

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



EAB

Royall & Company

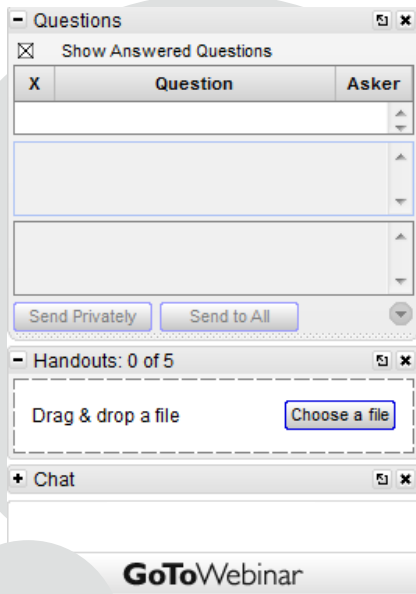
Innovations in Annual Fundraising

Using Breakthrough Strategies to Drive Higher Participation

Before We Begin...

A Few Housekeeping Items

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



The screenshot displays the GoToWebinar interface with three main sections:

- Questions:** A section titled "Questions" with a checkbox for "Show Answered Questions". It contains a table with columns "X", "Question", and "Asker". Below the table are two empty text input fields and two buttons: "Send Privately" and "Send to All".
- Handouts:** A section titled "Handouts: 0 of 5" with a dashed border. It contains the text "Drag & drop a file" and a button labeled "Choose a file".
- Chat:** A section titled "Chat" with a plus icon and a close icon. It contains a large text input field.

The GoToWebinar logo is visible at the bottom of the interface.



Today's speakers:



Synthia Reader

Strategic Leader



Dana Gresko

Manager, Analytics
and Fundraising Strategy

- 1 EAB and Royall & Company
 - 2 Decline in Participation Threatens Future Funding
 - 3 Innovative Strategies to Drive Higher Participation
-

Leveraging Data and Insights

Serving Higher Education Since 1989

► Our Mission

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



► Our Distinctive Approach



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



...Across the Nation's Leading Campuses

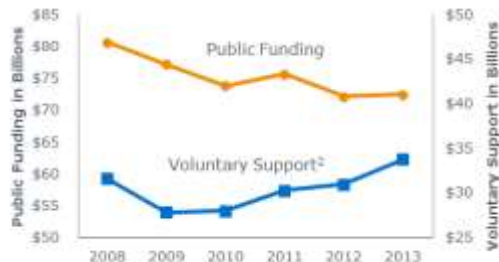
Abilene Christian Univ.	Swarthmore College
Bates College	Tulane University
Baylor University	Univ. of Central Florida
College of New Rochelle	Univ. of Central Missouri
Fordham University	University of Denver
Jacksonville University	University of Memphis
Kent State University	University of Wisconsin
Longwood University	Wake Forest University
Mary Baldwin University	Whitman College
Mississippi College	Wittenberg University
Simmons College	



Decline in Participation Threatens Future Funding

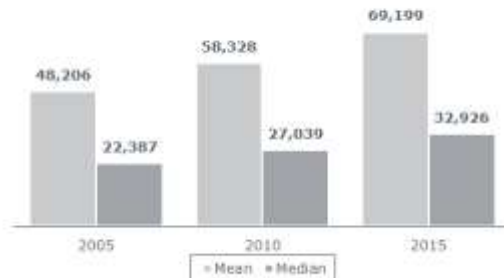
Universities Increasingly Reliant on Fundraising

National Center for Education Statistics
Revenue by Source (2008-2013)¹



Good News: Alumni Populations Continue to Grow

Mean and Median Alumni of Record
VSE Survey, 2005-2015



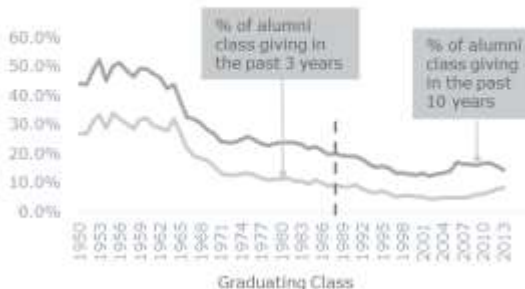
The Bad News: Participation Rates in Free Fall

Average Alumni Participation Rates (APR),
VSE Survey, 1975-2015



Institutions Extremely Dependent on Older Donors

Undergraduate Alumni Giving Across Aggregated Royall Clients



1) In real 2013 billions of dollars

2) Individuals compose 43% of total voluntary support

Rigorous Research Fuels Innovative Strategies

Data-Driven, Annual Fund Best Practices Drive Higher Participation

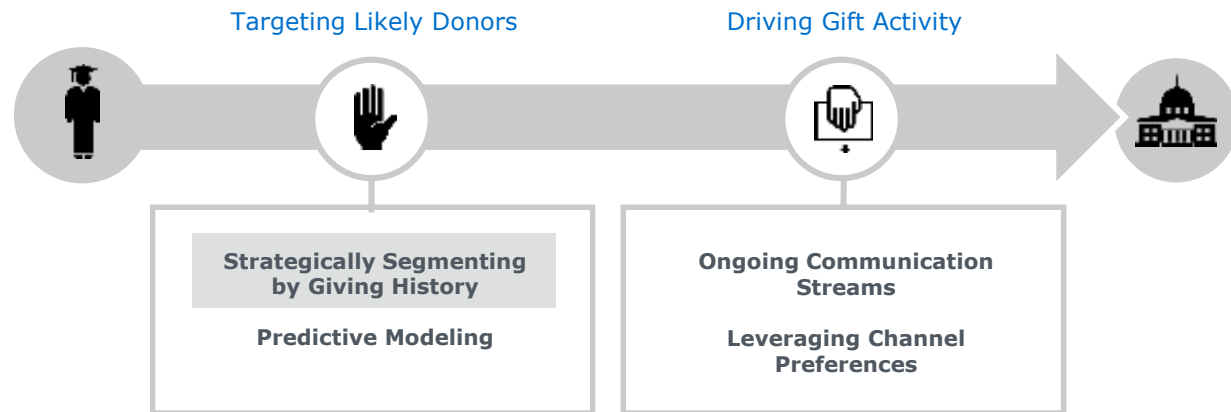
Royall & Company's Commitment to Innovation

100+

Data and analytics professionals on staff

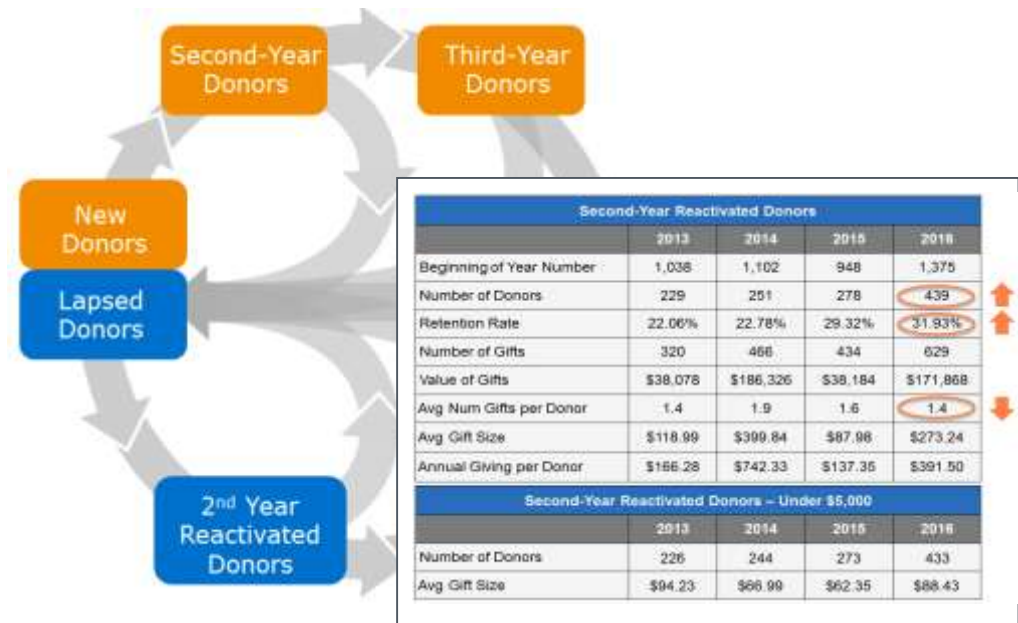
300+

A/B tests performed annually

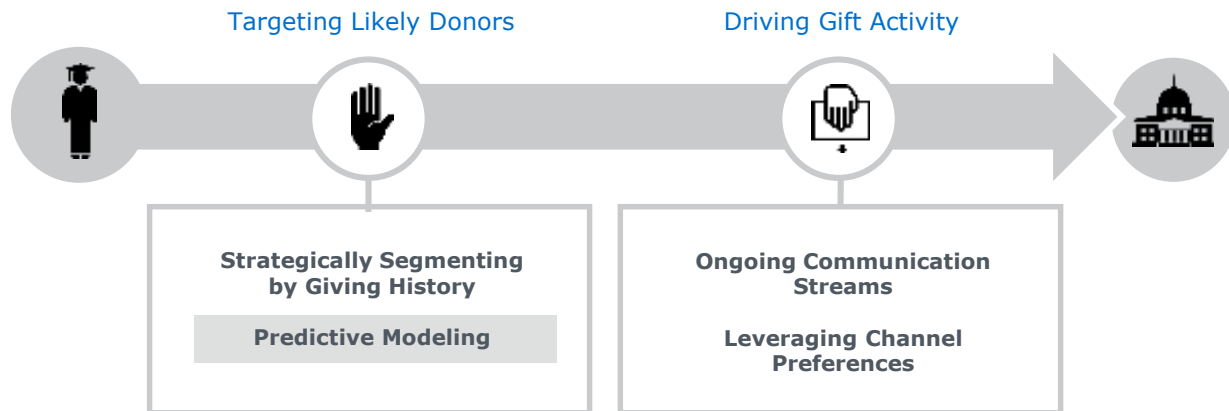


The Biggest Indicator of Propensity to Give

Segmentation by Individual's Past Actions



Beyond Segmentation



Some Alumni Are More Worthy of Your Resources

More than One-Third of Your Alumni Are Happily Disconnected

10%

of alumni are very connected to alma mater

43%

of alumni are not connected to alma mater at all

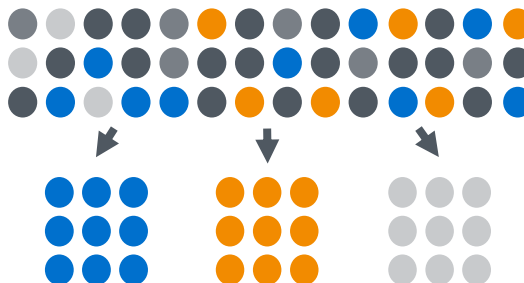
84%

of alumni are satisfied with their current level of connectivity

**From a
“One Size Fits All”
Approach...
...to Targeting
Nuanced Groups**

(360° modeling)

Universe of Never-Givers



Those Most Likely to Donate

So, Whom Should You Target?

Behavioral Data Effectively Identifies Donors Most Likely to Give



Transactional Giving History and Engagement Data

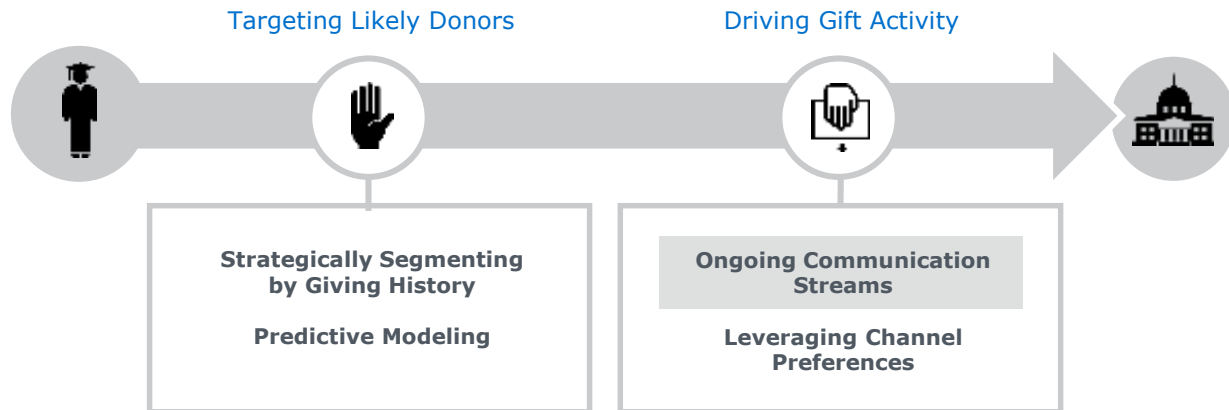
- ✓ Recent digital engagement
- ✓ Event attendance
- ✓ Updated account information
- ✓ Email type
- ✓ Modeled profile of likely donors



External Data Sources of Charitable Giving

- ✓ Frequency and amount
- ✓ Charitable categories (education, the arts, etc.)
- ✓ Political giving

Utilizing Data to Empower Engagement



Year-Long Communication Stream Tested

Question: Is building a relationship with previously disconnected constituents impactful?

Test: Launched a specially branded year-long communication stream to never-giver alumni at three schools. Communications included a mix of engagement elements with solicitations.

Control Group



Never-Givers and Donors

Contacted along with donors at key solicitation periods (Calendar Year-End, Fiscal Year-End, etc.)

Included in a never-giver version within existing campaigns—no separate branding for never-givers

Advancement communications received are almost exclusively solicitations

Never-Givers Cultivated for Engagement

Test



Never Givers

Donors

Built a year-long conversation with disengaged never-givers

Alternated engagement and solicitation pieces

Branded separately

Included small-dollar asks to reinforce that a gift of any size will count toward participation

Includes small back-end premium thank-you gift

Thematic Phases

Phase 1, September:

Cultivation and update info

Phase 2, October: Poll

Phase 3, Nov & Dec:

Calendar Year-End

Phase 4, January - March:

Ambassador engagement

Phase 5, March - June:

Fiscal Year End

Sample Calendar

Deployment	Date	Theme	Notes
Email 1	9/18/2016	Info update	
Email 2	9/24/2016	Info update	
Email 3	10/6/2016	Poll question	
Email 4	10/14/2016	Poll question	
Email 5	10/29/2016	Poll question	
Mail 1	11/16/2016	CYE - Infographic	
Email 6	11/18/2016	CYE - Infographic	
Email 7	11/29/2016	CYE - Infographic	Giving Tuesday
Email 8	12/8/2016	CYE - Infographic	
Email 9	12/19/2016	CYE - Infographic	
Email 10	12/29/2016	CYE - Infographic	Deadline
Email 11	12/31/2016	CYE - Infographic	Deadline

Results Show Significant Lift in Donors Acquired



66%

Higher response rate
from individuals
who received
the test stream¹

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Sample Calendar

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Email 4	10/14/2016	Poll question	
Email 5	10/29/2016	Poll question	
Mail 1	11/16/2016	CYE - Infographic	
Email 6	11/18/2016	CYE - Infographic	
Email 7	11/29/2016	CYE - Infographic	Giving Tuesday
Email 8	12/8/2016	CYE - Infographic	
Email 9	12/19/2016	CYE - Infographic	
Email 10	12/29/2016	CYE - Infographic	Deadline
Email 11	12/31/2016	CYE - Infographic	Deadline

Examples

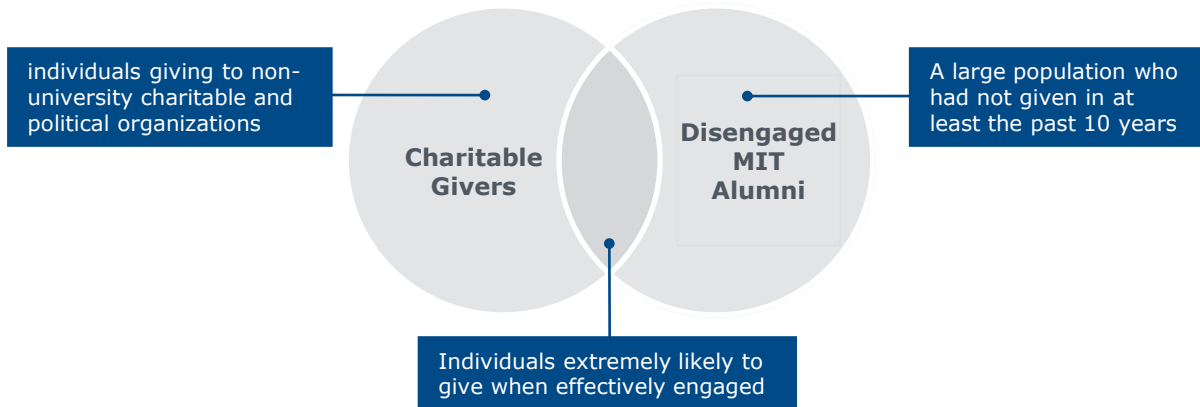
The collage displays several screenshots of the Jacksonville State University Dolphin Squad Campaign website, illustrating the user journey:

- Registration Page:** Features the "DOLPHIN SQUAD CAMPAIGN" header, a "Join the Campaign" button, and a form titled "We want to stay in touch with you!". The form includes fields for First Name, Last Name, Preferred Email, and Mailing Address, with a "Save" button at the bottom.
- Confirmation Page:** Displays a video of two athletes in lacrosse gear. Below the video is a "Join the Campaign" button.
- Survey Introduction Page:** Titled "Your opinion is important to us!", it explains the importance of the user's input and includes a "Submit" button.
- Survey Questions:** Shows a question: "What was the most important part of your college experience?" with four radio button options: "Professors who changed my life", "The variety of academic programs", "Hands-on learning or internships that changed my life", and "Student life and the community that shaped my experience".
- Thank You Page:** Titled "Hi, Dana! We're glad you're here.", it thanks the user for joining and includes a "Join the Campaign" button.
- Ready to show your JSU Pride? Page:** Features a large number "1" and text: "Because you could help fund a research project that leads to a cure for cancer." It includes a "Join the Campaign" button.
- Footer:** The bottom of the page features the Jacksonville State University logo and the text "Jacksonville State University" and "Join the Campaign" button.

MIT Reaches Out to Disengaged Alumni



Massachusetts Institute of Technology



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[illegible]

The sequence of screenshots illustrates the onboarding process for a new user on the Pit platform. The first screen displays the Pit logo and a personalized greeting, "Hello, Dana." Below this, a message states, "Thank you for registering on Pit and PIT Learning products with us. Welcome!" The second screen features a yellow background with the text "Welcome to PIT!" and a "Please message us" button. The third screen shows a "We want to follow up with you" message. The fourth screen displays a "Thank you for your feedback" message.

MIT Reaches Out to Disengaged Alumni

Engagement Campaign Follow-Up



Dear Mrs. Gresko,

Thanks to the thoughtful, heartfelt and inspiring welcome notes from you and many of your fellow alumni, this year's entering class of graduate students is feeling right at home at MIT.



Hundreds of students from MIT's various graduate programs enjoyed reading the notes during Orientation.

We were thrilled to receive so many notes. The memories and words of advice you gave them made me proud to be part of such a remarkable community.

If you're interested in learning about other ways to stay connected

Fall Campaign



Massachusetts Institute of Technology
500 Memorial Dr., Bldg.
Cambridge, MA 02139

XXXXXX

Dear XXXX,

You know from experience that the Massachusetts Institute of Technology doesn't just watch history go by. We make it. Our students and faculty have always driven cutting-edge research and made world-altering advances in technology and the sciences—much of which would not be possible without alumni support.

This year, MIT celebrated 100 years of making history in Cambridge. As we commemorate our past, we also look forward to the future. If alumni like you are involved, I know it will be extraordinary. Together we can build a better world.

That's why I invite you to make a gift to MIT today.

Please use the enclosed reply form or visit www.advanceMIT.org/fall2016

Even \$500 will help strengthen our institution and create opportunities for current and future generations to continue making history at MIT.

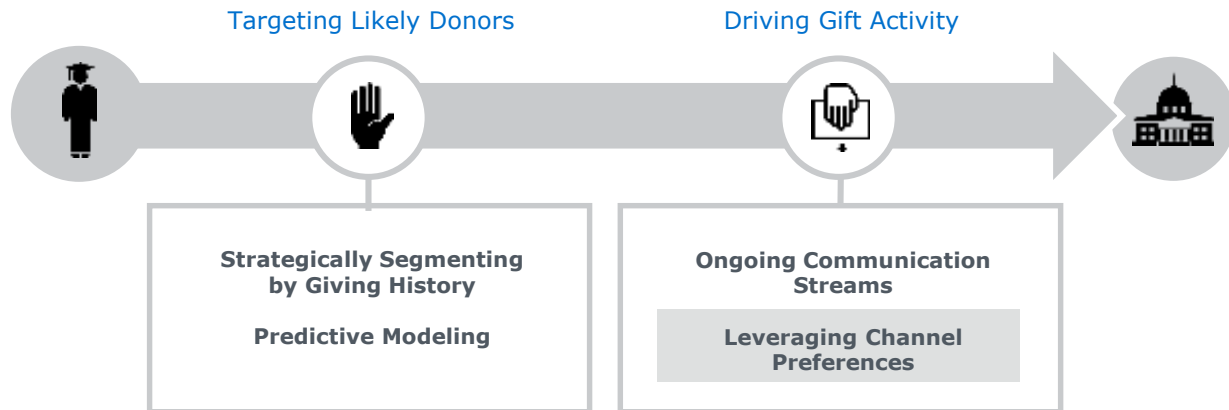
Here's why: Your gift is an endorsement of your graduate school experience at the XXXX Degree School XXXX. When XXXX Department XXXX alumni like you give back, it shows that you value your education. Every endorsement builds confidence in major donors, which then helps us secure gifts and grants that touch every part of the MIT experience.

It also helps us continue to recruit truly the brightest minds in the world into our institution. As our alumni network grows stronger with each new graduating class and as members of our community remain leaders in their fields, all of us benefit.

XXXX, I hope you will accept my invitation to support MIT today. Even a small gift will make a big difference!

Sincerely,

Utilizing Data to Empower Engagement

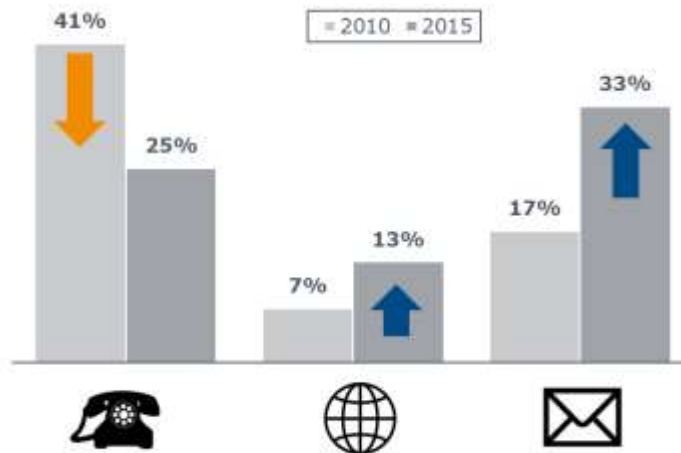


There Is No Silver Bullet

Reaching Donors Where They Are: Right People, Right Time, Right Place

As Phonathon Becomes a Supporting Medium, Direct Mail and Web-Based Responses Rise

Donor Channel Selection for Gift



A Higher-Touch Reminder to Give

Phonathon Targets Giving Page Drop-Off to Capture Almost-Givers

Benefits of Phone Follow-Up at the University of Memphis

Ubiquity



Deploys **multichannel strategy** to effectively reinforce the ask

Urgency



Inspires **immediate action**, addressing main impediment to giving

ROI



Uses valuable student caller time on **high-propensity** prospect pool

Closing the Giving Gap

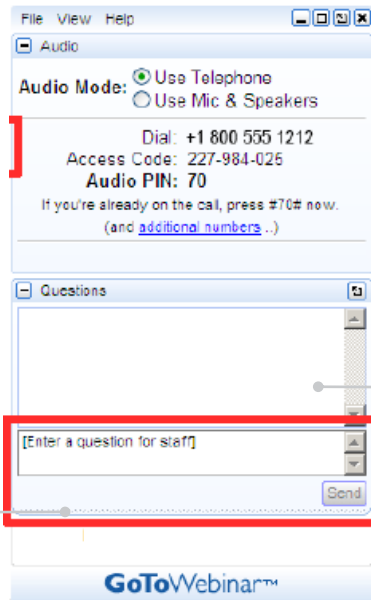
	Attempts	Pledges	Pledged Dollars	Average Pledge
General Phonathon (Spring 2015)	112,627	214	\$8,935	\$41.75
With Drop-Off Targeting (Spring 2016)	63,778	237	\$12,536	\$52.89
Year-Over-Year Change	-43.4%	+10.7%	+40.3%	+26.7%

Less effort...

...and more revenue

How to Submit Questions to Our Panelists

Enter a Question in the Question Panel



The screenshot shows the GoToWebinar interface. At the top is a menu bar with 'File', 'View', and 'Help'. Below it are two main panels. The 'Audio' panel contains the following text: 'Audio Mode:' followed by two radio buttons, 'Use Telephone' (which is selected) and 'Use Mic & Speakers'. Below this, it says 'Dial: +1 800 555 1212', 'Access Code: 227-984-025', and 'Audio PIN: 70'. A note at the bottom of the Audio panel says 'If you're already on the call, press #70# now. (and [additional numbers](#) ..)'. The 'Questions' panel is below the Audio panel. It has a large text input field with the placeholder text '[Enter a question for staff]'. To the right of the input field is a vertical scrollbar. At the bottom right of the input field is a 'Send' button. A red rectangular box highlights the input field and the 'Send' button. Below the Questions panel is the 'GoToWebinar™' logo.

Type your question
and hit Send

The presenter
may answer the
question here or
respond verbally

Run Annual Campaigns That Keep Giving Back



Deploy strategy
with **data
analytics**

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



Optimize
**campaign
design**

- Customized creative
- Full online and print production



Drive **campaign
performance**

- Messaging implementation
- Performance monitoring and reporting

▶ The Royall Difference



Targeting and
Timing Expertise



Rigorous
Analytics



Creativity

For More Information



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