Fundraising Products Template

Instructions

Grouping institutional priorities into fundraising products gives donors a sense of ownership over their giving and loyalty to the institution. Circulate the below template to academic units to gather information on where donors' dollars can have the greatest impact. Use the information to compile short brochures that gift officers can use in conversations with prospects.

Department Overview

This section will be used on the first page of the fundraising products brochure. Departmental leaders should describe the mission of their department and highlight particular strengths of their program. (100-150 words)

Impact Statement

This section summarizes for donors the impact that their gifts have on the department. Academic leaders should refer to the specific mission of the department and answer the question, "How will donors' gifts benefit students in ways that are unique from other departments?" (100-150 words)

Fundraising Products Template (cont.)

Fundraising Product List

This section will allow donors to pick funding priorities that fit with their capacity and philanthropic interests. Each fundraising product should include a title, cost, and description of impact.

Title: ____________________

Cost:____________________

Description (*50-75 words*)**:**____________________

____

____

____

Title: ____________________

Cost:____________________

Description (*50-75 words*)**:**____________________

____

____

____

Title: ____________________

Cost:____________________

Description (*50-75 words*)**:**____________________

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____

____

Title: ____________________

Cost:____________________

Description (*50-75 words*)**:**____________________

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Fundraising Products Template (cont.)

Title: ____

Cost: ____

Description (*50-75 words*)**:** ____

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____

____

Title: ____

Cost: ____

Description (*50-75 words*)**:** ____

____

____

____

Title: ____

Cost: ____

Description (*50-75 words*)**:** ____

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Title: ____

Cost: ____

Description (*50-75 words*)**:** ____

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Title: ____

Cost: ____

Description (*50-75 words*)**:** ____

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Alumni Volunteer Referral Organizer

Instructions

Alumni are often the best judges for their peers' likelihood to give. The following referral form will help advancement shops tap into their volunteers' networks to surface strong prospects.

Peer Referral Form Your Name: ______________________

Name: ____ Email: ____

Phone Number:_________________________________ Employer: _____________________________________

Address: ______________________________________ Job Title: _____________________________________

How strong is this individual's affinity to the institution? *(Think about whether he or she thinks fondly of the institution, is still in touch with faculty, staff, or students at the institution, stays connected to the institution via events or volunteering, etc.)*

Low Affinity High Affinity

1 2 3 4 5

Notes:____

____

In what way might he or she want to get involved with the institution? *(e.g., Volunteering, board service, council services, student mentoring, job shadowing, connecting with faculty, access to events, etc.)*

Interest Areas: ____

____

How strong is this individual's ability to donate to the institution? *(Think about his or her wealth, philanthropic spirit, job, place in career, family considerations, etc.)*

Low Capacity High Capacity

1 2 3 4 5

Notes:____

____

Should a gift officer visit this individual?

No, definitely not Yes, absolutely

1 2 3 4 5

Consider organizing the results of this worksheet in a spreadsheet to quickly sort through highly rated prospects.

Alumni Volunteer	Prospect Name	Email	Phone	Address	Employer	Job Title	Affinity Level	Affinity Notes	Interest Areas	Capacity Level	Notes	Gift Officer Visit	Notes
Jane A.	Jack Smith	jsmith@gmail.com	419-555-2990	XXXX	Johnson & Wilson	Partner	3	Recruits from university	Board service	5	Kids out of college, great job	4	XXX

Source: EAB interviews and analysis.

Alumni Relations Prospect Referral Template

Instructions

Alumni relations professionals often meet more potential donors than development staff and are therefore in a perfect position to refer prospects to the development office. Give this form to alumni relations staff to help them track and qualify the alumni they meet. Upload this document to the advancement office's intranet to streamline the referral process.

Prospect Referral Form

Your Name ________________

Please fill out as much as you recall from meeting this prospect

Constituent name: __________________________ Class Year:______________________

Home City, State: ___________________________ Employer: _______________________

- ❑ Business ownership (listen for: type of business, years in business, sales trends, recent sale)
- ❑ Career Path (promotions, title)
- ❑ Board Involvement (business or civic)
- ❑ Secondary homes
- ❑ Investment Properties (commercial, apartments, farms, vineyards)
- ❑ Family Foundation
- ❑ Major Philanthropic Gifts to Other Organization
- ❑ Vacation Spots
- ❑ Yachts, Private Airplanes,
- ❑ Collections (art, jewelry, antiques)
- ❑ Country Club Membership
- ❑ Hobbies (show horse, wine collecting, cars, sailing)
- ❑ Boarding Schools for Children
- ❑ Hired Help (nannies, chauffer, interior decorator)
- ❑ Other

Select one or more of the above and elaborate below with as much detail as possible:

Sources: Adapted from materials provided by Marquette University; EAB interviews and analysis.

Gift Society Tier Audit

Instructions:

Gift society tiers and corresponding stewardship initiatives are often established and sustained without studying donor giving trends. Answer the following questions to check the effectiveness of your current gift society levels, or to establish new levels.

Step 1: Develop Effective Gift Society Levels

Determine current donor trends by charting the number of current donors at each giving level.

Giving Level	Number of Donors	Average Gift Size	Average Years Spent Giving at Level	Average Wealth Rating
$500-$999				
$1,000-$1,499				
$1,500-$2,499				
$2,500-$4,999				
$5,000-$9,999				
$10,000-$14,999				
$15,000-$24,999				

Step 2: Distribute Stewardship Offerings Across Society Levels

Assess how stewardship offerings are allocated across the giving pyramid. Pay close attention to whether these offerings are structured to incentivize upgrades. The following questions will help advancement staff determine whether their stewardship program supports upgrades and consistent giving.

Questions to ask:

- Moving up the donor society pyramid, do stewardship initiatives increase in their level of exclusivity and senior leader access?

  ___Yes ___No

  If no, shuffle around initiatives to ensure that in-person senior leader time is directed to top donors, but that donors at other levels still receive some senior leader access through digital channels and exclusive events.

- Do any stewardship offerings receive little or negative donor feedback?

  ___Yes ___No

  If yes, evaluate the cost and importance of the stewardship offerings. Consider eliminating any honor rolls, certificates, or tokens that do not seem to resonate with donors.

Source: EAB interviews and analysis.

Gift Society Tier Audit (cont.)

Marketing Gift Society Levels and Benefits

Estimate the number of times donors from each society level are alerted about the tier they belong to and its corresponding privileges.

Questions to ask:

- Are donors sufficiently informed of the different levels of the gift society and the stewardship offerings that accompany them?

  ___Yes ___No

  If no, consider increasing the number and type of communications about the gift society, as well as the visibility of the society on the institution's giving website.

- Do all or most of advancement communications to gift society donors emphasize their society level and benefits?

  ___Yes ___No

  If no, ensure that any communications to each donor segment thanks them for their past giving and details their gift society level and corresponding benefits.

Source: EAB interviews and analysis.

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President’s Blog Launch Guide

Instructions

Mid-level donors often seek enhanced access to senior leaders. A presidential blog can meet this need easily and with little time commitment from the president. Follow these steps to launch a blog that effectively stewards donors.

Step 1: Select a Blog Manager

Although the president will be the face of the blog, another staff member must take ownership of coordinating and editing posts, drafting posts when the president is busy, and managing comments on posts. Use the checklist below to identify an ideal blog manager.

Blog Manager Candidate Checklist

	Attributes of Blog Manager
	Access to president
	Point of contact with donors
	Experience with stewardship
	Strong writing skills

Potential Blog Managers

- Leadership society director
- Stewardship manager
- Director of the annual fund

Step 2: Set Minimum Gift Level for Access

Establish a minimum dollar amount that will grant donors access to the president’s blog. An ideal minimum gift level will alleviate a pain point in the giving pyramid where donors upgrade slowly or not at all. Use the questions below to identify a minimum gift that will inflect giving behaviors.

- What giving tiers are already established?

- At which giving levels are a large number of donors currently parked?

- Which giving levels are you trying to move donors toward?

- Which giving level currently lacks strong stewardship initiatives? Which level does not receive the attention it deserves due to problems of scale?

- Which giving level is characterized by low satisfaction scores in donor surveys?

Source: EAB interviews and analysis.

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President’s Blog Launch Guide (cont.)

Step 3: Finalize Logistics

Set the groundwork for a sustainable initiative by working through key logistical matters ahead of time. Answer the following questions for various aspects of the blog process.

Password Log Ins

- How will passwords be delivered to donors (e.g., by email, in leadership society welcome packet, etc.)?

- Will donors have a single sign-on option that links with their Facebook or email account?

Editing Process

- Who will edit each post?

- What are the criteria this individual should use to edit each post?

Posting Calendar

- How frequently will blog posts be published?

- How will posts align with other donor communications or events?

Step 4: Determine Content

Blogs posts should draw in readers and give them a feeling of insider access. Determine topics using the following criteria.

Board-Level Topics

Identify topics that might be presented to a board member or trustee

Uniquely Presidential

Consider topics in which there is deep and unique value in hearing the president’s point of view

High Alumni Interest

Track blog post views, review donor surveys, and consult with alumni relations to identify topics most interesting to alumni

Example Titles from Ithaca College’s President’s Blog

- “‘I Do Not Invest in Buildings—I Invest in People”
- “Seeing the Future in a Moment of Darkness”
- “Learning from Tragedy”

Source: EAB interviews and analysis.

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President’s Blog Launch Guide (cont.)

Step 5: Market and Brand the Blog

Eligible donors must know they have access to the blog—and they must know that access is exclusive. Set the groundwork for a sustainable initiative by developing strong marketing and branding initiatives.

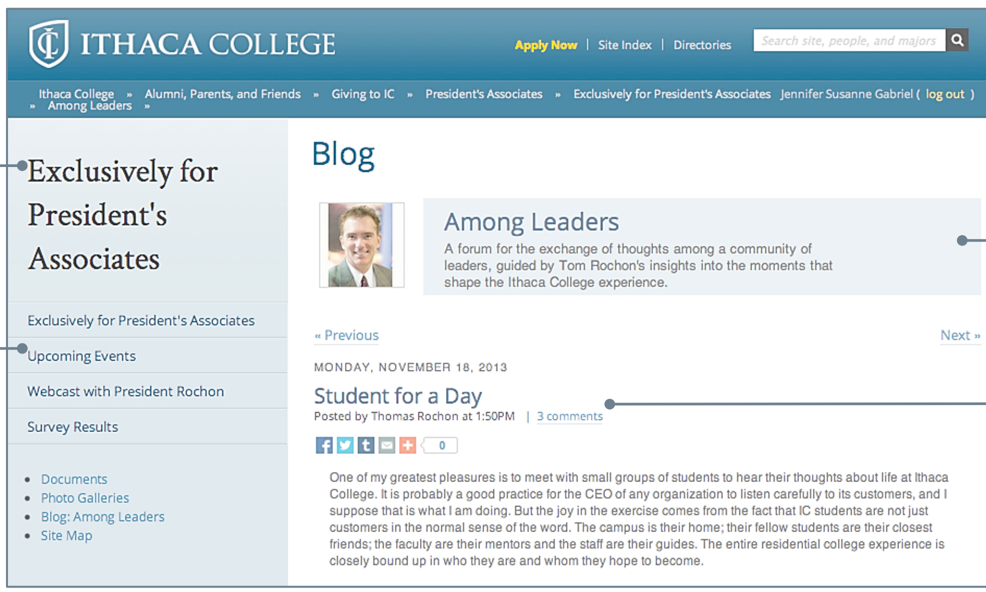
Potential Marketing Pushes

- Email blast to all eligible donors introducing the blog
- Email blasts to all eligible donors for each blog post
- Personalized emails from MGOs to high-touch donors
- Inclusion of upcoming blog post topics in newsletters or other standard communications

Branding Techniques from Ithaca College’s President’s Blog

Title focuses on exclusivity and access

Blog links to other exclusive opportunities



Description highlights President’s unique insights

Post is directly from President’s account

Step 6: Add Value for Donors Through Comment Thread Discussions

Continue the discussion by allowing donors to comment on blog posts. Add an additional level of stewardship by addressing donor comments. The blog manager should shift through comments and divide them into three categories.

1. Comments that do not require a response
2. Comments to be addressed by the President
3. Comments from top donors that should be addressed by their MGO

Source: Image courtesy of Ithaca College, EAB interviews and analysis.

Social Media Impact Ambassadors Launch Guide

Instructions

Social media impact ambassadors are volunteers who agree to share posts on their social network about the impact of donors' dollars. Advancement shops benefit from their postings because what people see on social media affects how they give. This is especially true for Millennial donors who are starting to take home bigger paychecks and are thinking about bumping up their giving. This resource outlines **six steps** to establish a social media impact ambassadors initiative.

Step 1: Recruit Ambassadors

Depending on who is managing the initiative and how much time he or she has, set a goal for the number of ambassadors to recruit. Consider adapting Skidmore College's social media volunteer description to recruit ambassadors.

Key Qualities of Effective Ambassadors	
✔	Self-identified alumni volunteer
✔	Heavy social media user with large network
✔	Actively supports the college online

Sample Social Media Ambassador Position Description

Do you tweet and use Facebook every day? Do you take pride in your Alma Mater? If your answer to these questions is yes, then you are exactly what we are looking for. Our institution is seeking highly motivated individuals who have a great passion for social networking, spreading the word, and making new connections.

<u>Requirements</u>

- Must have a basic knowledge of privacy settings
- Must be active on at least two social media platforms (preferably Twitter and Facebook)
- Strong commitment to ethics, honesty, and integrity in conducting business
- Home based, with bimonthly (more frequent when necessary) check-ins with social media liaison
- Supply social media liaison with your social media links (e.g., Twitter handle, Instagram name)

<u>Responsibilities</u>

- Promotion of social campaigns, competitions, and contests (e.g., reunion, giving challenges, etc.) using promotional content will be provided by Social Media liaisons
- Participate in regular meetings for updates
- Assist in growing the institution's presence on web-based social communities (e.g., Facebook, Twitter, LinkedIn, YouTube, Instagram)
- Post two to five updates/messages on all channels each week
- Analyze similar institutions' social media presence/strategies
- Identify threats and opportunities in user generated content surrounding our brand and report to our institution's Social Media liaison

<u>Time Commitment</u>

- Will vary based on number of upcoming events or relevant news which needs to be promoted. (Typically less than two hours per month.) Flexibility to work increased hours around peak events.

Source: Adapted from materials provided by Skidmore College; EAB interviews and analysis.

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Step 2: Plan a Content Strategy

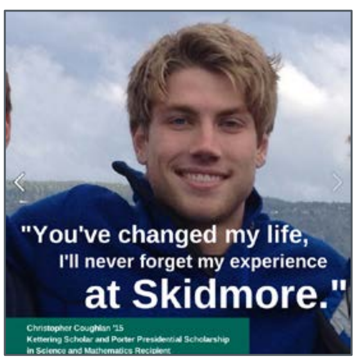
Think thoughtfully about what volunteers should push out to their networks. The following questions will help staff develop posts that ambassadors can share.

- What target demographic should the content reach? Will the ambassadors' networks reach this demographic?
- How can I adapt the content to fit different social media platforms (e.g., Facebook, Twitter, and Tumblr)?
- Is the content easy to understand? Is it attractive to viewers?
- What type of impact does the content share?
- What is the ideal timeline for pushing out posts?

Consider the following content produced by staff at Skidmore College:

#FunFactFriday

Gift impact stories, photos, and quotes posted every other Friday on Twitter and Facebook.



"SEE-Beyond" Summer Grant Recipient Profiles

Summer grant recipient profiles posted on the college's website, Facebook, and Twitter

#ThanksLucy

Student philanthropy day posts on Twitter and Facebook thanking donors for gifts made to the campus

Step 3: Train volunteers

Conduct training sessions to align volunteers with the mission of the initiative and outline their responsibilities. Consider hosting onboarding sessions through webinars or on the phone to bring volunteers up to speed. In addition, consider ongoing emails and discussion sessions to refresh knowledge and introduce new content. (Continued on next page.)

Sources: Image retrieved from: Skidmore College Facebook account; Image received from Skidmore College twitter account; EAB interview and analysis.

Social Media Impact Ambassadors Launch Guide (cont.)

Topics to address during onboarding sessions:

- Volunteer responsibilities
- Time required
- Resources to aid responsibilities
- Privacy concerns
- Social media use and etiquette

Types of Ongoing Communications:

- Calls to review progress, discuss upcoming initiatives, and address content questions
- Email and Twitter pushes to volunteers about important impact initiatives
- Consistently updated central resource (e.g., Facebook) to alert volunteers of messages, photos, and stories that the university wants volunteers to engage with and share with their networks

Step 4: Track Results

Track the following metrics to determine the success of the initiative.

Engagement Data

Platform	Metric	Before Ambassador Launch	After Ambassador Launch	Number Increase	Percentage Increase
	Followers				
	Likes				
	Comments				
	Followers				
	Likes				
	Comments				

Giving Data

Mini-Campaign or Donor Segment	Metric	Before Ambassador Launch	After Ambassador Launch	Number Increase	Percentage Increase
	Dollars				
	Donors				
	Dollars				
	Donors				
	Dollars				
	Donors				

Source: EAB interviews and analysis.

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