



Winning Donor Mindshare in the **Attention Economy**

Maximizing ROI from Multichannel Annual Giving

Independent School
Executive Forum





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The Independent School Executive Forum is EAB’s first research program for Pre-K to 12 schools, focusing on the best strategies and practices to address the most critical challenges facing heads of school, including: ensuring financial sustainability, enhancing fundraising and alumni engagement, balancing academic rigor with attention to student wellness, and optimizing faculty recruitment and professional development.

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Supporting Members in Best Practice Implementation

Resources Available Within Your Membership

This publication is only the beginning of our work to assist members in optimizing annual giving. Recognizing that ideas seldom speak for themselves, our ambition is to work actively with members of the Independent School Executive Forum to decide which practices are most relevant for your organization, to accelerate consensus among key constituencies, and to save implementation time.

For additional information about any of the services below—or for an electronic version of this publication—please visit our website (eab.com), email your organization’s dedicated advisor, or email research@eab.com with “Independent School Executive Forum ‘Winning Donor Mindshare in the Attention Economy’ Request” in the subject line.

Implementation Road Maps and Tools

Throughout the publication, this symbol will alert you to any corresponding tools and templates available in the Toolkit at the back of this book. These tools are also available on our website at eab.com.

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Executive Summary

The Changing Advancement Landscape

Untapped Advancement Potential for Independent Schools

As parent giving rates reach their natural ceiling, independent schools are increasingly turning to other sources of revenue to hit advancement targets. We are convinced that activating young alumni and engaging in smart digital outreach hold the greatest potential to increase advancement revenue, but most independent schools are not doing enough to take advantage of these opportunities.

Make It Easy to Give

Mobile phones have become almost universal possessions among Americans, and research indicates that they occupy an increasingly important place in the habits of the average consumer. At the same time, the proportion of digital giving dollars in overall annual giving is growing rapidly. This trend is especially visible among millennials, but also holds true for many baby boomers. Unfortunately, independent school advancement offices are only just catching up. Section 1 of this document details proven practices for optimizing giving pages for mobile devices, streamlining the digital giving experience, and reducing donor drop-off rates.

Connect Alumni to a Shared Cause

Millennial alumni present a unique challenge as a donor cohort. More than any other group, these donors want their gifts to have a tangible, identifiable impact, no matter how small they may be; in short, they want to change the world. This shift can be a challenge for advancement offices used to issuing appeals based solely on organizational need. Section 2 of this document outlines effective methods for increasing young alumni participation through innovative, cause-linked digital outreach.

Get Donors into the Habit of Giving

Cultivating a habit of giving among donors is the best way to ensure a reliable stream of advancement revenue. As American consumers increasingly depend on digital vendors and the 'subscription economy' continues to gather steam, excellent opportunities are opening up for schools to grow their recurring donor population with minimal expense and effort. Section 3 provides insight into engaging in low-investment, revenue-generating partnership programs with digital vendors and taking advantage of growing donor preferences for recurring giving.

Key Takeaways

Make It Easy to Give

- Commit to a robust digital giving strategy
- Remove unnecessary obstacles to online giving
- Don't let donors fall through the cracks

Connect Alumni to a Shared Cause

- Use crowdfunding approaches to empower small donors and reveal their interests
- Provide opportunities for donors to support both external causes and the school
- Align giving opportunities with donor passions

Get Donors into the Habit of Giving

- Explore partnerships with affiliate fundraising programs
- Institute, promote, and explain an easy recurring giving option
- Build in safeguards to protect against common pitfalls of recurring giving



Winning Donor Mindshare in the Attention Economy

Maximizing ROI from Multichannel Annual Giving

INTRODUCTION

Seeking More Diversified Revenue

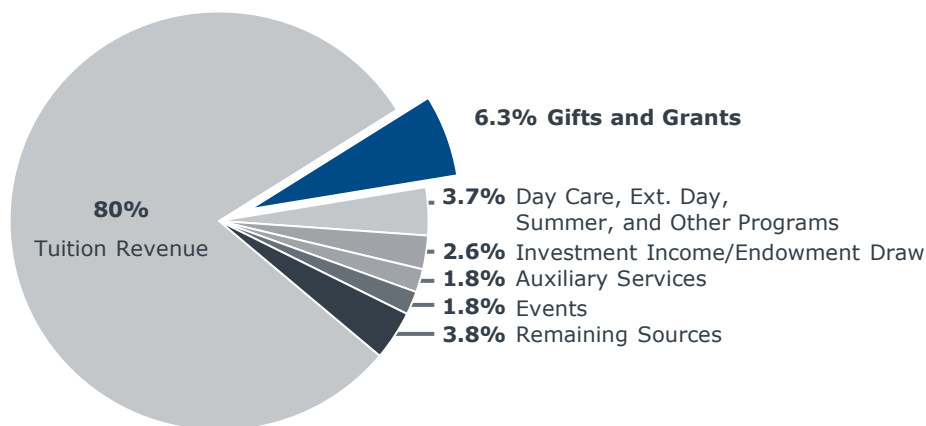
As the challenge of financial sustainability continues to grow across the education sector, flexible funding sources are becoming more important for maintaining institutional standards and pursuing growth.

While advancement revenue represented only a small portion of total independent school revenue in 2015, it was and remains the fastest growing source of funding for many schools, and therefore represents a critical area for investment.

Advancement Holds the Greatest Potential for New, Non-tuition Revenue

Sources of Revenue for Independent Schools

2015



Financial Viability in the Twenty-First Century

“Financial sustainability is the challenge of the times. **The need for additional revenue is growing, pressuring development officers to increase voluntary support—now the fastest-growing revenue stream at many schools.**

Fortunately, it is almost always possible to increase the total raised—to fulfill a school's fundraising potential. However, to do so, you must pay close attention to the changing needs of the 21st century.”

Helen A. Colson, Author
“Philanthropy at Independent Schools”

Source: NAIS Facts at a Glance, 2014-15; Colson HA, “Change Your Advancement Program: An Excerpt from ‘Why Change What Works?: An NAIS Guide to Change Management,’ *Independent School Magazine*, Fall 2010; EAB interviews and analysis.

This Year's Charge from the Membership

Of the 26 topics included in last year's topic poll, the items listed at right were among the most popular with Forum members.

The reader will notice that the leftmost column deals with the subject of financial sustainability. Advancement is, of course, a part of that topic, but given its stand-alone importance we decided to address it separately. Student mental health, another issue of great interest to members, is addressed in a separate study.

The Independent School Executive Forum's sister program, the Advancement Forum, works with close to 200 universities, and has produced four major research studies on advancement human capital. As these studies represent a rich body of material from which to draw, the Forum partnered with members to determine how to embed this content into their day-to-day work.

The feedback received from the nearly 20 advancement staff who were in attendance at the July 2016 Advancement Leader Executive Roundtable directed the research to towards cultivating the next generation of donors.

Where You Directed Our Teams via the Topic Poll and Research Interviews



Financial Sustainability

- Maximizing the Impact of Financial Aid
- Building the Optimal Financial Model
- Communicating Our Value Proposition
- Implementing High-impact Cost Savings



Advancement

- Cultivating the Next Generation of Donors
- Fundraising Habits of Highly Effective Heads
- Best Practices in Recruiting, Training, and Evaluating Development Staff



Student Mental Health

- Tackling the Student Stress Dilemma
- How to Respond to Students with Acute Mental Health and Personal Support Needs
- Reengineering Schedules for Student Wellbeing

This topic was also highly popular among heads of advancement in attendance at EAB's Advancement Leader Executive Roundtable in July 2016

At the Top of Our Parent Giving Game...

Beyond the strong member interest in advancement, another reason that the cultivation of new generations of donors was a focal point is that most independent schools identify parents as the primary sources of individual support. This is especially the case with regard to day schools.

To the right, the reader will notice significant evidence supporting the idea that parents are a healthy constituency for independent school fundraising. Over the past few years, independent schools have significantly increased the already very high parent participation rate, which now averages 71.9%.

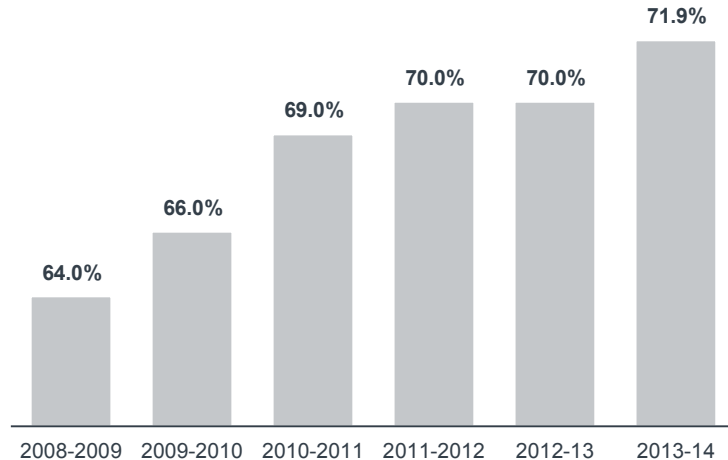
In the course of dozens of interviews conducted for this study, researchers became convinced that the parent participation rate for Forum member schools is likely above average.

Many schools have expressed skepticism about whether they can push their parent rates any higher at present. Schools appreciate the high levels of engagement, but given the significant burden of tuition, there is a sense among them that many parents may feel they are already giving all that they can.

Parents Remain a Reliable Donor Segment

Average Parent Participation Rate Climbs Steadily

NAIS Member Schools



Parental Involvement at All-Time High

“Our parent participation rate is **94%**. The parent annual giving volunteer structure is led by a parent chair, grade captains and 65 families. We appoint the chair(s) and provide lists of potential captains and volunteers from which they can recruit. We have a mix of experienced and new volunteers to reach out to all families within the school - it's all about peer to peer asking for both volunteering and financial participation in annual giving. **We're very lucky as our parents are engaged within the school on all levels.**”

*Lane O'Shea, Director of Development and Alumni Programs
John Burroughs School*

Source: NAIS Trendbook 2015-16; EAB interviews and analysis.

...With Room for Improvement Among Alumni

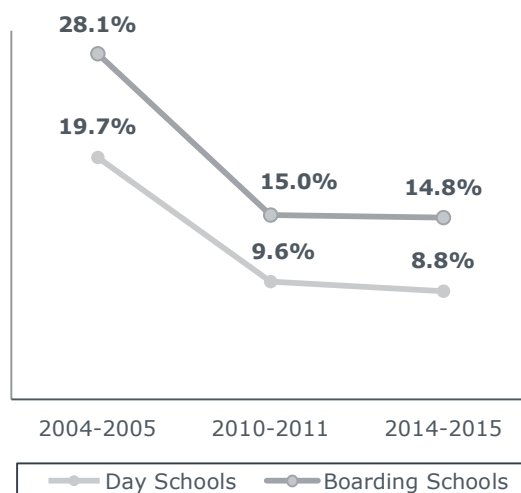
While the parent participation rate may be hitting its peak, it seems evident that alumni represent a clear advancement growth opportunity. Participation rates for independent school alumni have fallen in the last decade, and now hover around 10%.

When the above-mentioned rate is compared to the giving rates enjoyed by the top liberal arts colleges—which represent the closest analog cohort to independent schools in higher education—it becomes apparent that there is significant room for improvement.

Independent Schools Lag Behind Their Higher Education Brethren

Independent School Alumni Participation Rate

NAIS Member Schools



Top Ten Liberal Arts Colleges by Alumni Participation Rate

Institution	Alumni Participation Rate
Williams College	50.1%
Wellesley College	49.9%
Davidson College	48.6%
Bowdoin College	47.4%
College of the Holy Cross	45.1%
Amherst College	44.9%
Carleton College	41.9%
Colby College	40.3%
Bates College	39.7%
Randolph-Macon College	39.0%

19.98% Average APR for Baccalaureate Colleges

Source: NAIS Facts At A Glance 2015-2016 ; Council for Aid to Education, VSE Survey & DataMiner; EAB interviews and analysis.

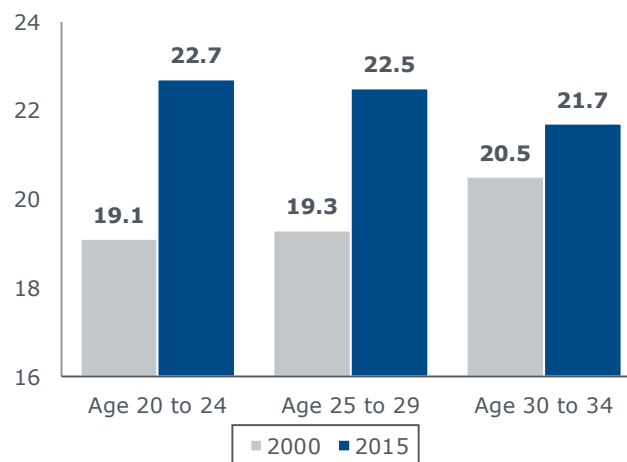
At Risk of Losing a Generation of Donors?

Of all alumni groups, young alumni hold the greatest opportunity for improvement. The number of younger Americans has increased across the past 15 years at a pace that exceeds that of other age groups.

This young cohort represents a sort of demographic blip, a blip of sufficient size to guarantee its prominent importance to independent school advancement offices for years to come. For that reason, it is imperative to determine how best to engage young alumni as soon as possible.

Younger Americans an Increasing Share of Total Population

Number of Young Americans by Age Group
(in millions)



Our Future Base of Support

“Despite coming into the workforce at an uncertain time, the sheer number of individuals belonging to the Millennial generation and their willingness to contribute money and time makes engaging them in philanthropy a high priority.”

“Generation G: The Millennials and How They Are Changing the Art of Giving”
Charities Aid Foundation of America

Source: US Census Bureau; Johnson, Grossnickle and Associates; EAB interviews and analysis.

Struggling to Engage Millennials

While dramatic in and of itself, the increasing share of younger people in the population is not the only reason to focus on that demographic. Over the course of this study, many heads of advancement expressed concern about decreased levels of engagement among young alumni.

Sector-wide data on young alumni participation rates is not publicly accessible, but a few Forum members were willing to disaggregate their alumni participation rates by decade of graduation. John Burroughs School provided an instructive example: their participation rate for alumni givers aged 18-28 is significantly lower than that of older individuals. Though striking, this phenomenon is not in any way unique; in fact it is very common.

It is important to note at this point that when addressing the subject of participation, this study looked specifically at the number of gifts per alumnus, not the dollar amount of individual gifts.

Some may argue that this phenomenon is simply a function of age, and that millennials will increase their participation rate as they grow older. This argument is, at best, a shaky assumption.

Annual Giving from Young Alumni a Growth Opportunity

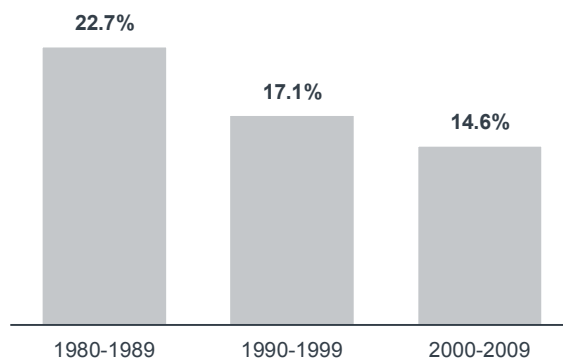
John Burroughs School Average Alumni Giving Rate

Classes 2006-2016 (ages 18-28) Classes 1966-1975 (ages 41-68)



Millennials Giving At Lower Rates Than Older Alumni

Private College Average Giving Rate by Class Year (n=65)



“We are always trying new ways to engage younger alumni. From email to text and phone calls to social media platforms, we hope that they are getting our messaging and staying connected with the school.”

Lane O'Shea
Director of Development and Alumni Programs
John Burroughs School

Source: Blackbaud Conference for Nonprofits 2014, *Young Alumni: Understanding Your Next Generation of Donors*; EAB interviews and analysis.

Competition Drives Down Donors for All

In addition to decreased levels of young alumni engagement, independent schools are now grappling with an explosion in the growth of nonprofit organizations. This growth has made it much easier for private citizens to find and support causes that capture their interests.

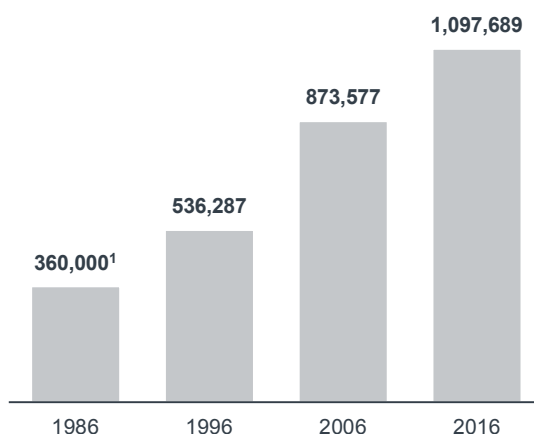
While researching this phenomenon, researchers came across a quotation from a blog post that addresses it in a particularly illustrative way: “Do you want to give to an organization that focuses on decreasing lead levels in housing so it doesn’t impact children’s health? There’s an organization for that. Do you want to give to an organization that focuses on research for Fragile X Syndrome? There’s an organization for that, too. Do you want to give to an organization that plants flowers on football fields to create a balanced atmosphere of peace and tranquility among men in helmets crashing into each other? Well...there isn’t an organization for that...yet. But these millennial donors want to see their dollars make an impact. The easiest way to do that is to find an organization that supports your unique interests and give.”

It is evident that people have an increasing number of choices when disbursing their philanthropic dollars, and it is becoming harder and harder to win their attention.

Crowded Philanthropic Sector Contributes to Fundraising Challenges

Unprecedented Growth in the Size of the Sector

Number of Public Charities, 1986-2016



More Options, Less Support

“The long term trend continues to move towards giving to fewer causes, with 42% of the survey’s oldest donors supporting eleven or more charities versus only 22% of middle-age donors.”

*Penelope Burk
The Burk Donor Survey 2014*

1) Approximate figure for 1986.

Source: National Center for Charitable Statistics, “The Number and Finances of All Registered 501(c) Nonprofits,”; P Arnsberger et al, “A History of the Tax Exempt Sector: An SOI Perspective,” *Statistics of Income Bulletin*, Winter 2008; P Burk, Cygnus Applied Research, *The Burk Donor Survey: Where Philanthropy is Headed in 2014*, September 2014; EAB interviews and analysis.

Playing to a Distracted Audience

Decreasing attention spans are a fact of life in the social media era. Immediately before the present period of ubiquitous, near-instantaneous communication and connectedness, the average human attention span reached twelve seconds. Less than two decades into the 21st century, that unimpressive span has shrunk by a full third, to an average of eight seconds.

As *Time* magazine gleefully pointed out in a 2015 article, appropriately titled "You Now Have a Shorter Attention Span Than a Goldfish", humans are now less inclined to focus on one thing at a time than their gold-finned counterparts.

In such an environment, attracting and retaining the attention of the average private consumer is a serious challenge.

Alumni Attention Scarcer Than Ever

Attention Spans Get Shorter

12 Seconds – average human attention span **in 2000**



8 Seconds – average human attention span **in 2015**

How Do We Stack Up Against Goldfish?

9 Seconds – average goldfish attention span in 2015

TIME You Now Have a Shorter Attention Span Than a Goldfish



All This Means We Need to Work Harder

"Digital lifestyles deplete the ability to remain focused on a single task....Multi-screening trains consumers to be less effective at filtering out distractions – they are increasingly hungry for something new. This means **more opportunities to hijack attention but also that brands need to work harder to maintain it.**"

Alyson Gausby, Consumer Insights Lead
Microsoft

Welcome to the Attention Economy

The truncation of the human attention span illustrated on the previous page has resulted in what some are calling “the attention economy.” In this attention economy, as the Wall Street Journal recently wrote, “the scarcest commodities are your eyeballs and ears.” The reason for this is intuitive: people have more information to sort through than ever before, and as a result they make reflexive decisions about which organizations with which to engage. They often direct their attention, and their dollars, to whomever is best at getting in front of them, whomever is loudest. However, they do have an eye for relevance. If an organization isn’t telling them something they care about, they will tune out remarkably fast.

As illustrated to the right of this page, the attention economy has four dominant characteristics. In order to successfully launch and maintain philanthropic campaigns targeting young alumni donors, independent schools will need to change their messaging to adapt to these elements.

Fleeting Mindshare Makes It Harder to Win Alumni Donors

WIRED Attention Shoppers!

FORTUNE The Attention Economy and the Implosion of Traditional Media



Attention Pays

“It’s beginning to dawn on people who ponder these kinds of things that it’s attention, not information, that lies at the heart of the new online world. In a world full of information, the **scarcest commodities are your eyeballs and ears.**”



Information Overload

Individuals must sort through more information than ever before



Top of the Inbox Wins

Endless influx of communications means consumers focus on the last organization to reach out



Split-Second Decisions

Appeals for money or attention elicit gut-check responses from busy consumers



Relevance Is Paramount

Consumers stay tuned in and primed to buy as long as the organization is engaging them with content that is relevant to their lives

Source: Fortune, Wired, and the Wall Street Journal; EAB interviews and analysis.

Flooding the Airwaves with Appeals

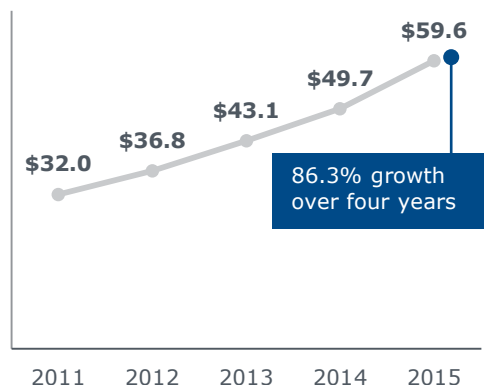
Over the last few years, many commercial organizations have reconciled themselves to the new attention environment and have nearly doubled their digital ad spending in an attempt to catch the eyes of customers. The evidence of this adaptation is overwhelming; by some estimates, the average US internet user sees over 1,300 digital ads every day.

Nonprofits have also begun coming to terms with the divided nature of donor attention. In the span between 2014 and 2015 alone, nonprofits sharply increased the number and pace of fundraising appeals communicated through both email and direct mail.

Commercial Organizations and Nonprofits Amp Up Outreach

Digital Ad Spending Skyrockets

Dollars Spent on Digital Ads (in Billions)

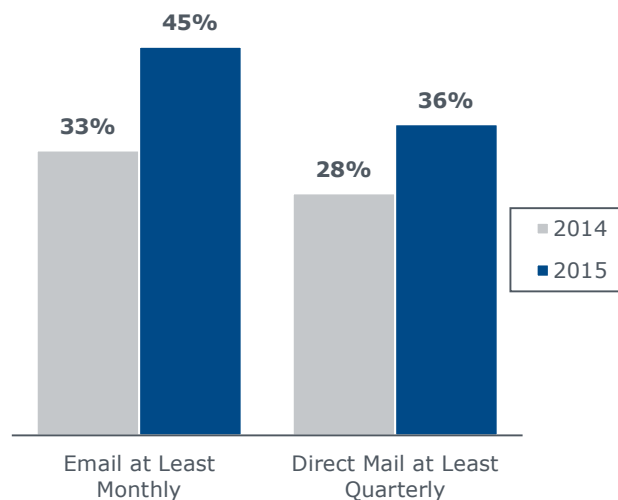


1,324

Digital ad exposures
per user per day in the
United States

Nonprofits Scramble to Be Heard

Frequency of Fundraising Appeals, 2014-2015



Source: Lu K, J Holcomb, "Fact Sheet: Digital News Revenue," Pew Research Center, June 15, 2016; Friedman J, Goodway Group; Miller-Leroux, K, 2015 Nonprofit Communications Trend Report; EAB interviews and analysis.

Preferred Giving Channels by Generation

While many philanthropic organizations have shifted their strategies with regard to engaging constituents, it is important to remember that each generational segment is unique in its preferences for different giving channels.

Those different sets of preferences are well-illustrated by the information to the right of this page. As the reader will note, Online Donations and Text Giving are very popular among Millennials and Gen Xers. It is also important to note that Baby Boomers, a demographic whose philanthropic habits do not often align with those of younger generations, also demonstrate a strong preference to donate online.

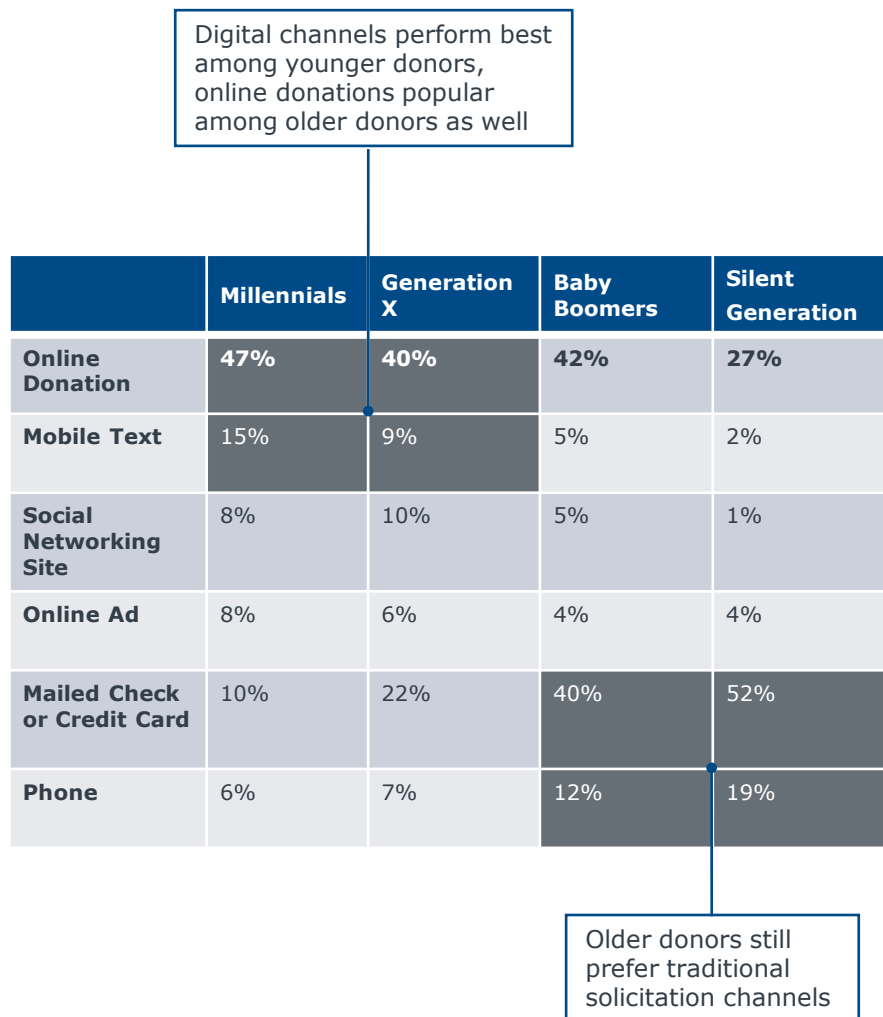
However, older donors exhibit a strong preference for more traditional giving channels, such as mailed credit card numbers, checks, or phone solicitations.

Given the distinct preferences of these alumni demographics, it is incumbent upon independent schools to adjust their advancement strategies accordingly, so that potential donors can be engaged in a manner they find convenient and familiar.

Online Giving Quickly Becoming the Norm, Even for Older Donors

Which Giving Methods Have You Used in the Last Two Years?

Blackbaud's Next Generation of American Giving, August 2013



Source: Rovner M, *The Next Generation of American Giving: The Charitable Habits of Generations Y, X, Baby Boomers, and Matures*, Blackbaud, August 2013.

Cord-Cutting Nomads Necessitate New Approach

Another reason that focusing on innovations in young alumni engagement is important is that reaching that segment is already difficult, and is becoming more difficult year after year.

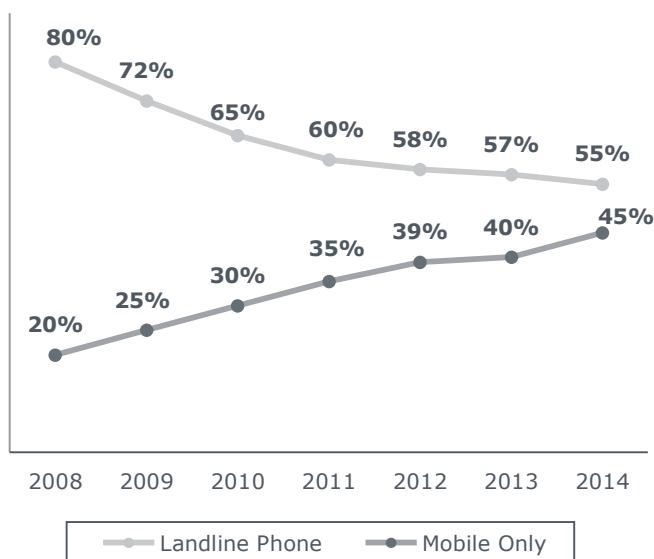
Part of this difficulty comes from a profound shift in personal communication habits. Mobile phone use has skyrocketed throughout the past 10 years, and this usage trend has been accompanied by a strongly correlated decrease in landline ownership. In earlier years, it was much easier to discover contact information for prospects through public records searches; the increasing displacement of landlines by mobile phones has made this method much less fruitful.

Exacerbating this obstacle is the fact that millennials are a highly mobile generation, as demonstrated by the figures to the right of this page. Millennials are constantly changing apartments and cities, a habit that makes it harder to track their home addresses.

Engaging Donors Through Technology Is No Longer Optional

Landline Phones Are a Dying Technology

Percentage of U.S. Households With and Without Working Landline Telephone



Millennials on the Move



44%

Of millennials say they plan to move within the next year

43%

Of all movers in the U.S. between 2007 and 2012 were millennials

See Appendix 1 for:

More tactics on tracking alumni, displayed on our infographic "Strategies for Alumni Data Collection"



Source: Richter F, "Landlines are a Dying Breed," *Statista*, February 24, 2015; Godfrey N, "The Young and the Restless: Millennials on the Move," *Forbes*, October 2, 2016; EAB interviews and analysis.

Major Gifts Depend on Early Acquisition

The final reason that makes young alumni giving an urgent topic is the imperative imposed by the pipeline for major giving.

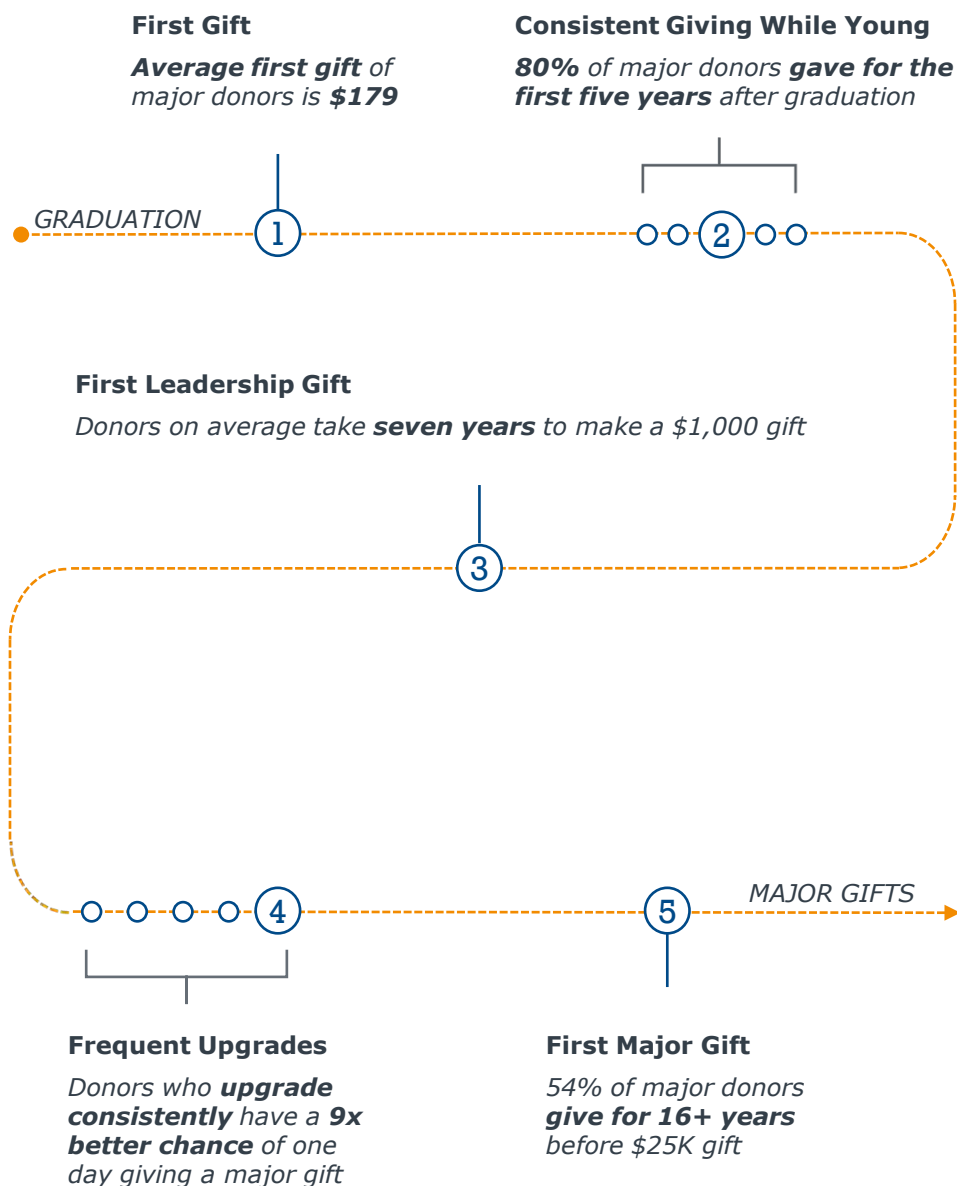
When observing the giving patterns of independent school alumni, a clear pyramidal gift structure emerges. The proportion of gifts that come from a specific number of donors is heavily lopsided. On average, 80% of fundraising revenue comes from the top 20% of donors.

Of course, that top 20% does not appear out of thin air. Those donors are not people who directed their philanthropic efforts elsewhere throughout their lifetimes and then, all of a sudden, decided that their alma mater was worth supporting. These people began their philanthropic habits with a gift to their school's annual fund, which brings donors in at the bottom of the pyramid, retains them over time, and upgrades their giving year over year.

If advancement offices do not consistently cultivate alumni donors beginning soon after graduation, it becomes much more difficult to build a major gifts pipeline.

Annual Fund Serves Crucial Cultivation Role for Future Supporters

An Overview of the Path to Major Giving



Source: Bingley C and Gawor B, "The Threat of Declining Alumni Giving Rates to Higher Education Fundraising," *Ruffalo Noel Levitz* webinar (March 22, 2016); Meer J, "The Habit of Giving," *Economic Inquiry* (March 2013); Barry F et al., "Cultivating Lifelong Donors: Stewardship and the Fundraising Pyramid," Blackbaud (2010); EAB interviews and analysis.

Feeding the Campaign Pipeline

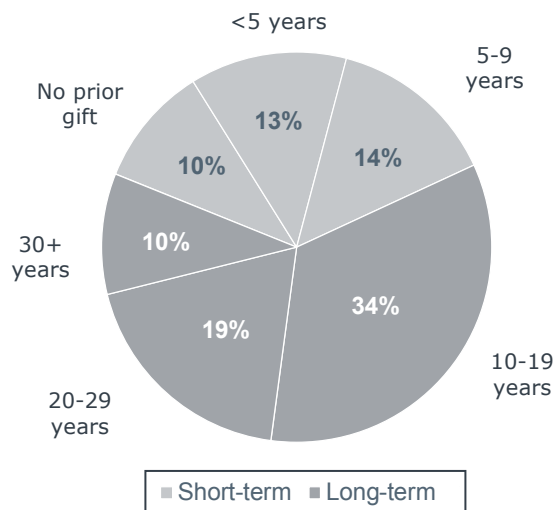
Another piece of evidence supporting the necessity of early donor cultivation comes from an insight uncovered by the Philanthropy Leadership Council, the Advancement Forum's sister team on the health care side of the company. According to their research, major gift donors have almost always been consistently giving for many years before making their biggest gift.

Thus, the return on investments made in annual giving efforts to engage young alumni should not be judged merely by the value of any given contribution they make, or by the aggregate participation rate. Annual giving efforts have been shown to pay off in the long run by feeding the major gift pipeline.

Today's Core Supporters Passed Through the Annual Fund

Length of Top Donors' Giving Histories Prior to Biggest Gift

Philanthropy Leadership Council



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 Relations
JK-12 Co-ed School*

Source: Philanthropy Leadership Council, *Enduring Relationships: Stewarding Donors to Deepen and Sustain Institutional Ties*, Advisory Board Company, 2008: 6; 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; EAB interviews and analysis.



Make It Easy to Give

SECTION

Tactic 1: Donor-Friendly Mobile Giving
Tactic 2: Hardwired Follow-Up Triggers

1

The Electronic Tether

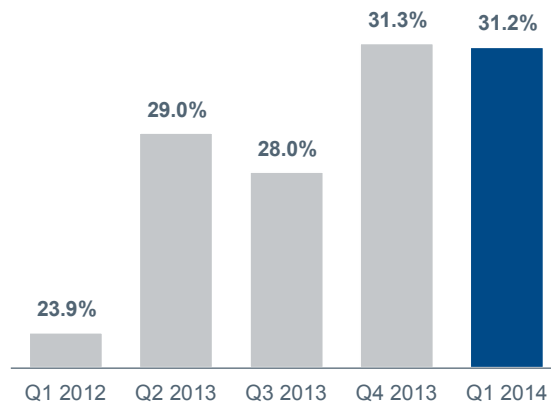
In order for independent schools to effectively solicit donations from young alumni, every step of the giving process must be made as convenient as possible. For millennials and an increasingly broad swathe of other generational cohorts, convenience means mobile-friendly site design.

Recent data show that more and more Americans are using their mobile devices to browse the internet. 2014 was the first year in which Americans spent more time accessing websites through their mobile devices than through their computers, and this trend is projected to grow quickly across the next few years.

Mobile phones have become an integral part of many people's day-to-day existence. Most Americans can barely go an hour without checking their phones, and it has become commonplace to sleep with or next to a mobile phone. Indeed, it is difficult to imagine a more immediate and dependable link to the modern individual.

Constant Mobile Use Creates Big Opportunities

Percentage of Total Web Traffic Coming from Mobile Devices



Smartphone Use Is Ubiquitous



52%

Of smartphone users check their phone **every 5-10 minutes**



44%

Of Americans say they couldn't make it a day without their smartphone



71%

Of smartphone owners sleep with or next to their smartphone

Source: Quarterly Mobile Traffic Report, "Walker Sands, (June 12, 2013); Bank of America, Trends in Consumer Mobility Report 2015; EAB interviews and analysis.

Squinting to Donate

Given the clear importance of mobile Internet, having a mobile-friendly or mobile-optimized online giving page is an imperative for independent schools.

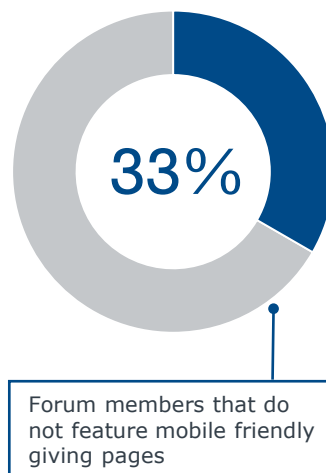
Unfortunately, many schools struggle with this facet of their advancement effort. In the course of research conducted over the last year, Forum research revealed that nearly one in three current member institutions have yet to create any form of giving page adapted for mobile access. Consequently, navigating these pages with a mobile phone is an awkward interface, more conducive to user-error and eye strain than philanthropy.

Beyond the immediate issue of convenience, data indicate that significant brand reputation consequences may result from non-mobile adapted websites. Users get frustrated, become less likely to engage with the organization in question, and more likely to feel that the organization does not place a high value on their contributions.

Some Independent School Giving Pages Hail from a Different Era

Suboptimal Independent School Giving Page Design

EAB Analysis of Member Giving Pages, n=57



School Image at Risk

48%

Of users say they feel frustrated and annoyed when they get to a site that's not mobile-friendly

52%

Of users said that a bad mobile experience made them less likely to engage with a company

48%

Of users said that if a site didn't work well on their smartphones, they felt like the company didn't care about their business

Source: Fisch M, "Mobile Friendly Sites Turn Visitors into Customers," *Google Mobile Ads Blog*, September 25, 2012; EAB interviews and analysis.

An Introduction to Mobile-Friendly Design

For schools that decide to tackle the challenge of mobile adaptation head-on, there are three primary options for creating a more donor-friendly interface.

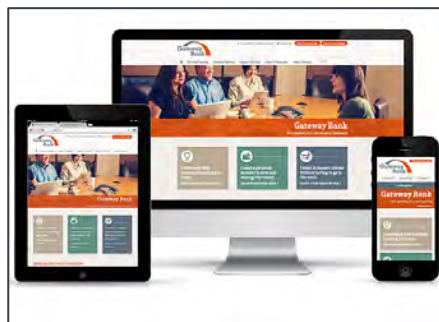
A responsive design approach takes the current layout of a giving page and gives it the capability to fit screens of any size. As the reader can see to the right, this method allows a page's display to resize dynamically, and even to re-arrange graphical elements to suit the new format, while retaining the same basic layout across different devices.

Adaptive design is a little different. Rather than just re-sizing to fit different screens, this approach involves designing several entirely different layouts for a giving site. Depending on the device accessing the site, the layout that is the best fit for that device's screen size will appear. Adaptive design allows for more control over the quality of the user experience, but requires greater investment.

A mobile-optimized giving site is designed to be used exclusively by mobile devices. This kind of site exists in parallel with its non-mobile version, and opens automatically in response to access through mobile devices. Investing in mobile-optimization can be costly, but can also create the most streamlined donor experience.

Three Approaches for Catering to Mobile Traffic

Responsive Design



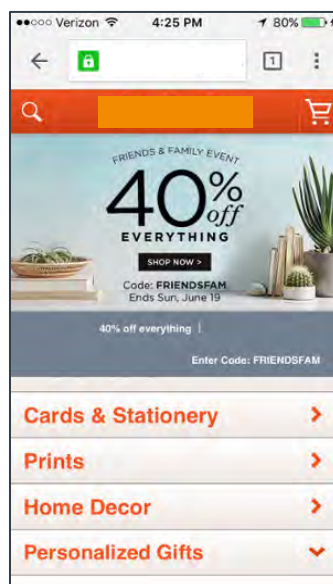
Same content sent to all devices; browser resizes to fit screen "on the fly"

Adaptive Design



Overall design remains the same; templates are customizable by device

Mobile Optimization



Completely separate site ensures streamlined mobile experience

See Appendix 2 and 3 for:

- A visual guide to choosing the right mobile design strategy for you
- Concrete examples of mobile-optimized giving pages from member schools

Source: Katkin, Zach. "Mobile-Optimized vs. Responsive Websites", Atilus website; "Maximize Fundraising With Minimal Effort"; EAB interviews and analysis.

Your Giving Page Is Leaving Money on the Table

One of the greatest obstacles to successfully completed giving processes is also one of the most avoidable: a high number of form fields.

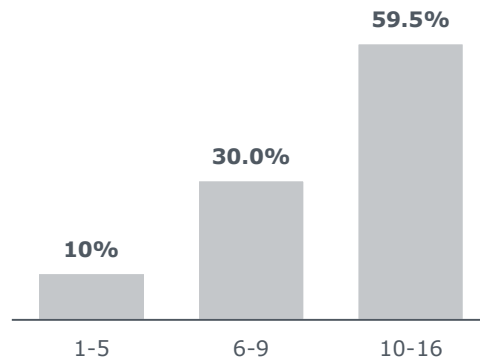
Research conducted on transaction completion rates (the rates at which prospective donors complete a giving process from start to finish) in the non-profit sector indicates that giving pages including 10 or more form fields frequently experience conversion rates over 20% lower than pages with five or fewer form fields.

To put it simply, a larger number of form fields frequently equates to a smaller number of digital donors.

Ineffective Donor Forms Make Giving Time-Consuming, Frustrating

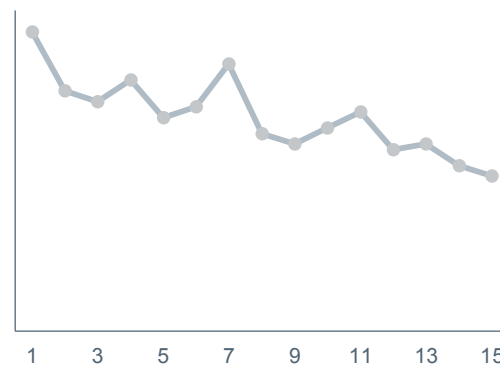
Percentage of Forum Member Schools Featuring Lengthy Giving Pages

n=57



The More Fields, The Fewer Gifts

Conversion Rate by Number of Form Fields



Losing Donors at the Finish Line

50+% Of prospective donors who visit giving pages do not ultimately make a donation

Source: Ruehl A, "You Have Been Abandoned," npENGAGE, February 6, 2013; EAB interviews and analysis.

Testing the Impact of Form Length

Having established the downsides associated with older giving pages that have not been optimized for mobile use, it will be useful to examine the case of St. Paul’s School, a co-ed, Episcopal, 9-12 boarding school located in Concord, New Hampshire. SPS provides an example of an independent school that has made a very successful shift to streamlined, intuitive mobile giving.

Recently, a St. Paul’s alum challenged the school to raise its alumni participation rate to 50%, with the promise of a \$1M gift in case of success. SPS took the challenge seriously and decided to work with a vendor, EverTrue, to create a more streamlined, mobile-friendly giving page that would encourage prospects to follow through on making gifts once they initiated the giving process.

In order to test the difference this new page was making in conversion rates, SPS used both the standard giving page and the EverTrue page. To the right, the reader will note the primary differences between the two pages, with the EverTrue page exhibiting a much more convenience-focused design.

Old Giving Form Goes Head-to-Head Against Streamlined Checkout



Alumni click on giving link

Solicitations circulated as part of young alumni challenge



Standard Giving Form

Long checkout form gives the donor maximum control



Experimental Giving Form

Short checkout form offers few options but quick finish

Product Specs for the Two Pages

	Standard Giving Form	Experimental Giving Form
Number of Fields	10	5
Gift Amount Location	At bottom of form	First selection
Supplemental Info	Address, CAPTCHA	None
Number of Pages	One	Three
Mobile Friendly?	No	Yes
Custom design based on campaign?	No	Yes

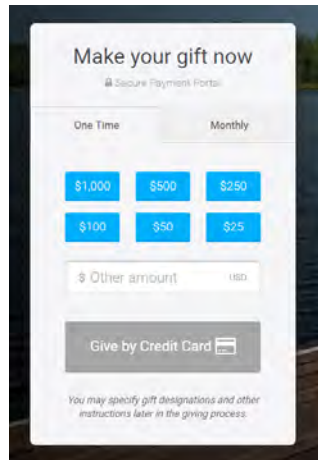
Source: EAB interviews and analysis.

Faster Than You Can Say ‘Go Pelicans’!

To the right of the page are three screenshots displaying the EverTrue giving process in its entirety. The reader will observe that the buttons and fields on these pages are large and clear, and should also note that the prompts asking for donor name and contact information can be auto-filled by cookies. The same feature applies to the credit card field.

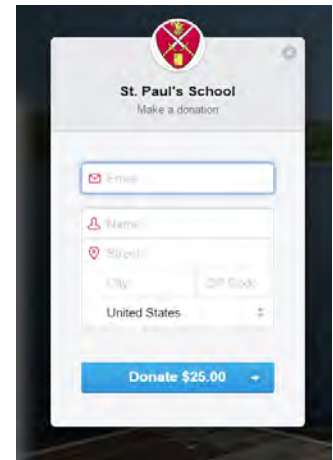
Simple, Elegant Design Expedites Giving

1 Amount



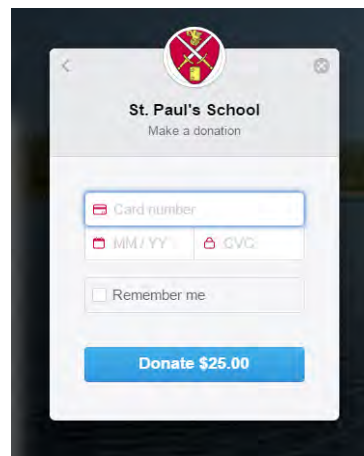
The screenshot shows a mobile app interface for St. Paul's School. The title is "Make your gift now" with a "Secure Payment Portal" indicator. Below the title are two tabs: "One Time" (selected) and "Monthly". There are six blue buttons for donation amounts: \$1,000, \$500, \$250, \$100, \$50, and \$25. Below these is a text input field for "\$ Other amount" with a "USD" dropdown. At the bottom is a "Give by Credit Card" button with a credit card icon. A small note at the very bottom says: "You may specify gift designations and other instructions later in the giving process."

2 Contact Information



The screenshot shows the "Contact Information" screen for St. Paul's School. It features a red shield logo at the top. Below the logo is the text "St. Paul's School" and "Make a donation". There are input fields for "Email", "Name", "Street", "City", and "State" (with a dropdown menu showing "United States"). A blue button at the bottom says "Donate \$25.00" with a right arrow.

3 Payment Information



The screenshot shows the "Payment Information" screen for St. Paul's School. It features a red shield logo at the top. Below the logo is the text "St. Paul's School" and "Make a donation". There are input fields for "Card number", "MM / YY", and "CVC". Below these is a checkbox labeled "Remember me". A blue button at the bottom says "Donate \$25.00".

Donors can speed up checkout with **cookie-enabled autofill** option

Source: St. Paul's School, "St. Paul's School Annual Fund" webpage.

EverTrue Experiment Pays Off

After comparing the results of the EverTrue page with those of the standard page, it is clear that the EverTrue page was a success for St. Paul's, outperforming the standard page's gift conversion rate by a multiple of 2.5.

Beyond the evidence of the numbers, St. Paul's School told Forum researchers that they received considerable positive alumni feedback on this shorter, more intuitive giving page, as is reflected in the quote to the lower-right.

Quick-Complete Giving Form Outperforms on Multiple Measures



Experimental Giving Page: Impact by the Numbers

65% Gift conversion rate¹

1,532 Alumni who made a gift

\$284K Amount raised via gifts made on form



The Business Case for Change

"We used EverTrue after receiving a challenge gift that required us to meet a participation goal of 50%. After we sent out the campaign emails with the EverTrue links, we heard from alumni that it was so great—it was very easy to complete. It's only a few clicks. There was none of the hassle related to the standard donation page."

*Tracey Perkins, Director of Alumni Giving and Relations
St. Paul's School*

1) Number of donors divided by number of individuals who received email solicitation

Drop-Off Doesn't Have to Be Fatal

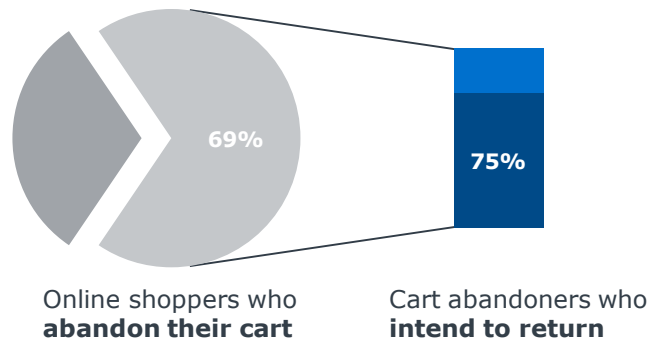
Even the simplest, most accessible giving pages still experience significant drop-off rates. Beyond doing everything possible to avoid that drop-off in the first place, advancement teams should be asking themselves, "How can we get those people back?"

Perhaps surprisingly, many of those who drop off intend to return. This phenomenon is well documented in the for-profit world, where three in four of the 69% of online shoppers who abandon their carts intend to return and complete their purchase at another time.

One of the most effective ways to respond to the 'lost-shopper' phenomenon is to set up an automated follow-up email that lands in the inboxes of shoppers who fail to complete a purchase (provided they have already given their email address). As the reader can see to the right, these follow-ups have a much greater response rate than run-of-the-mill solicitation emails when used in the private sector. As a result, a number of independent school fundraisers have begun to use them in their work.

Commercial Recapture Strategies Hold Lessons for Higher Ed

Cart Abandoners Don't Mean to Say Goodbye



"Just a Helpful Reminder"



Abandon purchase follow-up emails have a **5.2% response rate** vs. **1.9% corporate average for solicitation emails**

Missed Opportunity

"We're losing people we could get. I just know it. People come and look at the giving form. They decide it's too long, they'll get back to it. They never do. **And we're not doing anything to recapture them.**"

*Annual Giving Director
9-12 All-Boys Boarding School*

Identify Lost Donors and Reach Out

When ISEF researchers looked at a few of the independent schools that had adopted the follow-up approach at the time of the study, they were unable to find a school that had truly mastered it. Still searching for an example that would be useful to members, they turned instead to a small liberal arts college.

In the recent past, Dickinson College was experiencing a typical drop-off, no-return rate on their giving page. In order to confront this issue, they decided to work with their provider to track those lost donors, so that an administrative assistant in development could send them a gentle reminder email (pictured at right). The reader will note the diplomatic tone of the message, as well as the inclusion of both a phone number and web address to make responding as easy as possible.

These follow-ups worked remarkably well for Dickinson, yielding a response rate that consistently outperformed both private sector averages and the typical rate for Dickinson's standard email appeals.

Abandonment List Export Allows for Email Follow-Up

Recapturing Almost-Givers at Dickinson College



Abandonment

Prospect begins gift form but does not finish checkout



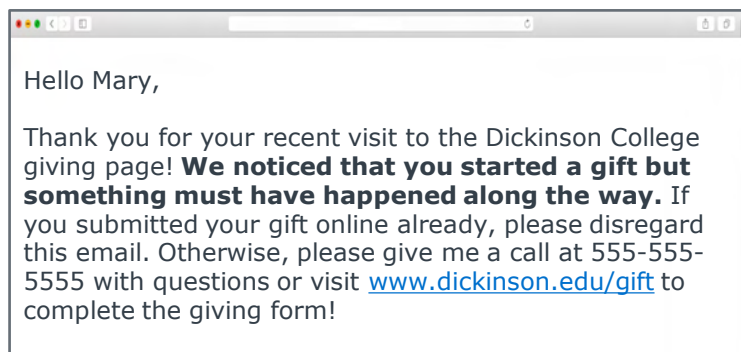
Tracking

Prospect's name and contact info recorded in system



Follow-Up

Staff sends email reminder to prospect 24-48 hours later



Helping Alumni Fulfill Their Intentions

30%

Approximate response rate to follow up emails during 2016 giving day

5%-10%

Approximate response rate to follow up emails year-round (v. **1.5% response rate** for 2016 FYE email campaign)

8.3%

Overall alumni donor growth, 2013-2015¹

1) Alumni donor growth attributable to peer fundraising strategy as well as follow-up emails and other tactics.

Source: Dickinson College, "Make Your Gift" webpage; EAB interviews and analysis.

Make It Easy to Give

From making giving pages mobile-friendly, to implementing quick-access giving forms, to following up with would-be donors to encourage successful completion of the giving process, the ideas that have been discussed in this section are all tested and proven methods to make it easier for prospects to give.

Independent school heads will find it useful to pose some or all of the questions at the right of this page to their annual giving staff. Key takeaways from this section are also included at the bottom-right of the page.

Next Steps for Heads of School

Questions for Your School's Annual Giving Staff



Develop a Donor-Friendly Mobile Giving Page



Hardwire Follow-Up Triggers

- 1 What is the drop-off rate for alumni who click through to the giving form?
- 2 How many fields do alumni have to fill out before they complete their gift?
- 3 Which giving page fields ask for "nice to have" information?
- 4 Is our giving platform vendor able to provide us a list of drop-off donors?
- 5 How often can we send email follow-ups without impeding staff workloads?
- 6 Is our phone contact rate high enough to entrust follow-ups to callers?

Key Lessons for Clearing the Path to Giving

- 1 **Commit to a robust mobile advancement effort**
Ensure that your giving page is adapted to be accessed by mobile devices; if possible, create a mobile-optimized giving page.
- 2 **Remove unnecessary obstacles to online giving**
Reduce the number of mandatory form fields on your giving page to the bare minimum; streamline your giving page by removing as much unrelated content as possible.
- 3 **Don't let donors fall through the cracks**
Set up an automated follow-up email that sends to donors who start the giving process but fail to complete it.

Source: EAB interviews and analysis.



Connect Alumni to a Shared Cause

SECTION

2

Tactic 3: Cause-Aligned Crowdfunding Campaigns

Tactic 4: Donor Passion Giving Opportunities

A Socially Conscious Generation

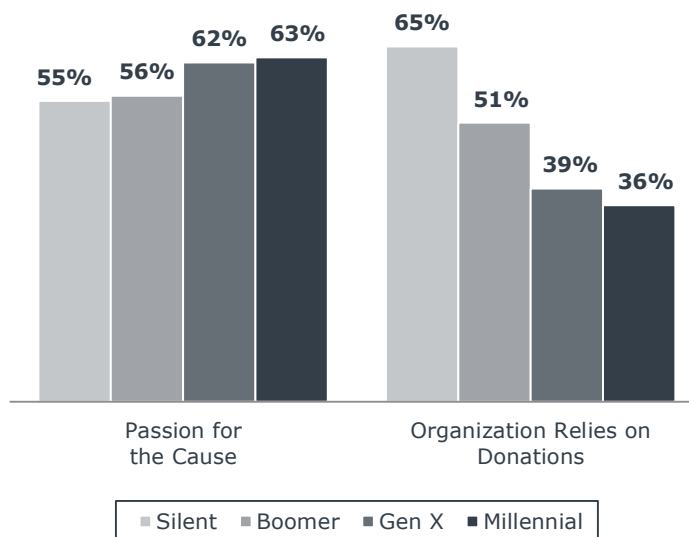
As established in the introductory pages of this study, engaging with young alumni donors is an absolute necessity for any independent school. In order to do that, advancement offices must adapt their outreach to suit the preferences of millennials, who are generally much less susceptible to appeals based on organizational need than older generational cohorts. For advancement offices that have traditionally concentrated their fundraising efforts on older generations, this can be a demanding adjustment.

As the reader will observe on the graph to the right, millennials are more motivated by cause-based appeals than any other generation.

Millennials Support What's Meaningful to Them

Giving Motivations Diverge by Generation

Primary Reason for Giving



A Belief in Big Impact

52% Of millennials gave to a social issue in the past month

82% Of millennials would give to specific projects and purposes

A New Type of Young Donor

"Millennials expect **transparency, sophisticated storytelling and technical savvy** from their charitable organizations. And many donors will not only give money, but will also volunteer and lend the force of their own social networks to a cause they believe in."

*Nicholas Fandos
The New York Times*

Source: VSE data miner; Fandos N, "The Millennial Way of Charity," *New York Times*, November 3, 2016 ; Abila, Donor Loyalty Study: A Deep Dive into Donor Behaviors and Attitudes, 2016, <http://www.abila.com/lpgs/donorloyaltystudy/>; Johnson, Grossnickle and Associates, Millennial Impact Report 2016; VSE Data Miner; EAB interviews and analysis.

A Win-Win for Donors and Schools

Millennial donors want the gifts they give to change the world, regardless of how small they may be. This phenomenon helps to explain the decline of unrestricted giving over the past decade. Schools that learn to work with and take advantage of this change can achieve significant benefits beyond boosting dollar counts in the short term.

Crowdfunding campaigns are a great way to engage with this new giving pattern. The unique value of crowdfunding is that it provides opportunities for the individual donor to feel valued, for the campus community to grow closer, and for the school to capture donor information, all while building the institutional brand.

Crowdfunding Empowers Small Donors and Reveals Their Interests



Small Gifts Make a Big Impact

Modest project goals ensure donors understand that their small gifts make a difference



All Donors Feel Valued

Targeted giving overcomes perception that donors' dollars do not have a tangible impact



Promote Goodwill on Campus

Advancement partners with student organizations and faculty members to market projects and process gifts



Capture Donor Information

Passion-driven giving reveals donor interests that can be leveraged for future solicitations

Source: EAB interviews and analysis.

Launching a Cause Crowdfunding Project

Westminster Christian provides a good example of an independent school making effective use of a crowdfunding campaign.

In December 2015, the school set a particularly ambitious goal for their annual “Feed the Need” fundraiser. They set their eyes on raising \$150,000 in a single week of giving. In order to reach that goal, they decided to partner with a company called Mobile Cause.

Westminster Christian Raises \$150K Through Partnership with Mobile Cause



Crowdfunding to Fulfill School Mission and Revenue Goals

“Crowdfunding...became the perfect solution, allowing WCA to empower parents, students, and staff to raise money for the cause as they shared the campaign with friends and family, who could also sign up to raise money on their behalf.”

MobileCause Case Study



School in Brief: Westminster Christian Academy

- Louisiana-based K-12, coed, private school
- WCA hosts annual “Feed The Need” fundraiser to raise money for children in impoverished nations, as well as raise money for improvements across campus

Source: “Maximize Fundraising With Minimal Effort,”; EAB interviews and analysis.

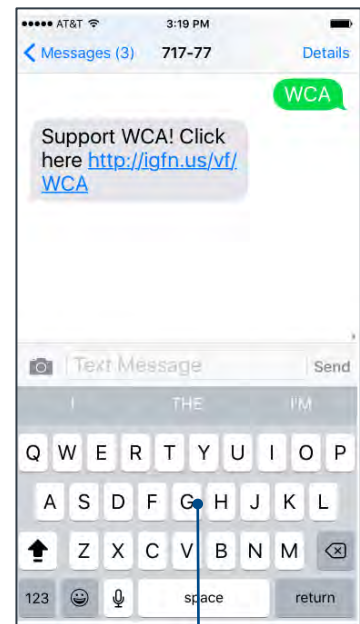
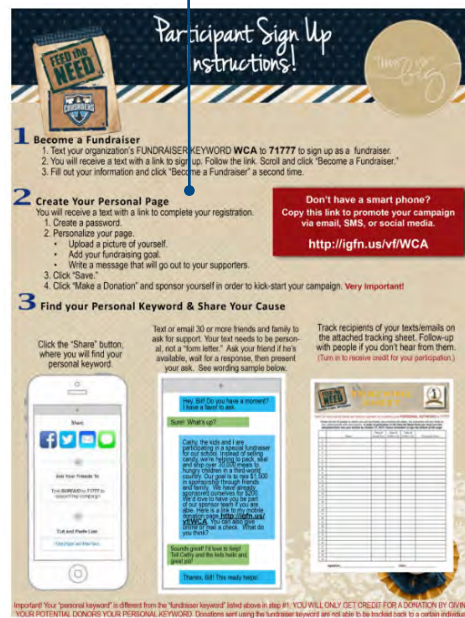
Launching a Cause Crowdfunding Project (cont.)

Through their partnership with Mobile Cause, Westminster was able to bring the entire school community into the advancement effort. In addition to reaching parents and current students, Mobile Cause's crowdfunding platform makes it easy to contact recent alumni.

Mobile Cause Platform Amplifies Outreach...

1

Provide parents and students with detailed instructions on creating their crowdfunding site



2

WCA parents and students use MobileCause platform to send text messages, emails, social media posts to solicit donations from friends and extended family

Launching a Cause Crowdfunding Project (cont.)

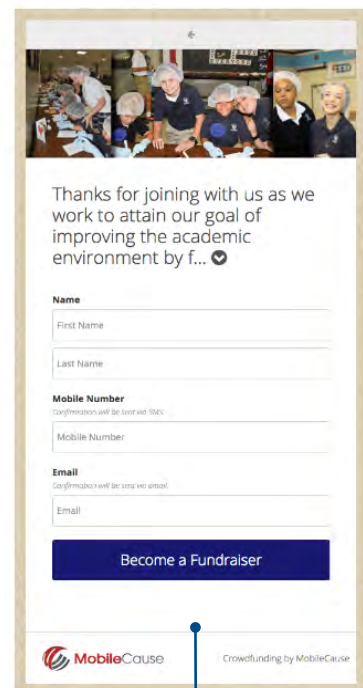
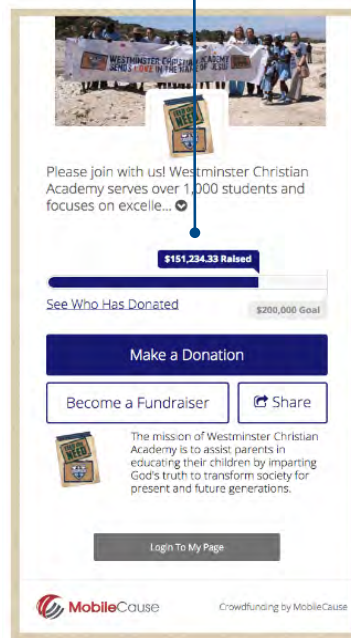
As the reader will note to the right of the page, when Westminster Christian donors activated a solicitation link, they were directed to a page where they could see the school's progress to their advancement goal, giving them a tangible sense of the impact of their contribution.

Immediately after giving, donors received a request to help further the campaign by sharing the crowdfunding page, or even by becoming fundraisers themselves.

...and Expands the Fundraising Team

3

Donors are directed to a mobile quick giving page where they can see WCA's progress to their goal



4

After successful donation, donors are invited to share the crowdfunding page or join the WCA fundraising effort

Source: "Maximize Fundraising With Minimal Effort."; EAB interviews and analysis.

Mobile Crowdfunding

As a model, mobile crowdfunding is naturally suited to cause-connected giving campaigns. Westminster Christian was able to realize significant benefits from their partnership with Mobile Cause. The ease and convenience of crowdfunding means that Westminster's success can be replicated at other independent schools.

Generates Impressive Results for WCA

“

Crowdfunding for schools is an easy, impactful way to raise large amounts of money in a short period of time—especially for schools looking to empower volunteers to do good and serve the poor.”

MobileCause

”

\$156K

Total dollars raised for campus facility improvements and mission project

1,456

New individual donors

12

Corporate Sponsors

400

WCA families and students created crowdfunding pages

See Appendix 4 for:

A sample of crowdfunding platforms and a checklist to help you pick the right vendor for your school.



Source: MobileCause, "Maximize Fundraising With Minimal Effort"; EAB interviews and analysis.

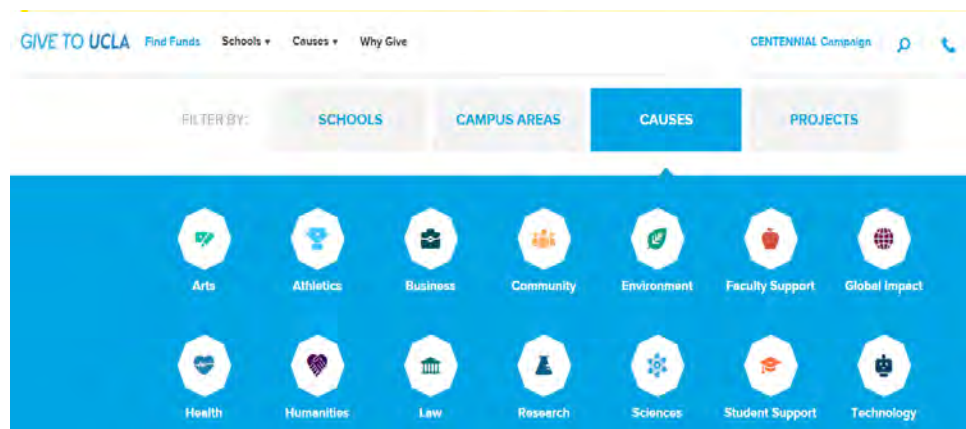
Let Alumni Choose What Resonates

Some universities are already doing a good job of creating cause-aligned giving pages. While advancement offices often do not have the capacity to systematically collect data about current alumni interests, what they can do is curate giving opportunities in a way that puts alumni in the driver's seat. The aim is to present all of the many giving options on campus not as an endlessly scrolling list, but rather as a discrete, ordered group of causes that alumni can sort themselves into.

Researchers were unable to find an exemplar independent school for this approach, but UCLA provides an excellent example from higher education.

Alumni who visit UCLA's giving page can choose to filter funds by cause. These causes span a range of topics, from arts, to community, to global impact and technology. When an alum clicks on one of these causes, they see a range of giving opportunities from units all across the institution. For example, the "research" cause includes funds for a congenital heart disease center, wildlife preservation, and undergraduate research.

Organizing Allocations by Impact Category Guides Alumni to Their Passions



Funds Curated from Across Campus



Research:

Congenital heart disease center; wildlife preservation, undergraduate research



Technology:

Nanosystems institute; diversity in engineering; aging and longevity research



Global Impact:

Arts and global health; infectious diseases in Haiti; student fieldwork support

The ‘Family of Funds’ Approach

Though the Forum membership did not include an independent school that had implemented a cause alignment strategy on their giving page at the time of this study, some independent schools have started to recognize the importance of grouping together funding opportunities from across campus in an effort to appeal to the cause orientation of younger alumni.

For example, Norfolk Academy features a “family of funds”, which enables alumni to donate to green initiatives, international programs, or community service.

Norfolk Academy Provides Thematic Giving Areas to Guide Donors



Source: Norfolk Academy Giving Page.

Connecting the Dots

Readers interested in trying the approach described on the previous pages should find the content to the right of this page useful. The table to the right presents a few recommendations for how advancement offices can approach identifying causes their donors are passionate about and to which they might already be contributing, as well as corresponding areas of your school fundraising where you might be able to direct these contributions.

We recommend finding this information by simply asking your potential donors, via surveys and interviews, and by investigating which LinkedIn and Facebook groups they have joined.

Align Donor Interests to Projects on Your Campus

Donor Interests	Current Giving	Redirected Funds
Education	<ul style="list-style-type: none">Teach For America	<ul style="list-style-type: none">Need-based scholarships
Environment	<ul style="list-style-type: none">World Wildlife FundNature Conservancy	<ul style="list-style-type: none">Environmental science labStudent research projects
Global	<ul style="list-style-type: none">Amnesty InternationalHeifer International	<ul style="list-style-type: none">Study abroad opportunitiesFaculty or student exchange
Tech/Science	<ul style="list-style-type: none">Doctors Without BordersGirls Who Code	<ul style="list-style-type: none">Robotics boot campExpanded STEM courses
Sports	<ul style="list-style-type: none">University of Michigan Booster ClubLittle League	<ul style="list-style-type: none">Athletics facility upgradesNew sports equipment

Data Sources:



Surveys



Social Media
Group
Memberships



Interviews

Source: EAB interviews and analysis.

Connect Alumni to a Shared Cause

The methods discussed in this section have all proven effective for helping schools increase donor participation and link their advancement appeals to causes. As the proportion of millennials in the prospective donor pool continues to grow, advancement offices should do more to prioritize these tools.

To the right of this slide, the reader will find some useful questions to share with advancement staff about both cause-aligned giving pages and crowdfunding, as well as key takeaway points from this section.

Next Steps for Heads of School

Questions for Your School's Annual Giving Staff



Launch a Cause-Aligned Crowdfunding Campaign



Identify Donor Passion Giving Opportunities

- 1 What school priorities overlap most with common alumni affinities?
- 2 What analytics do we use to determine campaign success?
- 3 What high-passion projects currently have limited reach and visibility among alumni?
- 4 What types of causes do our alumni give to outside the school?
- 5 How much overlap exists between external causes and our own funds?
- 6 If you were to group funds from across divisions, what would you put together?

Key Lessons for Connecting Alumni to Causes

1 Use crowdfunding approaches to empower small donors and reveal their interests

Establish crowdfunding campaigns that track and demonstrate the impact of smaller-scale donations while capturing information of new donors.

2 Provide opportunities for donors to support both external causes and the school

Connect crowdfunding campaigns to a cause that overlaps with alumni priorities and merits greater visibility among donors.

3 Align giving opportunities with donor passions

Provide opportunities for donors to filter funds by causes, appealing to motivations of younger alumni; recognize existing philanthropic interests of alumni and suggest similarly aligned donor opportunities at your school.

Source: EAB interviews and analysis.



Get Donors into the Habit of Giving

SECTION

3

Tactic 5: Integrated Affiliate Fundraising

Tactic 6: Embedded Recurring Giving

Scrip for the Twenty-First Century

To the right of this slide the reader will find a few examples of affiliate fundraising programs. These are essentially partnerships with major online retailers that allow schools to benefit from small but significant automatic donations made as part of a donor's regular purchase.

AmazonSmile stands out. This program, run by Amazon, enables its users to designate a nonprofit organization that will receive 0.5% of the value of their purchases each quarter.

We found ten examples of independent schools that have adopted and actively participated in this program, including Garrison Forest, Saratoga Independent School, and the IDEAL School of Manhattan.

These schools feature information about the partnership on their giving pages, encouraging school supporters to link their AmazonSmile accounts to their school.

Independent Schools Bring AmazonSmile into their Advancement Toolbox



Garrison Forest School

"Support GFS students and teachers while you shop at Amazon! When you shop at smile.amazon.com, Amazon will donate to Garrison Forest. Click here to shop or search for Garrison Forest at smile.amazon.com."



Saratoga Independent School

"Many of us now use Amazon for holiday shopping as well as regular purchases...those purchases can really add-up...The school can benefit from those purchases as well."



The IDEAL School

"Supporting IDEAL is easy when you shop at Amazon.com. Amazon will donate 0.5% of the purchase price of your eligible purchases to IDEAL through its AmazonSmile program. Simply access Amazon.com through THIS LINK or the logo below and select The IDEAL School of Manhattan as your charity of choice."



Amazon donates 0.5% of all purchases a user makes to a designated nonprofit or school.

It's as Easy as One Click

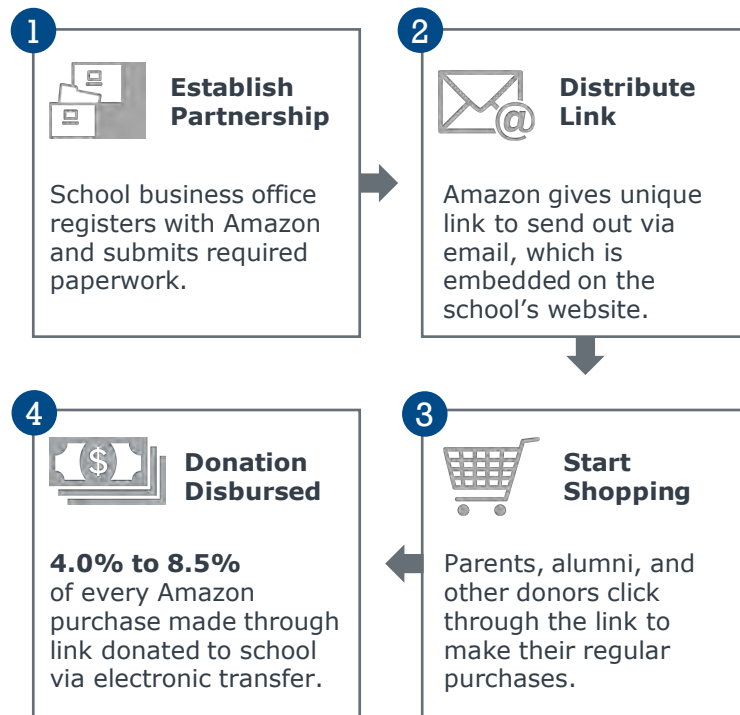
Some schools have taken this kind of partnership even further, setting up something called an Amazon Associates referral link.

Amazon Associates is an affiliate marketing program that is traditionally used by companies seeking to monetize the visitor rates associated with their web pages. As an example, a travel blog might use an amazon referral link to direct its readers to an amazon product page for noise-canceling headphones.

Schools interested in participating in this program initially register with Amazon, after which they receive a unique link. Schools then embed that link on their giving page and include it in email campaigns, encouraging supporters to make any Amazon purchases through that link. Between 4.0% and 8.5% of the value of any purchase made through that link goes to the school.

One Forum member that has enjoyed significant success with this program is Maret School, a co-ed K-12 day school in Washington, DC.

Amazon Associates Program Generates Referral Revenues for Schools



Amazon Associates vs AmazonSmile

- **Amazon Associates** earn money by sending online traffic from their organization's website to amazon.com
- **AmazonSmile** is a unique webpage (smile.amazon.com) that offers the same products as Amazon, but donates 0.5% of user purchases to eligible charitable organizations selected by customers

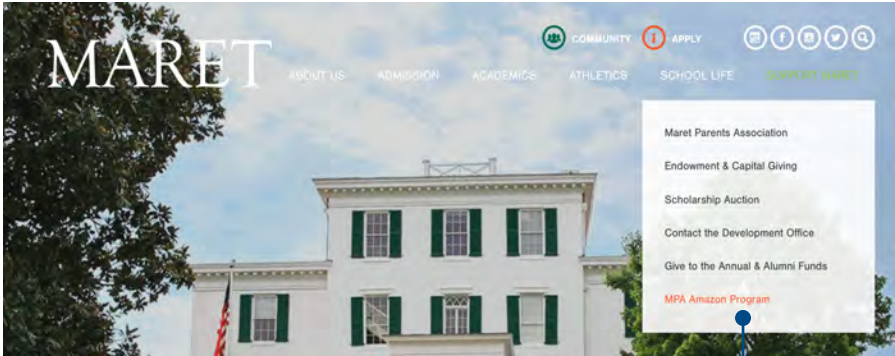
Source: EAB interviews and analysis.

It's as Easy as One Click (cont.)

The results of this partnership have been modest but meaningful for Maret. The programs mentioned on the previous two pages generated a combined \$7,500 for the school in 2016.

Taking advantage of this practice requires very little effort on the part of the school, either to join initially or to maintain once established. Schools can look at this as a small but dependable alternative revenue stream.

Maret School Partners with Amazon for New Revenue Stream



Maret Parents Association emails holiday reminder with link

Maret Giving Page prominently features Amazon Associates link



Source: EAB interviews and analysis.

From One-Click Shopping to One-Click Giving

To the right of this page the reader will find recommendations for optimizing an AmazonSmile partnership:

First, be sure to create step-by-step instructions, including screen shots and hyperlinks, directing supporters to the designation of their school as the nonprofit of choice.

Next, promote this partnership through email communications, the school giving page, and other communication platforms.

Additionally, while it is natural to think of parents and alumni as primary donor constituents, it is best to include grandparents, local community members, and other supporters in outreach for these campaigns. These people might not be willing to make direct donations to the school, but would be happy to designate your school as a recipient of funds from Amazon.

Finally, Amazon offers a suite of free tools, including social media templates, that can help schools advertise their partnership through Facebook and other platforms.

Engage Non-Traditional Constituents, Reap the Rewards

EAB's Tips to Maximize Donations



Create Step-by-Step Instructions

Provide instructions with screenshots to guide donors on how to designate your school their Amazon "charity"



Publicize Partnership

Frequently embed link into email communications, school giving page, other communication platforms



Engage the Broader Community

Encourage parents and alumni to involve extended family and community supporters by sharing the link



Promote Year-Round

Use Amazon's Marketing Tools feature to promote your school more effectively

Tapping into the Power of Networks

"The beauty of the program is that it brings in many more people in the community."

If grandma out in Wyoming is shopping it could benefit us as well. I even send the link to my brother in Indiana, and since he's purchasing items from Amazon anyway, he's happy to support Maret."

Marilyn Potts,
Director of Constituent Relations
Maret School

Source: EAB interviews and analysis.

The Rise of the Subscription Economy

One challenge inherent in many of the methods described on the previous pages is that they require action on the part of the donor, no matter how minimal. Donors have to access their credit card, fill out a form, and remember to click “submit” every year to avoid lapsing.

Relying on consistent donor action is becoming less realistic, as the “set it and forget it” attitude grows more prevalent in American consumer culture. Netflix, Spotify, and Amazon Prime all provide good examples of subscription-based companies whose business models are coming to define a large part of the consumer experience.

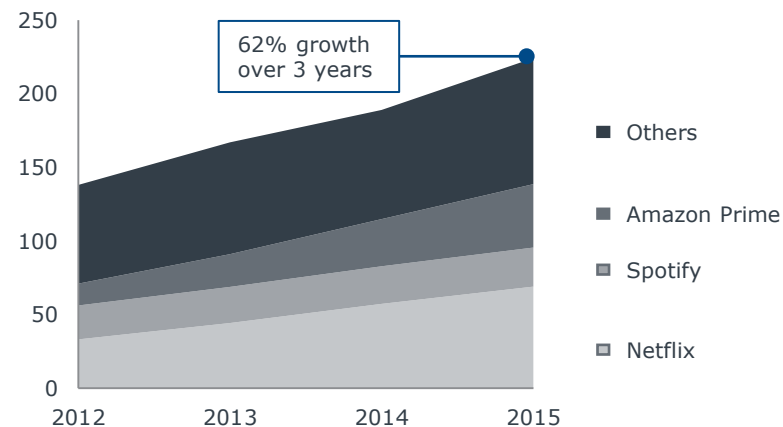
This shift has been profound enough for the media give it a name: the “subscription economy”. Business leaders at nearly half of the firms surveyed by the Economist on this question say they are starting to develop subscription-based business models.

Naturally, many advancement leaders have been wondering how the subscription economy might best be brought to fundraising.

Individuals Flock to Automatic Payments and Seamless Transactions

A Rapidly Growing Sector

Subscriber Counts at Ten Companies (Millions)



The Media Begins to Take Notice

WSJ Zuora Raises \$115 Million to Fuel Subscription Economy

FORTUNE Welcome to the Subscription Economy

Business Leaders Scramble to Avoid “Disruption”

40% Of companies are moving to develop subscription-based business models

Source: Whitler KA, “How the Subscription Economy is Disrupting the Traditional Business Model,” Forbes, January 17, 2016; Lev-Ram M, “It’s a Subscription Economy and You’re Just Living in It,” Fortune, June 6, 2014.; EAB interviews and analysis.

The Path of Least Resistance

Monthly giving, along with recurring giving in general, provides a convincing answer. Monthly giving has grown significantly over the last few years across the broader nonprofit sector. The stream has grown from 5% of gift revenue five years ago to 17% today. While the share of giving plateaued between 2014 and 2015, that figure masks a dramatic 24% increase in monthly giving revenue for the same period.

One reason for the rise of monthly giving is that so many donors want the option; 52% of millennial donors say they would consider taking advantage of a monthly giving option at the organizations they support. In fact, many organizations already have a monthly giving option – they just do not advertise it sufficiently.

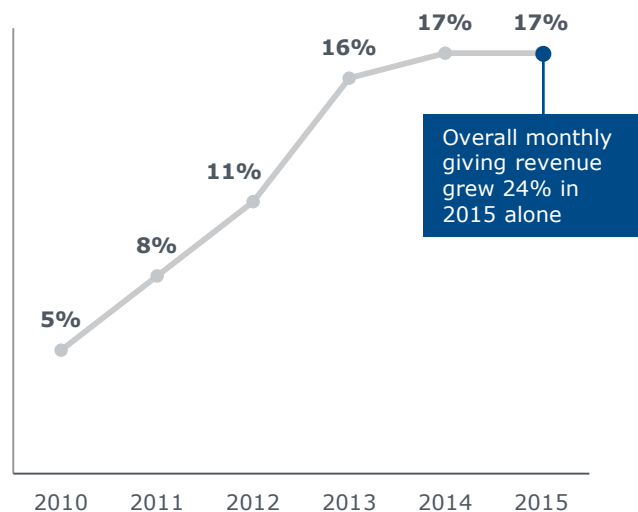
For the nonprofits that do publicize their recurring gift options, the results can be dramatic, often increasing annual average giving revenue by a multiple of two or even three.

By comparison, most independent schools have been slow in taking advantage of this opportunity. While most schools now have an option for recurring gifts, few publicize it, potentially bypassing a reliable revenue stream.

More Nonprofits Opt for Automatic Renewals

The Monthly Giving Wave Rises

Monthly Giving as a Share of All Online Giving



Good for Donors...

52%

Of millennial alumni express interest in monthly giving

...And Good for Nonprofits

2.9x

Greater annual revenue from the average monthly donor

80%

New monthly renewal rate

Source: M+R, 2016 Benchmarks Study, <http://mrbenchmarks.com/>; EAB interviews and analysis.

Independent Schools Offer Recurring Giving...

As part of this study's analysis of member giving pages, researchers investigated how many offered a recurring giving option. At first glance, the results were encouraging. As the reader will note to the right of the page, over half of Forum members do offer such an option. Unfortunately however, that option is often left without any promotional context, or even entirely without explanation. In these cases, the option is simply a box that donors can check in the course of making a donation.

In addition to the general lack of promotion around recurring giving options, no Forum member had run a dedicated campaign to convince donors to participate in recurring giving at the time of this study. Once again, higher education will provide a useful example of this kind of approach.

...But Don't Bother to Tell Their Donors

Forum Member Institutions Offer Recurring Gift Programs

56% Of Forum member schools offer recurring gift programs; the remainder offer no recurring giving options at all

Independent Schools Lagging Behind

"Independent schools are far behind other sectors when it comes to monthly giving. Nonprofits realized years ago that this was the way to boost retention and get more annual revenue from donors. **We're only just now catching up.**"

*Director of Advancement
JK-12 All Boys Day School*

Tapping into Millennial Preferences

As mentioned previously, over half of surveyed millennial donors have expressed an interest in monthly giving. The College of William & Mary recognized this as an opportunity to bring on more donors, and to do so in a way that would lead to consistent renewals.

However, the school also recognized that a dedicated messaging campaign would be necessary to transition one-off donors to monthly donors, and to add new donors to the recurring giving pool.

To the right of the page, the reader will note some of the themes that William & Mary's advancement office used in their monthly giving campaign. Targeted specifically at young alumni, many of the campaign's themes were specifically selected to appeal to the giving habits of that demographic.

Develop a Monthly Giving Program Aimed at Young Alumni

Aligning the Message with the Audience

1 Convenience Is King

Young alumni often choose the path of least resistance; monthly giving allows for "fix it and forget it"

2 It's Good for the Environment

Paperless nature of recurring giving syncs with eco-friendliness of young alumni

3 Strength in Numbers

Monthly giving allows for the community to come together and support their alma mater

4 Small Gifts Add Up to Big Impact

Appeals address young alumni concern, "What can my small gifts really do?"

William & Mary's Young Alumni Monthly Giving Campaign



THE MATH IS SIMPLE

If every undergraduate alum contributes as little as **\$5 PER MONTH** this year, it will add up to over

\$4,070,000!

As W&M alumni, our strength is in our numbers.

Make your gift today: impact.wm.edu/recurring

Multichannel Approach



Email



Phonathon



Direct mail

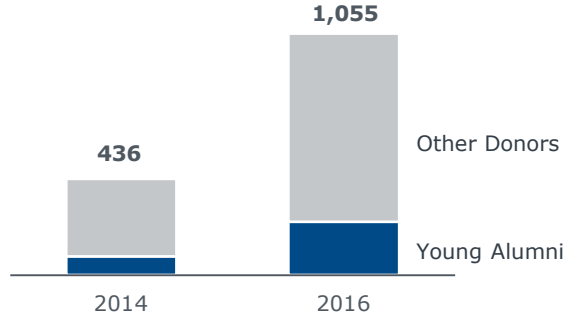
Source: EAB interviews and analysis.

Boosting Donor Counts and Dollars

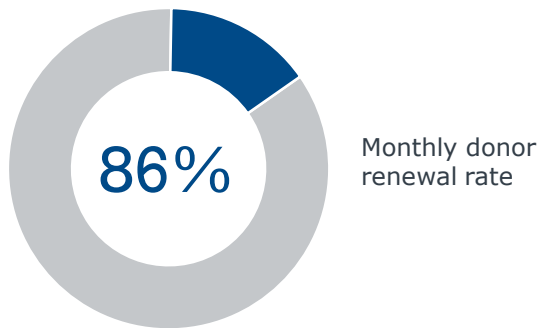
Tactics such as those employed by the College of William & Mary have significantly grown monthly donor counts across the past two years, especially among young alumni. The College managed to triple the number of young alumni monthly donors during that time, while raising nearly half a million dollars in recurring donor revenue each year. Given that the College’s monthly donors have been renewing at an 86% rate, securing those additional fundraising dollars has not required a major effort on the part of the school beyond the initial campaign. This reliable recurring donor population has allowed the school to refocus their advancement efforts on more difficult donor cohorts.

Young Alumni Embrace Recurring Gift Option

Impressive Monthly Donor Growth at William & Mary



Predictably Strong Retention



Maximizing Potential Revenue



Source: EAB interviews and analysis.

Avoiding Potential Pitfalls in Recurring Giving

Though appealing and effective, the recurring giving model is not without its pitfalls. Credit card expirations can unexpectedly deprive schools of donors, as can waves of canceled credit cards that accompany major data security breaches such as the 2015 Target incident. Additionally, the “set it and forget it” attitude can lead donors to neglect giving upgrades, which creates different challenges. Finally, institutional giving systems may not be set up to accept perpetually renewing gifts, allowing some giving commitments to lapse at the end of the fiscal year and requiring a renewal push from the advancement office.

Four Recommendations for Side-Stepping Common Obstacles



Expirations

Credit cards hit expiration date and donors do not renew



1 Proactive Outreach

Segment upcoming expirations for high touch pre-renewal cultivation



Fraud

Unexpected cancellations lead to lost gifts



2 Multichannel Reminders

Formalize plans for multiple renewal touches through diverse channels



Donor Inertia

Monthly donors forget about their gift and do not upgrade



3 Annual Upgrades

Solicit for larger monthly gifts on donation anniversaries



Infrastructure

System is unable to process open-ended recurring gifts



4 Technical Workarounds

Set the default pledge length to exceed the credit card expiration date

Source: EAB interviews and analysis.

Get Donors into the Habit of Giving

The approaches discussed in this section have all focused on removing as many obstacles as possible to alumni giving, and on taking advantage of the increasing popularity of recurring giving to both grow donation streams and make them more reliable.

To the right of the page, the reader will find a number of questions that will be useful for annual giving staff to consider, as well as key takeaways from this section.

Next Steps for Heads of School

Questions for Your School's Annual Giving Staff



Integrate Affiliate Fundraising

- 1 What kinds of partnerships does the school have to generate passive income?
- 2 Which nontraditional donor constituencies should we target for inclusion in these efforts?
- 3 What channels should we be embedding partnership info into in order to generate more revenue?



Funnel Donors Toward Automatic Renewals

- 4 Can our online giving platform default to recurring gifts for appeals?
- 5 Are we able to log indefinite payments instead of timebound pledges?
- 6 What stewardship offerings do we provide monthly donors, and how do we push upgrades for them?

Key Lessons for Establishing Donor Giving Habits

- 1 **Explore partnerships with affiliate fundraising programs**
Identify digital vendors that offer easily accessible partnership programs that do not conflict with your school's brand; engage in those partnerships to gain a significant additional revenue stream that requires minimal investment to establish.
- 2 **Institute, promote, and explain an easy recurring giving option**
To capitalize on the "subscription economy," make it easy for donors to set up a recurring giving option; explain to donors why this is beneficial for both their interests and the school, clarify when and where this option exists, and highlight the option in advancement campaigns as much as possible.
- 3 **Build in safeguards to protect against common pitfalls of recurring giving platforms**
Prepare for challenges such as credit card expiration or donor inertia by conducting proactive outreach to donors and suggesting donation level upgrades.

Source: EAB interviews and analysis.



Appendix

- Strategies for Alumni and Student Data Collection
- Which Mobile Design Solution Is Right For Me?
- Mobile-Friendly Design in Practice
- Choosing the Right Crowdfunding Platform for Your Needs

Strategies for Alumni Data Collection

Also Available at EAB.com

Many members have expressed interest in developing more strategies to collect alumni data. The graphic included below contains 157 ideas for where and how to collect alumni contact and affinity information. In order to get the most out of this tool, we recommend printing the PDF version that can be accessed either through the hyperlink above, or by searching for the phrase "Strategies for Alumni Data Collection" on the EAB website.

Strategies for Alumni and Student Data Collection

Building Connections with Future Donors

Targeting Preexisting Networks

- Current Student Outreach**
 1. Student Newspaper Scavenger Hunt
 2. QR Codes on Dining Hall Flyers
 3. High-Profile Event Tie-In
 4. Off-Campus Door-to-Door Outreach
 5. Main Quad Tabling Program
 6. Campus-Wide Media Push
 7. Student Giving Cell Number Requirement
 8. Checkout Ask from Local Business Partners
- Faculty and Staff Initiatives**
 9. Coach-Driven Alumni Athlete Updates
 10. Alumni Information Ticketing System
 11. Faculty-Facing Update Portal
 12. Development Review Grid Criteria
 13. Staff Update Quotas
 14. "Friend a Senior" Staff Campaign
 15. Student Affairs Roadshow
 16. Coordinated Staff Blogging Campaign
 17. Faculty-Led Webinar Registration
 18. "Nominate an Alum" Faculty-Selected Focus Group
- Parent-Facing Prompts**
 19. Parent Association Outreach Campaign
 20. "Refer Your Child" Giveaway
 21. Exclusive Local Event Access
 22. Career Advice Tie-In
 23. Parent-Directed Student Information Form
 24. Homecoming Invitation Mail Campaign
 25. Parent-Friendly Magazine Response Card
 26. Transcript Address Request
 27. "In the Loop" Parent Calling Program
 28. Parent Weekend Phone Update Form
 29. Faculty Club Guestbook Sign-In
- Volunteer and Peer Updates**
 30. Volunteer Update Pool Allocations
 31. "Who Do You Know?" Campaign
 32. Six-Month-Out Multichannel Push
 33. Gift Confirmation Peer Update Upsell
 34. Pop-Up Prompts in Volunteer Portal
 35. Referral-Friend Giveaway Contests
 36. Unique URLs to Track and Reward Peer Sharing
- Student Organization Analysis**
 37. Yearbook Affinity Aggregation
 38. Student Organization Roster Submission
 39. Collegiate Link Data Pull
 40. Student Newspaper Archive Review
 41. Activity Fair Sign-Up Request
 42. Student Organization Forum Registration
 43. Athletics Roster Contact Submission
- Young Donor Pushes**
 44. Student Donor Survey at Gift Checkout
 45. Emergency Aid Fund Donor List
 46. Ask-Student Giving Campaign Designations
 47. Crowdfunding Trends Analysis
 48. Gift Designation Aggregation
 49. Philanthropic Passion Survey
 50. Social Media Campaign Outreach
 51. Nonprofit Giving History Email Quick-Poll

Capitalizing on High-Impact Moments


- Orientation and First Year**
 52. First-Year Advising Form
 53. RA Orientation Questionnaire
 54. "Lifelong Community" Orientation Speech
 55. First-Year Seminar Presentation
 56. Activity Day Registration Table
- Senior Year**
 57. Senior Contact Update Ambassadors
 58. Embedded Class Gift Vowing Ask
 59. Senior Donor Gift Designations
 60. "Last Meal" Dining Hall Postcards
 61. Senior Survey Submission Requirement
 62. Doorknob Hangers for Graduating Seniors
- Commencement**
 63. Volunteer-Driven Pre-Ceremony Collection
 64. Cap and Gown Pickup
 65. Contact Ask from Official Photographer
 66. Graduation Program Insert
 67. Update Postcards on Graduation Chairs
 68. Graduation Pins for Updates
 69. Commencement Program QR Code
 70. Pre-Ceremony Jumbotron Ad
 71. Ceremony Exit Drop-Off Box
 72. Post-Graduation Next Steps Email
 73. Alumni Affairs Reception Ask
 74. Email Forwarding Walk-Through
- Alumni Gatherings**
 75. iPad Check-In Contact Confirmation
 76. Registration Table Update Postcard
 77. Seamless Integration in Pre-Event Registration
 78. Speaker Pitch with Synchronized Email Push
 79. One-on-One Staff Prompt
 80. Mobile Card Reader Checkout Ask
 81. Event Exit Drop Box
 82. Follow-Up Email Hyperlink
 83. Reunion Event Mobile Push
 84. Homecoming Response Card
 85. Alumni Weekend Mobile Campaign

Incentivizing Connectivity

- Contests and Raffles**
 86. Graduation "Bucket List" Contest
 87. Flash Raffles in Campus Spaces
 88. Free Homecoming Parking Raffle
 89. Post-Graduation Travel Check Raffle
 90. Facebook iPad Contest
 91. Summer Retreat Raffle
- Discounts and Giveaways**
 92. Alumni Association Discount Program
 93. Senior Week Pint Glass Giveaway
 94. School Pin Offer
 95. Spring BBQ T-Shirt Giveaway
 96. Local Business Discounts
- Recognition Programs**
 97. Alumni Honor Roll Recognition
 98. Consecutive Giving Society Requirement
 99. Commencement Program Notation
 100. Honorary Certificate Mailing
 101. Exclusive Event Access
- Career Assistance**
 102. Geocentric Alumni Networking App
 103. Career Services Networking Assistance
 104. Resume Information Aggregation
 105. Career Office Update Form
 106. Text Message Career Tips
 107. Career Fair Registration Requirement
 108. Career Services Webinar Registration Requirement
 109. Professional Society Forum Recruitment
 110. Career Services Homepage Networking Prompt
 111. Virtual Career Fairs
 112. Quid Pro Quo Networking Contact Exchange


Leveraging Diverse Communication Channels

- Social Media Tactics**
 113. Facebook Graph Search Data Mining
 114. LinkedIn Group Registration Requirement
 115. Personalized Social Media Outreach
 116. LinkedIn Job Mining Campaign
 117. Social Media Contact Information Campaign
 118. Facebook and Twitter Update Ads
 119. LinkedIn Group Homepage Prompt
 120. "Message List" Campaign
 121. Social Media Mention Tracking
 122. Hashtag Scanning and Outreach
 123. Alumni Retweet Campaigns
- Email Outreach**
 124. "Have You Moved?" Email Branding
 125. One-Click Email Questionnaires
 126. "Pass It On!" Viral Push
 127. "Where in the World Is..." Quick Response Outreach
 128. Peer-to-Peer Email Update Templates
- Website Prompts**
 129. Student Information Portal Quick Poll
 130. Alumni Affairs Homepage Ask
 131. Ticket Giveaway on Athletics Homepage
 132. University Homepage Campaign
 133. Mobile-Friendly Update Website
 134. Quick-Entry Website Fields
- Mobile Communities**
 135. "Hear It First" Campus News
 136. Mobile Philanthropy Quizzes
 137. Text Donor Name Requests
 138. New Community Member Raffles
 139. "Text Your Info" SMS Reply Campaigns
 140. Social Media Shortcode Advertisements
 141. Mobile Community Publicity Cards
 142. Community Recruitment at Commencement
- Alumni Magazine Tie-Ins**
 143. Rotating Theme Story Tie-In
 144. Major-Specific Advertisement
 145. QR Code Contact Information Ask
 146. Pull-Out Response Card
 147. "Find Your Friends" Website Tie-In
- Phonathon Touches**
 148. Alumni Association Welcome Call
 149. Young Alumni Association Targeting
 150. "First Day of Classes" Alumni Calling Campaign
 151. Student-Led First Year Out Interviews
 152. Affinity Group Phone Outreach
- Third-Party Resources**
 153. Alumni Data Mining Services
 154. Credit History Search
 155. Social Marketing Provider
 156. National Change of Address Database
 157. Customized Mobile Alumni Portals



Education Advisory Board

Advancement Forum



Learn more at eab.com

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Source: EAB interviews and analysis.

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eab.com

‘Which Mobile Design Solution Is Right for Me?’

Three Approaches for Catering to Mobile Traffic

Selecting the right mobile design approach for your school involves considerations beyond mere appearance. The graphic below provides guideposts for balancing six factors that are part of any mobile design decision.

Consideration	Responsive Design	Adaptive Design	Mobile Optimized
Retrofit with Existing Site			
Forward Compatibility			
SEO Optimization			
Customizable User Experience			
Performance and Load Time			
Ease of Maintenance			



Source: EAB interviews and analysis.

Mobile-Friendly Design in Practice

Excellent Examples: Punahou School and Princeton Day School

While few independent schools have created fully optimized mobile giving pages, Punahou School and Princeton Day School have taken that step. The clear, streamlined interface and small number of form fields present on the screens displayed below are perfect examples of giving processes that prioritize donor convenience.



Verizon 2:35 PM 79%

KU'U PUNAHOU

MENU MAKE A GIFT

MAKE A GIFT

YOUR INFORMATION


First Name *

Last Name *

Maiden Name

Class Year

Email *



Verizon 2:37 PM 79%

KU'U PUNAHOU

MENU MAKE A GIFT

YOUR GIFT

Make a

Directed to *


Special instructions?

☐ Yes

RECOGNITION

Punahou selects some of its donors to be recognized by first name, gift amount and direction, and relationship to the school - alumni, parent, etc. - on its website. By checking the following box, you are giving your consent to be included as one these selected donors.

☐ Yes, Punahou may publicly recognize my gift online



Verizon 11:16 AM 80%

Amount of Gift or Pledge: \$*

Donor first name:*

Donor last name:*

Designation*

☐ Annual Fund - Unrestricted

☐ Annual Fund - Athletics

☐ Annual Fund - Arts

☐ Annual Fund - Faculty Support

☐ Annual Fund - Financial Aid


Additional Information

Corporate:

☐ This donation is made on my behalf by a co

Anonymous:

☐ I prefer to make this donation anonymously



Verizon 11:17 AM 80%

Comments:

Matching Gifts

☐ My company will match my gift

Tribute Information

Type

Please Select...

☐ Mail a letter on my behalf to

☒ Please send a confirmation email to the address below:

my email address

SUBMIT AND PAY

Sources: Punahou School, "Ku'u Punahou" webpage; Princeton Day School, "Support PDS" webpage.

Choosing the Right Crowdfunding Platform

How to Answer the Crowdfunding Platform Question

Crowdfunding can be a powerful tool for advancement offices hoping to expand their donor pool and increase young alumni participation. To the right we have included a small sample of current vendors in the crowdfunding space, as well as a checklist to help interested schools evaluate which vendor is best suited for their purposes.

GIVECAMPUS

GIVECORPS



Crowdfunding Vendor Checklist

- What is the build/implementation timeline?
- What are the functionalities of the platform?
- How often does the platform need to be updated?
- What type of customer service support does the vendor offer?
- Will institutional staff need special training to use the platform?
- What are the ongoing partnership costs?

Source: EAB interviews and analysis.

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

**EAB**

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