

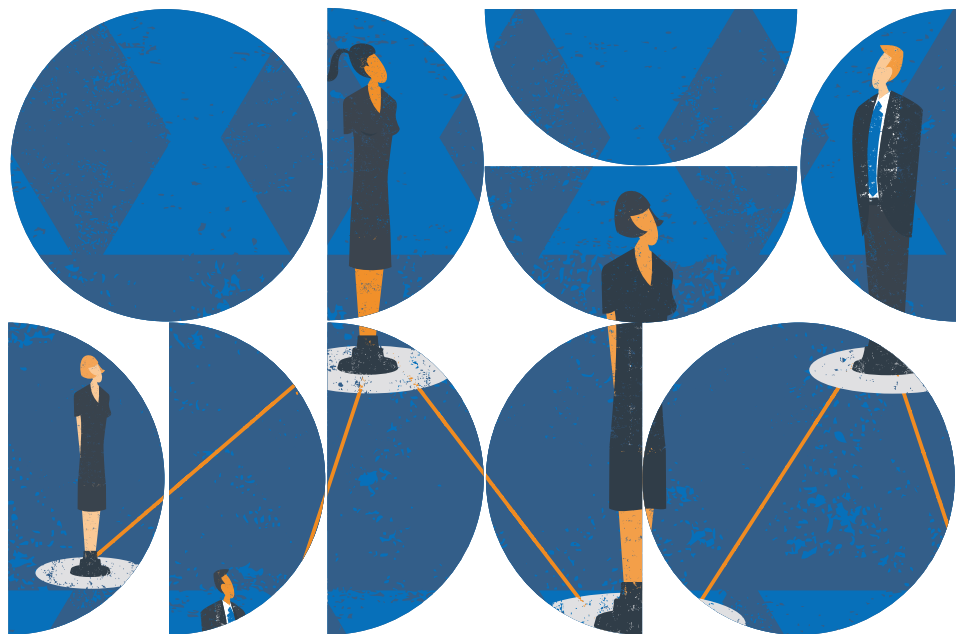


EAB

Optimizing the Campaign Pipeline

New Approaches to Mid-Level Giving

Advancement
Forum





EAB

Optimizing the Campaign Pipeline

New Approaches to Mid-Level Giving

Advancement Forum

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1

Goal: Make education smarter

Advisors to Our Work

EAB is deeply grateful to the organizations and individuals that shared their insights, analysis, and time with us. We would especially like to recognize the following individuals and institutions for being particularly generous with their time and expertise.

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Top Lessons from the Study

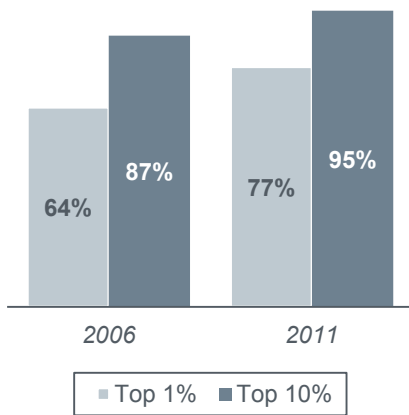
Building a Self-Sustaining Donor Pipeline

Major gifts have grown in importance in recent years, bringing a laser-like focus on high-dollar acquisitions to university advancement. In this climate, too many advancement leaders forget that the major gifts on which they rely are cultivated over time in the annual fund.

Most major gift donors start out giving small gifts and upgrade consistently over time. Advancement divisions that chase one-off gifts from wealthy individuals with low institutional affinity instead of strengthening relationships with up-and-coming donors do so at the pipeline's peril.

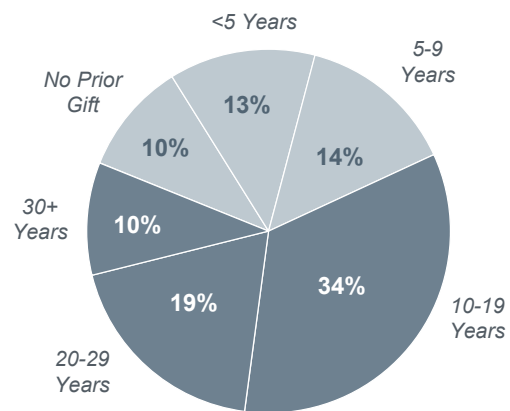
Percentage of Total Campaign Dollars Provided by Top Donors

CASE Campaign Report, 2011



Length of Top Donors' Giving Histories Prior to Biggest Gift

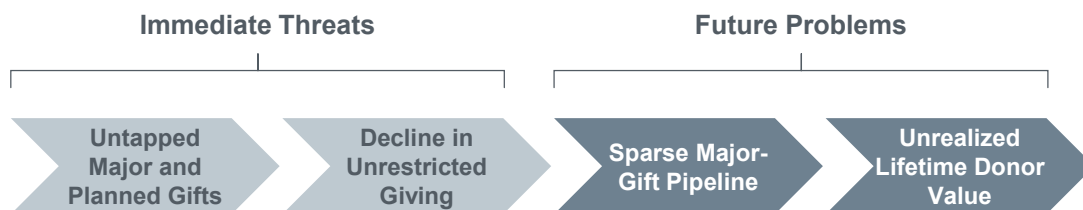
Philanthropy Leadership Council, 2006



Institutions that fail to cultivate and advance their pipeline donors, especially those giving mid-level gifts (typically between \$1,000 and \$25,000), risk undermining their immediate returns from high-affinity donors as well as their long-term major gift prospects.

A poorly planned mid-level cultivation strategy creates a number of risks. Advancement leaders may miss major and planned gifts from mid-level donors with hidden capacity whom wealth screenings fail to flag. Unrestricted revenue returns falter as staff overlook the donors most capable of giving these gifts. Over time, inattention to the pipeline results in a depleted pool of major gift prospects and diminished cumulative donor value.

Short- and Long-Term Effects of an Undeveloped Pipeline Strategy



Source: Philanthropy Leadership Council, *Enduring Relationships: Stewarding Donors to Deepen and Sustain Institutional Ties*, Advisory Board Company, 2008; Council for Advancement and Support of Education, "CASE Campaign Report," 2011; EAB interviews and analysis.

Top Lessons from the Study (cont.)

Building a Self-Sustaining Donor Pipeline

The primary outcome of an undeveloped pipeline strategy is donor inertia. Donors give loyally, but don't upgrade, even though they could. Advancement leaders can overcome donor inertia and move mid-level donors closer to major gifts by taking an ambitious, targeted approach to upgrades.

Segmenting mid-level donors who are likely to upgrade and offering them a well-timed, compelling solicitation moves committed supporters up the giving ladder to higher-value philanthropy.



Ask the Right Donors...

Smart segmentation strategies target donors whose capacity and gift history positions them for upgrades



...At the Right Time...

Upgrade proposals are sent to current-year donors when they are primed to increase their gift level



...With the Right Appeal

Mid-level donors are solicited for mini-major gifts that have a direct, visible impact on institutional priorities

While upgrades increase the value of the pipeline incrementally over time, some mid-level donors have untapped capacity to give high-value gifts immediately. Institutions that deploy existing resources to qualify these donors and refer them for major and planned gift cultivation see big returns in the short term.

Discovery initiatives are key to an effective major gift strategy, yet they often come at great expense to the institution. The opportunity cost of assigning qualification duties to major gift officers is high, since their time is most productively spent cultivating and soliciting the institution's best prospects.

Engaging students, alumni, alumni relations staff, and annual leadership giving officers in discovery and qualification achieves key divisional goals without distracting from direct fundraising work.



A Big Blind Spot

"We're missing low-hanging fruit on the major gift side. We're not assessing what we already have. I think there's potential to mine our giving society for major donors, but we don't do a good job finding them and asking them at that major level."

*Chief Advancement Officer
Public Research University*

Top Lessons from the Study (cont.)

Building a Self-Sustaining Donor Pipeline

Unfortunately, upgrades and discovery alone won't ensure the sustainability of the long-term major gift pipeline. Major gift relationships require well-executed stewardship to flourish over time. Yet most mid-level donors receive little more than gift society benefits, which do little to inflect future giving.

An overwhelming majority of donors care little about certificates, plaques, and other gift society touches. Yet donor relations continues to invest heavily in these offerings. Many advancement leaders have started to wonder whether their stewardship dollars could be spent more productively.



Unappreciated Incentives

73%

Of donors who received plaques or certificates threw them out

83%

Of gift society donors said it had no influence on their giving

+12%

Change in number of donors since 2003 who said gift clubs have no influence on their giving

Advancement leaders must turn to stewardship strategies that are scalable, tiered, and targeted to deepen giving relationships and position mid-level donors to advance through the pipeline.

Extending major gift treatment to mid-level donors, especially by enhancing exclusivity and access to senior leaders, carries with it disproportionately positive returns.

Key Strategies for Enhancing Exclusivity and Access



Leverage Digital Channels for Elite Access

Presidential Elite Insider Blog



Increase Exclusivity with Each Gift Upgrade

Tiered Leadership Programming



Select Priority Donors for Presidential Interactions

Strategic Donor Engagement Councils

Top Lessons from the Study (cont.)

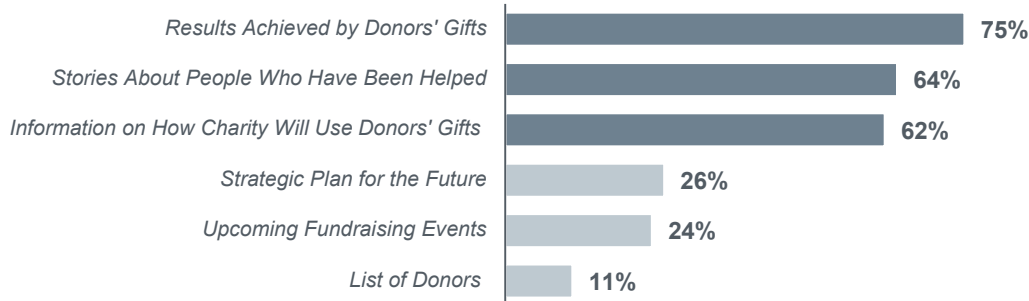
Building a Self-Sustaining Donor Pipeline

Demonstrating impact is essential to effective stewardship. Donors today take a more entrepreneurial view of their philanthropy, regardless of the size of their gift. They attach overwhelmingly to the direct change their gifts cause, and they grow disillusioned with organizations that do not communicate that change to them.

The rapid growth of the nonprofit sector across the past two decades caters to this need for impact-driven stewardship. Advancement leaders who fail to communicate the impact of gifts risk losing supporters to the extensive network of organization that do so.

Percentage of Donors Whose Giving Is Influenced by Various Donor Communications

Cygnus Donor Survey, 2013



Advancement leaders often struggle to communicate impact to donors due to resource and time constraints. Digital channels hold the potential to alleviate these pressures and facilitate transparent, impact-focused giving relationships with donors throughout the pipeline.

Donor relations strategies that give donors an inside look at the impact of their gifts on a regular basis transform supporters into partners of the institution. In addition to swelling the ranks of mid-level donors, they can also boost donor retention rates.

Implement Today

Prepare for Tomorrow

Beneficiary Email Narratives



Crowdsourced Student Thank-You Videos



Social Media Impact Ambassadors



Virtual Insider Series



Personalized Donor Dashboards



Source: Burk P, "The Burk Donor Survey," Cygnus, 2013. http://www.cygnusresearch.com/files/2013/2013-Burk-Donor-Survey_Report_US-PW.pdf; EAB interviews and analysis.

Road Map for Discussion

1 | **Essay: The Pipeline in Peril**

2 | Accelerating Donors Up the Giving Pyramid

- Targeted Upgrade Proposals
- Gift Match Laddering
- “Mind the Gap” Second Asks
- Fundraising Products

3 | Surfacing Untapped Major Gift Potential

- Student and Alumni Prospect Referrals
- Alumni Relations-Led Discovery Initiatives
- Discovery-Focused Fundraisers
- Transitional Giving Officers

4 | Enhancing Exclusivity and Access

- Password-Protected Presidential Blog
- Tiered Leadership Programming
- Strategic Donor Engagement Councils

5 | Scaling Digital Impact Reporting

- Beneficiary Email Narratives
- Crowdsourced Student Thank-You Videos
- Social Media Impact Ambassadors
- Virtual Insider Series
- Personalized Donor Dashboards

6 | Toolkit Resources

- Fundraising Products Template
- Alumni Volunteer Referral Organizer
- Alumni Relations Prospect Referral Template
- Gift Society Tier Audit
- President’s Blog Launch Guide
- Social Media Impact Ambassadors Launch Guide

Longer Time Frames, Bigger Goals

Modern fundraising campaigns have expanded in scope and size since the turn of the Millennium. Fundraisers aim for larger goals over longer periods of time, and they increasingly rely on major gift donors to achieve those aims.

As a result, major gift donors have ascended to a position of primary importance for higher education advancement. The vast majority of dollars that universities bring in come from a small swath of the donor pool.

Many advancement divisions are adjusting their staffing levels and fundraising strategies to accommodate these growing major gift opportunities. Major gifts are the order of the day, while fundraising from smaller donors recedes in importance.

Modern Campaigns Rely on Major Gifts to Hit Ambitious Targets



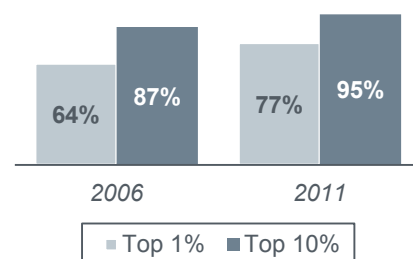
Burgeoning Campaign Goals

18% Longer time frames for current campaigns than for past campaigns (2011)

43% Growth in median campaign goals from 2000 to 2011

Percentage of Total Campaign Dollars Provided by Top Donors

CASE Campaign Report, 2011



Change at the Top

"I've been looking a lot at how fundraising has changed over the past 20 years. We all know the 80/20 rule—20% of donors will give 80% of the funds we bring in. The problem now is that 80/20 doesn't hold up anymore. It's changing. It's more like 90/10, or even 95/5. That's the order of the day in shops like this."

Ron Cohen
Vice President of University Relations
Susquehanna University

The Campaign Pipeline

Ironically, the single-minded attention that many advancement leaders pay to the top of the giving pyramid ultimately detracts from their efforts to cultivate major gifts in the future.

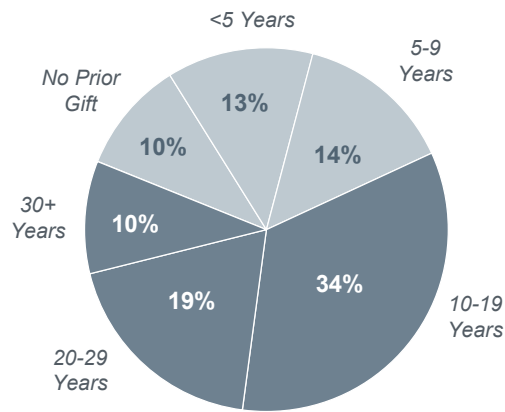
Major gift donors rarely enter they pyramid at the top. Instead, they build a history of giving to the institution over a period of years or decades. Starting small and upgrading consistently over time.

Investments in the pipeline yield impressive returns. Donors below the typical \$25,000 major gift level have a far greater chance of one day climbing into the ranks of an institution's core supporters if they give and upgrade consistently. Conversely, advancement leaders who spend little time focused below the major gift level may end up seeing diminishing returns at the top.

Today's Core Supporters Progressed Through the Annual Fund

Length of Top Donors' Giving Histories Prior to Biggest Gift

Philanthropy Leadership Council, 2006



Small Starts, Big Potential

9x

Increased likelihood that a donor who upgrades consistently will become a major donor

80%

Of alumni major gift donors make consistent gifts in first 5 years after graduation

\$255

Average first gift amount from major donors at the University of Virginia

Source: Barry F. "Cultivating Lifelong Donors: Stewardship and the Fundraising Pyramid," *Blackbaud*, 2010, https://www.blackbaud.com/files/resources/downloads/Book_CultivatingLifelongDonors.pdf; 6; Meer J. "The Habit of Giving," *Economic Inquiry* (March 2013), <http://onlinelibrary.wiley.com/doi/10.1111/eicn.12010/abstract>; Alumni Relations Task Force, "Appendix C: The Link Between Alumni Engagement and Alumni Giving," *The Scenes of their Youthful Studies: The Next Era in Alumni Relations*, University of Virginia: 2004, <http://www.virginia.edu/virginia/ARTFReport20040629.pdf>; Philanthropy Leadership Council, *Enduring Relationships: Stewarding Donors to Deepen and Sustain Institutional Ties*, Advisory Board Company, 2008; EAB interviews and analysis.

A Turning Point at the Mid-Level

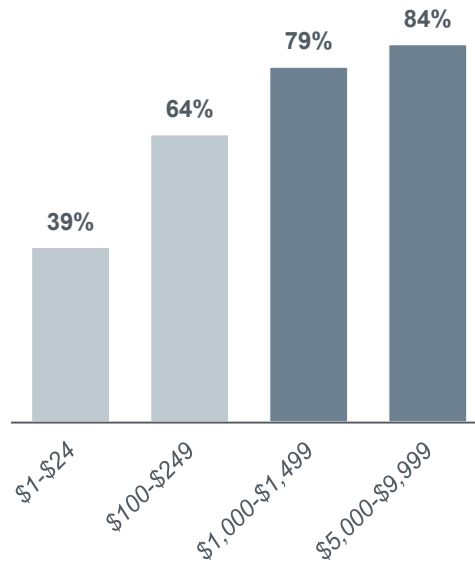
Although there is little doubt as to the pipeline's importance, tight university budgets force many advancement leaders to make hard decisions about where to focus their time. Advancement leaders who must prioritize donor populations will find that the mid-level brings the biggest returns.

Mid-level donors exhibit three characteristics that make them strong candidates for upgrade and cultivation efforts: they are loyal, as evidenced in their impressive retention rate; they're willing to make a sizable investment in the institution; and, in many cases, they have excess capacity that current solicitations aren't accessing.

The \$1,000 Threshold: An Indicator of Affinity and Potential

Overall Donor Retention Rate by Giving Level

Target Analytics, 2014



Even More Room for Growth

“The mid-level donors are the people we need to pay attention to. They’re the ones consistently giving \$2,500 to \$10,000 a year—which aren’t small sums. They have the most potential for growth. We really need to focus here.”

*Becky Zrimsek
Director of the Annual Fund
Carleton College*

Source: Target Analytics data reported in Allenby D, “The Bigger They Are,” Annual Giving Network, <http://annualgiving.com/2014/05/21/the-bigger-they-are/>; EAB interviews and analysis.

Disappointed Expectations in the Middle

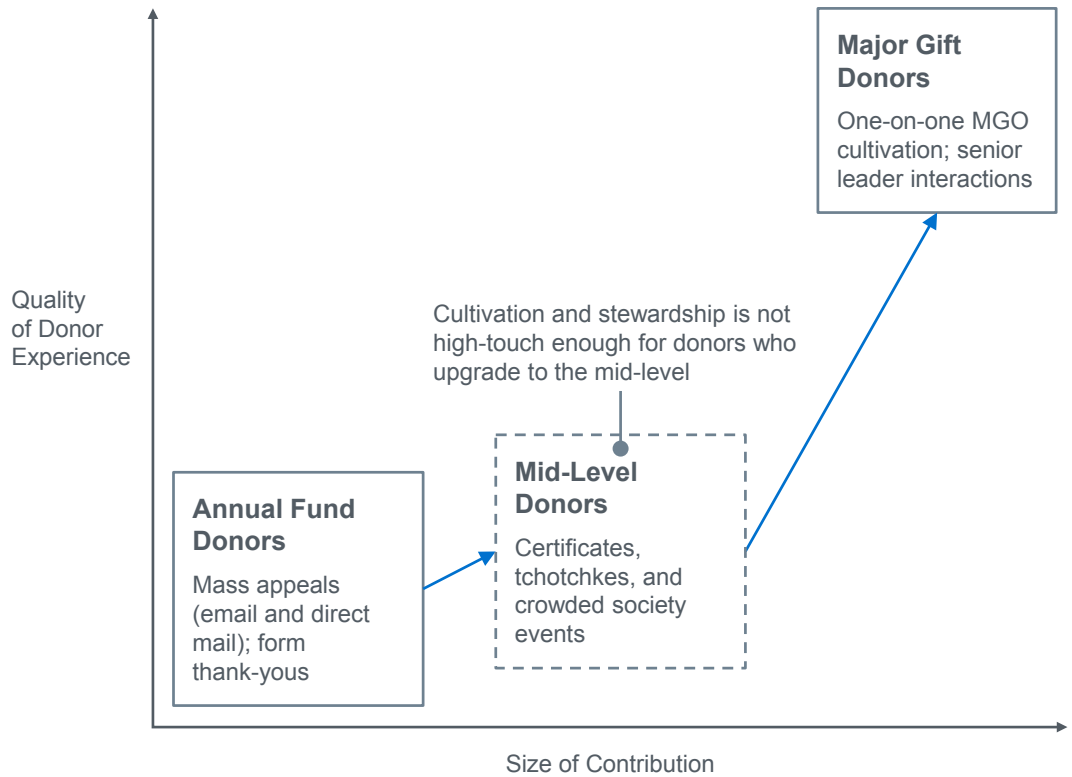
Despite the mid-level's potential for a great return on investment (ROI), this segment of the giving pyramid is often where advancement divisions are out of step with their donors.

While the donor experience that most small annual fund donors receive isn't exceptional, their expectations are generally low, so their disappointment is muted. By contrast, donors who make it to the major gift level have high expectations that advancement staff must meet through high-touch stewardship and cultivation.

The mid-level occupies an in-between space where donor expectations are high—akin to those of major gift donors—but where the treatment they receive is poor. Many advancement leaders see mid-level donors as high-end annual fund donors, rather than low-level major gift donors, and they treat them accordingly.

Donor Experience Fails to Keep Pace with Upgrades in Giving

Quality of Donor Experience Relative to Size of Contribution

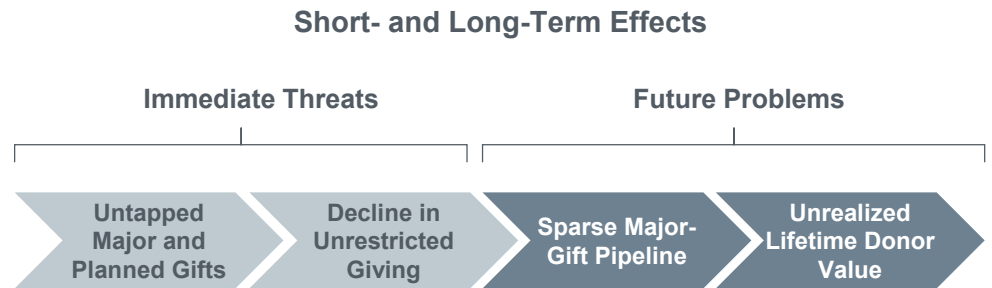


Source: EAB interviews and analysis.

“It’s Hurting Us Now and in the Future”

The misalignment of advancement’s mid-level donor strategies with the expectations these donors bring to giving poses multiple threats to advancement. Broadly speaking, advancement divisions are failing to capitalize on untapped capacity today and cultivate tomorrow’s major gift supporters.

The Consequences of an Undercapitalized Middle



Threatening Our Sustainability

“This is really taking a toll on our fundraising. We’re not getting the most out of the donors we already have in the pipeline—the ones who are most loyal to us. On top of that, I’m worried about our next campaign. When we close this one out and start thinking about an even more ambitious goal for the next one, will our donors be ready to step up their gifts? As it stands, I think the answer’s probably ‘no.’”

*Chief Advancement Officer
Private Research University*

The Hidden 10%

The most immediate of these threats involves the major and planned gift capacity that many mid-level donors currently possess. Often, a mid-level gift is the tip of a philanthropic iceberg. A segment of every mid-level donor population possesses significant untapped capacity that current gift levels and capacity ratings fail to identify.

By some accounts, the proportion of mid-level donors with excess capacity is remarkably large. Some advancement leaders approximate that it applies to 10% or more of the mid-level donor base. Yet these donors receive the same staid renewal appeals and incremental upgrade asks as the rest of the mid-level donor population. Without a segmented cultivation strategy, these donors will stay firmly entrenched in the mid-level, far below their true capacity.

Select Group of Mid-Level Donors Ripe for Major Gift Cultivation

Three Mid-Level Donors with Hidden Capacity



Jane Doe

Known Variables: \$1,000 annual gifts for 5 years, \$10,000 capacity rating
Unknown Variables: Private yacht, wine collection, summers on Cape Cod



John Smith

Known Variables: Recent upgrade from \$250 to \$2,500, unrated
Unknown Variables: Received \$1.5 million inheritance, intends to donate half



Mary Johnson

Known Variables: \$5,000 gift every 2-4 years, \$20,000 capacity rating
Unknown Variables: Immense savings account, currently writing a will



Overlooked Potential

“I know all of our million dollar donors. I don’t know the 10% of \$1,000 donors who could give a million dollars.”

*Keith Inman, Vice President for Advancement
University of Louisville*

The Unrestricted Giving Gap

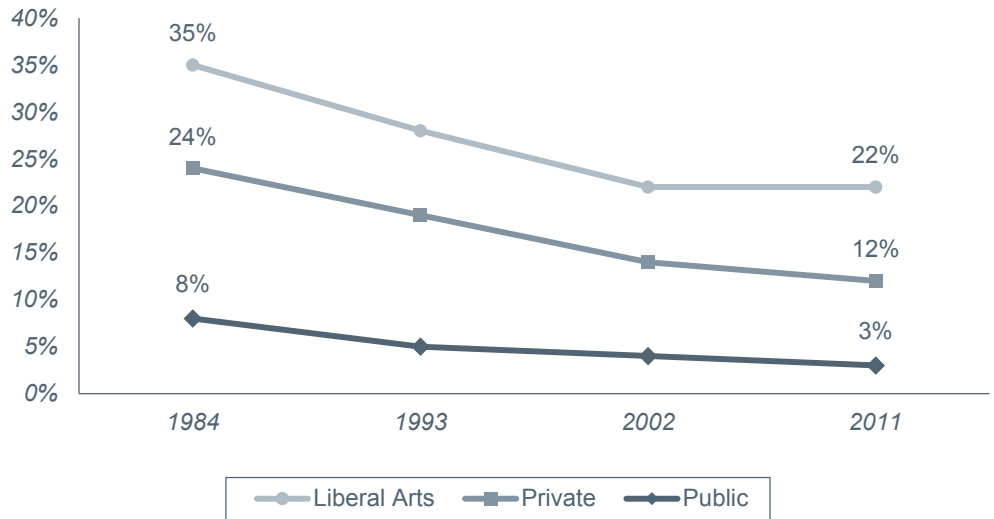
Even those mid-level donors who lack immediate major or planned gift capacity can substantially impact unrestricted giving totals. Unrestricted gifts have fallen consistently over the past three decades, prompting a budget crisis at many institutions. In some ways, the growing reliance on major gifts precipitated this situation; major gift donors are the most likely donor population to impose restrictive limits on how their gifts can be used.

The mid-level holds the potential to alleviate declines in unrestricted giving. Mid-level donors have the revenue power and willingness to give unrestricted gifts to the annual fund that can reverse these trends. Continued inattention to this donor population will exacerbate the unrestricted giving crisis.

Mid-Level Donors Are Overlooked Source of Much-Needed Support

Percentage of Private Support Directed to Unrestricted Funds

Voluntary Support of Education Survey, 1984–2011



Major Gifts Won't Help

“The \$100,000 level is where our unrestricted giving drops off. It’s been that way for a while. It just wasn’t a part of our culture to encourage large donors to make an unrestricted gift to the annual fund when they could set up an endowment with a \$100,000 gift. We had a culture of restricting anything we could. But then the economic downturn came, and it became very clear that having some unrestricted gifts would be really nice.”

*Associate Vice President of
Advancement Operations
Private University*

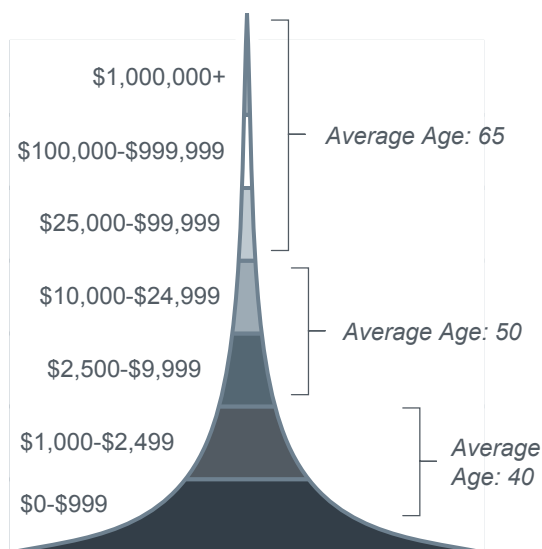
Fewer Donors “On Deck”

Although the mid-level boasts the potential to yield immediate revenue returns, the greatest rewards for investing in this donor segment come in the long run. Over the next decade and beyond, the capacity of mid-level donors will grow, vaulting many of them to the ranks of major-gift prospects. Those who give and upgrade consistently will be easier to acquire at the major gift level.

However, too few of these donors give in ways that position them for major gifts in the future. The unambitious renewal appeals on which advancement offices rely keep donors at set giving levels, with little progress toward the top of the pyramid. When the time comes to have a conversation about major gifts, gift officers will find that their prospects' giving histories are ill-suited for high-value philanthropy.

Inattention to Mid-Level Creates Empty Bench for Future Major Gifts

The Tapered Major Gift Pipeline



Attrition at the Top

“Yes, it’s true that 95% of your money will come from the top. But the top won’t be around forever. And if you’ve ignored the rest of the pyramid and you’re left with just a few donors giving right below that major-gift level, you better hope that all those donors are billionaires. Otherwise you’re out of luck.”

*Director of Alumni Programs
Public Research University*

Untapped Lifetime Value

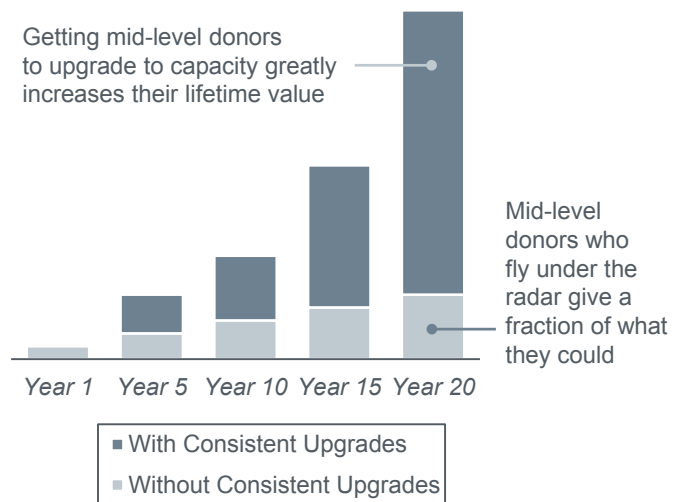
Over the course of donors' lives, undeveloped mid-level giving strategies put cumulative revenues at risk. The standard mid-level donor who keeps giving loyally but does not upgrade to higher levels yields meager returns. This is the situation most institutions face.

In contrast, those institutions that proactively move mid-level donors up the giving pyramid will not only bring in major gifts; they will also see the aggregate amount that donors contribute over their lifetimes increase by an order of magnitude.

Status Quo Misses Long-Term Revenue Potential of Mid-Level Donors

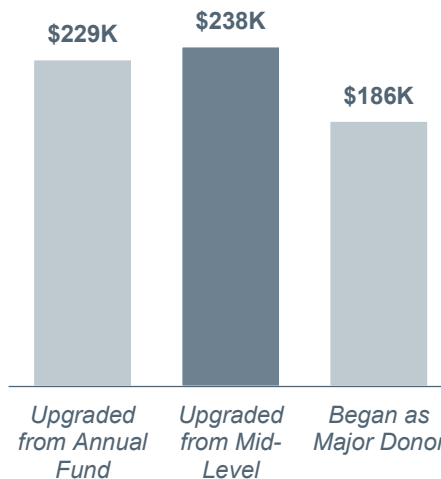
Cumulative Giving of Mid-Level Donors

With and Without Consistent Upgrades



Lifetime Giving of Major Donors by Highest Previous Gift Level

Pursuant Ketchum, 2013



Source: Lodhi A. "Secrets We Keep From Our Donors," Pursuant Ketchum, 2013, http://www.adrp.net/assets/Webinars/2013/april_13/secrets%20we%20keep.pdf, EAB interviews and analysis.

A Flurry of Concerns, but Two Main Problems

Advancement leaders are beginning to recognize the great risk of overlooking the mid-level. Yet when asked what they could do to solve these problems, answers varied widely, from revamping gift societies, to augmenting investments in digital fundraising, to developing personalized engagement plans.

Ultimately, these myriad approaches are connected by a focus on two things: upgrades and stewardship. Forward-thinking advancement leaders realize they must push for more ambitious upgrades from the swath of donors best positioned to make them. They must single out high-potential mid-level donors for immediate major-gift cultivation. Lastly, they must build sustainable long-term relationships through high-quality, impact- and access-driven stewardship.

Upgrade and Stewardship Strategies Are Lacking for Mid-Level Donors

Top-of-Mind Concerns

“Do donors care about my gift society?”

“Are my annual renewal appeals lowballing my mid-level donors?”

“How can I compete against the new generation of tech-savvy nonprofits?”

“What’s the fastest way to find my hidden high-capacity donors?”

“Should I approach the mid-level like annual fund donors, with mass communications—or like major-gift donors, with one-on-one touches?”



Primary “Pain Points”



Upgrades

- Mid-level donors are not targeted with compelling appeals for ambitious upgrades
- High-capacity mid-level donors do not move to major gift cultivation



Stewardship

- Mid-level donors receive minimal information on gift impact
- Individuals are not treated as insiders through access to senior leadership

Road Map for Discussion

1 | Essay: The Pipeline in Peril

2 | **Accelerating Donors Up the Giving Pyramid**

Targeted Upgrade Proposals

Gift Match Laddering

“Mind the Gap” Second Asks

Fundraising Products

3 | Surfacing Untapped Major Gift Potential
Student and Alumni Prospect Referrals
Alumni Relations-Led Discovery Initiatives
Discovery-Focused Fundraisers
Transitional Giving Officers

4 | Enhancing Exclusivity and Access
Password-Protected Presidential Blog
Tiered Leadership Programming
Strategic Donor Engagement Councils

5 | Scaling Digital Impact Reporting
Beneficiary Email Narratives
Crowdsourced Student Thank-You Videos
Social Media Impact Ambassadors
Virtual Insider Series
Personalized Donor Dashboards

6 | Toolkit Resources
Fundraising Products Template
Alumni Volunteer Referral Organizer
Alumni Relations Prospect Referral Template
Gift Society Tier Audit
President’s Blog Launch Guide
Social Media Impact Ambassadors Launch Guide

Strategies in Brief

Targeted Upgrade Proposals (p. 31)

Advancement leaders segment a small group of donors who are well positioned to upgrade to a higher mid-level tier. These donors receive high-quality, customized direct mail solicitations that resemble major gift proposals. The proposals ask for an ambitious upgrade to the next level of the institution's gift society, which often involves a doubling of the donor's previous gift.

Profiled Institution: Oregon State University (public, research university—very high research activity)

Gift Match Laddering (p. 34)

Funds from a major or planned gift are used to issue a matching challenge to a targeted group of donors who are likely to increase their giving to the next tier of the mid-level. Upgrade donors pledge to move gradually over the course of three years to the next level. The matching funds supplement their incremental upgrade in the first and second year. By the third year, they contribute the full upgraded amount.

Profiled Institution: Furman University (private, baccalaureate college—arts and sciences)

“Mind the Gap” Second Asks (p. 38)

Current-year donors who give within \$500 of the first tier of the mid-level receive a second ask at a designated point in the fiscal year. The second ask amount is customized to close the gap between the donor's previous gift and the first tier of the mid-level. The solicitation prominently features gift society branding and informs the donor that the requested upgrade will grant him/her membership in the society.

Profiled Institution: Carnegie Mellon University (private, research university—very high research activity)

Fundraising Products (p. 42)

Institutional and/or unit priorities are assigned a “price” and bundled in a brochure that frontline fundraisers can use during visits with donors. Prices range from the middle tiers of the mid-level through major gift levels. Donors receive high-quality stewardship and are encouraged to upgrade to larger fundraising products after the conclusion of their gift.

*Profiled Institutions: University of North Florida (public, master's university—larger programs),
University of Michigan (public, research university—very high research activity)*

At Risk of Donor Inertia

Mid-level donors are some of the most loyal supporters that colleges and universities have. They give consistently, year after year. While advancement leaders speak proudly of mid-level retention rates, they often cite a worrisome problem: despite mid-level donors' loyalty, their giving stagnates after a few years. They keep giving, but they don't give more, even though they could.

Donor inertia undermines fundraising revenues in the short term, since much of donors' philanthropic capacity is left untapped. More distressingly, it depletes the long-term major gift pipeline. Donors who do not advance up the ladder are less likely to give major gifts when they have the wealth to do so.

Considerable Room for Improvement Among Institutions



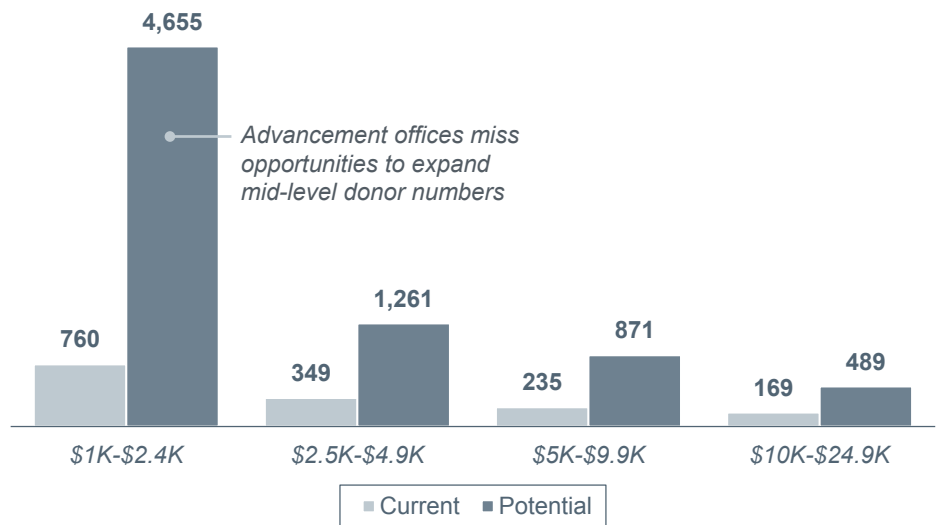
Stagnating in the Middle

"More and more we are seeing donor files that have a great number of lower-dollar donors and quite a few mid-level donors..., but very few major gift donors. **It's almost like once a donor gets in that middle range, they can't move up.** We're seeing plenty of them moving down or going away entirely, but the funnel up to major gifts is clogged. Something is not happening, and they can't get up and out."

*Jeff Schreifels
Senior Partner
Veritas Group*

Number of Donors at Leadership Giving Levels, Current and Potential

Private Research University, 2010



Source: Schreifels J, "Unclog Your Major Gift Program—Invest in Mid-Level Donors," Passionate Giving Blog, May 28, 2014, <http://veritasgroup.com/unclog-your-major-gift-program-invest-in-mid-level-donors/>; Target Analytics, 2010; EAB interviews and analysis.

Laddering Up the Mid-Level

Forward-thinking advancement leaders have taken steps to overcome this inertia by asking the right donors for an upgrade at the right time with the right appeal.

Though these strategies differ in approach, they are united by a willingness to solicit mid-level supporters for ambitious upgrades in a way that better aligns giving with their capacity. They all advance giving relationships with loyal donors toward the major gift level.

Three Key Steps for Upgrades in Annual Leadership Giving

High-Return Approaches to Increasing Mid-Level Donor Value



Ask the Right Donors...

Smart segmentation strategies target donors whose capacity and gift history positions them for upgrades



...At the Right Time...

Upgrade proposals are sent to current-year donors when they are primed to increase their gift level



...With the Right Appeal

Mid-level donors are solicited for mini-major gifts that have a direct, visible impact on institutional priorities

Profiled Strategies

Targeted Upgrade Proposals

Oregon State University

Gift Match Laddering

Furman University

Profiled Strategies

"Mind the Gap" Second Asks

Carnegie Mellon University

Profiled Strategies

Fundraising Products

University of North Florida

University of Michigan
(College of Literature, Science,
and the Arts)

Aiming for the Right Donors

Oregon State University has recently brought a deliberate focus on segmentation and targeting to all of its advancement efforts. While advancement staff at the institution apply a highly segmented strategy to everything from engagement, to fundraising, to stewardship, they've seen particular success using targeted outreach to move mid-level donors up through the tiers of their annual leadership giving society, the President's Circle.

Every year, annual fund staff identify a small number of donor segments whom they believe are on the cusp of upgrading to the next level of the society. They send these donors an upgrade proposal that asks for a much larger investment in the institution, often twice as large as the donor's previous gift.

Different Goals for Various Segments at Oregon State University

Targeted Upgrade Proposal Populations



Entry-Level President's Circle Donors *(New in 2014)*

- Individuals whose giving hovers around \$1,000
- *Purpose: Solidify donors' commitment to the university*



Established President's Circle Donors

- Mid-level supporters who consistently give \$2,500+
- *Purpose: Continue movement toward major gifts*



Highly-Rated Non-donors

- Uncultivated major gift prospects
- *Purpose: Generate first gifts to begin major gift cultivation*



The Initiative's Reach

906

Mailings sent in 2013

847

Mailings sent in 2014

\$4.44

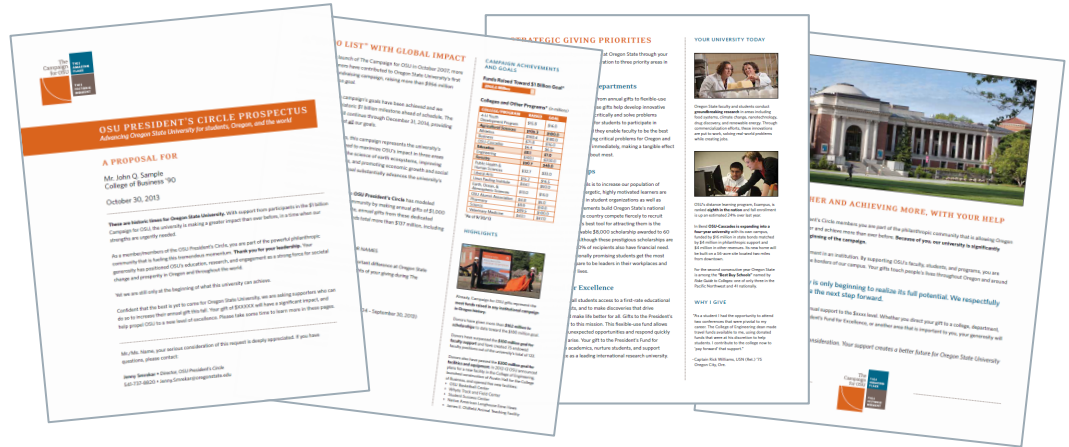
Cost per mailing

Major Gift Treatment for Mid-Level Donors

Oregon State supports their ambitious appeal with a high-quality, four-page mailing that resembles a major gift proposal. Advancement staff at the institution intend for donors to take their request seriously, and the quality of the solicitation furthers that aim.

The proposal is sent in a large, priority-mail envelope with a handwritten address that stands out from other direct mail pieces. A personalized reply card asks for a specific upgrade amount. In addition, the appeal is populated with customized content based on donor interests and giving histories. Advancement staff automate the customization process as much as possible by using a mail merge that links content such as impact stories to commonly shared donor characteristics.

Targeted Upgrade Proposal Makes a Strong Case for Investments



Key Proposal Elements

- Four-page impact-driven investment prospectus
- Personalized letter from a senior leader
- Highly customized reply card and envelope
- Large, priority-mail envelope
- Handwritten address on the outer envelope

Remarkable ROI

The returns from Oregon State’s targeted upgrade proposal have more than justified the resources that advancement leaders dedicate to it. Every year, recipients of the mailing respond enthusiastically, upgrading their giving to higher tiers of the mid-level.

The inclusion in 2014 of entry-level President’s Circle donors had a particularly beneficial impact on the mailing’s returns. This group proved to be primed for upgrades. Their gifts helped drive Oregon State’s revenue from the mailing past \$200,000, resulting in remarkably high ROI. And while the average gift amount declined, it did so because annual fund staff were targeting many more donors at the bottom tier of the mid-level. Targeting these donors helped accelerate them up the path toward higher-level giving while bringing in immediate dollars for the institution.

OSU’s Proposals Ladder Up Donors

Targeted Upgrade Proposals

Key Performance Indicators (KPIs)

Performance Metrics	2013	2014
Response Rate	5.6%	9.6%
Number of Donor Households	51	81
Average Gift Amount	\$3,023	\$2,590
Total Revenue ¹	\$186,842	\$229,000
Return on Investment (excludes staff time)	46:1	61:1

Mailing list expands to include entry-level leadership donors

Entry-level leadership donors respond enthusiastically to targeted upgrade proposal

Average gift sizes decrease as lower-capacity donors make gifts, but total revenue and return on investment increase due to larger gift volume

Source: EAB interviews and analysis.

Making Upgrades More Attainable

Advancement leaders at Furman University took a different approach to driving upgrades from mid-level donors. They used funds from a large bequest as an upgrade incentive for donors on the cusp of an increase.

The gift match laddering program, which ran from 2004 to 2009, asked a targeted group of donors to make a three-year pledge during which they would move progressively closer to the next tier of Furman's annual leadership giving society. During the first year of the pledge, the university would match 50% of the upgrade amount. In the second year, the university would match 25% of the upgrade. Furman asked donors to give the full upgrade amount by the third year.

This initiative eased the way for donors who wished to move to the next tier of the society. By breaking the upgrade process into smaller steps, Furman brought more donors within reach or higher-level giving.

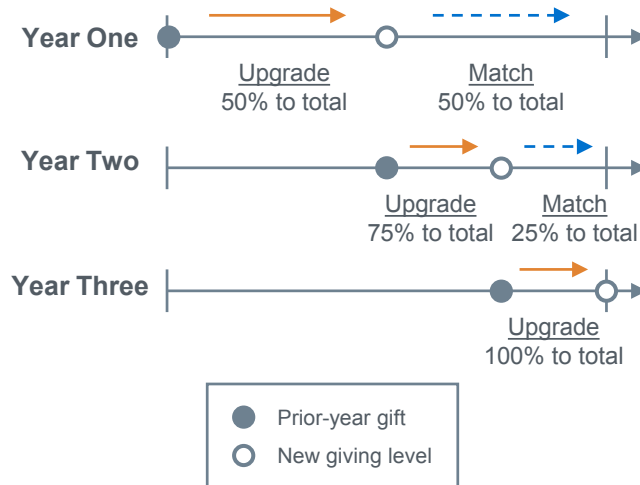
Furman University's Gift Match Laddering Initiative



The Step Up! Challenge

- Ran from 2004 to 2009
- Large estate gift funded the challenge
- Advancement staff marketed challenge through emails and one-on-one gift officer meetings
- Challenge targeted donors rated \$1,000+ and donors who consistently gave around \$500
- Continued Step Up! pledges without gift match after 2009

Percentage Upgrade Required and Matched for Step Up! Pledge



Source: EAB interviews and analysis.

Targeting High-Return Populations

Advancement staff at Furman marketed this giving option heavily to two main donor populations: young alumni whose giving hovered around \$500 and older alumni who were in the orbit of the \$10,000 society level.

Furman sent targeted mailings publicizing the gift match laddering program to these populations. Gift officers also brought it up when they were out on the road meeting with these donors.

In all, about three-quarters of the upgrade donors pledged to give at the \$1,000 level. Many of these entry-level upgrade donors came from the young alumni population targeted by Furman staff. Another 20% of the upgrade donors moved to the higher \$10,000 level. In addition, some of the donors made significant jumps, moving through multiple gift society levels as a result of gift match laddering.

Furman Upgrades Young Alumni and High-Capacity Donors



Young Alumni

Recent graduates upgrade to leadership giving society in a way that maps to their growing capacity



Prospective Major or Planned Gift Donors

Higher capacity donors ramp up their investment in the university step by step



Biggest Returns at Entry Levels

75%

Of laddered donors upgrade their giving to \$1,000¹

20%

Of laddered donors upgrade their giving to \$10,000²

1) First level of leadership giving society
2) First level of Richard Furman Society

Source: EAB interviews and analysis.

“They Upgraded, Now What?”

The true test of gift match laddering’s success came after the end of each donor’s pledge period. Because the initiative was meant to deepen giving relationships and advance donors through the pipeline, it was crucial that upgraded donors continued giving at their newly increased levels.

On this front, gift match laddering proved to be an unqualified success. Nine out of ten upgraded donors continued giving at the higher level, even without matching funds from Furman.

This success was due in part to Furman’s strategic use of frontline fundraisers. Upgraded donors were flagged as having high potential, and annual leadership giving officers and major gift officers followed up with them to reinforce the decision to give and prime the pump for even larger gift asks.

Gift Officers Focus on Upgraded Donors to Ensure Revenue Retention

Who Is Responsible for Preserving Gains?



Annual Leadership Giving Officers

Visit smaller laddered donors to maintain expanded investment



Major Gift Officers

Cultivate larger laddered donors to explore possibility of major-gift upgrade



Notable Retention

90%

Of laddered donors continue giving at the upgraded level or higher

Leading into the Next Upgrade



Gift Match Ladder Upgrade



Gift Officer Assignment



Stewardship and Cultivation



Strategically Timed Upgrade Ask

Explosive Revenue Growth

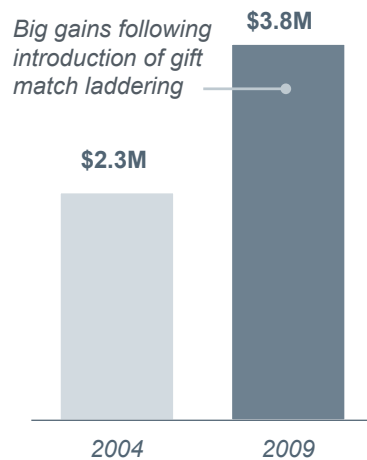
Furman saw incredible revenue gains from this program. Their annual fund returns increased by 65% over five years, even after the economic recession weakened giving globally.

Gift match laddering also expanded the base of donors giving five-figure gifts. These donors are the best candidates for future major-gift cultivation, so increasing their ranks allowed Furman to ensure ongoing fundraising successes.

Gift Match Laddering Supports Near Doubling of Annual Fund Returns

Furman University Annual Fund Returns

2004 and 2009



Big Gains at the Top

65

Number of donors at \$10K+ level in 2004

110

Number of donors at \$10K+ level in 2009



The Start of a Conversation

“This has been really successful at getting people to step up to leadership level giving and start thinking about major gifts.”

*Shon Herrick
Associate Vice President
for Development
Furman University*

Asking at the Wrong Time

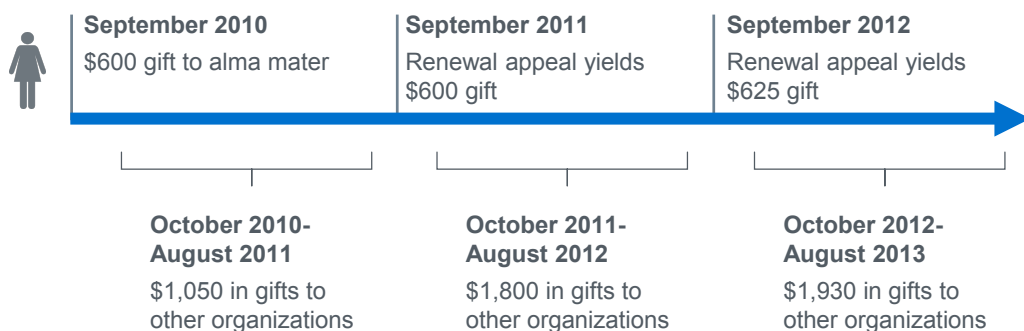
Oregon State University and Furman University both enjoyed success because they targeted the right donors. But even the best segmented mailing can go out at the wrong time.

Rather than concentrate all of her giving at one time, the typical donor gives multiple smaller gifts to organizations throughout the year. No one appeal captures the sum of that philanthropy. Yet most advancement divisions employ a once-a-year renewal model for mid-level donors.

As a result of this strategy, few advancement leaders can confidently say that they are capturing as much of their donors' total giving as they could be.

Once-a-Year Renewal Strategy Leaves Money on the Table

Three Years of Giving from Jane Q. Donor



Donors' Generosity Left Untapped

\$2,564

Median philanthropic contribution from U.S. households

\$54,783

Median discretionary income of U.S. households

4.7%

Percentage of discretionary income given by U.S. households

Source: "How American Gives," Chronicle of Philanthropy, August 20, 2012, <http://philanthropy.com/article/Interactive-How-America-Gives/133709>; EAB interviews and analysis.

Accelerating the Ask at Carnegie Mellon

To better access donors’ philanthropy across the year and increase their cumulative giving, Carnegie Mellon University turned to a second ask strategy.

The “mind the gap” second ask that advancement staff developed is customized to close the distance between the current-year giving of donors in the \$500 to \$999 range and the \$1,000 level, which is where the university’s Andrew Carnegie Society starts. The strategy aims to make an upgrade a lighter lift for donors who are approaching the first society tier, since it is broken out over two solicitations.

Second Asks Capitalize on Momentum from Current-Year Giving

Spring Resolicitations for Current-Year Donors



Within Donors’ Capacity

“For some of these donors, writing another \$250 check several months after making a first gift might not be a big deal. We’re trying to find those people.”

*Carole Panno
Director of Annual Giving Strategies
Carnegie Mellon University*



Second Ask Logistics

1,544

Number of donors receiving mailing¹

\$3.42

Cost per mailing

6-8

Hours total staff spent compiling mailing

1) Lapsed leadership donors are also included in the mailing.

Source: EAB interviews and analysis.

“Mind the Gap” Second Ask Mailing

Carnegie Mellon designed their “mind the gap” second ask to stand out from normal solicitations. The piece, which is printed on heavy-stock paper, looks like a formal invitation and features the Andrew Carnegie Society branding prominently. The solicitation also includes a note about how the donor will qualify for society membership after upgrading. This prominent branding is deliberately intended to raise awareness about the society and use that awareness to drive upgrades.

To facilitate the upgrade process, the reply card asks donors to give a specific, customized amount. The ask is tailored to the gap between the donor’s current-year giving and the \$1,000 entry point for the mid-level.

Appeals Solicit Leadership Upgrades from On-the-Edge Donors

Carnegie Mellon’s Upgrade Solicitations¹

Calls out opportunity to join Andrew Carnegie Society

Asks for a specific amount to bring donor to \$1,000 total annual giving

I'd like to join the ACS with a gift of: \$485.47

- Gifts of \$1,000 or more qualify for ACS membership.
An additional gift of \$485.47, along with your current fiscal year giving (including matching gifts and claims), will qualify you for ACS membership. Thank you for your consideration of becoming an ACS member!

I'd like to participate with a gift of: \$ _____

Carnegie Mellon Fund Scholarships

Friends of the Library Other: _____

All undesignated gifts will be directed to the Carnegie Mellon Fund.

John Q Sample
Artco Print & Mail ja13838603
155 Will Dr
Canton MA 02021-3710

Please provide your email for our records: _____

Please see reverse side to charge your gift or to arrange a matching gift.
Thank you for your anticipated support!

Offers option to broadly designate gift

1) Solicitations produced in collaboration with Artco

Source: EAB interviews and analysis.

Breaking the \$1,000 Barrier

Carnegie Mellon saw nearly 50 leadership-level upgrades in response to its 2014 mailing. These donors together contributed almost \$50,000 in additional gifts to the institution thanks to the second ask.

The success of Carnegie Mellon’s mailing reinforces the growing importance of second asks in higher education. Colleges and universities increasingly turn to second asks to promote giving to capacity. These tactics have proven so powerful that some advancement leaders attribute recent industry-wide per-donor revenue gains largely to second asks.

Second Ask Campaign Gets Donors to Invest More in CMU



Returns from Mailing (2014)

49

Gifts in response to mailing

3.1%

Conversion rate of mailing

\$47,650

Total additional revenue from donors who upgraded or renewed their gifts



Continuing to Resonate

“Second ask programs have dramatically impacted the cumulative revenue per donor.... As more institutions are implementing second ask programs, the evidence that such programs work is apparent. In fiscal year 2012 the median gift per donor change was a positive 0.8%, up for the third consecutive year. Additionally, more gifts were larger in 2012 than in 2011, with the median change in revenue per gift up 1.6%, for a third year of growth.”

*Target Analytics
2012 Index of Higher Education Fundraising Performance*

Generating a Sense of Ownership

Targeting the right donors at the right time can bring in upgrades from individuals on the cusp of making larger gifts. An equally important strategy involves approaching them with a compelling appeal. Some institutions have begun to develop fundraising products to better speak to donors' philanthropic motivations.

Fundraising products are clearly delineated on-campus causes or priorities that donors can support for a preset price. Donors typically contribute the full cost of funding the priority. They can include things like scholarships, study abroad stipends, and research funding.

Fundraising products are engineered to do a few things. First, their preset price tag structures giving conversations, providing donors a map of what gifts of different levels can achieve. Additionally, they impart to donors a sense of ownership over what they support through up-front impact and clear, effective stewardship. Lastly, they're built to mimic the major-donor experience at the mid-level, which leads naturally to upgrades.

Fundraising Products Bring Major Gift Experience to Mid-Level Donors

Key Components of Fundraising Products

1 Explicit Price Tag

Required funding levels attached to priorities allow gift officers to make direct asks for specific amounts

2 Up-Front Impact

Compelling descriptions of how gifts will be used draw more donors who want to know impact ahead of time

3 Clear Stewardship

Parameters of fundraising products give fund admins clear guidelines on how to steward donors

4 Natural Upgrades

Larger endowed funds replicate the look and feel of fundraising products, leading to easy upgrades

Source: EAB interviews and analysis.

Named Scholarships for Mid-Level Donors

The University of North Florida launched a fundraising products initiative based on expendable annual named scholarships.

Donors are asked to pledge at least \$5,000 across three years to support a specific student. Unsurprisingly, the stewardship that comes from this targeted approach is exceptional. Donors can meet their students and follow their progress over the three or more years that they are receiving support.

The University of North Florida Solicits Three-Year Pledges



Named Annual Scholarships at the University of North Florida

- *Minimum Pledge:* \$5,000
- *Term:* At least three years
- *Stewardship:* One-on-one scholarship lunches, photos of students with their donor, ongoing communication with student recipient
- *Examples:* Nursing student scholarships, study-abroad stipends, business scholarships in focused areas (e.g., logistics)



Feeling a Sense of Ownership

“In the communications back and forth with the donor, we want them to feel ownership of the scholarship. We want to talk about it in terms of them meeting their students and them hearing from their students. We invest some staff time up front in this, but we look at it as a long-term opportunity to grow to much larger giving.”

*Ann McCullen
Associate Vice President
for Development
University of North Florida*

Moving from Mid-Level to Major Giving

The up-front impact and high-quality stewardship of the University of North Florida’s fundraising products has helped move mid-level donors to the major gift level. While the short-term results are impressive—the university receives about \$100,000 every year through mid-level scholarships—it’s what happens after the pledge term runs out that is a true testament to the initiative’s effectiveness.

At the conclusion of the pledge period, many of the fundraising product donors move on to major or planned gifts. Without the annual named scholarship, the jump up to the \$25,000 endowment level would have been more difficult. Annual named scholarships work as stepping stones that make the path to major giving much easier and much more compelling.

Immediate Returns Are the Tip of the Iceberg



A Popular Giving Option

50

Average number of donors giving to annual named scholarships

\$100K

Average annual revenue from named scholarships

Next Steps for Scholarship Donors



Completes 3-year scholarship pledge



Upgrades to \$25,000 endowment scholarship



Includes bequest to university in will



A Stepping Stone to Major and Planned Gifts

“The upgrade is kind of an easy sell. They meet the student, they get attached, they feel really good about it. Then we say, ‘We would love for you to make this a permanent scholarship by creating an endowment at \$25,000.’ We move them along, so to speak.”

*Ann McCullen, Associate Vice President for Development
University of North Florida*

Turning Priorities into Fundraising Products

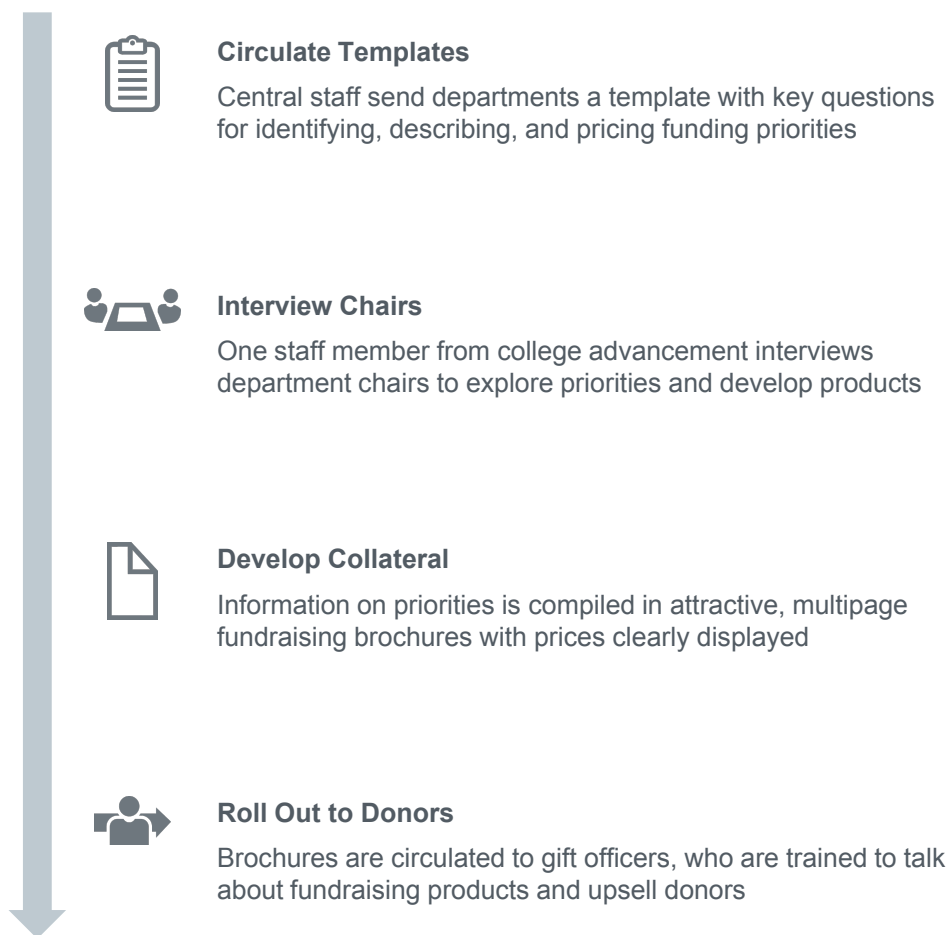
A best-in-class example of fundraising products comes from the University of Michigan's College of Literature, Science, and the Arts (LSA). When the university was gearing up for its 2003 campaign, advancement leaders at LSA thought about how to communicate their priorities to donors in new and compelling ways. They developed fundraising products to achieve this goal.

Staff within the advancement office reached out to each department within the college and asked unit leaders to outline their fundraising priorities using a preset fundraising product template. Advancement staff also interviewed department chairs to further develop the fundraising products before developing multipage brochures that gift officers debuted to donors.

College Advancement Works with Departments to Price Needs

Process for Developing Fundraising Products Prior to Campaign Launch

The University of Michigan's College of Literature, Science, and the Arts



Source: EAB interviews and analysis.

A Powerful Fundraising Tool

The fundraising product brochures, which are on average three pages long, outline each department's priorities and the cost of funding them. Priorities typically range from \$5,000 or \$10,000 to over \$1,000,000. Central staff also compiled college-wide brochures for scholarship support, innovation, and other strategic priorities.

Donors are exposed to the fundraising product brochures both through meetings with gift officers and through LSA's fundraising website. When gift officers go out and meet with prospects, they bring these along to help pique donors' interests in giving to specific priorities. Recognizing that gift officers can't meet with the entire prospect base, advancement staff also placed the brochures in a prominent position on LSA's online giving page.

Well-Designed Catalogs Clearly Outline Giving Options

Economics Department Product Brochure

Department-specific branding

Aspirational amounts for mid-level upgrades

GLOBAL SCHOLARLY VISIT FUND
\$90,000 annually

Michigan Economics has built strong collaborations with economics scholars at institutions of higher education abroad, and this fund would provide resources to support faculty visiting our department for a semester or more to teach and conduct research, as well as support our faculty traveling to institutions abroad for the same purpose. These exchanges of information and research enrich the faculty and contribute to the field at large, as well as provide increased visibility for the Department from a global perspective.

CURRICULUM TECHNOLOGY INITIATIVE FUND
\$15,000 annually

Economics courses, at both the undergraduate and graduate level, rely increasingly on the use of information technology to convey material effectively and monitor interactively that learning is taking place. To continue to attract the best students and provide top-notch classroom experiences, we must invest in creating effective ways to engage students in the classroom and connect with them outside the classroom.

FIFTH-YEAR GRADUATE STUDENT SUPPORT
\$50,000 annually per student

Michigan recruits some of the brightest and most innovative young scholars and trains them to lead the next generation of academic talent. Attracting the best students elevates our national ranking and enables productive faculty-student research collaboration. To compete with our better-funded peers at private institutions, we must offer stipends, teaching assistantships, and health care coverage. This funding is especially crucial for the fifth year of the Ph.D. program, when students are concentrating on completing their dissertations.

ECONOMICS STRATEGIC FUND
\$10,000 to \$50,000 annually

The Economics Strategic Fund provides the Department with a powerful source of discretionary support to address urgent needs and maximize opportunities. In recent years, gifts to the Strategic Fund have allowed us to recruit and retain outstanding faculty, fund graduate students traveling abroad to conduct research, support career and mentoring events hosted by undergraduates in the Michigan Economics Students (MES) organization, and recognize Honors students for exceptional academic achievement in Economics. Your gift of any size will have a direct impact on the lives of students and faculty.

Gift use clear in title

Flexible giving options to precipitate bigger gifts

Source: EAB interviews and analysis.

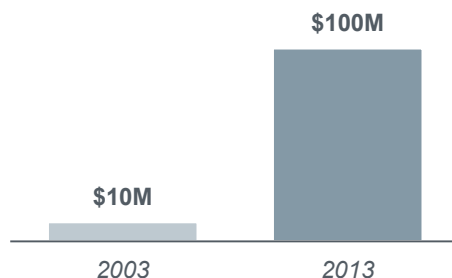
A Boon to Giving

Fundraising products have revolutionized the way LSA raises money. From a starting point of about \$10 million before the 2003 campaign, LSA has increased its annual fundraising revenue tenfold, to \$100 million in 2013. Of that money, 90% comes in the form of fundraising products.

On top of the big revenue gains, LSA is also seeing a new crop of fiercely loyal donors come up in response to fundraising products. That loyalty will pay future dividends, as donors' positive giving experience will incline them to give even bigger gifts in later years.

Fundraising Products Spur Exponential Increase in Annual Returns

Annual College Gift Revenues Before and After Fundraising Products' Introduction



Gift Revenue from Fundraising Products and Other Sources

2013



An Incredible Donor Experience

“I was a top salesperson at Xerox for 15 years. I never walked in to people just loving me because they had such a good experience. I had a lot of customer loyalty, but not like this.”

*Peggy Burns, Assistant Dean for Advancement
University of Michigan*

A Road Map to Larger Gifts

Fundraising products have been designed to help donors move up the giving pyramid at LSA. Within each department, donors can move from lower-value gifts up to higher-value gifts after they see the impact that their initial contribution had on the college.

Indeed, fundraising products work as pathways that donors can take from the mid-level to major gifts across multiple campaigns or, for higher-capacity mid-level donors, within the span of a single campaign.

Fundraising Products Provide Pathway for Upgrades

Example Campaign Gifts

	Campaign Year 1 <i>Initial Investments</i>	Campaign Year 4 <i>Upgraded Support</i>	Campaign Year 7 <i>Transformational Gifts</i>
Economics	\$5K annual Visiting scholar seminar series	\$40K annual Experimental economics technology center	\$800K endowed Center for the study of financial markets
History	\$10K annual Career development for history majors	\$50K annual Visiting fellowships for historians in the Global South	\$1M endowed Visiting professorship in the history of law
Molecular Biology¹	\$20K annual Outreach program for molecular biology student recruitment	\$50K annual Undergraduate summer research fellowships	\$2.5M expendable New equipment for biological imaging lab

1) Full title of department is Molecular, Cellular, and Developmental Biology.

Source: EAB interviews and analysis.

Moving Up the Giving Pyramid

Institutions that ask the right donors for an upgrade at the right time with the right appeal have seen their annual revenues increase and their long-term major gift pipeline fill with strong prospects. These strategies for accelerating donors up the giving pyramid optimize giving from the institution's most loyal donors, allowing their total contributions to match their full capacity. As that capacity grows over time, these approaches to upgrades lead donors seamlessly into the ranks of core institutional benefactors.

Strategies for Executing on Accelerated Upgrades

High-Return Approaches to Increasing Mid-Level Donor Value



Ask the Right Donors...

- 1 Define attributes that position donors for upgrades
- 2 Segment database by those attributes
- 3 Develop and circulate high-touch appeal to target donors



...At the Right Time...

- 1 Compile list of current-year donors in "upgrade window"
- 2 Spotlight benefits of leadership giving in appeal
- 3 Time appeal for 3-6 months after majority of donors give



...With the Right Appeal

- 1 Work with unit staff to identify and price out priorities
- 2 Design compelling product catalogs
- 3 Train gift officers to integrate product asks in visits

Source: EAB interviews and analysis.

Road Map for Discussion

1 | Essay: The Pipeline in Peril

2 | Accelerating Donors Up the Giving Pyramid
Targeted Upgrade Proposals
Gift Match Laddering
“Mind the Gap” Second Asks
Fundraising Products

3 | **Surfacing Untapped Major Gift Potential**
Student and Alumni Prospect Referrals
Alumni Relations-Led Discovery Initiatives
Discovery-Focused Fundraisers
Transitional Giving Officers

4 | Enhancing Exclusivity and Access
Password-Protected Presidential Blog
Tiered Leadership Programming
Strategic Donor Engagement Councils

5 | Scaling Digital Impact Reporting
Beneficiary Email Narratives
Crowdsourced Student Thank-You Videos
Social Media Impact Ambassadors
Virtual Insider Series
Personalized Donor Dashboards

6 | Toolkit Resources
Fundraising Products Template
Alumni Volunteer Referral Organizer
Alumni Relations Prospect Referral Template
Gift Society Tier Audit
President’s Blog Launch Guide
Social Media Impact Ambassadors Launch Guide

Strategies in Brief

Student and Alumni Prospect Referrals (p. 56)

Advancement staff enlist student employees and alumni volunteers in the effort to qualify prospects. Student visits double as informational interviews, leading to high response rates from alumni. Alumni volunteers are asked both to visit with high-priority prospects supplied to them by development staff and to suggest prospects whom development staff may have overlooked.

Profiled Institution: Georgetown University (private, research university—very high research activity)

Alumni Relations-Led Discovery Initiatives (p. 57)

Alumni relations staff fill out and submit a prospect referral form whenever they interact with an alumnus/a who displays notable wealth and propensity indicators. A subset of alumni relations staff assume formal qualification duties in addition to their engagement responsibilities.

Profiled Institution: Marquette University (private, doctoral/research university)

Discovery-Focused Fundraisers (p. 62)

Annual leadership giving officers focus on submitting high-capacity prospect referrals in addition to making annual fund asks. These gift officers train extensively with unit-based fundraisers to learn about departmental priorities and to streamline referrals. Incentives are structured to encourage referrals and ensure that fundraising imperatives do not obstruct the referral pipeline.

Profiled Institution: University of North Carolina at Chapel Hill (public, research university—very high research activity)

Transitional Giving Officers (p. 69)

Staff who previously served as annual leadership giving officers are reassigned to focus on a smaller pool of high-value donors. They prioritize visits based on wealth ratings and aim to surface excess capacity among existing annual fund donors, as well as unvisited prospects. Cultivation timelines grow much longer than for annual leadership fundraising, which allows transitional giving officers to gradually upgrade prospects to capacity.

Profiled Institution: McGill University (Canadian, medical doctoral university)

Missing the Needle in the Haystack

Targeted upgrade proposals, fundraising products, and other upgrade strategies can yield large revenue gains. They bring many donors' giving up to capacity. Yet for some high-net-worth donors, they may not do enough.

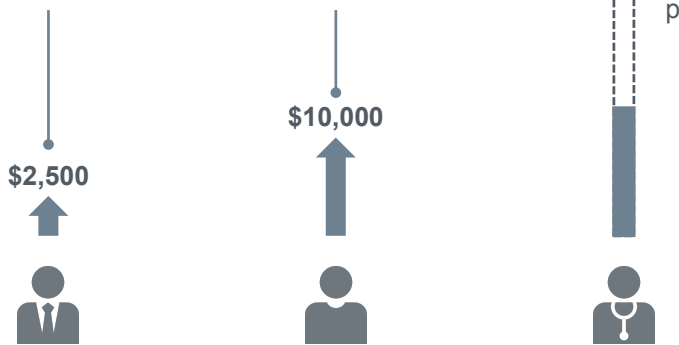
A segment of every mid-level donor population has capacity to give major and planned gifts in the short term. These donors typically require high-touch, in-person cultivation to move into the six- or seven-figure giving range.

Before directing cultivation efforts toward these donors, advancement leaders must first know who they are and how much potential they have. Nevertheless, many advancement leaders overlook current donor populations when they assess who their best major gift prospects are. Myopic discovery and qualification efforts hamper efforts to focus gift officers' time on high-potential leads.

High-Capacity Mid-Level Donors Often Undiscovered

Upgraded Mid-Level Donors

Upgrade strategies move mid-level donors to higher levels of annual leadership giving



But some high-capacity donors still give far below their full potential



A Big Blind Spot

"We're missing low-hanging fruit on the major gift side. We're not assessing what we already have. I think there's potential to mine our giving society for major donors, but we don't do a good job finding them and asking them at that major level."

*Chief Advancement Officer
Public Research University*

Source: EAB interviews and analysis.

A Crowded Field of Prospects

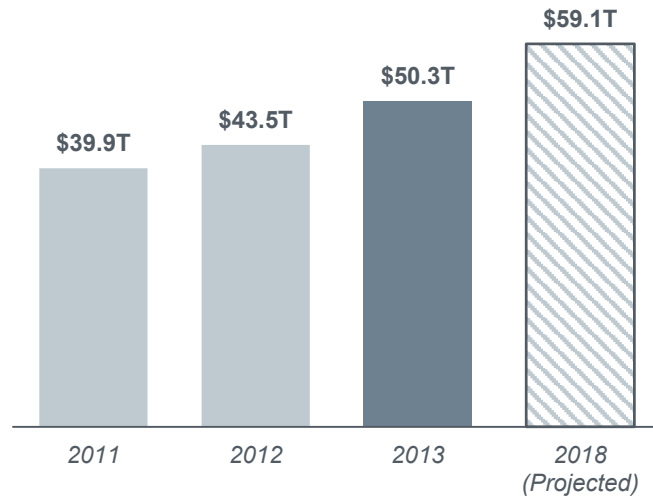
Overlooking the capacity of current mid-level donors to give major gifts has never been so important. The ongoing growth in private financial wealth means that more donors than ever before have the capacity to give transformative gifts.

This situation also substantially raises the opportunity cost of not examining mid-level donor populations for major gift potential.

Growth in Private Wealth Creates More Major Gift Opportunities

Private Financial Wealth in North America

Boston Consulting Group, 2014



High Wealth Density

7.1M

Millionaire households in the U.S.

1 in 17

U.S. households have \$1M or more in private wealth



Wealth Indicators All Around

“When I first started in this business, if they drove a Mercedes, you had to call them. Now everyone drives a Mercedes.”

*Keith Inman
Vice President for Advancement
University of Louisville*

Source: “Global Wealth 2013: Riding a Wave Growth,” BCG Perspectives, 2014, https://www.bcgperspectives.com/content/articles/financial_institutions_business_unit_strategy_global_wealth_2014_riding_wave_growth/?chapter=2; EAB interviews and analysis.

Many Barriers to Discovery

Advancement leaders' inattention to the mid-level is not without cause. Significant obstacles prevent advancement staff from identifying and cultivating mid-level donors who have major gift capacity. At many institutions, the ranks of mid-level donors are too extensive to effectively qualify everyone. In addition, institutional siloes prevent the sharing of information between staff who interact with prospects and the major gift officers who cultivate them.

These obstacles force major gift officers to chase high-net-worth prospects who lack the affinity necessary for major gifts, while leaving smaller, loyal donors with hidden wealth uncultivated.

Organizational Problems Disrupt Major Gift Pipeline

Obstacles to Surfacing High-Value Prospects



Too Many Prospects

- Lack of affinity information gives little indication of propensity to give
- Data-mining turns up thousands of “priority” prospects with no guidance on where to start



Little Time to Qualify

- Stringent revenue goals lead MGOs to deprioritize qualification visits
- MGO discovery efforts only touch small percentage of uncultivated alumni



No Referral System

- Annual fund staff underreport capacity to avoid surrendering their best donors
- Little collaboration between major gift operation and annual fundraisers

Students and Volunteers Surface Prospects

Some institutions have begun to identify worthwhile prospects across the donor pool by engaging current students and alumni volunteers in qualification.

Student discovery initiatives have grown in popularity in recent years and have shown great promise for surfacing hot prospects. Under these initiatives, students are paid to meet with alumni for informational interviews that double as qualification visits. They flag promising alumni for follow-up from a frontline fundraiser.

Other institutions have begun to experiment with alumni volunteer referrals. In this model, alumni volunteers either submit the names of fellow graduates whom they believe to be good prospects or visit with prospects whom the advancement office would like to qualify.

Two Models for Low-Cost Discovery

Model #1: Student Discovery Initiatives



- Popularized by Georgetown University
- Students visit prospects and donors during breaks to identify hot leads

Pros

- Student visits excite and inspire alumni
- Student visits are easier to book than fundraising meetings

Cons

- Students lack discovery skills or polish necessary for interactions with wealthy donors
- Hard to “close the loop” with students after interviews

Model #2: Alumni Volunteer Referrals



- Volunteers flag wealthy peers from list
- Alumni with unknown giving capacity receive volunteer visits

Pros

- Engages volunteers in meaningful work
- Surfaces more candid information than would be shared with development

Cons

- Volunteer management can be burdensome on staff
- Visits from volunteers may be valued less by alumni

Source: EAB interviews and analysis.

Engaging Alumni Relations in Discovery

A growing number of institutions are turning to internal, alumni-facing staff to qualify prospects. Alumni relations staff members are well-suited to the task of discovery and qualification. They are out on the front lines every day seeing alumni whom development staff may have never before met. At some institutions, the number of alumni whom these staff meet in any given year outnumbers those seen by development by a 50-to-1 ratio.

Unit Staff Well Situated to Surface Prospects

Key Components

- 1 Volume of Interactions**
Alumni relations staff see hundreds of alumni every year from all demographics
- 2 Engagement as Cultivation**
Meaningful engagement kick-starts cultivation before gift officer steps in
- 3 Overlap with Development**
Alumni-facing work and shared reporting lines create synergies within advancement



Choosing the Right Messenger

“Often times, outreach from the alumni association may be met with a lot more receptivity than outreach by development officers. They’re in a great position to engage prospects. Because of that, the expectation is that they’ll bring back prospect research information.”

*Jeffrey Schanz
Assistant Vice President, Institute Advancement, Development & Alumni Relations
Rensselaer Polytechnic Institute*

Giving Staff Tools to Succeed

Marquette University has taken steps to capitalize on alumni relations' potential by developing a powerful prospect referral form. Alumni relations staff are asked to submit a form when they have a conversation with someone who sounds like a good prospect.

The form itself is smartly designed to guide alumni relations staff to the sorts of information that might indicate wealth. A checklist of wealth indicators, such as business ownership, secondary homes, yachts, and private airplanes, helps teach alumni relations staff what to look for and streamline the information-sharing process once they hear them.

Prospect research reviews every form that alumni relations staff submit. The best prospects are moved into major gift officers' portfolios for cultivation.

Marquette University Builds Alumni Relations Prospect Referral Form

Alumni Relations Prospect Referral Form

Constituent information connects leads with alumni records

Alumni relations staff are asked to record revealing wealth indicators

Constituent Name: *

Class Year: **RE Record ID:**

Home City, State:

Your Name (Referral):

- Business Ownership (listen for: type of business, years in business, sales trends, recent sale)
- Career Path (promotions, titles)
- Board Involvement (business or civic)
- Secondary Homes
- Investment Properties (commercial, apartments, farms, vineyards)
- Family Foundation
- Major Philanthropic Gifts to Other Organizations
- Vacation Spots
- Yachts, Private Airplanes
- Collections (art, jewelry, antiques)
- Country Club Membership
- Hobbies (show horses, 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 you recall (click on the submit button when you're done):

[description required]

Free-text description gives development staff more specific information to evaluate prospects

Referral Forms Lead to Major Gifts

In less than a year of using the form, Marquette has made great gains. Staff have surfaced 20 high-quality leads, three of which have converted into major gift donors.

But the success of the form has actually exacerbated a dilemma that Marquette is facing. With great leads coming in, they're struggling to find gift officer capacity to actually go out, meet new prospects, and figure out in a more comprehensive manner if the leads have immediate major gift potential.

Marquette Alumni Relations Staff Surface Highly Productive Leads



Turning Up Untapped Dollars

20

High-quality leads submitted by alumni relations and verified by prospect research

3

Major donations made by prospects surfaced through alumni relations leads

\$50K

Endowment given as a result of alumni relations lead



Success Yields Next Steps

“Some of the leads were so good that they were put into major gift officer portfolios. One of them was a major endowment that already came in. So that’s a success story.... But we have about 7,000 constituents in qualification pools and 1,500 who are viable and who we need to start seeing. So we’re about to transition our roles in alumni relations to infuse even more qualification work in what we’re doing.”

*Stacy Mitz
Managing Director, Engagement and Affinity-Based Giving
Marquette University*

New Discovery Roles at Marquette

To solve this problem, Marquette began to transition some alumni relations staff members into discovery roles in 2014. Most of the revised positions are hybrid roles that focus on discovery part-time. Advancement leaders are also converting one position into a dedicated discovery role.

Marquette’s discovery staff will aim to visit over 700 unqualified prospects every year. These visits will go beyond what the prospect referral form can surface. The discovery officers will ask pointed questions designed to get at affinity, philanthropic inclination, and wealth. They’ll also look for referrals to other good prospects, since high-capacity individuals often have high-capacity networks.

Alumni Relations Staff Increase Capacity to Qualify Prospects

Prospective Visit Goals for Discovery Staff



Aims of Discovery Visits

- 1 Assess prospect’s affinity for Marquette
- 2 Learn about current philanthropic giving
- 3 Evaluate prospect’s capacity to give
- 4 Surface referrals to other high-potential alumni

Source: EAB interviews and analysis.

Mapping Next Steps to Alumni Potential

Discovery visits will be designed to zero in on whom gift officers should see right now. The highest potential prospects will be fast-tracked to major gift officers' portfolios for immediate cultivation.

Other interviewed constituents will be assigned an engagement plan culled from a variety of opportunities. Engagement plans serve two purposes: they keep alumni who might be good prospects down the road connected to the institution without spending too much of development's time on them, and they prevent alumni from feeling like the school only cares about them if they have money.

Although the new discovery initiative is still too young to determine outcomes, advancement leaders at Marquette anticipate that it will result in higher yields for major gift officers, as their portfolios will fill with stronger prospects surfaced through the initiative.

Discovery Visits Lead to Both Giving and Engagement



Discovery Officer Conducts Qualification Visit

Officer evaluates both capacity and desire to give



High-Potential Prospects Are Passed to Gift Officers

Gift officers schedule visits to discuss opportunities for philanthropic impact



Other Interviewed Constituents Are Given Engagement Opportunities

Ensures that interested alumni are segmented for invitations and involvement



Prospect Engagement Plans

Affinities

Parents' Council; Women's Council; LGBT Alumni Group; Ethnic Alumni Association

Volunteerism

Admissions; Club Leadership; Event Coordinator; Athletics

Social Media

Online Alumni Club Ambassadors

Career

Program Speaker; Mentor; Job Shadow

Source: EAB interviews and analysis.

Staffing Up for Annual Leadership Giving

Annual leadership giving officers comprise another group of internal, alumni-facing staff who could be positioned to surface prospect leads.

Annual leadership giving officers have proliferated in advancement divisions in recent years. Advancement leaders have recognized that many mid-level donors require more high-touch treatment than a direct mail solicitation can provide. They've accommodated that need by investing in frontline fundraisers who visit donors below the major gift level.

Today, a growing percentage of North American institutions employ annual leadership giving officers, are taking steps to hire some, or are seriously evaluating the ROI of doing so.

Institutions Dedicate Resources to Cultivating Mid-Level Donors



A Growing Need

“Our advancement shop has to start treating the people who give the \$1,000 and \$5,000 gifts more like future major donors. Right now we ask major gift officers to fill dead time on the road with visits to our best mid-level donors, but I’m starting to think we need to have a more dedicated, strategic approach here.”

*Chief Advancement Officer
Public Master’s University*



New Investments in Staff

“We just hired four annual leadership giving officers. We realized we couldn’t afford to keep holding our mid-level donors at arms-length. If the only communication we have with them comes through direct mail or phonathon solicitations, we’ll never be able to build a giving relationship with them that culminates in a major gift.”

*Director of Annual Giving
Private Research University*

Junior Major Gift Officers

Annual leadership giving officers function like major gift officers, only they visit current and prospective mid-level donors instead of major ones. They also tend to see a lot more of them. At some institutions, annual leadership gift officer visit loads can reach 200 per year.

The strategy most annual leadership giving officers use is based on volume. They visit a lot of prospects and make a mid-level ask on every visit. Many advancement leaders report strong revenue gains and numerous mid-level upgrades thanks to this strategy.

Prospecting Potential from Annual Leadership Giving Officers

Example of Fundraising Goals and Benchmarks for Frontline Fundraisers

Performance Metric	Annual Leadership Giving Officers	Major Gift Officers
Portfolio Size	125-300	75-125
Annual Visits	100-200	80-180
Experience in Fundraising	0-3 years	3+ years
Dollars Raised	\$100K-\$200K	\$500K-\$1.5M
Number of Gifts	40-75 (annual and/or leadership gifts)	5-8 (major gifts)
Gift Size	\$1K-\$25K	\$25K-\$1M+

Annual leadership giving officers frequently visit hidden-capacity donors

Source: Grabau T, "Major Gift Metrics That Matter," *Colloquy*, (2012): 36-40; CASE Gift Officer Metrics & Reporting InfoCenter samples. http://www.case.org/Samples_Research_and_Tools/Samples/Gift_Officer_Metrics_and_Reporting.html; Advancement Forum, "Gifted and Talented: What Makes a Top Fundraiser?" (2014); EAB interviews and analysis.

The Broken Pipeline in the Annual Fund

Despite these revenue gains, many advancement leaders are missing an opportunity to use annual leadership giving officers to fill today's pipeline for major gifts.

As it stands, annual leadership giving officers excel at upgrading donors within the mid-level. But when they come across someone with major gift potential, they think first and foremost about the annual fund. Their incentives focus on individual and unit-based revenue goals, rather than the total dollars they had a hand in bringing into the institution. As a result, their activity is narrowly focused, and potential major gifts are left uncultivated.

Annual Leadership Giving Officers Fail to Communicate Leads

Annual Leadership Visit Pool



Standard Upgrade Donors

- Visits yield upgrades within the annual leadership giving level
- Future cultivation occurs through direct mail solicitations or brief solicitation visits

Give to Capacity



Major Gift Potential

- Gift officers ask for standard annual leadership upgrades
- They do not alert colleagues in prospect research and major gifts about donor's potential

Give Far Below Capacity

Major Gift Visit Pool



Managed Major Gift Prospects

- Long-term, high-quality cultivation results in large gifts
- Portfolios include "usual suspects;" they lack promising annual leadership donors

Give to Capacity

Source: EAB interviews and analysis.

Generating Leads While Driving Upgrades

While this situation is common within advancement divisions that employ annual leadership giving officers, some institutions are taking a proactive approach to breaking down these siloes and mending the pipeline.

One such institution is the University of North Carolina at Chapel Hill (UNC-Chapel Hill). Advancement leaders at UNC-Chapel Hill established a discovery initiative in the annual fund in 2014. They envisioned this new initiative as a way to achieve both discovery and fundraising goals.

The discovery-focused fundraisers that UNC-Chapel Hill hired as part of this initiative are tasked with upgrading mid-level donors, as well as with surfacing major and planned gift prospects. Their visit load is focused on about 1,500 priority prospects who fit one or more criteria indicating major or planned gift potential.

UNC-Chapel Hill's Discovery-Focused Fundraisers Strengthen Gift Ladder

Annual Leadership Gift Officer Staffing (3 FTE)



Upgrade Annual Leadership Donors

Meet with prospects, make the case for giving, solicit annual leadership gifts, and encourage upgrades

Refer Untapped Major Gift Prospects

Assess capacity and affinity, explore philanthropic motivations, identify priorities of interest, and pass prospect leads



Criteria for Visits

- Leadership giving for 5 or more consecutive years
- Giving at any level for 15 or more consecutive years
- Highly rated annual fund donors and non-donors



Prospect Pool Characteristics

1,500

Total priority prospects

1,200

Prospects meet two of the three criteria

700

Prospects meet the leadership giving criteria

Instilling a Culture of Collaboration

To make sure that discovery-focused fundraisers don't prioritize upgrades over referrals, advancement leaders at UNC-Chapel Hill built an intensive discovery training program. This program educates staff about fundraising priorities in each of the university's 13 schools and helps them build relationships with the fundraising staff in each one.

A series of online modules focused on discovery techniques compliments departmental trainings. Together, these two components give discovery-focused fundraisers the skills to qualify donors and the institutional relationships necessary to refer them for further cultivation.

Hybrid Staff Undergo Unit-Based Trainings to Smooth Referrals

Key Concepts of Discovery Training Curriculum

Intensive on-campus training program lasts for 6-8 weeks and includes...



Externally produced webinars on qualification essentials, capacity indicators, and fundraising skills



Presentations and department tours led by major gift officers in each of the 13 schools (about 2-4 hours each)



Extensive review of development materials outlining strategic fundraising priorities at all giving levels



Setting Expectations Early

“We drilled constantly in training that this is about referrals. This is about providing a service to our schools and units and being donor centered. It's about identifying prospects and determining their interests, then aligning them with the area on campus that's the best fit. That's what's going to get the greatest major gifts.”

*Rebecca Bramlett
Director of Annual Giving
UNC-Chapel Hill*

Turning Training into Action

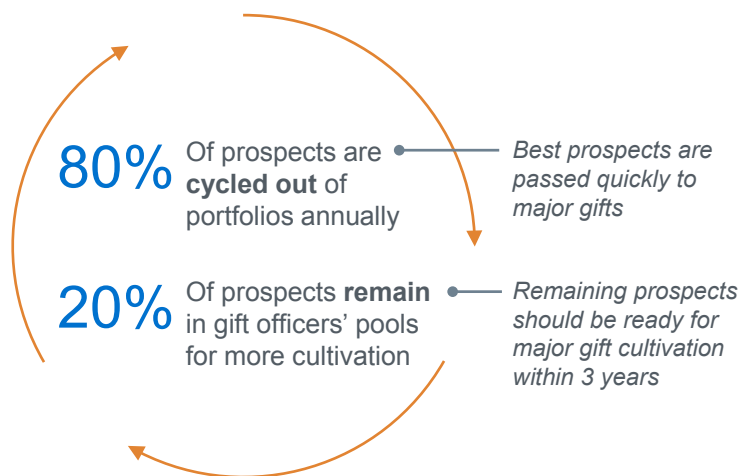
Of course, training on its own isn't enough. There have to be mechanisms in place to reinforce the lessons of training. Advancement leaders at UNC-Chapel Hill have deployed a small handful of referral drivers, including portfolio rotation and secondary solicitor status.

With portfolio rotation, all of a discovery-focused fundraiser's prospects rotate out within a three-year window, and 80% of them move every single year. This system ensures that the best donors will never languish in an annual fund pool. In addition, discovery-focused fundraisers receive secondary solicitor status on major and planned gift proposals for prospects they refer.

Advancement leaders at UNC-Chapel Hill will soon consider whether to implement a formal referral goal to further incentivize lead-sharing among the discovery-focused fundraisers and major gift officers.

Program Mechanics Support Major Gift Referrals

Rapid Portfolio Churn Encourages Referrals



Other Referral Drivers



Secondary Solicitor Status

Co-listing on gift proposals boosts revenue performance



Referral Goal (*Prospective*)

10% referral goal for visits may apply to future evaluations

Major, Planned, and Annual Giving Gains

In the discovery-focused fundraiser program's first six months, UNC-Chapel Hill qualified nearly 200 new prospects, a quarter of whom made annual fund donations. In addition, the program had a significant impact on the institution's major and planned gift pipeline. Hybrid discovery fundraisers surfaced four donors who had already written UNC-Chapel Hill into their wills but had not informed the planned giving office, while another seven prospects were identified as having immediate major gift potential.

Promising Early Results from UNC-Chapel Hill

In the program's first six months...



Prospect Pool Characteristics

192

Visits made to high-priority prospects and donors

25%

Of visited prospects gave annual gifts

4

Donors referred to planned giving to document estate gifts

7

Donors referred for \$25K-\$100K gift cultivation

In the program's next six months...



To Do List

- Establish performance benchmarks based on current-year outcomes
- Cultivate relationships with prospects who are remaining in the portfolio for now
- Begin stewardship of donors who give in response to visits
- Work with units to update officers on funding priorities

Untapped Major Gift Capacity in the Annual Fund

McGill University has gone beyond the annual leadership giving officer model in an effort to better identify and cultivate major gift prospects.

In early 2013, advancement leaders started to suspect that their annual fund contributed fewer prospects to the major gift pipeline than it could.

Advancement leaders diagnosed two primary causes of this problem. First, annual leadership giving officers were overly focused on the annual fund's bottom line. Second, the way they estimated how much prospects could give put too little emphasis on wealth. The ratings they used combined capacity and affinity, which meant a lot of high-net-worth individuals who hadn't been properly cultivated received low ratings.

By their estimates, there were 1,200 people coded for the annual fund whose wealth put them in the \$25,000+ gift range. The annual fund code meant they would never get anything other than a quick, small-ask annual leadership visit.

High-Potential Prospects Elude Major Gift Officers at McGill University

Siloed Approach to Fundraising



Annual fund officers focused exclusively on making annual fund asks



Data Not Used to Fullest Potential



Prospect ratings combine affinity and capacity; no ability to look at variables independently



Unknown Prospects with \$25K+ Capacity



1,200 high-value prospects "hidden" in annual leadership gift officers' pools



Stuck in the Annual Fund

"When we redid the financial ratings, in the annual fund officers' pools, we found 1,200 donors whose five-year financial ratings were actually \$25,000 and up. Essentially, these special and major gift prospects were hidden. As they were giving already on an annual basis, we knew that their affinity for the university was good, but these donors actually had the capacity to make more significant gifts. At the time, however, we saw them as donors who made leadership level annual fund gifts and not as prospects according to their real philanthropic capacity."

*Anne Carbonneau
Managing Director of Development Programs
McGill University*

Rightsizing Prospect Pools

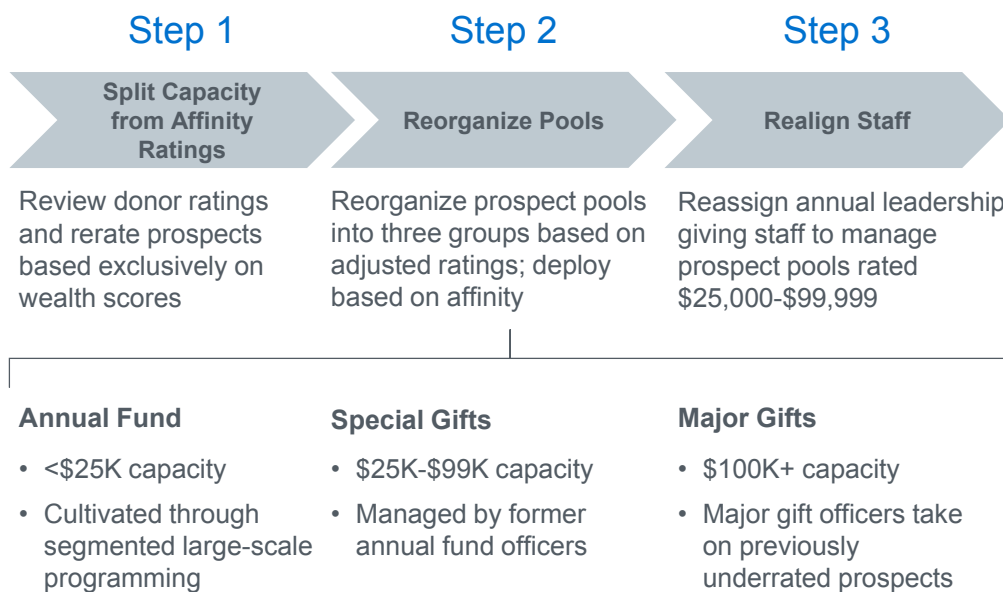
To change things, advancement leaders at McGill took three steps forward. Together, these steps separated out high-capacity individuals who had been assigned to the annual fund and dedicated staff to cultivate them for larger gifts.

The first step involved temporarily ignoring affinity in all donor ratings. Advancement staff gave donors new ratings based solely on wealth. Next, they organized donors into three categories according to wealth—annual fund, special gifts, and major gifts. Once they put them in these categories, advancement staff looked at affinity again to figure out which prospects in each category they should prioritize. This meant that the highest-affinity high-net-worth individuals in each category would be seen first.

During the third step, advancement leaders reassigned McGill’s five annual leadership giving officers to the same reporting line as major gifts and dedicated them exclusively to prospects who were rated in the \$25,000-\$99,999 range.

Capacity Audit, Gift Officer Redeployment Improves Pipeline

Pipeline Overhaul and Repair Process



Source: EAB interviews and analysis.

Changing Gift Officers' Direction

The new transitional giving officers' pools are much smaller than when they served as annual leadership giving officers. The reduced portfolio size allows them to cultivate prospects in a high-touch manner over a longer period of time.

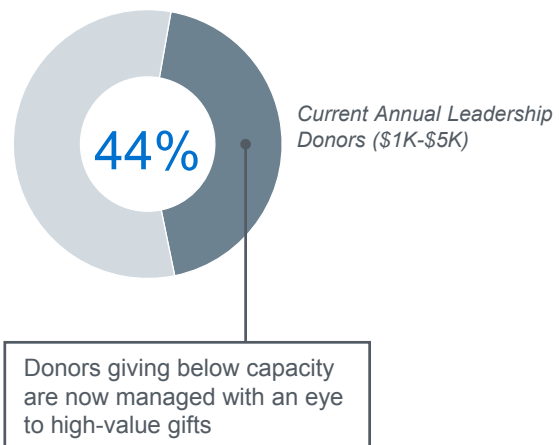
Longer cultivation time frames with higher dollar goals profoundly changed the way transitional giving officers raise funds from their prospects. Yet despite the changes, transitional giving officers see many of the same prospects they previously visited as annual leadership giving officers. Current annual leadership donors comprise nearly half of transitional giving officers' pools. The officers simply focus in a more targeted manner on McGill's highest-capacity mid-level donors, and they cultivate them for larger gifts over a longer period of time.

Frontline Fundraisers Turn Their Sights to Wealthier Prospects

Attribute	Old Model	New Model
	Annual Giving Officers	Development Officers
Portfolio Size	300 prospects	120 prospects
Philanthropic Capacity	<\$25,000	\$25,000-\$99,999
Change in Salary Cost	N/A	No change
Supervising Administrator	Associate Director of the Annual Fund	Associate Director of Development Programs
Purpose	Sustain and grow revenue for the annual fund	Cultivate and upgrade high-potential donors who give below capacity

Development Officer Portfolios¹

Average Number of Annual Leadership Donors in Higher-Capacity Pools



¹) Does not include major gift officer portfolios.

Source: EAB interviews and analysis.

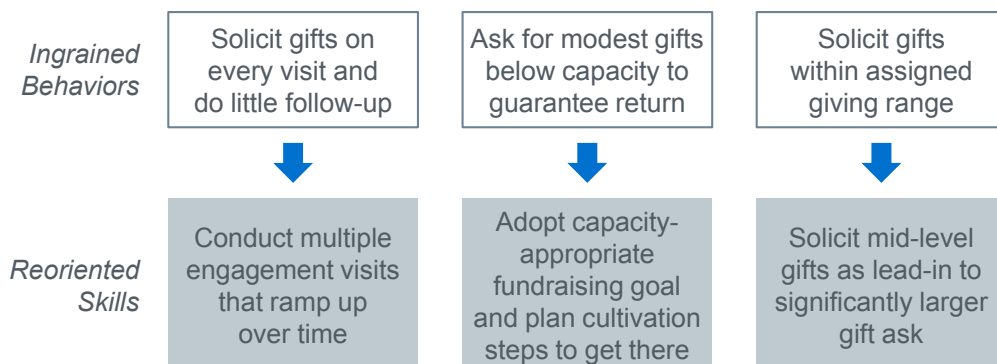
Going Beyond a New Portfolio

More focused prospect pools didn't immediately bring with them better engagement. Some of the transitional giving officers at McGill who were used to one-visit-one-ask struggled to shift over to more progressive, strategic cultivation.

Advancement leaders upskilled the reassigned gift officers by training them to build up a relationship over multiple visits, aim for prospects' full capacity, and plot out a strategy of smaller gifts that lead to bigger ones.

Upskilling Redeployed Staff

Gift Officer Retraining Focus Areas



Shooting for Big Gifts

“We put a lot of work into training and changing the way [gift officers] thought about ratings. They had been saying, ‘We’ll be lucky if we get x-amount from this person.’ Now they’re saying, ‘This is the donor’s total philanthropic budget, what is our strategy to gain a more significant part of it?’”

Isabelle Roy
 Director of Prospect and Pipeline Management
 McGill University

“Go Where the Money Is”

McGill’s program is still in its early stages. The biggest success advancement leaders point to at this point is smartly putting their resources where the highest-value donors are. Whereas the annual leadership giving officers were managing portfolios that collectively contributed about \$400,000 a year, today their new portfolios are together worth over \$1.2 million.

The donors within those portfolios are also slowly starting to upgrade their giving. Since McGill’s new strategy is built around longer-term cultivation, advancement leaders see these incremental upgrades as positive steps towards more transformational donations.

Redeployed Gift Officers Manage and Cultivate High-Value Portfolios



Managing Bigger Gifts

\$400K

Value of prospect pool managed by five gift officers prior to redeployment (2012-2013)



\$1.2M

Value of prospect pool managed by seven gift officers after redeployment (2013-2014)



Building Up to Capacity

“The intent is to build up to that ultimate gift. But in the first instance, if this person has never given and they’re rated \$50,000 to \$99,999, securing a leadership annual gift from this prospect would be an excellent first step. That’s the beginning of stewarding them toward their maximum capacity gift.”

*Kathryn Muller
Associate Director of
Development Programs
McGill University*

Identifying Unknown Major Gift Prospects

Many institutions struggle to qualify prospects at a pace fast enough to keep major gift officers' portfolios filled with promising leads. Yet the information necessary for qualification may already exist within the institution and its networks. Students, alumni, alumni relations staff, and annual leadership giving officers all interact with a high volume of potential donors.

Empowering them to recognize good prospects and submit referrals will ensure that the major gift pipeline is constantly filled with promising prospects.

Strategies for Executing on Next-Generation Discovery Initiatives

High-Return Approaches to Surfacing Untapped Major Gift Capacity



Enlist Alumni Relations Staff

- 1 Audit and minimize administrative responsibilities
- 2 Train staff on qualification and discovery skills
- 3 Prioritize visits with high-capacity annual fund donors



Look Within the Annual Fund

- 1 Recruit frontline fundraisers to focus on mid-level gifts
- 2 Enhance training to focus on discovery and qualification
- 3 Fine-tune incentives and KPIs to encourage referrals



Redeploy Annual Gift Officers

- 1 Reevaluate capacity ratings based solely on wealth
- 2 Move annual fund officers to same unit as major gifts
- 3 Train redeployed staff for high-quality cultivation

Source: EAB interviews and analysis.

Road Map for Discussion

1 | Essay: The Pipeline in Peril

2 | Accelerating Donors Up the Giving Pyramid
Targeted Upgrade Proposals
Gift Match Laddering
“Mind the Gap” Second Asks
Fundraising Products

3 | Surfacing Untapped Major Gift Potential
Student and Alumni Prospect Referrals
Alumni Relations-Led Discovery Initiatives
Discovery-Focused Fundraisers
Transitional Giving Officers

4 | **Enhancing Exclusivity and Access**
Password-Protected Presidential Blog
Tiered Leadership Programming
Strategic Donor Engagement Councils

5 | Scaling Digital Impact Reporting
Beneficiary Email Narratives
Crowdsourced Student Thank-You Videos
Social Media Impact Ambassadors
Virtual Insider Series
Personalized Donor Dashboards

6 | Toolkit Resources
Fundraising Products Template
Alumni Volunteer Referral Organizer
Alumni Relations Prospect Referral Template
Gift Society Tier Audit
President’s Blog Launch Guide
Social Media Impact Ambassadors Launch Guide

Strategies in Brief

Password-Protected Presidential Blog (p. 82)

Donors who give mid-level gifts receive access to a password-protected blog where the president writes about strategic institutional priorities. The blog features prominent gift society branding and underscores the group's exclusivity. Donor comments on the blog elicit responses directly from the president when appropriate, heightening a sense of VIP access.

Profiled Institution: Ithaca College (private, baccalaureate college—arts and sciences)

Tiered Leadership Programming (p. 86)

Donors gain increasingly enhanced access to high-profile institutional leaders as they upgrade to higher tiers of the mid-level. VIP touches move from large-scale events to intimate exchanges with the institution's most senior leaders. The gift levels at which stewardship touches increase are audited to ensure that they align with and inflect donors' giving behaviors. Advancement staff introduce new tiers to alleviate donor inertia.

Profiled Institution: University of Delaware (public, research university—very high research activity)

Strategic Donor Engagement Councils (p. 90)

High-potential mid-level donors are targeted for exclusive membership on advisory councils with minimum gift requirements. A diversity of council types, such as affinity-based councils and demographic-based councils, ensure that various donor interests are accommodated. Senior leaders, including the president and provost, attend council meetings to engage donors and solicit their advice on strategically critical issues.

Profiled Institution: Drexel University (private, research university—high research activity)

Seeing Themselves as Benefactors

Without well-developed stewardship efforts, giving relationships can wither over time. Donors grow resentful of the advancement office, which they see as only engaging them when fundraisers want money.

Despite stewardship's importance, advancement leaders struggle to develop meaningful touches for all donors. Stewardship is especially problematic for mid-level donors due to the outsized expectations they bring to their giving relationships. Mid-level donors tend to see themselves more as low-level major gift donors rather than high-level annual fund donors. As such, they expect high-touch treatment typically reserved for major gift donors.

In particular, mid-level donors want stewardship staff to create opportunities for them to interact with senior leaders. They see themselves as members of an exclusive group of institutional benefactors, and anything the advancement office can do to reinforce this belief will strengthen giving relationships with the mid-level.

Mid-Level Donors Want Access to Senior Leaders

Donor Expectations Escalate with Gifts

\$20 Gift	\$100 Gift	\$500 Gift	\$1,000 Gift
"Sure, I can spare some pocket change"	"I know it's not much, but it's something"	"This should really help some students"	"I expect some VIP treatment for this"

Prospect Pool Characteristics

<p>45%</p> <p>Of donors gave again after a thank-you call from a senior leader (compared to 33% after calls from students)</p>	<p>61%</p> <p>Of Millennials want access to the leadership of the organizations they support</p>	<p>75%</p> <p>Of Millennials want to help senior leaders plan the strategic direction of organizations they support</p>
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Source: "How to Reach Young Donors," AFP (2010), <http://www.afonet.org/Audiences/ReportsResearchDetail.cfm?itemnumber=4455>; Burk P, "The Burk Donor Survey," Cygnus, 2013, http://www.cygnusresearch.com/files/2013/2013-Burk-Donor-Survey_Report_US-PW.pdf; EAB interviews and analysis

A Problem of Scale

Mid-level donors' desire for senior leader access presents problems of scale and sustainability. Whereas a president or provost may be able to steward a large portion of the relatively small major donor base, the ranks of mid-level donors are far too extensive at many institutions for effective one-on-one engagement.

Even those institutions that would be willing to dedicate their senior leaders' time to extensive stewardship for mid-level donors must answer questions about ROI, due to the proportionally limited share of total revenue that these donors contribute.

Mid-Level Donors Are Too Numerous for VIP Treatment

Number of Events Required to Serve All Major and Mid-Level Donor

EAB Analysis

Activity	\$100K+ Donors (n=100)	\$1K-\$100K Donors (n=2,250)
Presidential Dinner (10 attendees)	10 events	225 events
Briefing with VP of Enrollment Management (5 attendees)	20	450
Private Lab Tour (3 attendees)	33	750
Meeting with Provost and Dean (1 attendee)	100	2,250



Questioning the ROI

“Our Leadership Donors (\$1K-\$50K) want to be engaged similarly to how we manage major donors \$100K+. But really, it is getting harder to justify the ROI of doing that, even though it is important to building our pipeline. We simply wouldn't generate the same amount of money as we would at the major donor level, and with budget constraints we need to strategically allocate to where we get the highest return. This is forcing us to be more creative and innovative with our engagement and stewardship programs with leadership and lower-end major gift donors.”

*Brian Otis
Vice President for Development
University of Connecticut*

Source: EAB interviews and analysis.

A Seemingly Quick Fix

The common solution to these problems of scale is the gift society. Donors who make mid-level gifts are inducted into a society that provides them with prescribed stewardship touches and one-size-fits-all engagement opportunities.

Gift societies are often characterized by a membership certificate, an annual report, a tchotchke of some sort, and a large-scale donor event. These features are easily replicable across the entire mid-level donor base, thereby saving stewardship staff time and effort.

Advancement leaders have relied overwhelmingly on gift societies in recent years to steward mid-level donors. At many institutions, the mid-level donor experience is characterized exclusively by society membership.

Institutions Turn to Gift Societies for Answer to Mid-Level Problem



The Standard Solution

“Our gift societies are the main way we show mid-level donors we care about them. The society format helps us organize and scale our efforts. It’s kind of a one-size-fits-all approach, but we like to think that the donors value being a part of that elite club. I hope they’re framing their certificates and putting them up on their walls. And we of course love having them back to campus for the big annual gala with all their fellow society members.”

*Chief Advancement Officer
Private University*

Common Leadership Society Benefits

An Abundance of Mailings and Tchotchkes



Society certificate



Form thank-you and tax receipt



Annual report and honor roll



Lapel pins

Infrequent All-Society Programming



Annual on-campus gala



Regional member gatherings

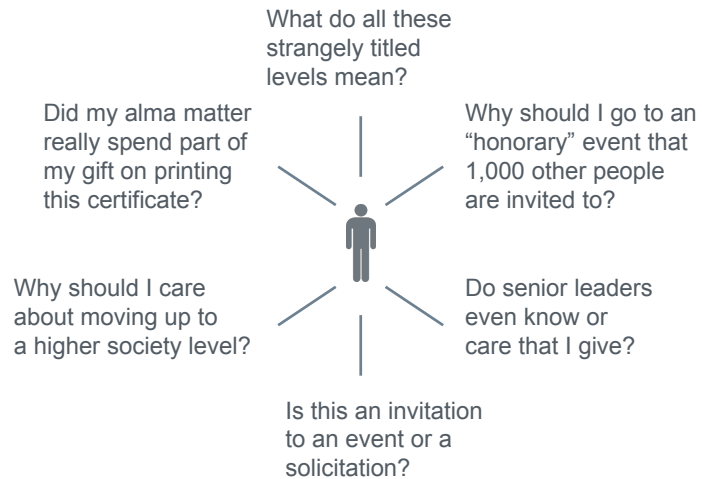
The Gift Society Problem

Despite advancement leaders' reliance on gift societies, few donors attach much importance to them. Skepticism abounds when it comes to the value of society benefits. Although societies are meant to communicate to donors that they are valued, as well as to incentivize upgrades, these aims are lost on donors. In fact, most donors throw out the recognition materials that come with gift society membership. Even more donors report that gift societies have no influence on their giving.

Considering that advancement leaders dedicate disproportionate stewardship resources to gift society programming, many are beginning to take heed of these trends and rethink mid-level donor stewardship.

Focus on Recognition Ignores What Donors Really Want

Common Donor Questions and Complaints



Unappreciated Incentives

73%

Of donors who received plaques or certificates threw them out

83%

Of gift society donors said it had no influence on their giving

+12%

Change in number of donors since 2003 who said gift clubs have no influence on their giving

Enhancing Exclusivity and Access

In particular, three institutions have taken steps to enhance exclusivity and access for mid-level donors without overburdening their staff with unsustainable stewardship responsibilities.

The first two institutions, Ithaca College and the University of Delaware, fine-tuned their gift society programming and benefits to better align with donors' interests.

The last institution, Drexel University, supplemented gift societies by targeting mid-level donors for membership on strategic donor engagement councils.

Three Approaches for Colleges and Universities

Leverage Digital Channels for Elite Access



Presidential Elite
Insider Blog



Ithaca College

Increase Exclusivity with Each Gift Upgrade



Tiered Leadership
Programming



University of Delaware

Select Priority Donors for Presidential Interactions



Strategic Donor
Engagement Councils



Drexel University

Insider Access Through Digital Channels

Ithaca College learned that mid-level donors wanted enhanced access and exclusivity when advancement staff conducted a donor survey in 2011. A strong theme that emerged from donor responses was the desire for more access to the president and more information about higher education.

The college responded by launching the Alumni Leaders blog, a password-protected presidential blog open only to donors who give \$1,000 or more. The blog engages donors as insiders and gives them access to the president's thoughts on key issues before other constituencies. Its comment function also allows donors to engage in a back-and-forth discussion with the president.

Ithaca's Password-Protected Presidential Blog

Key Elements



Exclusive access for \$1,000+ donors



Frequent posts (bimonthly)



Board-level topics and tone



Comment function to facilitate interactions



Exclusive Insights

"Part of giving at this level is becoming an insider. Part of becoming an insider at Ithaca is being able to read and comment on things going on in the mind of the president sooner or sometimes more exclusively than everyone else. This is what engages donors."

*Chris Biehn
Vice President for Institutional Advancement
Ithaca College*

“A Community of Leaders”

The branding on the blog casts donors as members of an elite group of philanthropists whose support for the institution grants them access to the president. Alongside a picture of the president, a text header casts the blog as “a forum for the exchange of thoughts among a community of leaders.”

It also underscores the connection between society membership and digital access to the president. The prominently displayed tag line, “Exclusively for President’s Associates,” reminds donors that the blog is a benefit of membership in the society. It aims to turn the gift society into a motivator that influences donors’ giving.

Blog Gives Mid-Level Donors VIP Access to President’s Vision

Ithaca College’s Alumni Leaders’ Blog

The screenshot shows the Ithaca College website's blog page. The header includes the college name, navigation links, and a search bar. The main content area features a sidebar with navigation options like 'Exclusively for President's Associates' and 'Webcast with President Rochon'. The main article is titled 'Student for a Day' and includes a photo of President Rochon and a text excerpt. Annotations with lines pointing to specific elements provide context:

- Branding focuses on exclusivity and access:** Points to the 'Exclusively for President's Associates' tagline in the sidebar.
- Page header casts society members as valued insiders:** Points to the breadcrumb navigation path: 'Ithaca College » Alumni, Parents, and Friends » Giving to IC » President's Associates » Exclusively for President's Associates'.
- Presidential webcast adds multimedia element to the blog:** Points to the 'Webcast with President Rochon' link in the sidebar.
- Posts reflect on institution's strategic priorities:** Points to the article title 'Student for a Day'.

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

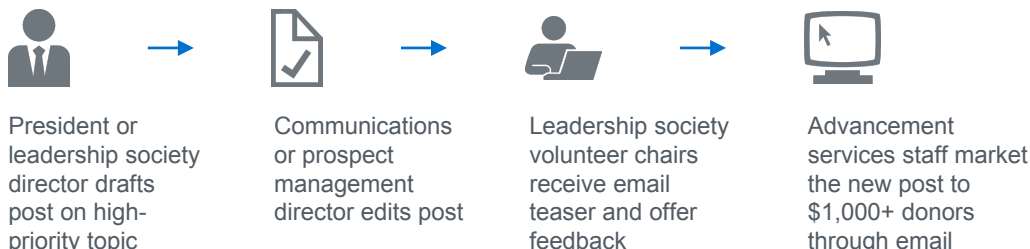
Creating a Sustainable Process

Recognizing that the president's time comes at a premium, advancement leaders at Ithaca hashed out a strategy for streamlining the production process for the blog. After the president authors a post, a variety of staff and volunteers critique, edit, and blast it out to donors.

Advancement leaders at Ithaca also wanted to make sure that the president spends his time as strategically as possible when it comes to answering donor comments. To do this, they have tasked the leadership society director with reviewing comments and bringing only relevant ones to the president's attention. They also have MGOs reach out when any of their assigned prospects leave a comment, since that's a ready-made engagement opportunity.

Staff Members and Volunteers Play a Key Role

Creating New Blog Posts



Brokering Presidential Interactions



Source: EAB interviews and analysis.

Eagerly Awaiting Posts

Ithaca has seen success with their blog, both in terms of engagement and giving. On the engagement front, donors respond enthusiastically whenever a message about a new post lands in their inbox. They open these emails at more than twice the rate that they open other emails from Ithaca, and they spend on average two and a half minutes on the posts.

Ithaca is also acquiring and retaining more leadership society donors since the launch of the blog. While a number of initiatives contribute to that gain, such as earlier screening of parents and improved screening overall, the blog still plays a major role in Ithaca's progress.

Donors Enjoy Opportunity for Online Interactions with President



Generating More Viewers, More Frequently, for Longer

52%

Average open rate for emails with new blog posts

262%

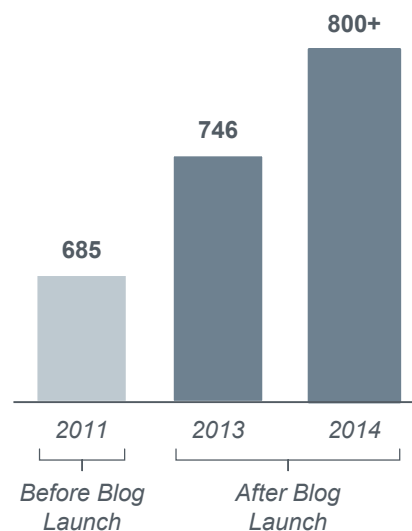
More traffic on website during months with blog posts

2m 28s

Average time donors spent on April 2014 blog post

Number of President's Associates Donors

2011–2014



Source: EAB interviews and analysis.

Rethinking Leadership Societies

While Ithaca honed in on a single leadership society benefit, the University of Delaware took a more far-reaching look at how society programming was structured. In the past, all donors who gave \$1,000 or more to Delaware received the same stewardship touches. Upgrading didn't bring with it any enhanced engagement. As a result, Delaware saw slow upgrade rates.

At the university president's behest, advancement staff set out to change things. They rebranded the society, created additional tiers, and built special programming into each tier of the society. The revamp aimed to give donors compelling reasons to upgrade from one tier to the next.

Delaware Diamond Society Revamp at the University of Delaware

Before

One level of access for most donors

All donors received a welcome package, lapel pin, athletic tickets, and one event per year, regardless of level

Result: Low average gifts, slow upgrades

Society Relaunch Steps

- 1 Rebranded society levels and messaging
- 2 Inserted additional giving tiers to facilitate upgrades
- 3 Added exclusive events to match giving levels
- 4 Created proactive marketing strategy to reach current members and prospects

After

Graduated access for upgraded donors

As donors move up the giving ladder, their level of exposure to senior leaders increases

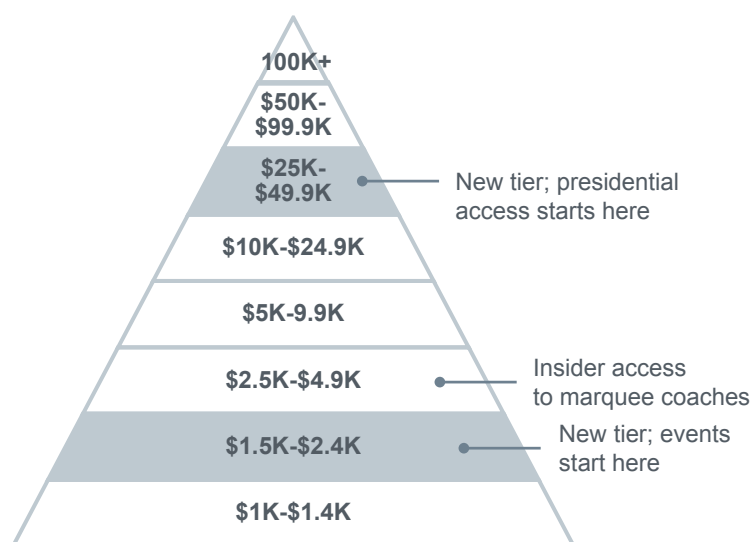
Goal: Higher average gifts, faster upgrades

The New Delaware Diamond Society

The new Delaware Diamond Society debuted in Summer 2013. One important feature of the new society structure is that donors who give bigger gifts get enhanced access to senior leaders. For example, donors who give the minimum \$1,000 get the standard lapel pin and discounts, but at the new \$1,500 level they have access to an alumni and faculty author series that features a keynote address from the provost. The \$2,500 level brings with it an invitation to a panel discussion with Delaware’s marquee coaches. If donors upgrade to the \$25,000 level, they start getting access to the president, first through a luncheon, and then at more intimate gatherings if they keep upgrading.

Additional Ladder Rungs Make Donors’ Climb Easier

New Tiers and Revised Benefits



An Upgrade Incentive

“We’ve seen that donors really want to be invited to exclusive events with senior leaders, so they might up their giving from \$1,000 to \$1,500. Donors have increasingly been upgrading their gift to the next levels to get that greater recognition, stewardship, and engagement.”

Dave Morris
Senior Associate Director of Leadership Giving
University of Delaware

Building Buzz and Enthusiasm

The launch of the revamped society brought with it a big marketing effort. This effort was more than just a publicity push. Advancement leaders at Delaware sought to create a new culture with the society at the center.

Staff across the university were trained on the new structure and benefit program for the society. Gift officers were taught to integrate society levels into their solicitations. In addition, all university constituents got some sort of notice about the new society, be it through the alumni magazine, a phonathon call focusing on membership, or an event invitation for existing members.

Relaunch Emphasizes Delaware Diamond Branding

The Rollout Process



Train Staff

Hold meetings and inform all advancement staff of new branding and messaging



Circulate Publicity Materials

Send new materials and messaging to the UD community through direct mail, email, and phone calls



Educate Gift Officers

Train gift officers on how to use new society structure as a stewardship and upgrade tool



New publicity materials are sent to...

University of Delaware Community

- Alumni magazine
- Website pages
- Email campaigns

Prospective Society Members

- Gift officer visit materials
- Targeted emails
- Phone scripts

Delaware Diamond Society Members

- New member welcome packet
- Messaging for events
- Event invitations

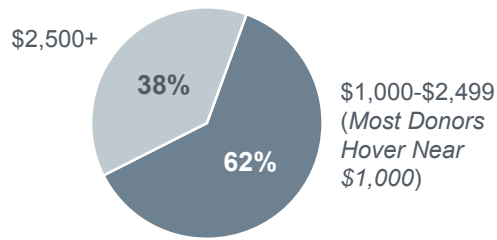
Driving Upgrades

Overall, Delaware has seen fantastic gains in just a year of running their revamped society. They've seen a 20% growth in membership and a 15% increase in median gift size. On top of that, the new society level they introduced at the \$1,500 mark has driven a lot of donors who were hovering right at \$1,000 to upgrade.

New Society Model Brings More Donors to Higher Giving Levels

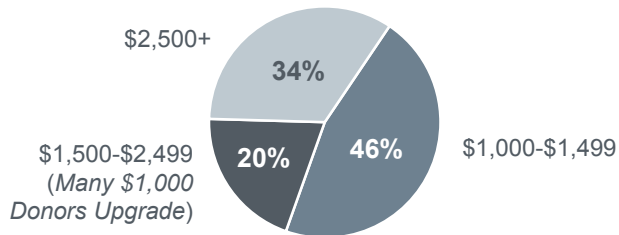
Percentage of Donors at Society Levels

Before Revamp 2012



3,102 total society donors

After Revamp 2014



3,716 total society donors



Prospect Pool Characteristics

20%

Increase in society members
(2012-2014)

15%

Increase in median gift size, from \$1,300 to \$1,500
(2012-2014)

\$14M

Given by society members
(2013)

Donor Councils: A Dime a Dozen

Forward-thinking advancement leaders can leverage gift societies to move donors through the gift pipeline. However, sometimes the best way to engage donors and give them insider access to key stakeholders lies outside the bounds of the traditional society. Advisory councils hold great potential for this sort of cultivation.

Research from the Association of Governing Boards of Universities and Colleges shows that over three-quarters of institutions have advisory councils at the college or school level. Many of them have them at the institutional level, too. These councils are seen tangentially as cultivation vehicles, but their primary purpose is purely advisory: they have no gift minimum, and their membership isn't chosen with an eye to moving people through the gift pipeline.

This makes the traditional advisory council a somewhat poor solution to the problem of exclusivity and access for mid-level donors.

Traditional Councils Lack Oversight and Strategic Recruitment



Donor Advisory Council Status Quo

1 in 3

Institutions have councils at the institutional level

3 in 4

Institutions have councils at the college or school level

78%

Of councils do not have a minimum gift requirement

Challenges of the Traditional Council Model



Minimal coordination and oversight from dedicated staff



Membership chosen with no strategic vision



"Dog and Pony Show" meeting agendas lack purpose



Bland, generic council themes that fail to tap donor interest

Strategic Member Selection at Drexel University

Drexel University recently launched strategic donor engagement councils that deployed the advisory council model in a way that more deliberately cultivated and upgraded donors. As of 2010, Drexel didn't have advisory councils, and they saw this as an opportunity to take the status quo approach and do it right.

Over the last three years, they launched seven advisory councils and implemented a \$2,500 gift minimum for membership. They recruited members to these councils strategically, aiming for individuals giving below the \$2,500 minimum who have capacity to give more. Their aim was to use the council to propel people through the gift pipeline.

Donors with Room to Grow Serve Alongside Model Donors

Advisory Council Members' Giving Profiles

1

Undercapitalized Donors and Non-donors

Mid- and high-capacity individuals whose giving is less than \$2,500 annually

Goal: Upgrade low-level, promising donors

2

Model Mid-Level Donors

Individuals giving \$5,000 to \$10,000 a year who can set an example for their peers

Goal: Steward donors and provide role models for lower-level donors

3

Major Donors

Core institutional supporters who can illustrate for others the path to major giving

Goal: Steward donors and provide models for mid- and lower-level donors



Peer Examples Aid in Cultivation

"We want to have those who are already philanthropists influencing those who aren't yet.... We have some who might be at \$1,000, but they should be at \$5,000. Having somebody who is a \$5,000 donor is extremely helpful when they view each other as peers and can see that a peer is doing more. They naturally step up when it's a peer saying, 'I'm doing more.'"

*Kristen DeVries
Associate Vice President for Advancement
Drexel University*

Matching Donor Interests...

Advancement leaders at Drexel also deliberated over what types of councils would best attract and cultivate donors. They ended up matching the themes of the strategic donor engagement councils to donors' interests and expertise, thus setting them apart from the standard one-size-fits-all model currently in use.

Councils are grouped around affinities, demographics, or giving potential. They range in size from 20 to 60 members, with 300 donors in total serving on the seven councils. Councils meet twice a year to consider issues of strategic importance to the university, participate in focus-groups for new ideas, and listen to topical guest speakers from the university.

This high-quality engagement allows senior leaders at Drexel to not only strengthen the donor pipeline, but also to have a sounding board off which to bounce their ideas. It's a win-win for donors and the institution.

...With Institutional Priorities and Needs

Councils Are Built Around...



Affinities

- Real Estate Council
- Civic Engagement Council
- Energy Council



Demographics

- Women in Leadership and Philanthropy Council
- Parents' Council



Giving Potential

- Leadership Council
- Board of Visitors

Purposes Served by Councils		
✓	Cultivate donors to drive upgrades	} Pipeline Management
✓	Qualify major donor prospects	
✓	Establish focus groups to aid university decision making	} Decision Support
✓	Solicit industry expertise	

Source: EAB interviews and analysis.

Going the Extra Mile

The success of Drexel's strategic donor engagement councils rests on four pillars. First, Compelling invitations command donors' attention, yielding an 80% acceptance rate. At the meetings, members interact with a rotating cast of senior leaders, from the executive director of e-learning to the senior VP for enrollment management, as well as the president and provost, who join two-thirds of the meetings.

In addition, the meetings are used as workshops for key priorities on campus that align with donors' interests. Lastly, members are given a feeling of exclusivity through perks like insider access to university announcements at the same time that the board hears them.

Four Major Success Drivers for Drexel's Advisory Councils



Compelling Invitations

High-quality invitations signed by president and follow-up phone calls from president yield 80% acceptance rate



Access to Senior Leaders

President or provost attends 70% of meetings; council meetings feature other high-profile senior leaders



Tailored Information and Agendas

Senior leaders tailor discussions to areas of donor interest and update donors on outcomes of previous meetings



Insider Treatment

Meetings focus on workshopping university priorities; members receive first wave of university announcements

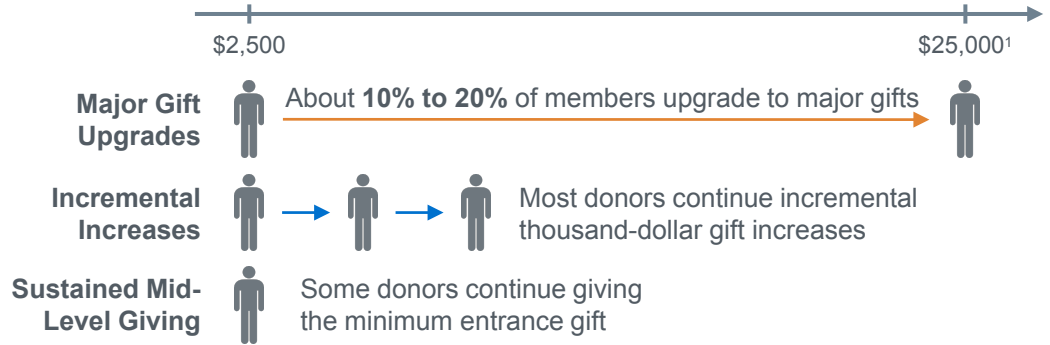
Highly Effective Cultivation

Strategic donor engagement councils have boosted Drexel's upgrade rate. About 10% to 20% of council members moved from the mid-level to major gifts after joining the council. Of the remaining council members, most climb more gradually up the ladder. The median giving level after these first few years of having the councils in place is about \$5,000, up from the \$2,500 minimum when the councils were founded.

Interestingly, few donors have to be prompted to make these upgrades. Their service on the council not only makes them feel like valued investors in the university, it also gets them actively looking for projects on campus to fund.

Councils Meaningfully Engage Donors, Leading to Upgrades

Gift Trajectory of Council Members



Organic Upgrades

"As [council members] learn about new things, they give additional gifts to different funds.... They get inspired and start organically giving more, not because we have a strategic major gift ask in place, but because they get more and more excited."

Kristen DeVries
Associate Vice President for Advancement
Drexel University

1) Major gifts start at \$25,000 at Drexel University

Source: EAB interviews and analysis.

Facilitating Insider Access

Ensuring that mid-level donors feel a sense of exclusivity and access is a struggle for advancement leaders. High-touch stewardship is inherently difficult to scale.

Institutions that successfully build out a VIP stewardship program for mid-level donors rely on digital channels, plan a tiered system of stewardship touches, and target key mid-level prospects for presidential treatment.

These strategies deepen mid-level donors' affinity for the institution and position them to upgrade, both through incremental increases now and major gifts in the future.

Strategies for Building a Community of VIP Supporters

High-Return Approaches to Enhancing Exclusivity and Access



Leverage Digital Channels for Elite Access

- 1 Establish password-protected blog for president
- 2 Publicize blog access as benefit of leadership giving
- 3 Solicit comments on blog and follow up with engagers



Increase Exclusivity with Each Gift Upgrade

- 1 Analyze donor data to find points of upgrade "inertia"
- 2 Create new giving society levels around those points
- 3 Develop quality programming and publicize tiers heavily



Select Priority Donors for Presidential Interactions

- 1 Establish councils themed around donor interests
- 2 Recruit and upgrade candidates to councils
- 3 Dedicate meetings to discussions with top admins

Source: EAB interviews and analysis.

Road Map for Discussion

1 | Essay: The Pipeline in Peril

2 | Accelerating Donors Up the Giving Pyramid
Targeted Upgrade Proposals
Gift Match Laddering
“Mind the Gap” Second Asks
Fundraising Products

3 | Surfacing Untapped Major Gift Potential
Student and Alumni Prospect Referrals
Alumni Relations-Led Discovery Initiatives
Discovery-Focused Fundraisers
Transitional Giving Officers

4 | Enhancing Exclusivity and Access
Password-Protected Presidential Blog
Tiered Leadership Programming
Strategic Donor Engagement Councils

5 | **Scaling Digital Impact Reporting**
Beneficiary Email Narratives
Crowdsourced Student Thank-You Videos
Social Media Impact Ambassadors
Virtual Insider Series
Personalized Donor Dashboards

6 | Toolkit Resources
Fundraising Products Template
Alumni Volunteer Referral Organizer
Alumni Relations Prospect Referral Template
Gift Society Tier Audit
President’s Blog Launch Guide
Social Media Impact Ambassadors Launch Guide

Strategies in Brief

Beneficiary Email Narratives (p. 102)

Advancement staff write profiles of inspiring beneficiaries and circulate their stories bimonthly to donors via email. The emails are written in the beneficiary's voice and speak directly to the impact of donor's gift on the individual's experiences and accomplishments.

Profiled Institution: Boston College (private, research university—high research activity)

Crowdsourced Student Thank-You Videos (p. 105)

Students record and submit self-produced stewardship videos to circulate to donors. A formal contest incentivizes participation. Advancement staff publicize the contest through broad-based channels, such as the student newspaper, as well as to targeted populations, like student callers. Videos are sent to alumni in a strategic manner: different constituencies are asked to critique videos, vote for them on social media, or simply to view them after receiving them in an email.

*Profiled Institutions: University of the Pacific (private, doctoral/research university);
University of Connecticut (public, research university—very high research activity)*

Social Media Impact Ambassadors (p. 108)

Alumni volunteers share short impact posts created by the advancement office on social media. Ambassadors are selected either for their visibility in the donor community or their reach on social media. Formal onboarding sessions train ambassadors, while ongoing coordinating meetings, such as conference calls, keep ambassadors motivated and working strategically to communicate impact to their peers.

Profiled Institutions: University of California, Davis (public, research university—very high research activity); Skidmore College (private, baccalaureate college—arts and science)

Virtual Insider Series (p. 114)

Donors receive insider access to a series of webinars hosted by key institutional stakeholders. The webinars detail the work that donors' gifts help fund. Advancement leaders rotate webinar topics among a diverse range of issues so that they touch on all donors' interests.

Profiled Organization: The World Wildlife Fund (nonprofit organization)

Personalized Donor Dashboards (p. 117)

A central online portal profiles the beneficiaries whom individual donors or funds support. Donors who log onto the dashboard can access not only an itemized gift history, but also a multimedia-rich list of students, faculty researchers, and others who have benefited from their philanthropy. Sophisticated back-end tools streamline the collection of beneficiary information, ultimately reducing the time that staff spend on stewardship.

Profiled Organizations and Institutions: DonorsChoose (nonprofit organization); University of Maryland (public, research university—very high research activity); University of Washington (public, research university—very high research activity)

Donors Crave Results and Impact

Besides exclusivity and access, today's donors want to see results. The modern focus on ROI has brought with it high expectations for demonstrating gift impact.

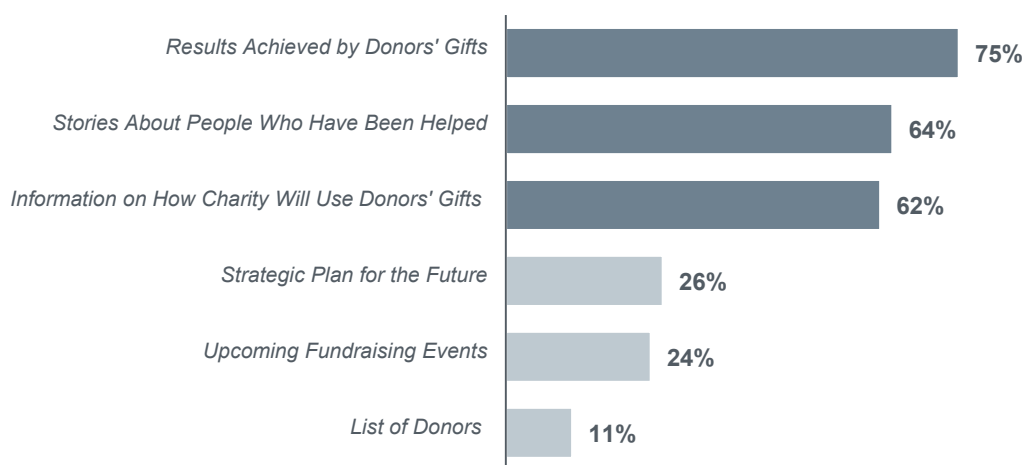
Donors are looking to hear first and foremost about what their gifts achieve, yet very few of them receive that information. A staggering 85% of donors say they never learn about the outcomes of their gifts. This oversight on the part of nonprofits leaves a lot of money on the table, as a majority of donors would give more if organizations showed them impact.

Still collecting and communicating impact information to donors is difficult. Direct mail budgets are only so big, and one-on-one visits with mid-level donors for stewardship purposes aren't sustainable.

But Nonprofits Struggle to Address These Needs

Percentage of Donors Whose Giving is Influenced by Various Donor Communications

Cygnus Donor Survey, 2013



Donor Advisory Council Status Quo

85%

Of donors don't receive information on gift outcomes

84%

Of donors would give more to charities that showed them results

77%

Of Millennial donors would stop donating if they don't see gift impact

Source: Burk P, "Attrition Getting You Down?," Cygnus, 2007, http://www.cygnusresearch.com/files/articles/Attrition_Getting_You_Down.pdf; Burk P, "Donor Communication and Recognition: A Right or a Reward," Cygnus, 2007, http://www.cygnusresearch.com/files/articles/Donor_Communication_and_Recognition-A_Right_or_a_Reward.pdf; "Millennial Donors Report 2011," JGA and Achieve (2011) http://cdn.trustedpartner.com/docs/library/AchieveMCON2013/MD11_Report.pdf; EAB interviews and analysis.

1) Major gifts start at \$25,000 at Drexel University

Digitizing Donor Relations

These barriers to communicating gift impact may be beside the point. Donors are increasingly turning to low-cost digital channels to engage with the causes they support. Thought leaders in the world of advancement are starting to recognize the great potential for meaningful donor engagement that these channels provide.

Meeting Donors' Needs with Low-Cost Tools



Donor Advisory Council Status Quo

70%

Of donors have a social media account

57%

Follow at least one nonprofit on social media

47%

Of Americans like to learn about causes through online channels



Full of Opportunity

"I think the digital space is full of opportunity that's not been used. For some, it's the best way to stay engaged. For others, it's just easier to give. I think it's a missed opportunity to not use the web in ways to promote fundraising and stewardship priorities alongside more traditional engagement initiatives."

*Ryan Catherwood
Director of Engagement Strategy
University of Virginia*

Source: Burk P, "The Burk Donor Survey," Cygnus, 2013, http://www.cygnusresearch.com/files/2013/2013-Burk-Donor-Survey-Report_US-PW.pdf; "12 Must-Know Stats About Social Media, Fundraising, and Cause Awareness," Non-Profit Tech for Good, 2013, <http://www.nptechforgood.com/2013/04/22/12-must-know-stats-about-social-media-fundraising-and-cause-awareness/>; EAB interviews and analysis.

Five Approaches to the Digital Realm

The institutions profiled here have capitalized on opportunities for digital stewardship. They have scaled impact reporting through online channels to reach a broad segment of donors with information on what their gifts achieve.

These strategies range from easily implementable tactics to more forward-thinking approaches that require large resource investments across long time horizons. Regardless of the ease of implementation, they are all shaping the expectations that donors bring to their giving relationships. The efforts that these institutions have undertaken raise the bar for effective stewardship and set the pace that other institutions must follow in the future.

Tactics for Immediate Implementation and Future Innovation

Implement Today



Beneficiary Email Narratives

(Boston College)



Virtual Insider Series

(University of Connecticut, University of the Pacific)



Crowdsourced Student Thank-You Videos

(UC Davis, Skidmore College)



Social Media Impact Ambassadors

(World Wildlife Fund)

Prepare for Tomorrow



Personalized Donor Dashboards

(University of Maryland, University of Washington)

Telling Beneficiaries' Stories

In late 2013, advancement staff at Boston College realized that they had an opportunity to use email to connect donors with what their gifts supported. They started selecting beneficiaries to profile, including students, faculty, and a nearby Catholic school that they partner with and help raise money for. The profiles they email out to donors are written as if they come from the beneficiaries themselves. They underscore how the beneficiaries' achievements and experience at Boston College are made possible by support from donors.

The frequency with which advancement staff at Boston College send beneficiary email narratives keeps giving top of mind for donors without saturating them with appeals. Currently, staff circulate the emails every quarter, though they might accelerate the pace to once a month in the future.

Boston College Delivers Concise Stewardship Stories Quarterly

“Thank You from #17” Lacrosse Student Email

Dear Theresa,

My success as an Eagle both on and off the lacrosse field is possible because of donors like you.

I came to the Heights just over two years ago and it's been a fantastic experience all around. As a freshman, I was honored to be named to the All-ACC team and, in my sophomore year, I started in all 20 games. This year our Eagles have made it to the NCAA tournament for the second time in history. Helping BC compete against great teams is what fuels me and allows me to play hard in the midfield. Lacrosse is my passion and I'm lucky to play with so many other talented athletes.


Off the field, I'm an orientation leader and mentor for BC's First Year Experience program. Working with FYE has helped me develop my interpersonal skills and introduced me to many people I wouldn't have met otherwise. Perhaps most important, I get to express my love for BC to others, hoping to inspire their own passion for a place I've come to call home. How great a job is that?

My BC experience has also challenged me academically. This summer I'll be applying what I've learned as a finance major in the Carroll School of Management at an internship with Morgan Stanley in New York City. I'm excited to see what the business world has in store and where the internship will take me.

When you support Boston College, regardless of where you have given, you're changing the lives of students like me. Without people like you, my dreams of attending BC on scholarship wouldn't have been possible and for that reason and many more—I want to say thank you. Your generosity has allowed me—and other students and student-athletes like me—to receive a phenomenal education, meet inspirational people, and explore great opportunities. I'm so grateful that you have chosen to give back and I hope one day to do the same.

Thank you,





Mikaela Rix '15



Boston College's Past Focus Areas

- Scholarship recipient with a history of community service
- Psychology professor's neurological research discoveries
- Children from the neighboring Catholic school

Elements of a Successful Snapshot

	Addressed directly to the donor
	Short and heartfelt
	Written in the voice of the beneficiary
	Distributed every 3 to 4 months
	Rotating themes touch different donor interests

Source: Email courtesy of Boston College; EAB interviews and analysis.

From Idea to Inbox

The process for compiling a beneficiary email narrative takes about 10 to 15 hours of staff time over the course of a month. About five to seven staff members contribute to this initiative, from the writer in marketing and communications who interviews the beneficiary and puts the piece together, to the stewardship director who edits the piece, to the web team members who build in images and blast the email out to the donor database.

Staff Select Topics, Interview Students, and Distribute Stories

Process for Developing and Circulating Email Narratives



Source: EAB interviews and analysis.

A Tidal Wave of Responses

Beneficiary email narratives engage a broader segment of Boston College donors than the institution's other communications. Their open rates outperform other university emails by 21%.

The success of the beneficiary email narratives goes beyond web analytics. Donors often reply to the emails to say how much the messages mean to them. The best-performing email from the past year generated more than 100 donor responses that filled up 27 pages.

Boston College hopes to leverage donors' enthusiasm for the emails to boost future fundraising returns. One strategy is to piggyback off of successful beneficiary email narratives with solicitation emails. Boston College did this with a follow-up solicitation for a gift to their partner Catholic school a few months after sending a beneficiary email narrative about it.

Focus on Impact Yields Positive Donor Feedback



Capturing Mindshare

51%

Open rate after fourth quarter email compared to **30%** average open rate

100+

Donor responses received after fourth quarter email

A Sampling of Donor Responses

“ Thanks for the letter, it's much appreciated to put a face on my donation!

It is people like you that make it so rewarding for my wife and I to contribute to the BC scholarship fund.

We are so happy that we are able to help and are so proud of what you have accomplished and continue to accomplish at BC. ”



Full of Opportunity

“I think the digital space is full of opportunity that's not been used. For some, it's the best way to stay engaged. For others, it's just easier to give. I think it's a missed opportunity to not use the web in ways to promote fundraising and stewardship priorities alongside more traditional engagement initiatives.”

*Ryan Catherwood
Director of Engagement Strategy
University of Virginia*

A New Way to Say ‘Thank You’

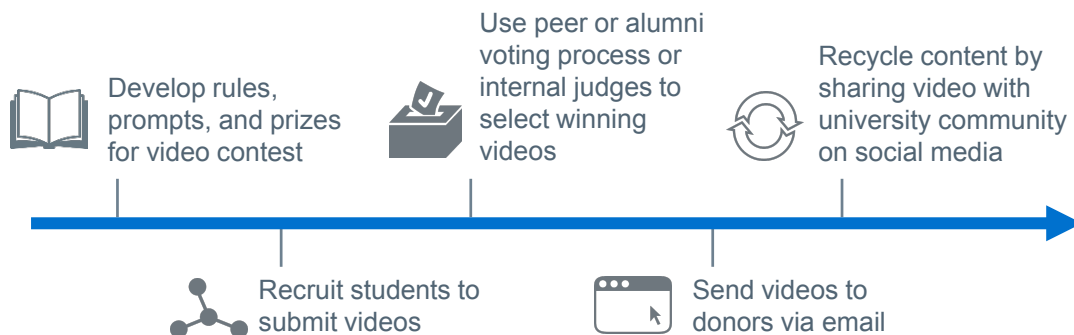
A growing number of institutions are also experimenting with video-based stewardship. The videos they create are typically well-designed affairs with high production costs. They impress donors with their tight editing and scripting.

Still, some of the authenticity of the traditional student “thank you” is lost in these types of productions. A small number of institutions are beginning to find a middle ground by turning away from expensively produced videos in favor of student-generated video content.

These institutions enlist willing student participants in thank-you video contests. The videos that come out of the contests may lack the glossy finish of centrally produced content, but they make up for it in sincerity, authenticity, and meaningfulness to the donor. They’re the 21st century version of the handwritten note from a student.

Low Cost Student Video Contests Deliver Heartfelt Sentiments

Typical Video Contest Process



Better Than the Archaic Thank-You Card

“In the past, we used to mail these archaic Thanksgiving cards to donors. It cost us hours of staff time and hundreds of dollars and we were not even sure if the donors appreciated it. These videos cost us next to nothing and we got responses from people telling us how much they enjoyed it. It is definitely a worthwhile endeavor.”

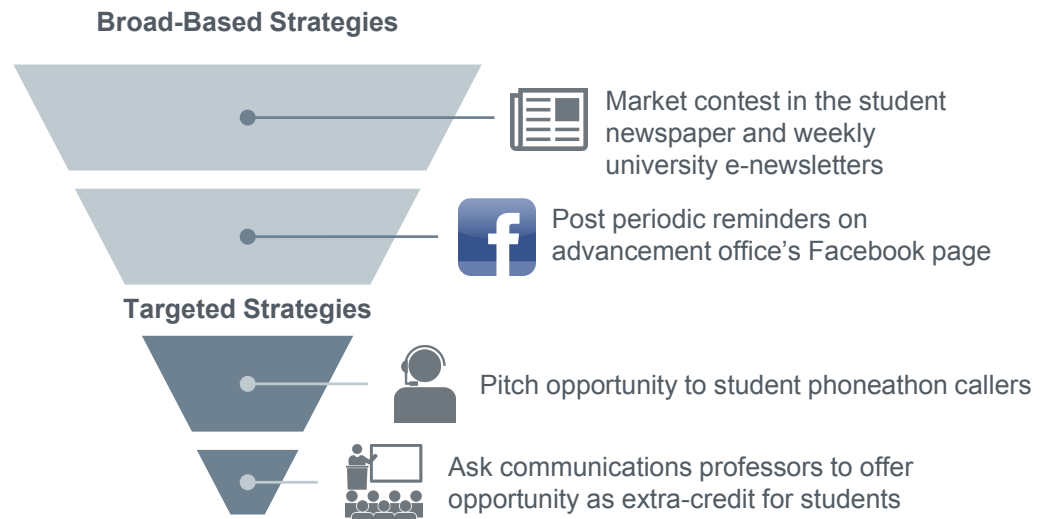
*Natalie Loschke
Assistant Director of Annual Giving Operations
University of the Pacific*

Recruiting Student Participants

One of the biggest challenges to launching a successful student thank-you video contest is recruiting student participants. The University of the Pacific has developed a strong process for surfacing willing students. They adopt a variety of broad-based strategies that reach a large number of students and includes more targeted strategies for reaching out to student groups that might be more likely to participate.

Targeting Discrete Student Segments Increases Entry Numbers

University of the Pacific's Participant Recruitment



Source: EAB interviews and analysis.


Many Opportunities for Donor Engagement


Another important logistical component of student thank-you video contests are how advancement staff use the contest to engage donors. Simply filming the videos and sending them to donors may not be enough.


At the University of Connecticut, donors are involved in nearly every step in the process. Advancement leaders asked three prospects who worked in media to give feedback on the students' videos. After that, the videos were uploaded to the advancement office's Facebook page, where over 1,000 people voted by "liking" their favorite video. To cap this off, they made sure every donor got a copy of the winning video in his or her email inbox at the end of the year as a thank you for donating.

Multiple Uses for Student Videos at University of Connecticut

Contest Rollout and Stewardship Strategy

- 1 Engage Alumni Prospects as Judges** Reach: Low
Three alumni with development potential and media expertise were engaged through a video critique 

- 2 Open Voting to University's Social Media Community** Reach: Medium
Over 1,000 alumni, parents, and friends voted for videos on Facebook by "liking" and sharing them 

- 3 Circulate Winning Video Via Email** Reach: High
The contest winner's video was sent to all donors as an end-of-the-year stewardship touch 

Source: EAB interviews and analysis.

Tapping into Hidden Networks

Many advancement divisions struggle to capture mindshare with donors through their stewardship communications. Enlisting highly connected alumni as social media impact ambassadors can help overcome this challenge.

Social media impact ambassadors are volunteers who share posts on their social networks about what donors' dollars are doing. Typically, the advancement office generates this content and pushes it out for the ambassadors to repost.

Institutions Share Results Through Volunteer's Social Networks



Advancement office posts impact story



Impact ambassadors repost story on social media



Ambassadors' networks engage with story



The Friend Connection

52%

Of Millennials are motivated to give because of a friend or peer endorsement and **63%** would give if a friend directly asked them for a gift



Better Advocates

“Donors and alumni can tell the story better than we can. Their stories are more personal, everyone has a different story to tell, and they can truly connect with their friends and peers.”

*Director of Development Outreach
Public University*

Deploying Social Media Impact Ambassadors

There are many different approaches to partnering with social media impact ambassadors. Regardless of how they are used, ambassadors can be effective at institutions of all types and sizes.

The University of California, Davis (UC Davis) and Skidmore College have both turned to social media impact ambassadors to publicize gift impact.

Institutions Recruit Donor and Alumni Volunteers



Approach #1

Profile Donors

UC Davis profiles donors and encourages them to share their stories on social media



Approach #2

Recruit Volunteers

Skidmore College recruits active social media users to repost gift impact stories from university pages

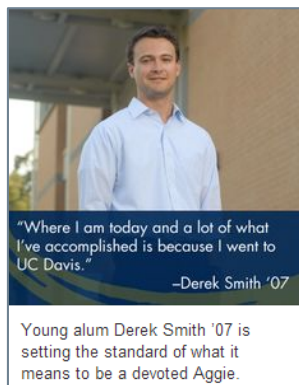
From Donors to Social Media Ambassadors

After UC Davis wrapped up a campaign in 2013, advancement leaders decided to refocus their efforts on stewardship. As part of this initiative, they chose 100 donors from a diverse group of segments to profile online. Staff traveled to interview these donors about why they gave and what they wanted their gift to achieve, and they put together a donor profile for each one.

When these profiles were done, UC Davis looked to these donors to act as social media impact ambassadors and to publicize the profiles on social media. Gift officers emailed donors with the completed profile and an explicit request that the donor share it on Facebook, Twitter, LinkedIn, or any other social network they used. Including a shareable link made reposting content a light lift for donors.

UC Davis Engages Donors to Share Their Personal Stories

“One Campaign, One Hundred Stories”



Profiles Include:

- Students
- Donors from every college
- Major donors
- Young alumni
- Loyal donors
- Planned gift donors
- Parents
- Mid-level donors

Helping Stories Go Viral



Making Sharing Easy

- 1 Gift officers alert donors of complete profile via email and share link
- 2 Encourage donors to share profile with friends, family, and peer networks
- 3 Provide clear directions and links for easy sharing on social media

Source: Image retrieved from: UC Davis Pinterest account, <http://www.pinterest.com/ucdavis/one-campaign-one-hundred-stories/>; EAB interviews and analysis.




Skidmore’s Social Media Megaphone

Skidmore College takes an even more intensive, hands-on approach to deploying social media impact ambassadors. In 2013, staff recruited 10 ambassadors whose affinity for the college and presence on social media made them good candidates for outreach. They asked the ambassadors to spread the word about Skidmore to alumni who may have fallen out of touch.

What sets Skidmore’s social media impact ambassador program apart is that they provide them with lots of high-quality content. Every two weeks, social media staff at the college ask the ambassadors to share a #FunFactFriday post that focuses on student beneficiaries or donor-funded projects on campus. They also partner with the ambassadors to share posts about beneficiaries of the SEE-Beyond scholarship initiative and #ThanksLucy, their version of student philanthropy day.

Volunteers Share Themed Impact Posts with Their Networks

Ten Formal Ambassadors...

Criteria for Recruitment	
	Self-identified alumni volunteer
	Heavy social media user with large network
	Actively supports the college online

... Share Staff-Produced Content

- **#FunFactFriday:** Gift impact stories, photos, and quotes posted every other Friday on Twitter and Facebook
- **SEE-Beyond:** 25 summer grant recipient profiles posted on the college’s website, Facebook, and Twitter
- **#ThanksLucy:** Student philanthropy day posts on Twitter and Facebook



Engaging Eager Volunteers

“We figured that tapping into alumni who were already raising their hands to volunteer would allow us to reach so many more people through their social networks.”

*Daniella Nordin
Online Community Manager
Skidmore College*

Managing and Engaging Ambassadors

Whereas UC Davis gently encourages their ambassadors to post content, Skidmore takes a more formal approach to managing their activity. All new ambassadors go through an onboarding process consisting of a conference call on volunteer responsibilities and a training webinar that touches more directly on social media use.

Staff at Skidmore coordinate ambassador activities on an ongoing basis through a variety of touches throughout the year. Periodic conference calls, email and Twitter pushes, and a private Facebook group all help synchronize their efforts.

Consistent Follow-Up and Communication Sustain Volunteer Mindshare

One-Time Onboarding Process



Conference Call

Outline responsibilities, time requirements, and resources for ambassadors



Training Webinar

Review social media etiquette, privacy, and volunteer responsibilities

Ongoing Training Communications



Conference Calls (2 per semester)

Discuss upcoming initiatives; address content questions and privacy concerns



Email and Twitter Pushes (5-6 per year)

Highlight posts relating to donor impact that ambassadors can share



Facebook Group Updates (Ongoing)

Posts to a private Facebook group that ambassadors can mine for content

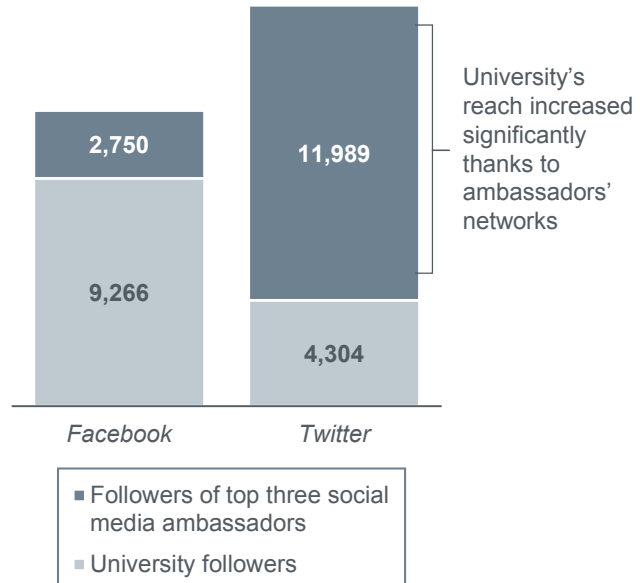
Giving Outcomes Go Viral

First year results indicate that Skidmore's social media impact ambassadors are achieving the aspirations set when the program was initiated. They effectively share information about Skidmore, specifically about what donors' dollars do, in front of scores of people that the advancement office currently doesn't reach through their own social media efforts.

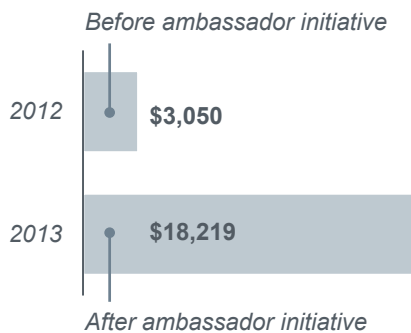
An expanded social media reach is an important outcome because so many of today's donors view social media as a philanthropic channel. This attitude is reflected in the six-fold increase in giving during a one-day social media fundraising campaign following the launch of the ambassador initiative.

Social Media Ambassadors Expand University's Reach

University and Ambassador Social Media Followers



One-Day Social Media Fundraising Campaign Revenue



597%
Gain in one day social media campaign revenue following ambassador launch

Source: EAB interviews and analysis.

Responding to Donor Needs

Often, donors want deep dives into the impact their gifts have. While quick social media posts, thank-you videos, and beneficiary emails illustrate impact, they may sometimes fail to educate donors thoroughly enough about the work that their dollars support.

A virtual donor insider series, which is a series of webinars that spotlight the work that organizations do with donors' gifts, circumvent these obstacles. They provide close looks at gift outcomes, and they cultivate a feeling of partnership between the donor and the organization.

The best example of a virtual donor insider series occurs outside of higher education. The World Wildlife Fund (WWF) stages a webinar series to which they invite an exclusive list consisting primarily of donors who give \$1,000 or more.

WWF's Virtual Events Give Experts a Platform to Demonstrate Impact



Donor Needs
WWF Survey, 2013

- | | | |
|----------------------------------|-----------------------------------|-----------------------------------|
| 1 Access to topic experts | 2 Knowledge of gift impact | 3 Sense of donor community |
|----------------------------------|-----------------------------------|-----------------------------------|

Webinars Focus on Experts, Impact, and Community



Source: World Wildlife Fund, WWF Conservation Insider Series, <http://www.worldwildlife.org/pages/wwf-conservation-insider-series>; EAB interviews and analysis.

Filling Out the Middle

Donors are responding positively to WWF's virtual insider series. About 250 donors tune in on average to the webinars, which are put on once a quarter. In addition, WWF is seeing an uptick in mid-level donor counts and dollars, which advancement leaders at the organization attribute in part to the webinars.

Still, these are just preliminary gains. The true measure of success will come in the future. As WWF continues to build out this program, they will closely monitor a number of metrics, such as how quickly mid-level donors move through the giving pyramid, whether viewers engage with the organization between webinars, and if the major donors they invite to the webinars give repeat gifts.

Webinars Steward Annual Leadership, Major, and Planned Giving Donors

Looking to the Present...



Early Gains from Webinars

210-280

Donors tune into webinars or view archived versions

6%

Annual increase in mid-level donors and dollars

“ If you looked at our donor pyramid before, it was pretty skinny. We didn't have enough activity in the middle. But now, we are starting to see that middle section fill out. ”

...While Planning for the Future



Metrics for Ongoing Review

- Upgrades from mid-level donors
- Increases in mid-level donor counts
- Planned gift donor retention
- Engagement behaviors of webinar attendees
- Repeat major gifts

“ We'll look at annual snapshots, but I also want to see them over time. We can look at these donors three years from now. If they've attended regularly, has their giving increased? ”

Making It Work on Your Campus

Colleges and universities who seek to launch a virtual donor insider series may want to make some modifications to ensure they fit in a higher education context. Advancement leaders should pay particularly close attention to developing relevant, compelling agendas, targeting donors with whom development would like a deeper relationship, and reviewing webinar performance to improve future offerings.

Use Webinars to Connect Donors with Campus Stakeholders

Key Steps		Considerations for Implementing Insider Series Webinars	
Develop agendas		Compile list of hot topics and newsworthy developments related to giving	
		Identify faculty members and administrators who can speak to chosen issues	
Target priority donors		Define donor segment that will be granted access to webinars	
		Design compelling electronic and print invitations that emphasize the discussion of impact	
Assess and refine		Review post-webinar analytics to make future program improvements	

Source: EAB interviews and analysis.

Beyond the Generalized Results Narrative

Donors today want extremely personalized communications. In particular, they want information on how the specific funds and causes they support are impacting beneficiaries. Personalized donor dashboards deliver this information in a donor-centric way.

Personalized donor dashboards are the most ambitious strategy colleges and universities are using today to scale digital impact reporting. They involve populating a donor-specific online portal with information on the specific funds that individual donors support.

This approach moves beyond the traditional static stewardship mailing. Instead, it gives donors a central place to go when they want to review their gift history and learn about what their dollars achieve. They succeed because there's a growing expectation among donors that anything they need to know, they can find online.

Taking a Step Towards Personalized Impact Reporting



The Next Frontier

Personalized Donor Dashboards

Beneficiaries are identified and profiled through portals that map to individual supporters' giving histories

Key Advantages	
✓	Provides a one-stop shop for donors to review giving history, see impact, and give again
✓	Streamlines stewardship and solicitation processes
✓	Outpaces nonprofit peers in the stewardship realm



Impact at the Center

“Giving donors a central place to see the ongoing, direct impact of their gifts exceeds donors’ expectations. That’s the future of stewardship.”

*Chief Advancement Officer
Private University*

Charities and Nonprofits Take the Lead

Unsurprisingly, the broader nonprofit world first pioneered this idea. Small, nimble organizations have developed responsive portals that curate impact information automatically based on donors' giving histories.

DonorsChoose.org is a best-in-class example of an organization that has embraced personalized donor dashboards. Their dashboard displays far more than the bare-minimum list of gift transactions. Instead, each entry catalogs the specific accomplishments made possible with donors' gifts. The dashboard uses multimedia elements, such as photographs, in addition to text descriptions.

DonorsChoose Already Provides Personalized Dashboards

DonorsChoose.org Giving Page

The screenshot shows the DonorsChoose.org interface. At the top, the logo reads "Donors Choose.org Teachers ask. You choose." with navigation links for "Projects", "Gifts", "About", and "Help". The user is logged in as "Hi, Elizabeth" with a heart icon and a shopping cart icon. A button says "I'm a teacher »". Below the navigation, the user's location is "Elizabeth in arlington, VA" with radio buttons for "first name", "anonymous", and "custom".

The first project entry is "The Junie B. Jones Project" by Mrs. Kipfer. It is marked as "Updated". The project description includes a photo of a teacher reading to students and a grid of smaller photos showing book deliveries. The text states: "Total cost: \$400 Highest Poverty Illinois". A quote from the teacher reads: "Junie B. Jones is a new friend to many first and second graders in our school and an old friend to many third and fourth graders and beyond. All were thrilled to see their friend in brand new shiny bo..." with a "more" link. The project status is "Completed!" with details: "Apr 12, 2014 \$400 given 6 donors". A "Half-off thanks to" badge for Kroger is displayed, along with a "Share" button.

The second project entry is "National Geographic Science Magazines and Books" by Mrs. Bryan. It is also marked as "Updated". The description includes a photo of a library shelf. The text states: "When students are searching for books in the library, they are constantly asking for books relating to what they are learning in their science class. By contributing to our science library... more". A quote from the teacher reads: "My students need 16 books in the library relating to science. Total cost: \$378 Bayou Community Academy (Highest Poverty) Thibodaux, LA". Another quote says: "It is with humble gratitude that I thank you for contributing to my project to provide my students with additional science reading materials in our school library. You are a part of establishing a med..." with a "more" link. The project status is "Completed!" with details: "Apr 11, 2014 \$378 given 8 donors". A "Share" button is also present.

Source: Images retrieved from: DonorChoose.org; EAB interviews and analysis.

Too Difficult to Replicate

The agility of small nonprofits make them strong candidates for adopting personalized donor dashboards. Higher education does not enjoy the same flexibility. Indeed, a number of challenges inhibit the development of personalized donor dashboards at colleges and universities. Institutional siloes, uncooperative beneficiaries, and overburdened advancement staff all preclude dashboards at most institutions.

Higher Ed Institutions Seem Too Complex for Personalized Pages

Obstacles to Implementing Donor Dashboards in Higher Ed



Silos between financial aid and advancement impede information sharing



Students and faculty members neglect to submit information in a timely manner



Donors' dollars are distributed widely across several beneficiaries



Staff do not have capacity to manually communicate outcomes to individual donors

A Virtual Introduction to Student Beneficiaries

Yet some schools have deemed dashboards to be worth the effort. The University of Maryland took steps to provide impact information online as early as 2006, when staff at the institution created a public-facing “Celebration of Scholarships” website. Although this website isn’t the sort of donor-specific, customized portal that DonorsChoose.org offers, it does allow visitors to look up the beneficiaries of individual funds or even of individual donors. In some cases, visitors can even view student photographs and read answers to a questionnaire about what donors’ gifts have helped students achieve.

The University of Maryland’s Celebration of Scholarships Website

Sample Scholarship Beneficiary Page

Scholarship description shows donor’s intent and philanthropic motivations

Prospective donors can give directly through impact page

Terry Margulis Dunlap Memorial Drama Scholarship Fund

● Scholarship History
Support this Scholarship ●

The Terry Margulis Dunlap Memorial Drama Scholarship Fund was established, through the University System of Maryland Foundation, Inc., on March 9, 1983, by gifts from family and friends in memory of Terry Margulis Dunlap, Class of '72. At the request of the donors, the Fund was transferred to the University of Maryland College Park Foundation, Inc. in December 2005. Spendable Income from the Terry Margulis Dunlap Memorial Drama Scholarship Fund supports drama scholarships at the University. Primary consideration will be given to students exhibiting excellence or potential excellence in theatrical performance.

Donor

- Harold J. Margulis

Recipients

● [2007 - 2008 | 2008 - 2009 | 2009 - 2010 | 2010 - 2011 | 2012 - 2013]

2012 - 2013 Recipients Back to top

- Rebecca A. Ballinger
- Emma L. Hebert
- Robert W. Hunter

2010 - 2011 Recipients Back to top

- Anna E. Lynch
- David L. Olson

2009 - 2010 Recipient Back to top

- Scott P. Whalen

Historical beneficiary list illustrates impact over time

Select student profiles feature testimonials and photographs

Source: University of Maryland, “Celebration of Scholarships,” https://advancement.umd.edu/celebration/showScholarship.php?main_id=68; EAB interviews and analysis.

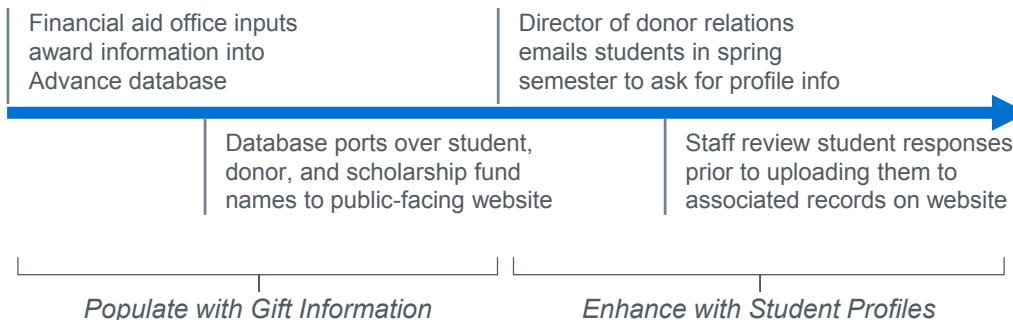
A Steady Stream of Information

Advancement staff at Maryland follow a well-honed protocol for making sure the website is comprehensive and accurate. First, they work with financial aid and database administrators to make sure they're uploading the correct scholarship information into the website. Then they reach out to students to solicit photographs and testimonials, which staff edit before uploading.

This process has yielded an incredibly robust repository of impact information. The website features thousands of student names, testimonials, and photographs. Although the portal focuses exclusively on the beneficiaries of endowed scholarships—Maryland has not expanded the initiative to donors below the \$25,000 gift level—it has helped illuminate what gifts can accomplish on campus for all donors.

Automated and Manual Processes Fill Website with Scholarship Data

Process for Adding Information to Celebration of Scholarships Website



An Encyclopedia of Impact

7,804

Student names on website

2,000+

Student testimonials and photos

1,714

Listed scholarship funds

803

Identified donors

Source: University of Maryland "Celebration of Scholarships," <http://advancement.umd.edu/celebration/index.php>; EAB interviews and analysis.

University of Washington's Giving Portals

The University of Washington is taking even more ambitious strides to create personalized donor dashboards. These dashboards give donors a single place to go for any information they could want about their giving.

In early 2014, Washington debuted the beta version of their giving portal. Although it does not yet feature donor-specific impact stories, it does include functionality that makes donors' lives easier, including itemized gift histories, printable gift receipts, and university contacts that map to donors' giving.

Personalized Donor Dashboards Offer Interactive Experience

Dashboard User Interface

Contact info updates surface donors seeking additional engagement

Donor contacts mapped to giving history

Current year giving, lifetime giving, and society membership prominently displayed

Itemized gift history with options to easily renew past gift

Printable gift receipts

Source: EAB interviews and analysis.

By the Numbers

In the first few months of using the personalized donor dashboard, Washington has seen a lot of usage from donors. Not only are donors logging on to see their giving history and print receipts, but they're also renewing their gifts to funds they supported in the past directly through the portal.

Dashboard Initiative Yields Early Wins



Donor Views and Dollars

2,378

Total logins

94

Donations made through portal

\$65,680

Gift revenue through portal

Giving Histories of Dashboard Users

November 2013 to June 2014



34%

\$2K+ annual donors



34%

Active prospects (donors and non-donors)¹



92

\$100K+ lifetime donors

Source: EAB interviews and analysis.

Next Steps at UW

These early accomplishments are only the beginning of what advancement leaders at Washington hope to achieve. Next, they'll build out an endowment reporting tab so that endowment donors can monitor fund performance in the same place that they track their gift history.

Following the launch of the endowment reporting tab, advancement staff will set their sights on communicating donor-specific gift impact through the portals. They will start working on getting stories about student beneficiaries, donor-funded research, and other projects on campus uploaded to the portals of the individual donors who are helping to fund them.

Expanding Dashboards to Showcase Gift Outcomes

Plan for Dashboard Development



Step 1

Fine-tune easy and secure log-in process



Step 2

Create a tab for endowment reports (*Fall 2014*)



Step 3

Develop phase one of the impact section of the portal (*Late 2015*)



Step 4

Continue to develop and refine portal (*Ongoing*)



A Compilation of Impact

“The notion of a running compilation of impact is really powerful. When a donor looks at this portal, they won't just see how much money they gave. They will see what kind of difference they made, the number of lives they touched, and the faces of the students who now have the opportunity to go to college thanks to them.”

*Mark Lanum
Director of Donor Services
University of Washington*

Looking Ahead: Impact-Driven Portals

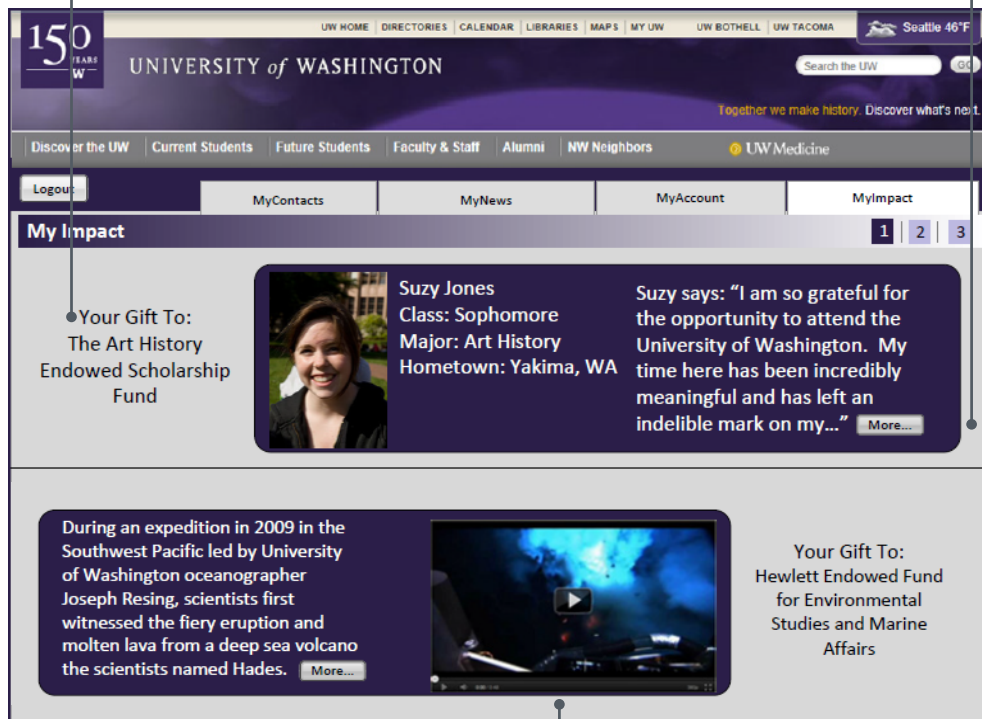
Early wireframe mock-ups of what advancement leaders intend for the impact section of the personalized donor dashboard shows a multimedia rich user experience that connects donors to their philanthropy far better than traditional stewardship mailings. Donors' gift histories are laid out with photos, testimonials, and even videos accompanying them. With a click of a mouse, donors will be able to learn about how they are changing the world through giving to Washington.

Donors Will See Impact History and Gift History

University of Washington Impact Portal¹

Specific designations with gift use information

Student profiles submitted by beneficiaries



Multimedia elements including videos

1) Wireframe mock-up of impact portal intended to show future user interface.

Source: Image courtesy of University of Washington; EAB interviews and analysis.

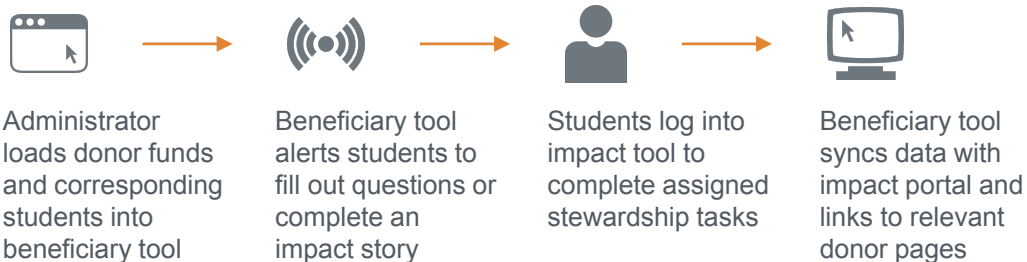
Minimizing the Administrative Burden

As Washington contemplates the move to impact reporting, they are starting to think about how to entice beneficiaries to share their stories. The approach advancement leaders have taken to solving this challenge is to build new tools that can be integrated seamlessly into people’s workflows.

In particular, advancement staff are working to develop an impact reporting tool that fund administrators can easily use to track which students get each of the scholarships. In the future, when fund administrators log which students receive which scholarships into the tool, it will automatically notify students that they have to submit some information that can be used for stewardship. The beneficiary tool will then automatically sync that information into the donor portal, thereby reducing the stewardship burden on staff.

Streamlined System Will Prompt Beneficiaries and Automate Uploads

Process for Collecting Beneficiary Narratives



Work with the current processes and stakeholders to ensure that new tools are seamlessly integrated into existing workflows

Populations to Target for Impact Information

1 Students

“Our first target will be students since they have distinct stories and a designated donor fund”

2 Faculty

“Once we have the system figured out, we will replicate it for faculty members”

3 Generalized Funds

“Funds that don’t have an easily identifiable beneficiary will come sometime down the line.”

Transforming Donor Relations

Advancement leaders at Washington expect to see more donors engage with the portal as functionality increases, since the inclusion of beneficiary testimonials and photos will make it a much more user-friendly experience—with engagement ideally leading to ongoing giving.

The launch of the impact section of the dashboard will also decrease the amount of time that advancement staff have to spend stewarding donors, as well as the resources that must be invested in print materials.

Impact Portal Will Pioneer 21st Century Donor Experience



Anticipated Outcomes of Impact Portal



Higher usage rates and awareness of portal among donors



Increase in gifts made through the portal



Less time dedicated to manual stewardship collection



Reduced mailing costs for endowment reports, donor rosters, etc.



Exceeding Donor Expectations

“The donor portal as it stands now is not something you do for the ROI. It’s just a cost of doing business.... But when you move into the impact part, then it’s okay to ask about ROI. We’ll be going above and beyond what’s expected. For that, I will be looking at page hits on impact reports, frequency of visits—your typical web stats.... And I want to look at the retention rate—do donors give again?”

*Mark Lanum
Director of Donor Services
University of Washington*

Facilitating Insider Access

Advancement leaders are beginning to recognize the importance of impact-driven stewardship in today's world of ROI-focused donors. Despite the need for communications about gift outcomes, many institutions struggle to connect donors to the results of their philanthropy.

Innovative institutions have turned to digital and multimedia-focused strategies to illustrate in a scalable fashion how it is that donors' gifts affect beneficiaries. The best of these institutions have built bespoke systems that map impact to donors' giving histories, ensuring maximally relevant stewardship.

Strategies for Building a Community of VIP Supporters

High-Return Approaches to Enhancing Exclusivity and Access



Ramp Up E-Communications

- 1 Identify beneficiaries and gift outcome stories
- 2 Develop a plan for bimonthly or quarterly communications
- 3 Recruit alumni to repost stories to social media



Expand Multimedia Use

- 1 Solicit thank-you videos for a student competition
- 2 Recruit faculty and fund administrators to talk about gift use in webinars
- 3 Encourage mid-level donors to engage with the content



Highlight Individual Impact

- 1 Build a digital system for collecting beneficiary stories
- 2 Load donors' giving histories into password-protected site
- 3 Post stories to portal linked to individual giving histories

Source: EAB interviews and analysis.

Road Map for Discussion

1 | Essay: The Pipeline in Peril

2 | Accelerating Donors Up the Giving Pyramid
Targeted Upgrade Proposals
Gift Match Laddering
“Mind the Gap” Second Asks
Fundraising Products

3 | Surfacing Untapped Major Gift Potential
Student and Alumni Prospect Referrals
Alumni Relations-Led Discovery Initiatives
Discovery-Focused Fundraisers
Transitional Giving Officers

4 | Enhancing Exclusivity and Access
Password-Protected Presidential Blog
Tiered Leadership Programming
Strategic Donor Engagement Councils

5 | Scaling Digital Impact Reporting
Beneficiary Email Narratives
Crowdsourced Student Thank-You Videos
Social Media Impact Ambassadors
Virtual Insider Series
Personalized Donor Dashboards

6 | **Toolkit Resources**
Fundraising Products Template
Alumni Volunteer Referral Organizer
Alumni Relations Prospect Referral Template
Gift Society Tier Audit
President’s Blog Launch Guide
Social Media Impact Ambassadors Launch Guide

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): _____

Title: _____

Cost: _____

Description (50-75 words): _____

Fundraising Products Template (cont.)

Title: _____

Cost: _____

Description (50-75 words): _____

Title: _____

Cost: _____

Description (50-75 words): _____

Title: _____

Cost: _____

Description (50-75 words): _____

Title: _____

Cost: _____

Description (50-75 words): _____

Title: _____

Cost: _____

Description (50-75 words): _____

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:

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.

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.

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 deflect 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.

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.

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

The screenshot shows the Ithaca College website's President's Blog. The page title is "Exclusively for President's Associates" and the sub-header is "Among Leaders". The main content area features a post titled "Student for a Day" by Thomas Rochon, dated Monday, November 18, 2013. The post includes a photo of Thomas Rochon and a description of the exercise. The page also has a sidebar with navigation links and a search bar at the top.

Annotations:

- Title focuses on exclusivity and access:** Points to the main title "Exclusively for President's Associates".
- Blog links to other exclusive opportunities:** Points to the sidebar menu items: "Upcoming Events", "Webcast with President Rochon", and "Survey Results".
- Description highlights President's unique insights:** Points to the "Among Leaders" description: "A forum for the exchange of thoughts among a community of leaders, guided by Tom Rochon's insights into the moments that shape the Ithaca College experience."
- Post is directly from President's account:** Points to the author information: "Posted by Thomas Rochon at 1:50PM | 3 comments".

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.

Requirements

- 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)

Responsibilities

- 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

Time Commitment

- 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.

Social Media Impact Ambassadors Launch Guide (cont.)

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.



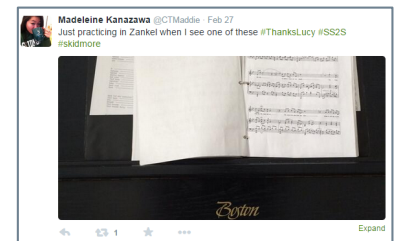
“SEE-Beyond” Summer Grant Recipient Profiles

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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