



Maximizing Alumnae Engagement and Giving

The Changing Face of the 21st Century Donor

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Advancement Forum

Is \$1B the New \$100M?

Mega-Campaigns Have Reshaped the University Fundraising Landscape

Recent Billion-Dollar Plus Campaigns



\$6B



\$5B



\$2B



\$1.2B



\$1.5B



\$2B

48

\$1B+ campaigns currently underway at institutions of higher education

87

\$1B+ campaigns completed in last 15 years at institutions of higher education

Onwards and Upwards

"The Board keeps setting more ambitious campaign goals and they want them concluded in shorter and shorter amounts of time."

Vice President of Advancement, Master's College



The Road Ahead is a Challenging One...

...And the Old Playbook Isn't Enough

The Mega-Campaign Today...



Increased dollar goals



Compressed time frames



Historic levels of student debt



More diverse alumni segments



Questions about the overall value of higher education



...Is Complicated by Larger Questions

**The
Economist**

Is College Worth It?

**The
Boston
Globe**

*The College Debt Crisis is
Even Worse Than You Think*

**The
New York
Times**

Wrestling With Title IX

We Must Act Now

"Anyone in my role as vice president overseeing an advancement shop is **crazy to think you can continue doing the same things the same way and get anything other than the same results.**"

Matthew T. Lambert
Vice President for Advancement, the College of William and Mary



More Diverse Than Ever Before

Demographic Shifts Alter Campus and Alumni Composition

Campus Diversity on the Rise



A New Argument for More Diverse Classrooms



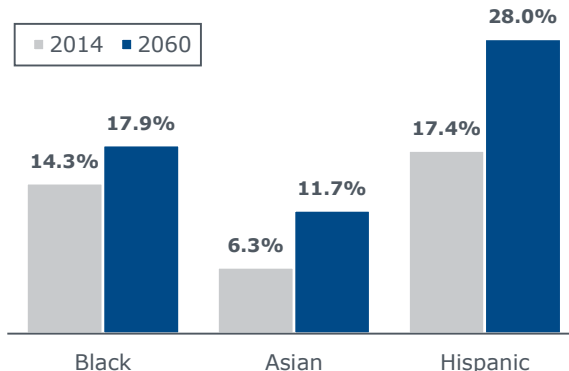
Why Does Diversity Matter at College Anyway?



First-Generation Students Unite

Continued Growth in Diversity

Projections of US Population Demographics



Diversity North of the Border Remains Strong

16.25M

Individuals in Canada who identified as being part of a visible minority group

47%

Percent of Toronto residents who are members of a visible ethnic minority

20%

Percent of the total Canadian population who are immigrants to Canada

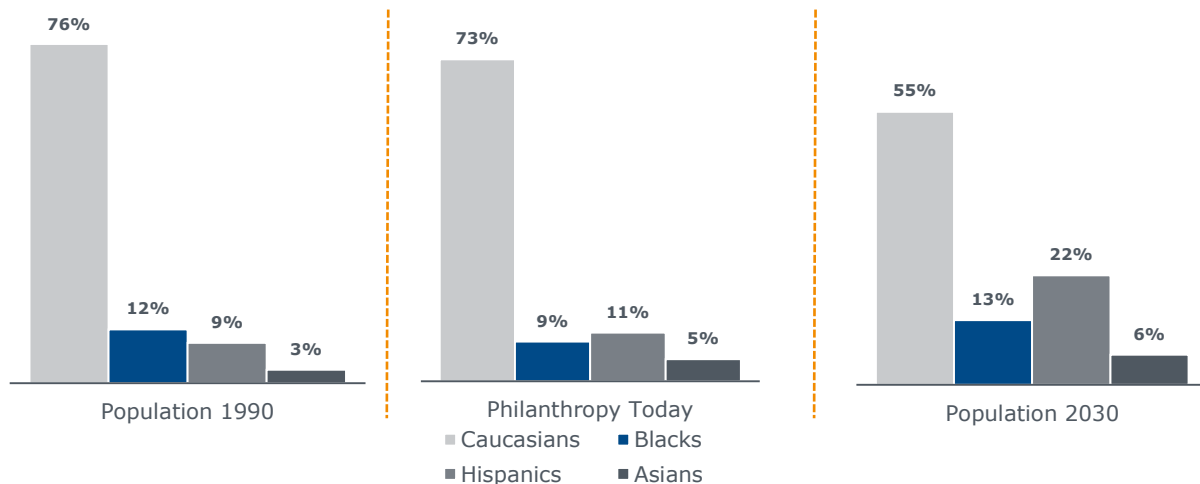
Source: Statistics Canada, [Population and Demography](#), Government of Canada 2016; Colby, S., ["Projections of the Size and Composition of the U.S. Population: 2014 to 2060,"](#) US Census Bureau, March 2015; Advancement Forum interviews and analysis.

Fundraising Like it is 1990

Our Donor Demographics Today Look Like America Did Two Decades Ago

Is George H.W. Bush Still President?

Comparing Population Demographics and Giving Behaviors Today



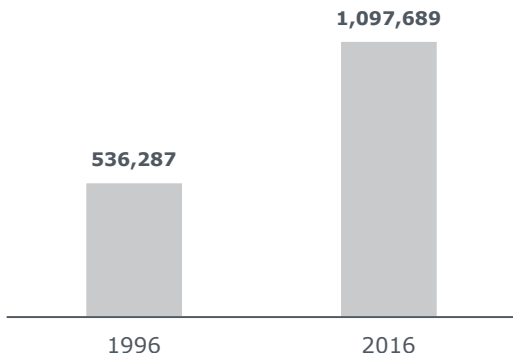
Source: Colby, S., "[Projections of the Size and Composition of the U.S. Population: 2014 to 2060](#)," US Census Bureau, March 2015; Gasman, M. and Nelson Bowman III, *Engaging Diverse College Alumni: The Essential Guide to Fundraising*, Routledge, 20Colby, S., "[Projections of the Size and Composition of the U.S. Population: 2014 to 2060](#)," US Census Bureau, March 2015; 14 Rovner, S., "[Diversity in Giving](#)," Blackbaud, 2016; Advancement Forum interviews and analysis.

If You Don't Engage Them Someone Else Will

Nonprofits Experimenting with Initiatives for Diverse Groups

Dramatic Growth in Nonprofit Sector

Number of Public Charities, 1996-2016



“We have seen an explosion in the non-profit sector in the past decade. We are constantly trying to speak to new and diverse donor audiences.”

Vice President of the Foundation
Regional Nonprofit Organization

Courting Hispanic Donors



Changing Lives One Smile at a Time

Multimedia Efforts

- Ran a series of television commercials in Spanish language
- Included more children from Spanish-speaking countries in images
- Ran commercials on *Discovery en Español*, *History en Español*, and *Univision*.

Direct Mail Acquisition Results

	English	Spanish
Response Rate	.88%	.98%
Average Gift	\$20.63	\$22.45

Source: Sandoval, T., "Operation Smile Courts Hispanics With Eye on Population Shift," *The Chronicle of Philanthropy*, May 3, 2016; "Facts About Nonprofits," National Center for Charitable Statistics; National Center for Charitable Statistics, "The Number and Finances of All Registered 501(c) Nonprofits,"; Advancement Forum interviews and analysis.

Tried and True No Longer Works

The Challenges in Engaging Diverse Alumni

Status Quo Engagement and Solicitation Techniques

- ✗ Country club hosted gala dinner
- ✗ Standard web-based donor portal
- ✗ Alumni weekend solicitations
- ✗ Nonspecific text-to-give campaign



"Why are they asking me to support an endowment, I am not even sure what that is."

"How will this impact students who looked like me?"

"Why are there no women on this alumni panel?"

"I thought things had changed since the 1980s, why are these so few students of color in these pictures?"



A Different Experience

"We have had a lot of great diverse alumni come through our doors. At first glance they don't have very much in common with each other, but upon closer inspection **it is clear that they all share the common bond that their university experience was different than 'the norm.'** Their relationship with us was just different. Maybe better than, maybe worse than, but regardless it was different."

*Vice President for Advancement
Private Research University*

Pressure From All Sides

Majority-Minority on the Horizon, Investing Now to Ensure Sustainability

Tyranny of the Immediate



- Yearly goal
- Campaign launch
- Participation rates
- Board priorities



Diverse Alumni Requirements



- Time
- Effort
- Consistent focus
- Investment



"What Am I to Do?!"

"I know I must do something, but I have pressure coming from all sides, where do I even begin? I fear taking a step in one direction to realize only months later I should have went another way."

*Vice President, Advancement
Baccalaureate College*

Investing Now For a Stronger Future

"Diverse alumni take a little longer to bring around to the development side of the house. We need to prove to them that the way in which they were treated on campus has changed and will remain so after the check is signed."

Vice President for Advancement, Public Research University





“I Depend on Me”

The Growing Financial Clout of Women in the 21st Century



Greater Wealth

45%

Of American millionaires are women

“**Women have more money now than they ever did before.** That’s great news for us, as they are more philanthropic than men– but we have troubling news in that we have not historically engaged them– we have lots of work to do.”

*Vice President, Advancement
Baccalaureate Institution*



Increased Decision-Making

+59%

Growth in female owned businesses since 1997

“**Women are becoming more vocal actors in philanthropic decisions.** In donor households headed by women, we have seen those gifts be substantially larger than those headed by men.”

*Vice President, External
Canadian Institution*



Longer Life Expectancy

70%

Percent of intergenerational wealth transfer projected to inherit

“**Women are living longer and longer than men– and they are not only going to have more money in their own right, they are also going to inherit trillions of dollars** across the next 20 years too!”

*Vice President Development
Master’s Institution*

Wielding Philanthropic Power as Never Before

Female Donors Hold Significant Potential for University Advancement

50%

Of single women who would give to charity compared to 40% of single men

90%

Of philanthropic decisions in high-net worth households where women are the sole decision maker or equal partner

156%

More given to charity by the wealthiest 25 percent of women compared to their male peers

Much Work Still to be Done With This Segment

Stereotypes About Women Donors

- Lack confidence in financial decision-making
- Need to be taught how to use philanthropy to strategically advance their values
- Aren't comfortable talking about money or fear outliving their money

Structural Barriers

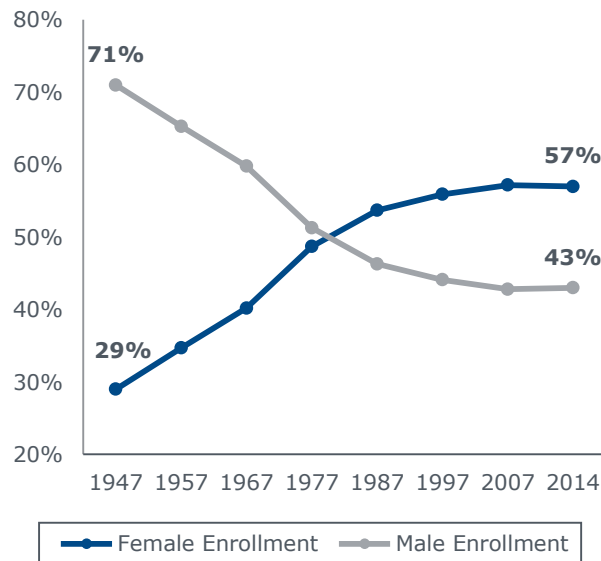
- Heavy reliance on transactional, "match your peers" driven fundraising asks
- Default donor profile in software is single earner, male headed household
- Thank you notes go out addressed first (and sometimes only) to the husband

A Troubling Trend in Higher Education

Enrollment Versus Giving Trends Among Female Alumni

College Enrollment Trends

Percentage of First-time Students by Gender



Where Are the Women?

“Our enrollment statistics showed that we were moving towards a majority of women on campus, but our giving statistics showed that most of our donors, at all levels, were men. That was a troubling trend to us.”

*Associate Vice President for Development
Master's Institution*

\$8K vs. \$19K

The average lifetime giving for women alumnae of [Duke University](#) was about \$8,000, while men gave \$19,000

Pastel Invites, Lunches, and Finance 101

A Programming Legacy of the 1980's and 1990's

Status Quo Women and Philanthropy Programs

1



College invites high net worth women alumni to attend day-long seminar

2



Event emphasizes financial planning and money management

3



Local non-profit gives lunch talk about their work with high school students

4



Attendees network with other alumni, faculty, and college staff

Common Challenges and Barriers



Time consuming for staff to organize



Questionable return on investment



Agendas not focused on institution specific updates and causes



Not resonating with alumnae



"I own my own business. I don't need a financial education workshop."

"I am a lawyer with skills as well as community connections but they didn't seem to be interested in that."

"The university never asked me for anything. However, I did become a donor to the local non-profit that presented. It is a great cause."

Women Donors Want Greater Connections

This Trend Unlikely to Change in the Near Future

What Women Donors Want

- Encourage greater involvement with organization
- Impact stories with results data
- Facilitate peer-to-peer relationships
- Leadership and networking opportunities
- Long-term thinking
- Research and investigation
- Increased connection with charity

Donating to Alma Mater Isn't a Priority for Millennial Alumnae

77%

Of female millennial alumni have given to their favorite **non-profit** cause

44%

Of female millennial alumni have given to their **alma mater** (56% of male millennial alumni have donated to alma mater)



Of Course They Are Not Giving, We Are Asking Them to Lunch!

"Millennials want to give their time, skills, and dollars. They also want to see their impact....they are willing to work hard, but they want to be hands on. We need to do more than ask them to lunch."

*Assistant Vice President, Alumni Relations
Master's College*

Source: Bowman, M., "[Mind the Gender Gap – Women's role in philanthropy – A Canadian Perspective](#)," *Fundraising Compass*, 11 August, 2015.; Stiffman, E. "What Women Donors Want," *The Chronicle of Philanthropy* 7 October 2015; "Millennial Alumni Report," *Achieve Guidance Research*, 2014, p 15; Feldman, D., [Millennial Impact Report](#), *Achieve Research*, 2015; Advancement Forum interviews and analysis.

Rethinking Alumnae Philanthropy

A Culture Shift at William & Mary



Alumnae Engagement and Philanthropy

“It is imperative that we first engage women meaningfully in the life of the university. From there we can develop a strong pipeline of women leaders so that we ultimately see great increases in philanthropy. Our mantra is grow engagement, grow leadership, grow philanthropy.”

*Matthew T. Lambert
Vice President for University Advancement
William & Mary*



Alumnae Engagement Initiatives FTE



- Full-time staff position focused on alumnae programming, volunteer, and engagement opportunities
- Dual reports to advancement and provost's office to enhance cross-campus collaboration

Faculty and Staff Advisory Group



- 35 members charged with creating alumnae engagement that benefits academic departments and students
- Assist in growing relationships with alumnae volunteers and leaders

Women & Philanthropy Leadership Circle



- High-level women donors convened to provide input and feedback on engagement efforts
- Exploring models to grow alumnae giving to at least the same level as male graduates

Learn, Connect, Participate, and Support

Oregon State's Giving Circle Engages Alumnae with Campus Partners

Key Elements of the Women's Giving Circle

1



Contributions Secured

125 women each contribute between \$250 to \$1,000 annually to the giving circle to support campus projects

2



Grant Announcement

Campus units and groups learn of funding opportunity through an annual email from the Provost

3



Units Submit Proposals

Potential grantees craft and submit proposals to the Foundation office

4



Conduct Site Visits

Giving circle members visit funding applicants to learn about and vet projects

5



Online Voting

Members complete online ballot to select projects for funding

6



Award Grants

Women's giving circle provided \$80,000+ to 13 programs and groups at OSU in 2015

Hands-on Involvement and Direct Impact

A Win-Win for Circle Members and Advancement

Sample Funded Projects by OSU's Women's Giving Circle

\$10,000

Sexual Violence Prevention Workshop Series to support university efforts to combat sexual assault on campus

\$2,500

Women in Physics Conference held on campus in January 2016 bringing together young women scientists

\$9,800

Stipends for learning assistant program, which facilitates active learning in large lecture courses in the College of Science

Key Logistics:

- Circle members have contributed over \$700,000 to OSU projects since 2003
- \$250-\$1,000 annual contributions required for circle membership
- One staff member from Annual Giving supports the circle as well as a 12 person steering committee
- Annual "Bring a Friend" campaign encourages circle growth

”

A Gateway for Philanthropy

“What we have seen is that the giving circle is a gateway for women to become involved in philanthropy. Some of them are already very philanthropic, but for some this has been a great way to onboard them to giving at OSU.”

*Kellie Parker
Senior Associate Director of Annual Giving
Oregon State University Foundation*

A Diversity of Giving Circle Options

Many Ways to Build Connections to the Institution and Other Women



Builds In a Mentorship Component

Expands Philanthropic Networks

Advises on Alumnae Engagement Strategy

✓ Includes opportunity for circle members to serve as career mentors to scholarship recipients

✓ 50/50 split of giving circle funds between college projects and local community nonprofits

✓ Members give advice on strategies for increasing alumnae engagement

✓ Circle members also participate in leadership training, cultural activities, and networking initiatives

✓ Participants vote to support projects after site visits and informal debriefs

✓ Enhances networks among current alumnae and gives them a space to engage with each other

✓ Five-year post-scholarship “re-seed” requirement instills a culture of philanthropy in student recipients

✓ Deepens circle members engagement with each other and community networks

✓ Creates a structure for recruiting the next generation of alumnae volunteer leaders

“Dynamic Women Making a Powerful Impact”

A Change in Focus at Women & Philanthropy at UCLA (W&P)

women & philanthropy

UCLA

Women & Philanthropy (1994)

- Established with the **goal of raising several hundred dollars** from women for the university
- Used “**opt-in**” **model** where donors had to join to access the programming and benefits
- **Founded by 15 members** who each gave a gift or pledge of \$25,000 for five year membership
- The group grew to **140** members

Revamped Program (2014)

- Changed to **recognition model** so all women who give at the qualifying levels are automatically welcomed into the network
- Added **new membership tiers** including University Leadership and Lifetime, for those whose giving to campus reaches \$250,000 to broaden opportunities for mentoring and engagement
- Revitalized effort to identify **leadership opportunities** for women at the university including boards and committees

1,870

Total members in W&P network in 2016

365

Positions held by W&P members on university boards and committees

\$611M

Total given by W&P members to UCLA since 1994

Women Alumni: The Path Forward

Reflection Questions and Potential Next Steps



Reflection Questions

- What does our institution's giving look like for alumnae as compared to the overall trends?
- Are our millennial alumnae giving at lesser rates than their male peers?
- What programming and initiatives do we currently offer for alumnae?
- How many of our senior volunteer leadership roles are currently held by women?



Potential Next Steps

- Explore whether alumnae would be interested in a giving circle
- Assess whether it makes sense to invest in dedicated programming for alumnae and/or a FTE to work with this segment
- Enhance the number of women on boards and committees through dedicated recruitment initiatives



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