

The best practices are
the ones that work for **you.**SM



EAB

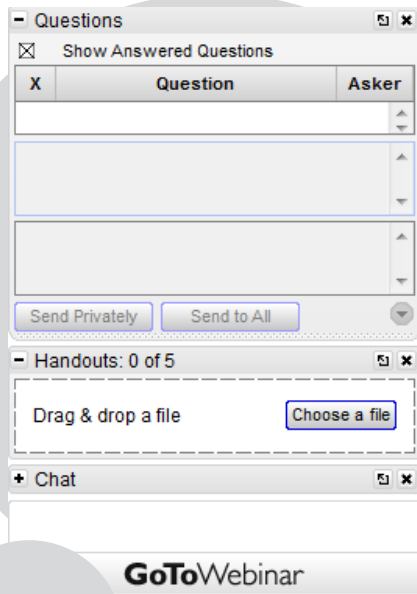
Royall & Company

Fourth-Quarter Fundraising: Finish Strong to Start Strong

Before We Begin...

A Few Housekeeping Items

- Phone lines are muted
- Submit questions during the presentation via chat on the GoToWebinar main screen



The screenshot shows the GoToWebinar interface with two main sections: Questions and Handouts. The Questions section is at the top, featuring a checkbox for "Show Answered Questions", a table with columns "X", "Question", and "Asker", and two empty text input fields. Below the input fields are buttons for "Send Privately" and "Send to All". The Handouts section is below the Questions section, showing "Handouts: 0 of 5" and a "Drag & drop a file" area with a "Choose a file" button. At the bottom of the interface is a "Chat" section with a plus icon and a text input field. The GoToWebinar logo is visible at the bottom right of the interface.



GoToWebinar

Today's speakers:



Julie Solomon

Practice Manager,
Advancement



Dana Gresko

Manager, Analytics
and Fundraising Strategy

Leveraging Data and Insights

Serving Higher Education Since 1989



EAB

Royall & Company

► Our Mission

Utilize proven, data-driven strategies to help colleges and universities achieve their most important revenue goals



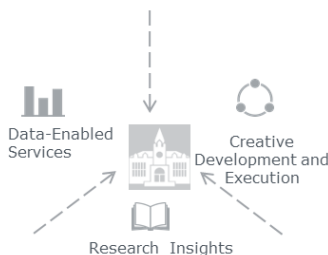
► Our Distinctive Approach

Gathering and Analyzing Data to Inform Best Practices...



Continuous Feedback Loop

...Through Our Unique Collection of Capabilities...



...Across the Nation's Leading Campuses

Abilene Christian Univ.	Millsaps College
Bates College	Simmons College
Baylor University	Swarthmore College
Central Washington Univ.	Tulane University
Fordham University	Univ. of Central Missouri
Iona College	University of Denver
Jacksonville University	University of Memphis
Kent State University	Wake Forest University
Longwood University	Whitman College
Loyola Univ. - Maryland	Wittenberg University
Mary Baldwin University	

- 1 Fourth-Quarter Annual Fundraising
 - 2 Case in Brief: Wittenberg University
 - 3 Testing Insights to Help Hit Your Fiscal Year-End Targets
-

Did you gain

65–70%

of your fiscal year goal by December 31?

If **not**, you've got
some ground to make up
to hit your **target goals** this year.

1

Fourth-Quarter Fundraising

2

Case in Brief: Wittenberg University

3

Testing Insights to Help Hit Your Fiscal
Year-End Targets

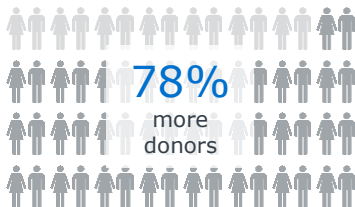


Case in Brief: Wittenberg University

- Private university in Springfield, Ohio
- Partnered with Royall in 2011 on single spring campaign to increase alumni participation and offset declines in phonathon revenues
- Diversified channels, focusing on direct mail, email, and a social media-driven Day of Giving; segmented alumni more effectively, increased the frequency of donation requests, and incorporated incentives; helped organization optimize its phone channel

Initial Royall-Led Annual Fund Campaign Performance

Versus Prior Year





Second Partnership Reignites Fundraising Trajectory

- The initial partnership was a success, and the Wittenberg team felt they learned so much that they brought the campaign management back internally.
- Total quarterly gifts declined 46% the first year and then were stagnant for 18 months. A new VP took the reins in 2013, and she partnered with Royall again.

31%

Increase in annual fund gifts

32%

Increase in annual fund gifts greater than \$1,000

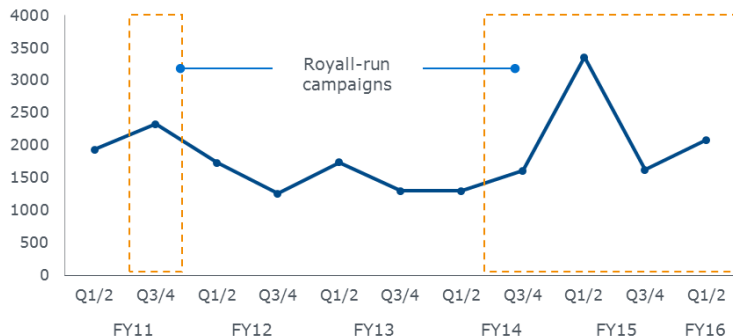
34%

Increase in donations from direct mail

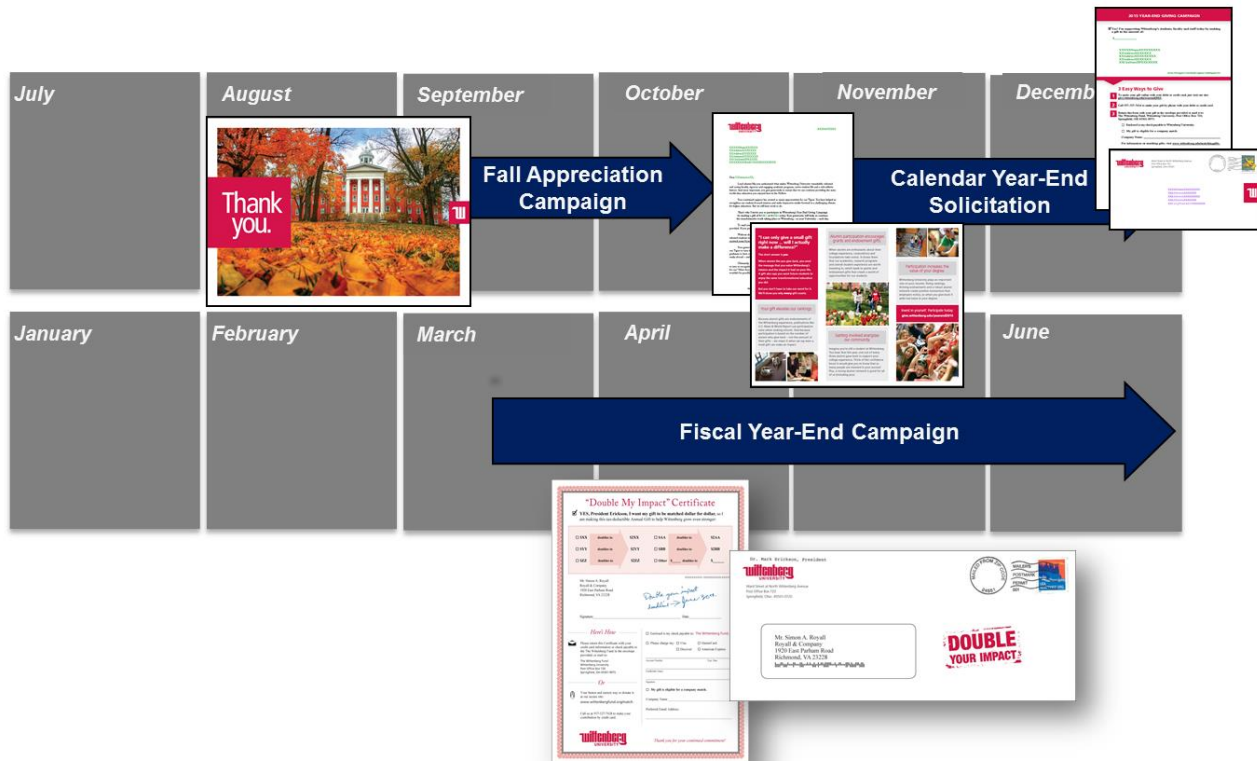
Average Quarterly Gift

By Campaign Manager


Quarterly Annual Fund Gifts



Communications Calendar



1

Fourth-Quarter Fundraising

2

Case in Brief: Wittenberg University

3

Testing Insights to Help Hit Your Fiscal
Year-End Targets

Are You on Track to Hit Your Annual Giving Targets?

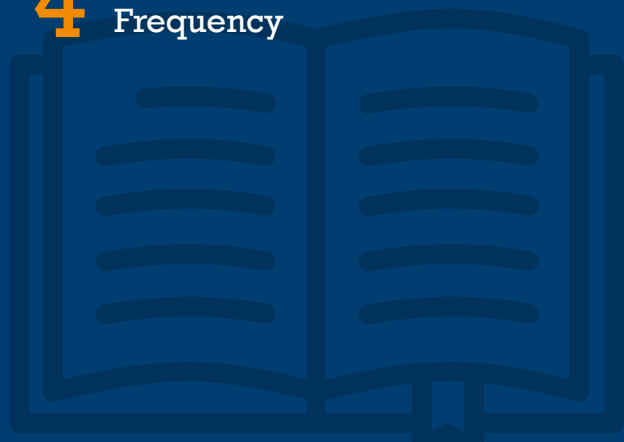
— *testing insights for a positive spring*

1 Matching
Gift Challenge

3 Tried-and-True
Copy Formatting

2 Outer
Envelope

4 Email
Frequency



Creating a Deadline

Matching Gifts Continue to Be One of the Most Effective Imposed Deadlines



TEST Matching Gift Challenge

- Goal

To determine the impact of including a matching challenge offer to alumni

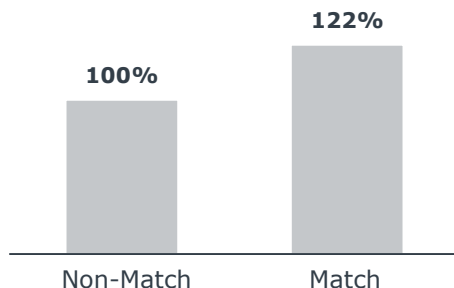
- Hypothesis

By including a matching challenge offer, we will see a lift in response rate



Match Give Provides 22% Lift

Response Rate



Variations:
"Alumni Challenge"

Deciding on Packaging



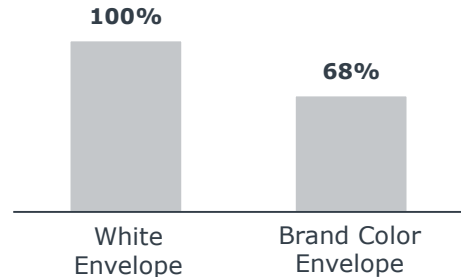
TEST Outer Envelope

- Goal
To determine the impact of a colored, branded envelope
- Hypothesis
Using an envelope with the school's colors, we will see a lift in response rate



Decreased Response of 32% with Colored Envelope

Response Rate



Paying Attention to Formatting Details

Italics, Bold, and Other Text Format Choices Can Have a Big Impact



TEST Copy Format Test

- Goal

To determine how the use of traditional direct marketing/copy formatting techniques impact overall giving

- Hypothesis

Employing enhanced visual direct marketing techniques will create a response rate lift

LENOIR-RHYNE
UNIVERSITY

XXXXXX

XXXXXXXXXXXX
XXXXXXXXXXXX
XXXXXXXXXXXX
XXXXXXXXXXXX
XXXXXXXXXXXX
XXXXXXXXXXXX
XXXXXXXXXXXX

Dear XXXXXXXXXXXX,

As one of Lenoir-Rhyne's largest freshmen classes finishes their first year on campus, I want to make sure you know that your gift makes this student's year his truly important first semester! From You helped make it possible for many of our boys to enjoy life-changing opportunities that will prepare them to Take Charge and meet the pressing needs of our community and the world. Thank you.

It's one thing for me to tell you all about the difference you have made for our students, but now I would like to introduce you to some students whose stories are made possible through your support.

XXXXXXXXXX, meet Ayesha Smith and Jacob Thigpen.

Ayesha, a double major in psychology and human services, is the type of bright, determined student who exemplifies what it means to be a Bear. She is president of her sorority, serves as historian for the Black Student Alliance, and sings in LRU's Nu Generation Gospel Choir (for which she also serves as president). In just a few weeks, Ayesha will earn her degree and become the first person in her family to graduate from college.

Jacob, an athletic native, credits the beautiful campus and Lenoir-Rhyne community for enticing him to Hatteras. Football has been a big part of his LR experience; he helped our Bears maintain the title of SAC champions from 2012 to 2014 as a left tackle. But Jacob also demonstrates the well-roundedness and selflessness that define our Bears. He is an active member of our LR house system, volunteers with the Salvation Army, and serves as a Bible study leader (which has helped him find his path and decide to become a Christian minister to minister to youth of all ages after graduation).

These are the types of success stories your gifts help make happen... and there are many more stories like them. There you are proud of the tremendous impact you've had on our talented students!

Because you are clearly dedicated to our students' success, I want to make sure you know that a fellow donor has issued a Matching Gift Challenge: any gift made before May 31 will be matched dollar for dollar.

This is an excellent opportunity to make twice the impact as we plan for the upcoming school year.

(Once, please...)

Office of Advancement | P.O. Box 7487 | Rhyne, NC 28603

THE UNIVERSITY OF THE SOUTH

Executive Director of Advancement Relations and Annual Giving

P.S. Every gift keeps Lenoir-Rhyne moving ahead... and your gift today will go twice as far because it will be matched dollar for dollar. Please renew your support or give today at lenoir-rhyne.edu/give or by returning the enclosed reply form. Thank you, XXXXXXXXXXXX.

P.P.S. If you have any questions about The Fund for Lenoir-Rhyne, please don't hesitate to contact me at rebecca.allen@lr.edu. I would love to hear from you.

Paying Attention to Formatting Details

Italics, Bold, and Other Text Format Choices Can Have a Big Impact

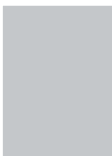


Test Format Received a Response Rate Lift of 24%

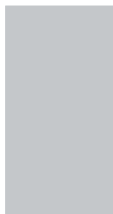
Response Rate

124%

100%



Control
Letter



Test
Letter

LENOIR-RHYNE
UNIVERSITY

XXXXXX

XXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXX

Dear XXXXXXXXXXXX,

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Office of Advancement | P.O. Box 7487 | Hickory, NC 28603

THE ASSOCIATION OF AMERICAN COLLEGES
Executive Director of Advancement Relations and Annual Giving

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P.P.S. If you have any questions about The Fund for Lenoir-Rhyne, please don't hesitate to contact me at rebecca.allen@lr.edu. I would love to hear from you.

Impact of Copy Format Can Be Significant



September 1, 2015

Dear Hillary,

You've done so much for our school! That's why I heartfelt "thank you" for all that your generosity has done for our school. Another football season and fall semester of exciting time of growth, your support has enabled our school to shape the world around them!

Today's students are a lot like you, and before I can I invite you to make a gift to the Annual Fund. As always, your help will keep us advancing upward and onward.

Your history of giving has been a key part of transforming us into the residential community of courageous thinkers, learners and doers we are today. Your support has provided us with vital resources to welcome the largest freshman class in our history and ensure student success and access through our FreshMinds program.

Thanks to you, the next generation of ambitious students is following in your footsteps and making a big difference in our community and beyond! I hope you will accept my invitation to make a gift of \$ASK1 or even \$ASK2, if you are able. Visit our secure site, www.give.edu, or use the enclosed reply form.

On behalf of all of us, you have our enduring gratitude for the important role you play in making us proud.

With personal thanks,
John Smith
John Smith '92
Annual Fund Director

September 1, 2015

Dear Hillary,

You've done so much for our school! That's why **I want to take this moment to extend a heartfelt "thank you"** for all that your generosity has helped the University accomplish this past year.

Another football season and fall semester of momentum are under way. And during this exciting time of growth, your support has enabled our daring dreamers and trailblazers to shape the world around them!

Today's students are a lot like you, and before I continue sharing the impact of your generosity, I invite you to make a gift to the Annual Fund.

As always, your help will keep us advancing upward and onward.

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With personal thanks,
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John Smith '92
Annual Fund Director

P.S. It takes only a few minutes to make a gift at our secure site, www.give.edu. You'll help build a bright future.

Frequent Mistakes Impacting Response

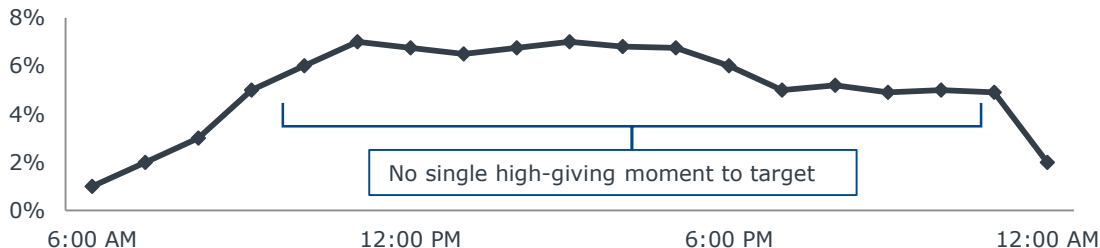
- ✗ Left-justified text and combined paragraphs
- ✗ No typographical emphasis (i.e., bold, italics)
- ✗ No postscript
- ✗ Institution-centric case for giving

Currently Testing Email Frequency

Advancement Forum: Multi-Touch Campaign Brings Outsized Returns

Last-Minute Gifts Are Spread Across December 31

Percentage of Online NYE Donations by Hour for All Nonprofits



Ensure No Gift Is Forgotten

7 AM



"Last day of 2015 to get your gift in!"

4 PM



"Time's running out!"

12 PM



"We're halfway there!"

10 PM



"Only two hours to make your gift!"

Achieving Quantifiable, Outsized Fundraising Impact

— *testing insights key to long-standing return on investment*

1 Matching
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3 Tried-and-True
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2 Outer
Envelope

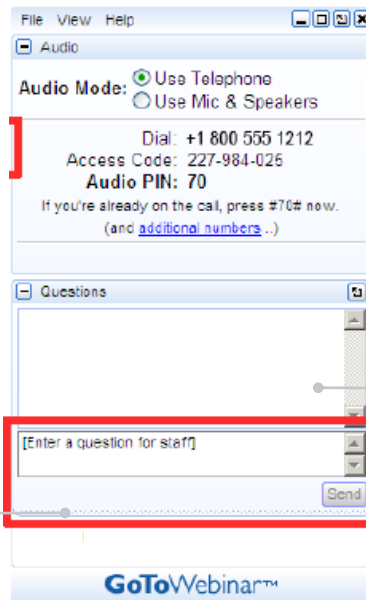
4 Email
Frequency



100+ Data and analytics professionals • 300+ A/B tests performed annually

How to Submit Questions to Our Panelists

Enter a Question in the Question Panel



File View Help

Audio

Audio Mode: ☒ Use Telephone ☐ Use Mic & Speakers

Dial: +1 800 555 1212
Access Code: 227-984-025
Audio PIN: 70
If you're already on the call, press #70# now.
(and [additional numbers](#)..)

Questions

[Enter a question for staff]

Send

GoToWebinar™

Type your question
and hit Send

The presenter
may answer the
question here or
respond verbally

Run Annual Campaigns That Keep Giving Back



Deploy strategy
with **data
analytics**

- Culling and analyzing your data
- Modeling and segmentation
- Strategic direction



Optimize
**campaign
design**

- Customized creative
- Full online and print production



Drive **campaign
performance**

- Messaging implementation
- Performance monitoring
and reporting

▶ The Royall Difference



Targeting and
Timing Expertise



Rigorous
Analytics



Creativity

Complete Our Survey to...



Request our whitepaper:

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Cutting Edge](#)



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The Advancement Blog](#)

For More Information



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