



Connecting Alumni to a Cause

Part Four of the Winning Donor Mindshare Webconference Series

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Advancement Forum



Welcome to the Attention Economy

Fleeting Mindshare Makes It Harder to Win Alumni Donors

WIRED Attention Shoppers!

FORTUNE The Attention Economy
and the Implosion of
Traditional Media

THE WALL STREET JOURNAL 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.**”

Key Features of the Attention Economy



Information Overload

Individuals must sort through more information than every before



Split-Second Decisions

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



Top of the Inbox Wins

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



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

The Rise of Impulse Giving

Donor Loyalty Declines as Giving Options Grow

A Shift in Behaviors

“The next generation of donors have different philanthropic behaviors. **They do more one-off giving** than their predecessors. They come, they go. There’s been a shift away from doing checkbook philanthropy at the end of the year where you look up what causes you gave to last year and make those same gifts again.”

*Barbara Turman
AVP Annual Giving
Rutgers University*

Unpredictable

42%

Impulse Givers

Support a constantly shifting roster of nonprofits whenever the mood strikes

6%

Habitual Supporters

Make regular donations, but to somewhat random causes

17%

Selective Givers

Give spontaneously, but do so to a fixed set of causes

16%

Philanthropic Planners

Routinely give and deliberately select nonprofits to support¹

Predictable

1) Remaining 20% of respondents' survey answers did not place them into any one of the four categories.



Winning Donor Mindshare in the Attention Economy

Maximizing ROI Through Multichannel Annual Giving

Beginning at the End of the Annual Giving Pipeline



Make It Easy to Give



Opportunity Size



Population Size

Goal: Plug Leaky Renewal and Acquisition Pipeline

Cut Through the Noise



Opportunity Size



Population Size

Goal: Expand Pipeline to Include Interested Lapsed and Non-Donors

Connect Alumni to a Cause



Opportunity Size



Population Size

Goal: Augment Traditional Donor Constituencies with New Donors

Failing to Convince Skeptical Alumni

Millennial Alumni Skeptical about Giving to Higher Ed

Often very generous...

61%

Of Millennial donors
give to 3 or more
nonprofits annually

...but prefer charities...

75%

Would give to another
nonprofit before their
alma mater

...over higher education

55%

Have never donated
to their alma mater



Higher Ed Not Delivering on Impact

"It would never cross my mind to give to my school. If I can only give \$100, **you get to see that go so much farther with a smaller, more localized cause.** If you give \$100 to a school you might get a thank-you note. It almost feels like giving your money to the mall."

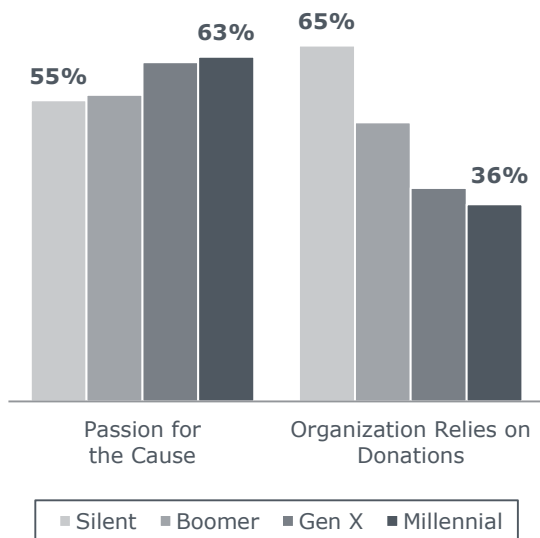
Katie Randall
25-Year-Old Augustana College Graduate

A Socially Conscious Generation

Millennials Support What's Meaningful to Them

Giving Motivations Diverge by Generation

Primary Reason for Giving

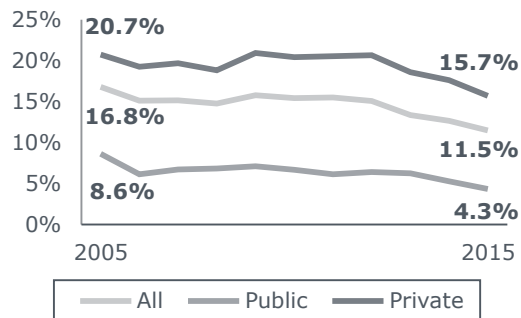


A Belief in Big Impact

52% Gave to a social issue in the past month

82% Would give to specific projects and purposes

Unrestricted Giving's Share of Total Giving



Source: 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; Advancement Forum interviews and analysis.

Crowdfunding Taps into Passion for Causes

Highlighting Targeted Ways to Make an Impact

Cornell University's Crowdfunding Platform



Cornell University Home Apply Log In

SMALL PROJECTS BIG IMPACT

Support Cornellians making a difference.



Cornell's Climate Smart Farming Program
By Allison M. Chatroghyan
Help Cornell researchers, extension specialists, and students develop cutting-edge tools and resources to support farmers with climate change decision making.

\$1,445

14% Funded 26 Donors 0 Days Left



Breaking Borders, Building Bridges
By Jennifer Weidman
Help Cornell students of Engineers Without Borders break borders by building a bridge to revive the community of Calcha, Bolivia!

\$17,946

119% Funded 148 Donors 0 Days Left



Far from Cayuga's Waters: Chorus & Glee Club in Mesoamerica
By Katherine Minnes
Help send the Cornell Chorus and Glee Club on a performance and service tour through Mexico and Guatemala to represent Cornell and share our music abroad!

\$31,080

124% Funded 234 Donors 0 Days Left

1

Focus on Impact

Platform branding underscores how small gifts make a difference

2

Passion-Oriented Projects

Funding opportunities mimic niche nonprofit organizations

3

Something for Everyone

Diversity of projects satisfies needs of various alumni groups

1,705

Gifts to Cornell crowdfunding, October 2015 to May 2016

Cause Fundraising Still Lives at the Margins

Crowdfunding Relegated to “Afterthought” at Many Universities



Limited Reach

- Projects promoted exclusively to leaders’ personal networks
- Potential donors outside of project leaders’ networks never hear of compelling campaigns

Unresponsive to Demand

- Overwhelming alumni interest in a particular topic rarely results in a campaign
- Projects chosen based on which students and faculty want to participate



Lack of Expertise

- Project leaders rely on intuition and minimal training to raise money
- Annual giving staff’s knowledge of best practices has little bearing on campaign outcomes

Narrow Appeal

- Esoteric projects overly focused on specific activities and goals
- Renewals complicated by lack of broader alignment with alumni social missions and goals



Putting Cause Fundraising at the Core

Moving from One-Off Projects to Systematic Efforts



Solicit for “Common Denominator” Causes

Circulate appeals for impact funds that resonate with a critical mass of alumni

Tactics

- High-Volume Impact Appeals
- Priority Population Message Testing



Enfranchise Campus Partners

Collaborate with faculty and staff to identify and solicit affinity groups

Tactics

- Ambassador-Driven Outreach Initiative
- Affinity Giving Campus Collaborations



Put Alumni in the Driver’s Seat

Organize giving opportunities into high-interest cause categories

Tactics

- Cause-Curated Giving Page

Lifting the Unrestricted Veil

Shine a Spotlight on Discrete Priorities that Donors Can Impact

The University of North Florida Changes Course

From Loyalty Appeals...

Old Model: Solicit for UNF's Greatest Needs

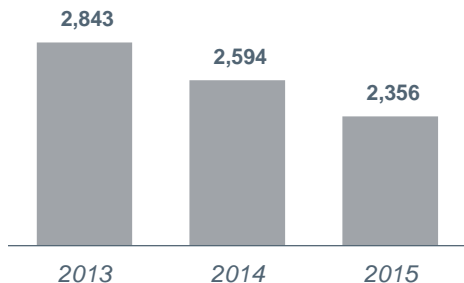
“If I ask someone to write me a \$100 check without sharing what for, few are going to sign on the dotted line.”

...To a Focus on Impact

New Model: Highlight High-Passion College Funds

“We started asking the colleges for the areas of opportunity people could make an impact and likely experienced themselves.”

Donor Counts Declining



College of Business Impact Appeal

Solicitation highlights three impact opportunities



Career
Center



Study
Abroad



Scholarships

0.51%

Response rate for appeal to mostly **lapsed and non-donor** population

Social Media Sheds Light on Non-Donor Affinities

Facebook Data Helps Identify Highest-Potential Solicitation Theme

MIT's Strategic Solicitation Development Process

Assess Engagement Analytics

Identify priority population to target

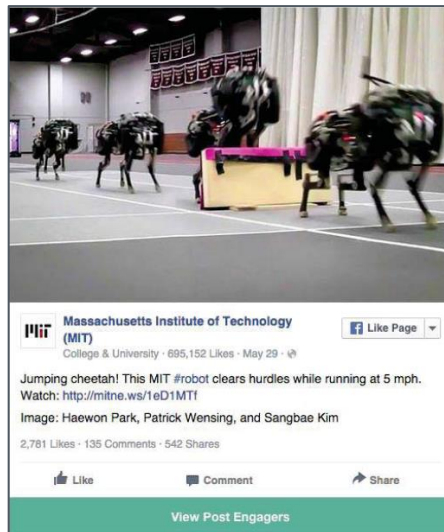
Analyze engagement data to find what resonates best

Craft into Campaign

Find ready-made solicitation opportunity

Send email appeal to all non-donors for selected fund

Robotics Facebook Post Overperforms



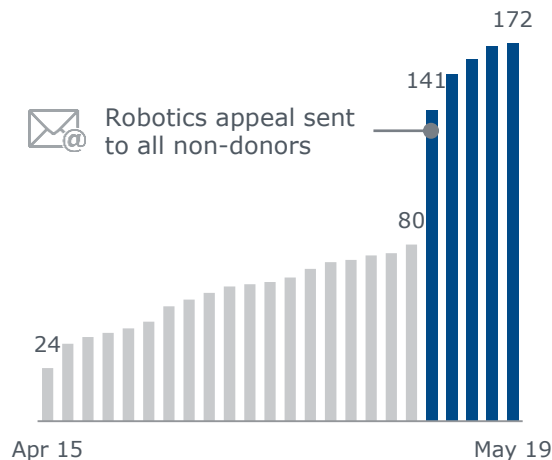
Source: Massachusetts Institute of Technology, Cambridge, MA.; Advancement Forum interviews and analysis.

Robotics Solicitation Strikes a Chord

Analytics Point to the Right Cause for Non-Donors

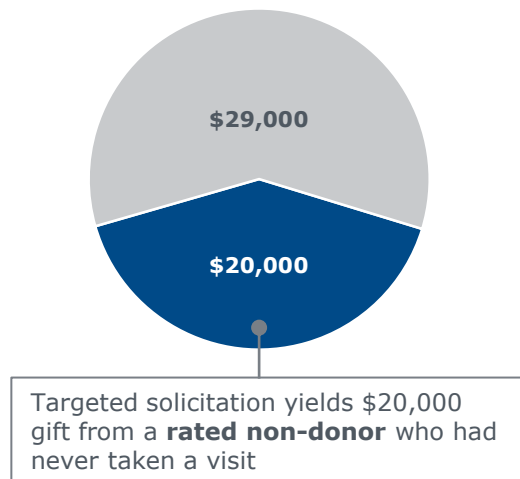
Email Appeal Nearly Doubles Donors...

*Total Robotics Campaign Donors,
April-May 2015*



...And Surfaces Leadership Gift from Non-Donor

Total Robotics Campaign Dollars



Embrace the Diversity of Alumni Interests

“Common Denominator” Appeals Overlook Countless Affinities

From a “One Size Fits All” Approach...



1,000 Affinities



...To More Nuanced Affinity Segments



Manageable Segments

“Our alumni care about so many different things. How can we possibly capture that in mass appeals?”

“We address each of our affinity groups individually. Personalizing by cause has brought big returns.”

Two “Force Multiplier” Approaches



Enfranchise Campus Partners

Enlist faculty and staff members to help identify segments and compile appeals



Put Alumni in the Driver’s Seat

Curate funds into compelling causes and let alumni choose what resonates with them

Segment Alumni by Campus Relationship

Faculty and Staff Ambassadors Make a Personalized Case for Giving Back

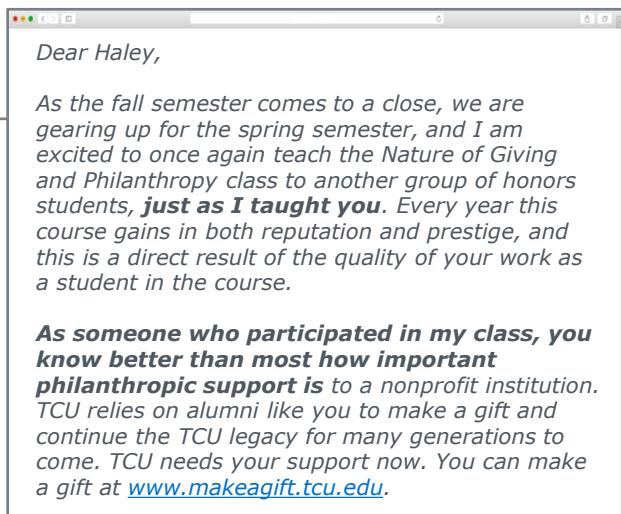
Texas Christian University Taps into Wide-Ranging Alumni Communities

Excerpted Campaign List

Ambassador	Alumni Group	Audience Size
"Nature of Giving" Professor	Course Participants	64 alumni
Director of First Year Experience	Orientation Camp Leaders	263 alumni
Rhinoceros Researcher	Environmental Science Majors	123 alumni
Chemistry Department Chair	Chemistry Majors	208 alumni
Leadership Center Director	Leadership Development Program Participants	71 alumni

Solicitations Emphasize a Cause That Alumni Can Relate To

Plain-Text Email from Personal Connection



An Authentic Appeal to Alumni Affinities

Right Message and Right Messenger Resonates with Young Alumni

Highly Targeted Solicitations

“These emails go through our email system, and they’re written and approved by us. But they look like they came from a faculty or staff member from across the university. They are highly targeted and very specific. Open rates for these emails have been through the roof.”

*Harmonie Farrow
Director of Loyalty Giving
Texas Christian University*

An Unprecedented Response¹

400x

Higher response rate than for typical young alumni email campaigns

25%

Of solicitation recipients gave a gift

100%

Of donors graduated in the last 10 years

1) Data for 2016 initiative unavailable. Results based on smaller 2015 pilot.

Surface High-Potential Fundraising Projects

Affinity Group Partnerships Target Nuanced Alumni Segments

Old Model



One-Size-Fits-All Unrestricted Asks

- 8-10 campaigns a year
- Solicitations asked for unrestricted dollars
- Alumni segmented exclusively by giving history

New Model



Targeted Affinity Fundraising

- 50+ campaigns a year
- 75% of solicitations ask for restricted dollars

- **Alumni segmented by campaign-specific variables, including affinity**

Segmentation Criteria

Sustainability Appeal

- Email listserv
- Former student interns
- Student eco-reps
- Environmental science majors

2,280 Recipients

LGBTQA Campaign

- Newsletter recipients
- Local community advocates
- Students who participate in center activities

648 Recipients

Student Club Project

- Current parents
- Past parents who have given to student clubs
- Alumni with student clubs coded on record

13,724 Recipients

Collaboration Is Key to Affinity Outreach

Annual Giving Staff Share Campaign Workload with Fundraising Groups

A Collaborative Enterprise



Annual Giving Handles Mechanics

- Appeal logistics (deadlines, printing)
- Copywriting best practices
- Solicitation templates
- Alumni data



Campus Partner Adds Reach and Relevance

- Prospect lists and contact information
- Appeal content and case for support
- Social media promotion
- Personal network solicitations

Key Steps to Launching Affinity Campaigns

EAB Recommendations



Identify campus partners willing to participate in fundraising



Determine which alumni segments each project could appeal to



Prioritize projects based on breadth of relevance and diversity of appeal



Assign roles and responsibilities to campus partners and establish deadlines



Develop creative materials for multichannel or digital appeals



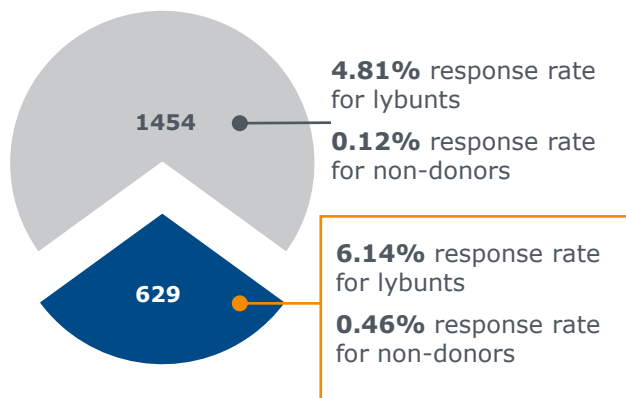
After campaign, **assess results** and record lessons-learned for future solicitations

Affinity Giving Acquires Donors

Recent Graduates and Non-Donors Respond to Highly Targeted Appeals

Affinity Projects Claim a Growing Share of Giving

Snapshot of Direct Mail Donors, 2015



■ Affinity Appeal ■ Broad Appeal

Young Alumni Response Rate

0.6% Affinity appeal mailing

0.4% Broad appeal mailing

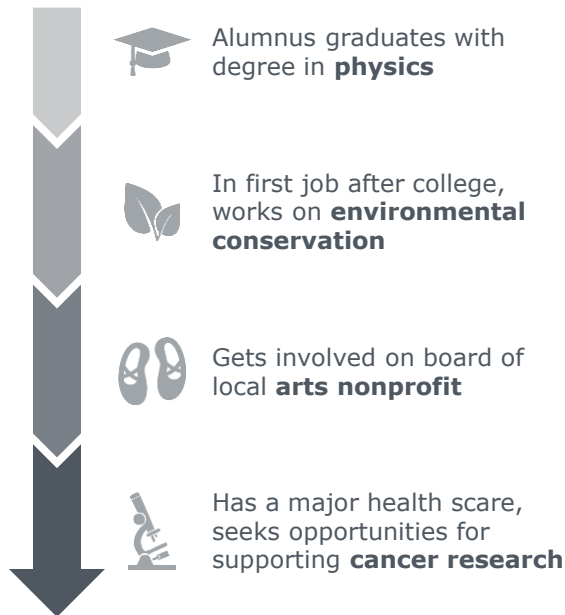
“Percentage-wise, we almost always see a better response when we’re **putting something in front of our non-donors that feels personal to them**, as opposed to a generic pitch to give back.”

*Kevin Morgenstein Fuerst
Senior Director of Annual Giving
The University of Vermont*

Evolving Affinities Complicate Outreach

Only Alumni Can Truly Say What Will Motivate Them to Give

Alumni Affinity Shifts and Grows



Hard to Predict Where Alumni Will Give

Fundraising Results from a Large Research University

49% Of college of engineering graduates gave to another school or college

77% Of college of arts and sciences graduates gave to another school or college

A Lack of Affinity Intel

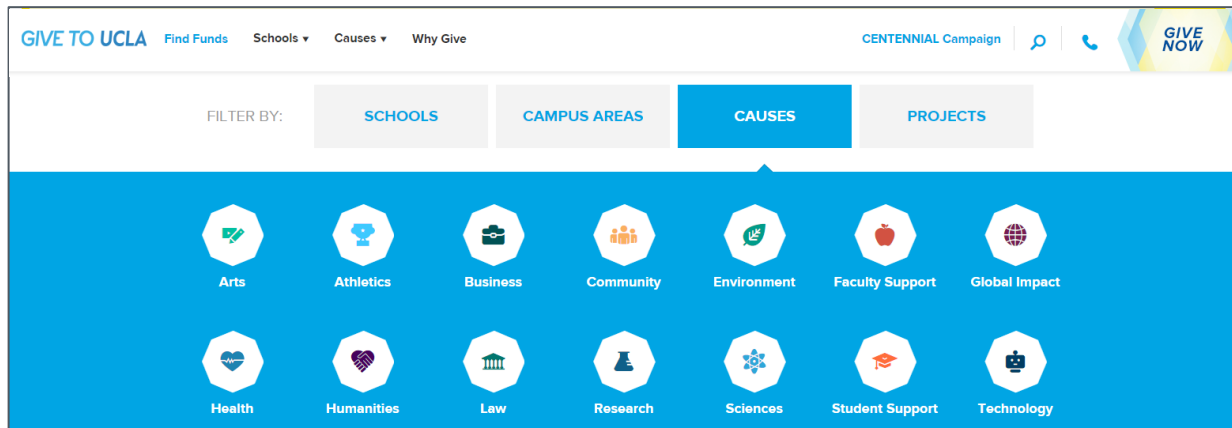
“I had an alumnus call me up and say, ‘I want to give to the music program—can I do that?’ I was baffled. Turns out he was a college of business graduate. All we’d ever done was solicit him for business. We’d never asked him for the thing he cared about—heck, **we didn’t even have a clue what he cared about.**”

*Annual Giving Director
Private Research University*

Let Alumni Choose What Resonates

Organizing Allocations by Impact Category Guides Alumni to Their Passion

UCLA's Road Map of Causes



The screenshot shows the 'GIVE TO UCLA' website interface. At the top, there are navigation links: 'GIVE TO UCLA', 'Find Funds', 'Schools', 'Causes', and 'Why Give'. On the right, there is a 'CENTENNIAL Campaign' link, a search icon, a phone icon, and a 'GIVE NOW' button. Below the navigation, there is a 'FILTER BY:' section with four tabs: 'SCHOOLS', 'CAMPUS AREAS', 'CAUSES' (which is selected and highlighted in blue), and 'PROJECTS'. Under the 'CAUSES' tab, there is a grid of 14 cause categories, each represented by an icon and a label: Arts, Athletics, Business, Community, Environment, Faculty Support, Global Impact, Health, Humanities, Law, Research, Sciences, Student Support, and Technology.

Funds Curated from Across Campus



Research: Congenital heart disease center; wildlife preservation; undergraduate research



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

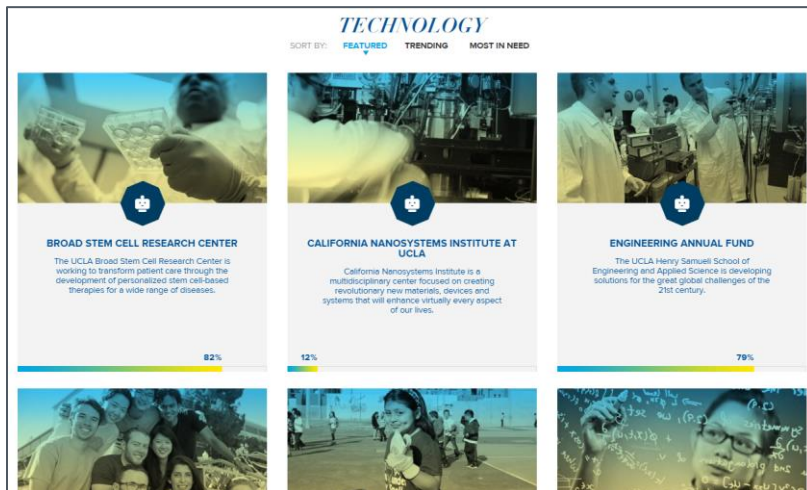


Technology: Nanosystems institute; diversity in engineering; aging and longevity research

Beyond a Static List of Designations

User-Friendly Giving Interface Reminiscent of Crowdfunding Platform

UCLA Optimizes Online Donor Experience



Key Elements

1 Multimedia Layout

Images feature prominently on fund pages

2 Progress Bars

Showing progress increases transparency for donors

3 Detailed Descriptions

Most funds have customized cases for support

“Our site is designed to help a donor find what matters most to them. A philanthropic investment is not about money, it is about impact. It is a donor's investment into something they believe in and we as an institution must strive to be their greatest facilitator, whether online or face to face.”

Gary Stevens, Director of Digital Strategy
UCLA

Source: University of California – Los Angeles, Los Angeles, CA.; “Give to UCLA” website, <http://giveto.ucla.edu/find-funds/>; Advancement Forum interviews and analysis.

A Diagnostic for Alumni Affinities

“Find Your Purpose” Web Quiz Points Alumni to Funds That Will Inspire

Alumni Answer Quick, Fun Questions

- 1 Choose a quote that best describes your life philosophy
- 2 What's your ideal weekend activity?
- 3 Where would you like to visit most on campus?

Quiz Assigns Alumni a Giving Persona



The Builder



The Connector



The Healer



The Explorer




The Creator









The Nurturer

Persona Mapped to Suggested Funds



THE HEALER

Your mind was designed to connect science with compassion, constantly on a mission to mend, soothe, revive, and renew. Whether it's medicine, health, or the environment, quality of life and ensuring that for others is of top priority to you.

 <p>ALWAYS REMEMBER NEVER SURRENDER SCHOLARSHIP ENDOWMENT: TAKE A STAND AGAINST SUICIDE</p> <p>Provide support for the Always Remember Never Surrender Scholarship Endowment in the College of Natural...</p>	 <p>CROPS FOR HEALTH: FEED THE WORLD</p> <p>Propel research and education that seeks solutions for better food crops to benefit humans across...</p>	 <p>CVMS SCHOLARSHIP ENDOWMENT</p> <p>Make an impact on the next generation of veterinarians, doctors, and scientists.</p>
 <p>MARCHING BAND ENHANCEMENT: BAND TOGETHER</p> <p>Support the award-winning CSU Marching Band – our green-and-gold heartbeat.</p>	 <p>NEW START FOR DISTINGUISHED VETERANS: SERVE THOSE WHO HAVE SERVED</p> <p>Honor our veterans with support and hope of a brighter future at Colorado State University.</p>	 <p>SAVE THE ELEPHANTS: STOP THE IVORY TRADE</p> <p>More than 25,000 elephants are killed for their ivory each year. Poaching is far outpacing...</p>

Cultivate the Unconvinced

Next Steps for Advancement Leaders

Nine Questions to Connect Alumni to a Cause



Solicit for “Common Denominator” Causes



Enfranchise Campus Partners



Put Alumni in the Driver’s Seat

- 1 What department or college priorities overlap most with common alumni affinities?
- 2 What analytics do we use to determine appeal branding?
- 3 What high-passion projects currently have limited reach and visibility among alumni?
- 4 What information do you ask faculty/staff to provide when planning an appeal?
- 5 In which parts of the planning process could you engage campus partners?
- 6 What alumni intel do our campus partners have that we currently lack?
- 7 What types of causes do our alumni give to outside the institution?
- 8 How much overlap exists between external causes and our own funds?
- 9 If you were to group funds from across divisions, what would you put together?



Coda: Annual Giving 2026

A Profession Evolves

A Glimpse of the Future

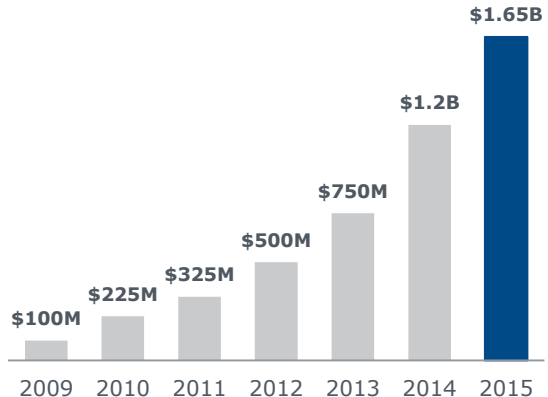
Marketing Automation Dominates Commercial Industry

Marketing Automation in Practice

- 1 Firm builds out customer profiles based on behavioral data
- 2 Developers program content streams that are individualized for each profile
- 3 Customer actions activate content stream
- 4 Customer automatically receives personalized communications

The Rise of a Must-Have Tool

Vendor Revenue, 2009-2015



\$5.5B In acquisitions from 2010 to 2015 (outpacing vendor revenue three times over)

49% Of businesses currently use marketing automation to manage customer relationships

Toward the Next Generation of Advancement: The “Amazon Experience” for Giving

“Our approach is grounded in **the core belief that the alumni of today expect and deserve to be treated and engaged as unique individuals**....Best-in-class solutions and learning from other industries and fields can position us for more relevant, meaningful, and high-impact interactions with alumni and donors.”

*Thomas Hammond
Associate Vice President for Alumni Relations
Rutgers University*

A New Playbook for Annual Giving

Philanthropic and Commercial Worlds Converge in Outreach Strategies

From Old-School Fundraising...



...To the Frontiers of Marketing



Rigidly scheduled outreach

Appeals sent at regular, predictable times of year



Segments based on giving history

All alumni who give similarly get same appeals



Single-channel or lightly multi-channel outreach

Channels operate independently of one another



Separation of engagement and gift appeals

Engagement content planned without reference to gift asks



Trigger-based appeals

Digital microbehaviors spark automatic follow-up



Nuanced, psychographic segments

Alumni grouped based on passions, interests, and behaviors



Omni-channel campaigns

All channels, including full range of digital, used to deliver appeal



Integrated content marketing and appeals

Engagement serves to “warm” prospect pool and surface leads



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