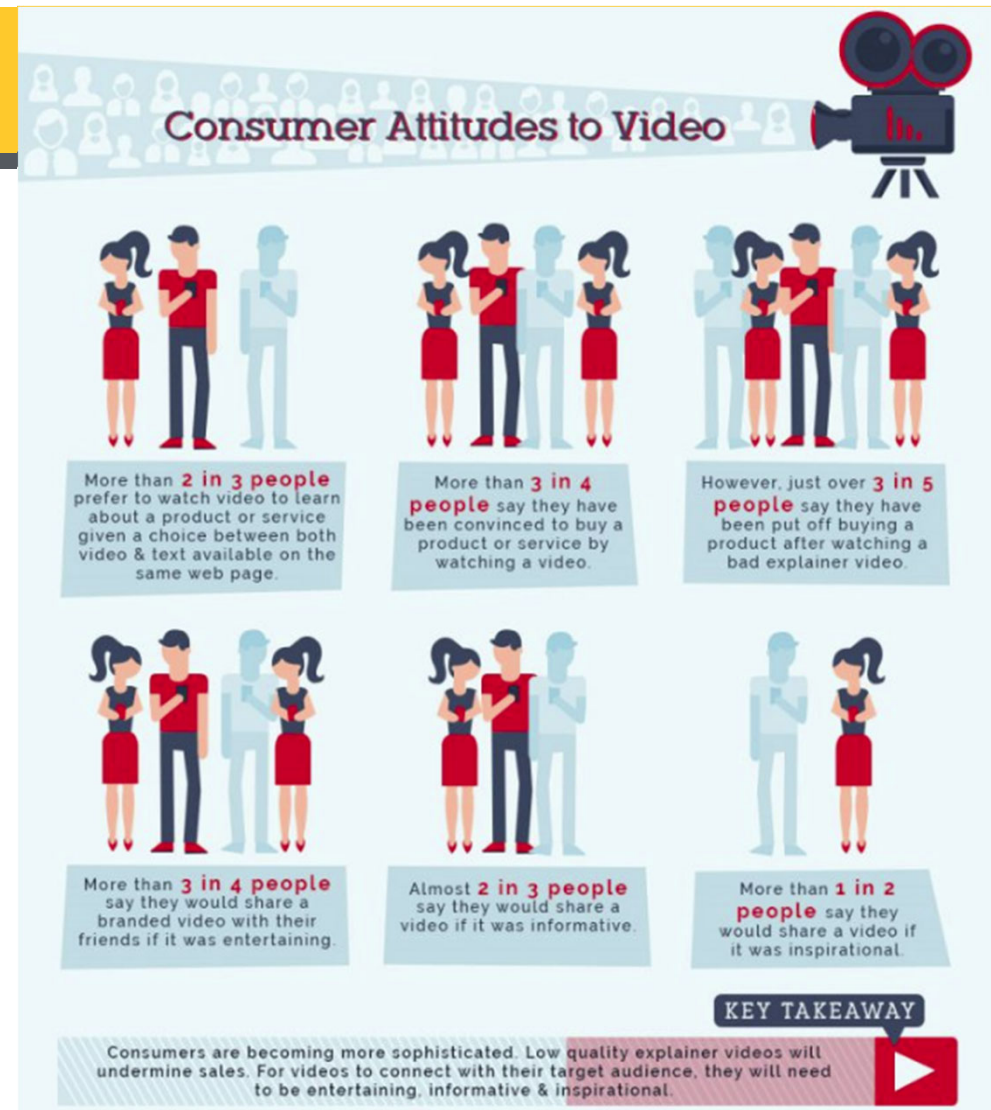
Social Media: Make stewardship social



Employ video

- Entertaining
 - Informative
 - **Inspirational**
- 57% of those who watch a nonprofit's video will give to that nonprofit

Source: Business Insider & Google





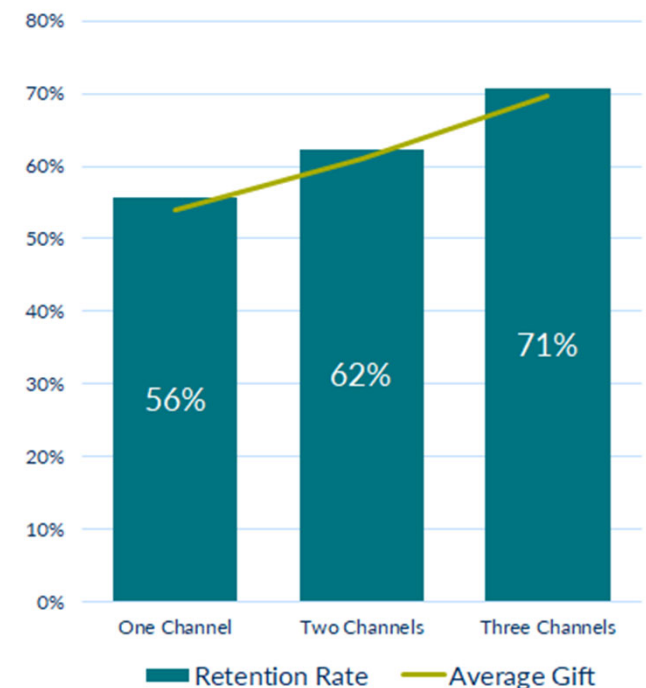
DEVELOPING COMPREHENSIVE APPEAL PLANS AND SCHEDULES

POLL #1: XXX

- Suggestions from Chad:
 - How many of you have a dedicated FTE dedicated to managing online channels (i.e. crowdfunding, email, social media, etc.)? My rationale behind this question is to drive home the need within Annual Giving shops to have a resource who “owns” these channels and is considered the SME within the University
 - How many of you capture social media handles within the online giving page (for stewardship)?

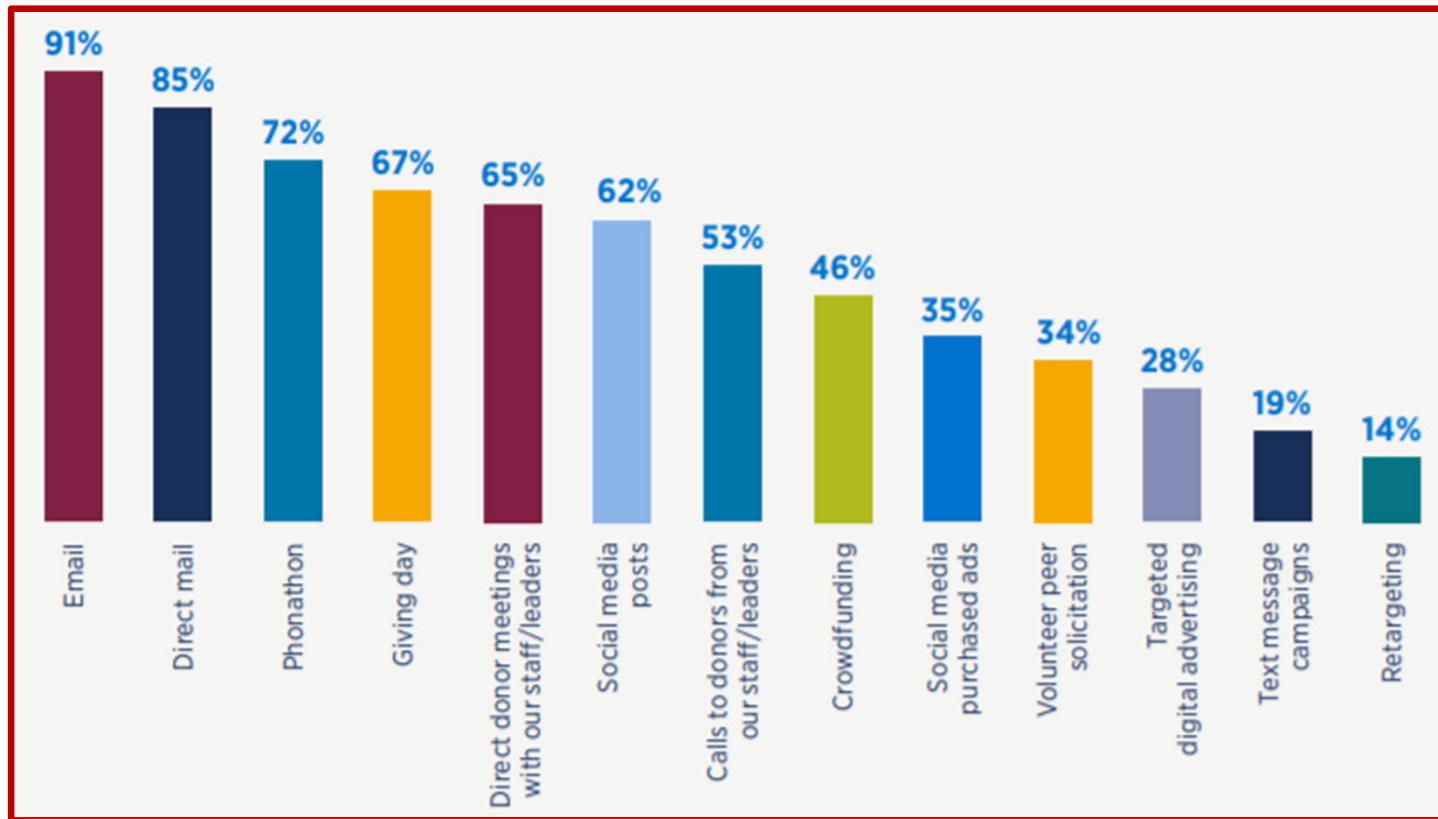
Increase reach by increasing channels

- 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



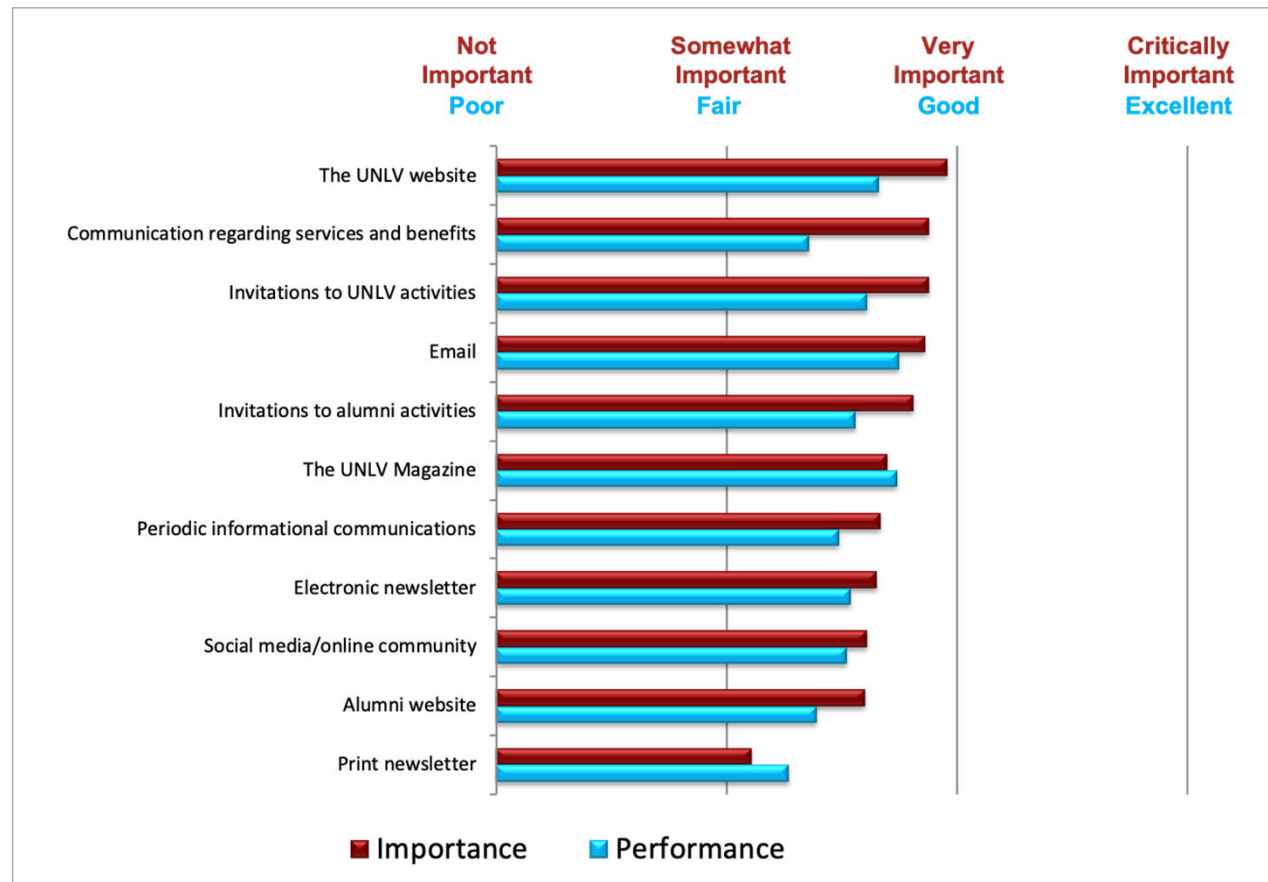
Source: Digital Marketing Association

Dissect your appeal toolkit



Source: Ruffalo Noel Levitz

Survey alumni and donors



Ask insightful survey questions

- How would you most like to be contacted for philanthropic support?

Email

Telephone

Face-to-Face

Not at all

Mail

Text

Social Media

- How valuable would each of the following be to you in making a decision to give to our institution?

Know how gifts are used

Provide scholarships to students

The right thing to do

Increase quality of academics

Increase rankings

Nicer facilities

- Please indicate the extent of your loyalty to each of the following:

The institution in general

My degree/program

A faculty member

Athletics

A student organization I was part of

Determine appeal frequency

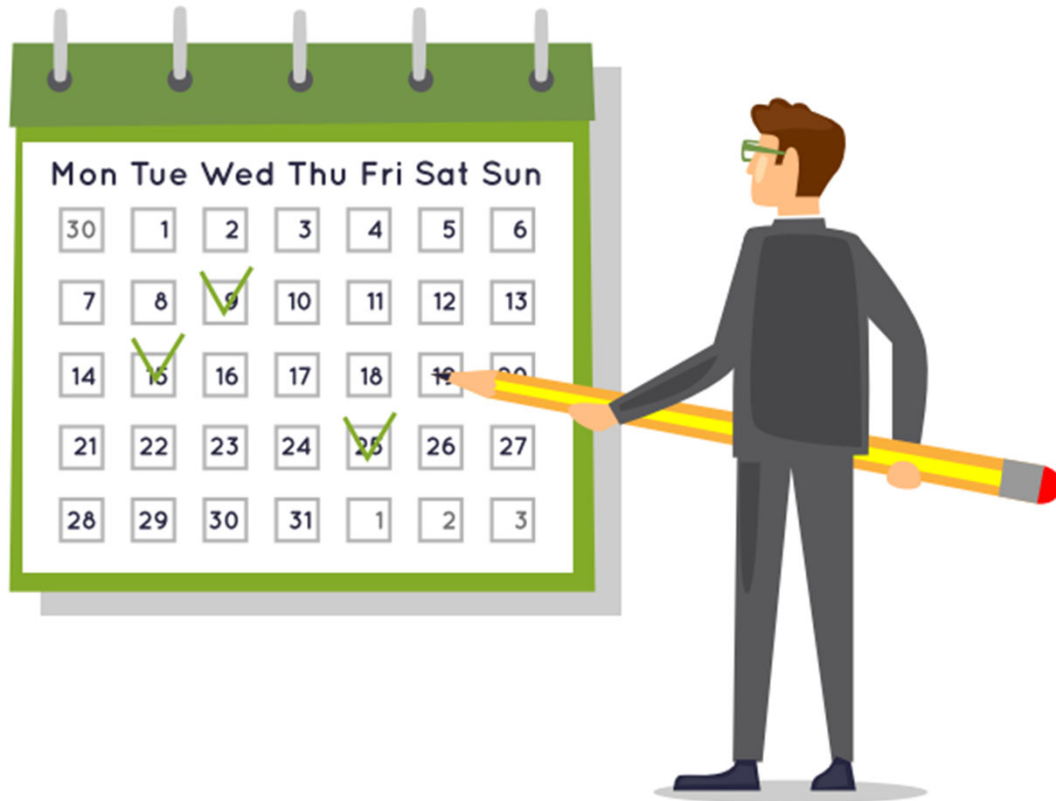


Chart your solicitation and stewardship calendar

- *Example:* Multi-channel anniversary donor

Solicitation			Stewardship		
Touchpoint	Channel	Timing	Touchpoint	Channel	Timing
1	Email (w/ Video)	6 weeks prior to anniversary	1	Social Media (if applicable)	Immediately
2	Direct Mail	4 weeks prior to anniversary	2	Thank You Email	Immediately
3	Email (w/ 2nd Video)	First day of anniversary	2	Social Sharing within Email	Immediately
4	Social Sharing	Ongoing	4	Thank You Letter & Receipt	2-3 days post gift
5	Phonthon	Anniversary Month	5	Thank You Email (w/ Video)	2 weeks post gift
6	Retarget Ad (if applicable)		6	Thank You Text (if applicable)	1 month post gift
7	Text	Anniversary Date (ask or stewardship)	7	Impact/Use of Gift Mail	2 months post gift
8	Direct Mail	1 month post anniversary	8	Thank You Phonathon	2 months post gift
9	Email (w/ 3rd Video)	6 weeks post anniversary			

Chart your solicitation and stewardship calendar

- *Example:* Multi-channel giving day donor

Touchpoint	Date	Channel
1	5/1/2019	Postcard Direct Mail
2	5/7/2019	Teaser Email
3	5/7/2019	Teaser Social Media Post
4	5/31/2019	Phonathon - Message
4	6/1/2019	One Week Away Email w/ Video
5	6/1/2019	One Week Away Social Media Post
6-13	6/9/2019 Day of Giving	3-4 Emails
		Peer Email
		Digital Ads
		Retarget (if applicable)
		4-5 Social Media Posts
		Text Message
14	6/10/2019	Thank You Email w/ Video
15	6/10/2019	Thank You Social Media Post
16	6/26/2019	Thank You Postcard Direct Mail
17	7/5/2019	Thank You Call Phonathon

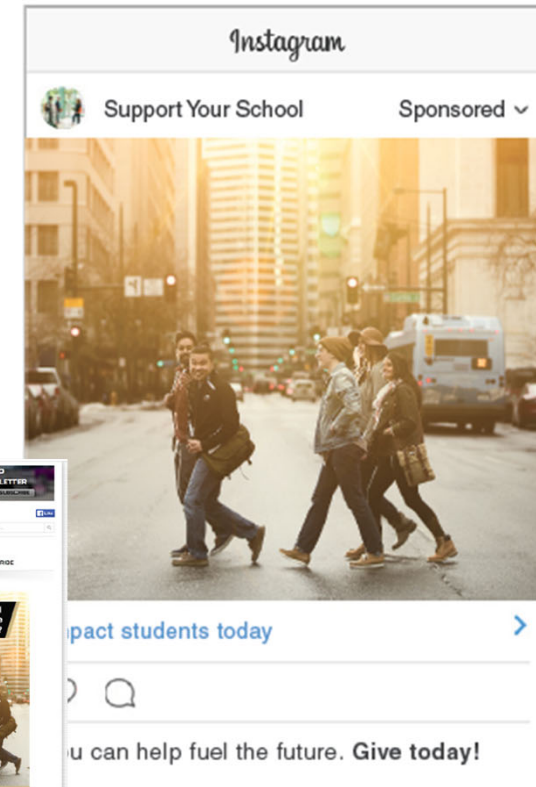
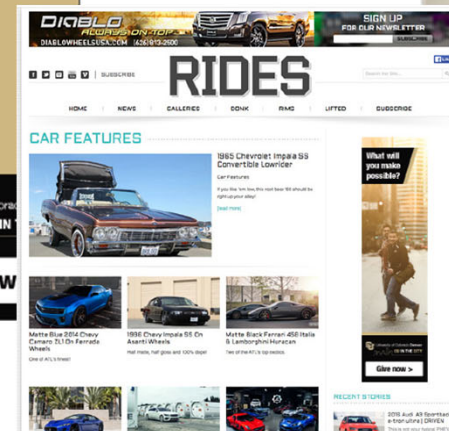
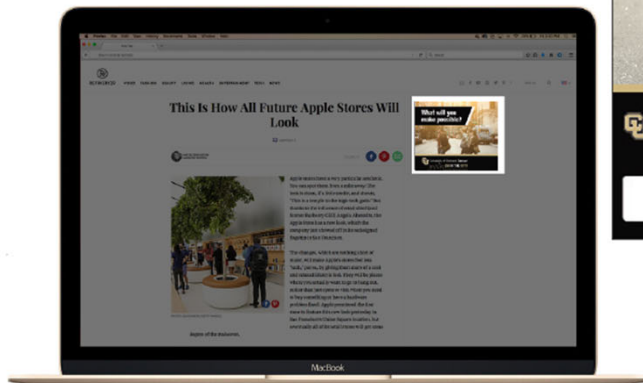


CRAFTING AND OPTIMIZING MESSAGES ACROSS CHANNELS

POLL #2: XXX

- Suggestions from Chad:
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Ensure consistency across channels



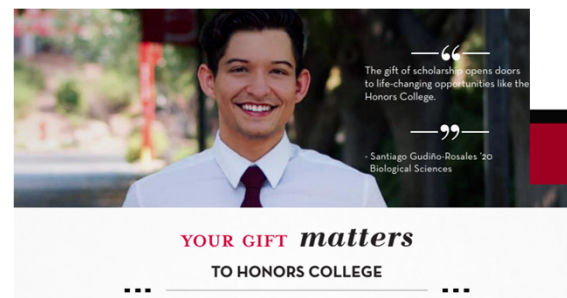
Use consistent branding and visuals



Craft unified messages

Your Gift Matters...

- To Department of Finance
- To College of Fine Arts
- To our student athletes
- By providing a world-class education
- To Maria
- Today!
- Now!



Consider best practices

- **Direct Mail**

- Spend more time
- Provide multiple ways to respond
- Targeting/personalization are crucial
- Use a P.S. section and sidebars to reiterate your offer and call to action

- **Digital Ads**

- Make them stand out
- Keep them simple
- Stick to brand

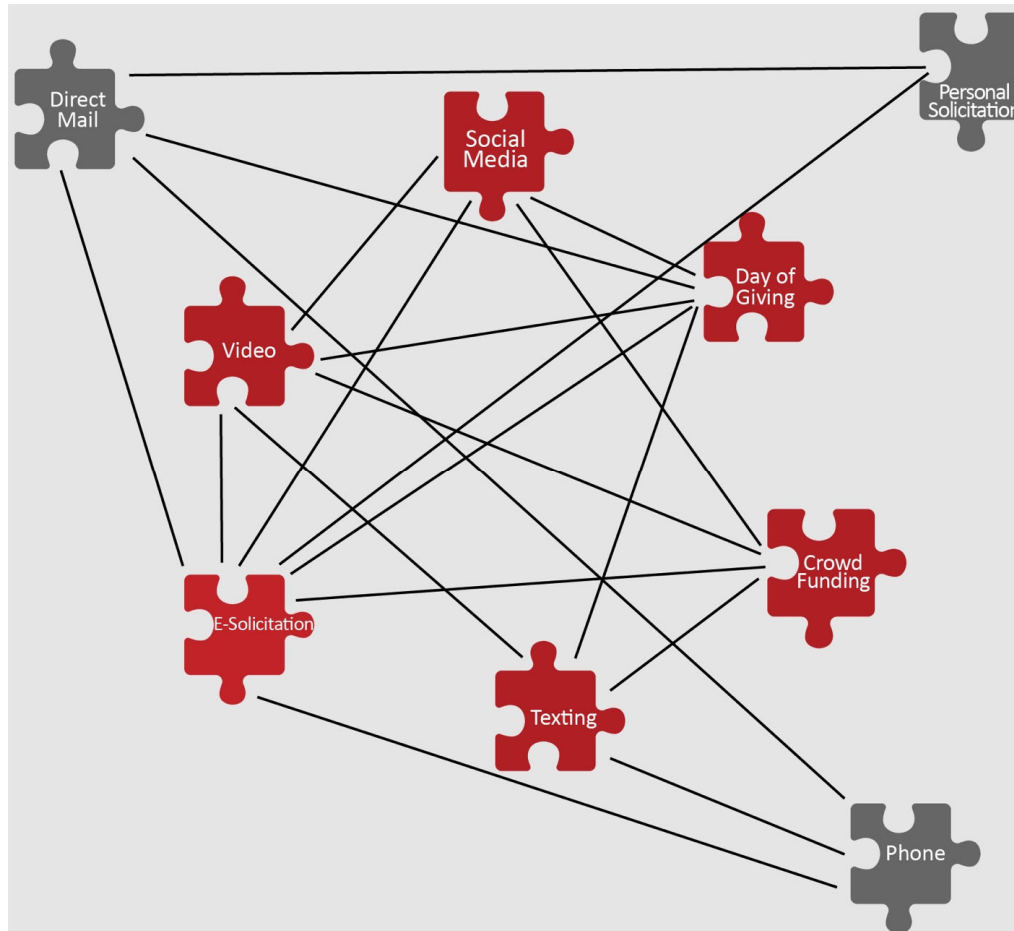
- **Email**

- Keep it short and sweet
- Timing is everything
- Measure, tweak, and repeat

- **Text Message**

- Pay attention to frequency
- Provide value
- Use common language
- Respond ASAP

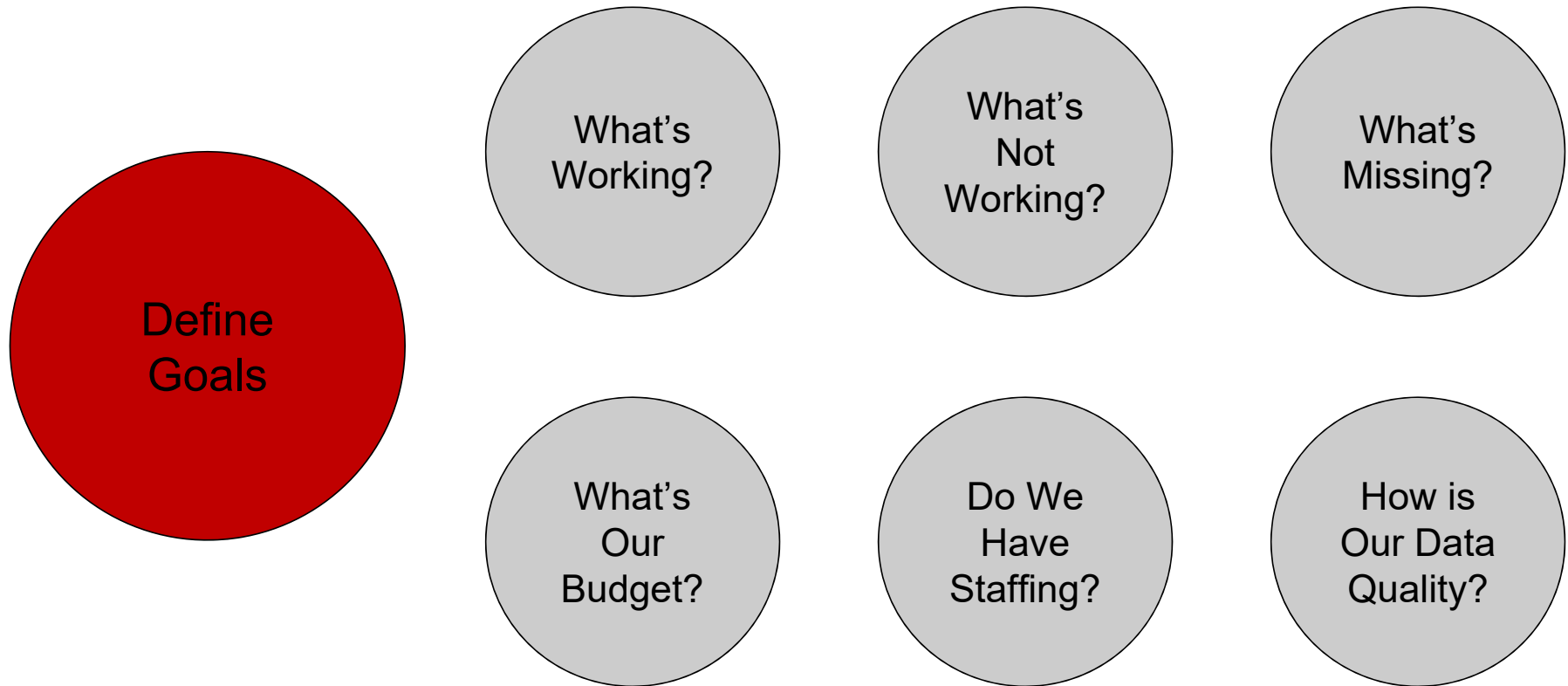
Remember every channel is a piece of the puzzle





EVALUATING YOUR EFFORTS

Ask important questions

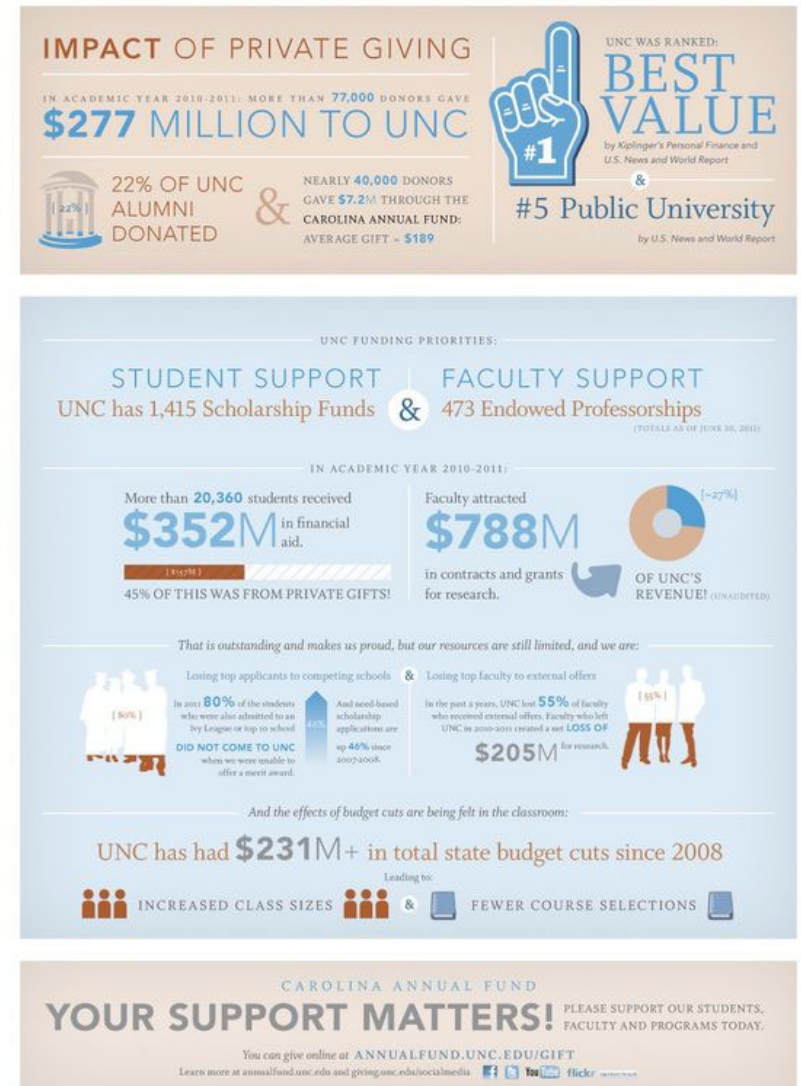


Create a snapshot of your results

Solicitation Method-All Gifts	FY18 Final		FY18 YTD		FY19 YTD	
Personal Solicitation	\$6,009,530.24	2,395	\$2,599,527.65	1,100	\$4,143,960.68	1,757
Phone	\$381,051.75	3,906	\$187,716.39	2,283	\$217,624.74	2,318
Direct Mail	\$2,821,111.39	2,774	\$678,121.67	1,112	\$208,112.32	690
Other/General	\$592,539.47	574	\$376,594.94	469	\$270,988.13	449
Email/Online	\$369,636.88	839	\$201,271.82	454	\$379,650.64	1,292
Events	\$359,725.43	230	\$294,502.93	203	\$298,461.00	171
Emerging Technologies	\$137,219.44	1,097	\$104,953.86	915	\$430,305.69	1,746
Unknown/Blank	\$2,226,729.94	5,515	\$2,151,859.16	5,226	\$373,381.67	74
Total	\$12,897,544.54	11,254	\$6,594,548.42	6,931	\$6,322,484.87	7,754

Articulate efforts to others

- Use infographics to “tell the story”
 - Internal and external
- Attribute appeal codes
 - Quantify appeals



Key Takeaways

- Annual giving **must** include the integration of online and offline appeals
- Create a holistic calendar
- *Remember:* Donors are not loyal to one channel
- Dedicate staff to online channels
- Track results

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