



Strategies for Donor Recognition: Annual Honor Rolls and Alternative Practices



Advancement Forum

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1) Executive Overview

Key Observations

Honor rolls are a common but not ubiquitous practice within advancement offices. Printed honor rolls are becoming less common as advancement offices work to reduce overhead spending and respond to donor preferences. Although the majority of colleges and universities continue to publish honor rolls, a growing number of institutions have already, or intend to, discontinue annual honor roll publications.

Measuring the impact of honor roll on donor behavior is more difficult compared to alternative donor-relations programs. Advancement offices rely on honor rolls to recognize donor generosity and demonstrate institutional gratitude; however, there is little data available regarding their impact on donor behavior. Advancement offices publish donor honor rolls online to modernize services and cut costs. Contacts at profiled institutions agreed that online honor rolls better serve the needs of donors accustomed to accessing information online, offer more flexibility to respond to errors in reporting, and are less expensive to produce than printed honor rolls. Website analytics and email click through rates are the most reliable methods for collecting data on the impact of honor rolls on donor behavior.

Discontinuing honor rolls releases significant staff and budget resources. Contacts observe that reducing costs can make available resources for alternative programming or help advancement offices reduce overhead costs associated with fundraising. Leadership at most advancement offices typically redirect a portion of funds towards new donor recognition programs (e.g., experiential programs for donors on campus, thank you note and phone campaigns).

Donor-centered recognition programs provide better opportunities to cultivate donor-institution relations compared to honor rolls. Donors are unlikely to engage advancement officers in conversations around donor honor rolls unless there is an error in the publication. Anecdotal experience suggests that most donors ignore honor roll publication, and prefer customized outreach. The most popular donor-centered recognition programs are donor recognition profiles on websites and student-written thank-you letter campaigns.

Donors are unlikely to comment on changes to an institution's honor roll policy. Contacts at profiled institutions reported little or no feedback follow a change to their honor roll publication policy. For examples, when contacts at **Institution B** ceased publication for a year they received no response from donors. In contrast, contacts at institutions that implement donor-centric recognition programs often report an increase in positive communication between donors and advancement officers.

2) Donor Honor Rolls

Production of Honor Rolls

Most Profiled Institutions Publish Honor Rolls Despite Limited Impact and High Costs

Four out of the six profiled institutions will publish an honor either in print or online in 2014. **Institution E** does not publish an honor roll, and **Institution E** does not publish a print honor roll and will not publish an online honor roll in 2014. Institutions that transitioned to online honor rolls did so in order to reduce costs and collect data around donor response through online tracking. Advancement offices that transitioned from print to online published rolls achieved these goals, but contacts note that staff did not immediately experience a reduction in work load. Contacts at institutions with online honor rolls believe that their institutions either are very likely or somewhat likely to discontinue publishing an honor roll in the next ten years.



Common Donor Recognition practices among Non-Profits¹

- 18% of organizations publish honor rolls in print only
- 19% of organizations are phasing out any form of honor roll publication
- 20% of organizations no longer produce honor rolls
- 65% of organizations that publish an honor roll organize donors according to gift level category
- 22% of organizations that publish an honor roll organize donors alphabetically

Honor Roll Practices at Profiled Institutions

Institution	Current Honor Roll Policy	Past Honor Roll Policy	Expected Changes to Honor Roll Policy
Institution A	Print honor roll	Print honor roll	Considering online honor rolls
Institution B	Suspended print honor roll in 2013; reinstated in 2014	Print honor roll	Considering online honor rolls
Institution C	Online honor roll	Print honor roll	Short term: Publish online honor roll Long Term: Use data to determine future publication strategy
Institution D	Print honor roll	Print honor roll	Short term: Publish print honor roll Long term: Consider online honor rolls
Institution E	Online honor roll	Print honor roll	Discontinuing honor roll in 2014
Institution F	No honor roll	No honor roll	No honor roll

¹ Source: Donor Centered Fundraising; How to Hold on to your Donors and Raise Much More Money, & "The Pulse of Donor Relations Survey Results and Observations"

Honor Roll Coordinators Spend over Half their Time Editing and Formatting Donor and Gift Information

Annual honor rolls typically require four to seven months to compile, publish, and distribute. Contacts at institutions that publish an honor roll agree that formatting data from advancement databases and checking data for accuracy are the most time and labor intensive steps in publishing an honor roll. Advancement offices risk frustrating or alienating donors by printing an honor roll that incorrectly reports a donor's name, gift size, or gift dedication. Contacts at **Institution C** spend weeks fact-checking with major gift officers to ensure reporting accuracy.

In addition to confirming information accuracy, honor roll coordinators must format data according to the style and reporting standards of their honor roll.

The format and organization of an honor rolls varies greatly within and across institutions; however, contacts agree that as complexity increases, so does production time. Donor honor rolls typically categorize donors around:

- Gift size
- Giving society affiliation
- Gift type
- Donor affiliation to the university (e.g., alumni, parent, community member)

Advancement officers at **Institution A** hire external proofreaders to review their honor roll publication for formatting errors and to ensure style consistency throughout the publication. This practice increases the professional quality of their honor, but also adds to the total publication cost. Contacts at **Institution B** developed an institution-wide honor roll policy to streamline the data collection and formatting process, clarify reporting standards, decrease reporting errors, and create a uniform brand-image across all honor roll publications.

Advancement Data Systems can Facilitate or Delay Honor Roll Production

Honor roll coordinators rely on information stored in donor and giving databases to produce an honor roll. Well-maintained databases that display information in categories used in honor roll formatting facilitates honor roll production. However, databases that are out of date or do not record information according to honor roll criteria increase labor hours and slows production and contribute to honor roll content and formatting errors. One contact reported spending over 300 hours adding punctuation to the data produced by her institution's database.

Contacts at **Institution B** chose to suspend their annual honor publication in 2013 while updating information in their donor database. Similarly, leadership at **Institution E** capitalized on reporting errors in their database to indefinitely suspend their honor roll publication. Unlike **Institution B**, where contacts hope to resume publishing an honor roll in 2014, contacts at **Institution E** do not anticipate resuming online publication following the database update.

Contacts at profiled institutions report mixed experiences using in-house and third party databases. At **Institution D**, transitioning from an in-house database to a third party system initially increased production time as honor roll coordinators had to learn to navigate and access the necessary information in the new system. At other institutions, contacts were relieved to transition to third party systems, calling their in-house systems "inefficient" and "overtaxed."

Publishing and Postage costs for Printed Honor Rolls are Comparable to the Annual Salary of One Full Time Employee (FTE)

Contacts at profiled institutions that currently publish annual honor rolls estimate publishing and mailing costs to be \$60,000 annually. Donor relations consultant Lynne Wester estimates that most institutions spend over \$110,000 annually to publish an annual honor roll. Printing costs vary according to honor roll content, size, and the number of recipients. Contacts at **Institution A** note that using photos and high quality paper to create the look and feel of a “coffee-table book” significantly increases printing costs.

Impact of Honor Rolls on Donor Behavior

Honor Rolls have the Greatest Impact at Institutions with Established Alumni Networks and Strong Class-Giving Cultures

Donor honor rolls are most effective at institutions with well-established class giving traditions and high alumni giving rates. Contacts note that this type of giving culture is rare and difficult to cultivate but agree that, where present, annual honor rolls become instrumental to maintaining and cultivating gift giving. Advancement officers at **Institution D** typically organize donors in descending order of annual contribution within class years, and publish a draft honor roll before the close of the fiscal year that allows donors to preview their giving status relative to their peers, and provides them with an opportunity to contribute a supplemental gift prior to the final honor roll publication.

Most Donors Express Ambivalent or Negative Feelings about Honor Roll Publications

Donor relations experts Lynne Wester and Penelope Burke agree that honor rolls do not motivate donor giving and can negatively impact the donor-institution relationship if there is an error in reporting.² Contacts at profiled institutions agree that donor communication related to honor rolls is almost always initiated by donors to report misinformation. Donor relations officers are able to address errors in reporting through online honor rolls, whereas print honor rolls do not offer this flexibility.

Contacts at institutions that transitioned from print to online honor rolls reported very little donor feedback and no negative responses to the policy change. Contacts at **Institution B** and **Institution F** did not receive any calls when donor rolls were suspended or ended at their current or previous institutions. Institutions publishing honor rolls online typically receive fewer than 30 requests for printed copies annually.

²Source: Donor Centered Fundraising; How to Hold on to your Donors and Raise Much More Money



Problems Associated with Publishing Honor Rolls²

- 80% of non-profits omit donor names in error
- 70% of non-profits misspell donor names
- 45% of non-profits include names of anonymous donors in error
- 58% of individual and 88% of corporate donors said giving levels do not influence them to maintain subsequent gifts at the current level
- 71% of non-profits of individual and 83% of corporate donors say giving clubs and honor rolls have no influence on the size of gift they consider

Assess the Impact of Online Honor Rolls on Donor Behavior through Website Analytics

The impact of print honor rolls is virtually impossible to track unless a donor volunteers the information through communication with advancement officers or when making a gift. As a result, advancement officers often rely on anecdotal evidence rather than data to determine the impact honor rolls have on donor behavior.

Institutions with online honor rolls use website analytics that track website navigation, and email click through rates to gain information about how donors interact with honor roll publications. Contacts at one institution concluded that the number of individual viewers visiting the honor roll webpage was an estimated five percent of the total number of donors included in the publication, and that viewers spent an average of 2.5 minutes on the page. This information helped persuade advancement and institutional leadership to discontinue honor roll publication.

Online Honor Rolls are more Flexible, Accessible and Lower Cost than Print Versions

Online honor rolls appeal to advancement leadership because they avoid many of the drawbacks of print honor rolls without requiring a fully revised donor recognition strategy. **Institution C** implemented an online honor roll to reduce costs, and found that online honor rolls were easier to prepare, publish and update. However, contacts also note that online honor rolls still require significant staff resources to prepare and review.



Embedded Giving Forms Increase Honor Roll Value

Northwestern University embeds a donation form into their young alumni honor roll web page for donors interested in adding their name. Donors fill out the form using credit card information and the website is updated once the payment is processed.

³ Source: Donor Centered Fundraising; How to Hold on to your Donors and Raise Much More Money, & "The Pulse of Donor Relations Survey Results and Observations"

EAB Analysis of Honor Roll ROI

ROI Indicators	Print Honor Rolls	Hybrid Honor Rolls*	Online Honor Rolls
Publication Costs	C- Honors typically cost between \$60,000-\$100,000 to publish and mail. Additional costs may be incurred if the institution hires external proofreaders.	A- Uploading PDF versions of print honor rolls require minimal tech support. However, developing an interactive honor roll web page can require extensive support in web design.	B Developing and continually updating an interactive honor roll web page can require extensive support in web design.
Staff Resources	C- At most institutions with multiple honor rolls or complex formats, the role of an honor roll coordinator is a full time position. Preparing the institution-wide honor roll typically amounts to 30% of a coordinator's annual responsibilities.	A- Honor roll coordinators need to format the honor roll into a web-friendly document and rely on IT or communications staff to upload it to the website.	B Robust and interactive online honor rolls that are password protected require significant IT support and collaboration between web designers and the honor roll coordinators
Time to Produce and/or Deliver	C Typically 4-6 months	A 1-3 weeks, following the creation of the print document	B+ Typically 4 months, however some online honor rolls are updated throughout the giving period
Access	C Access to print honor rolls may be restricted to certain donor levels and rely on accurate mailing information.	B+ Anyone who wishes to access online PDF of print honor rolls is able to do so, making donor information overly accessible.	B- Donors are given instructions to access honor information and may contact the advancement office for additional help.
Donor Privacy	B- Donor information is restricted to recipients of print honor rolls. Once printed, errors and omissions cannot be corrected.	D Without password protection, anyone is able to view donor information.	A Donor information is password protected and specific information can be added, removed or altered in real-time in order to respond to changes in donor preferences.
Metrics	D Advancement officers agree that no effective methods exist to assess the ROI of printed honor rolls. Staff must rely on anecdotal evidence or personal accounts instead, though they might conduct surveys or focus groups with alumni.	C Institutions are able to track the number of viewers who access an uploaded PDF.	B+ Website analytics can track page visits and track where visitors navigate to within the honor roll, and after visiting the honor web page. These metrics provide the best data-driven insight into honor roll impact.
Overall Grade	C	B-	B+

**Hybrid honor rolls are published both in print and online, such as an uploaded .pdf document or a dedicated web page that replicates the appearance of a printed page.*

Maximize ROI of Donor Honor Rolls

Combine Honor Rolls with other Advancement Publications and Target Key Donor Groups to Reduce Print Costs

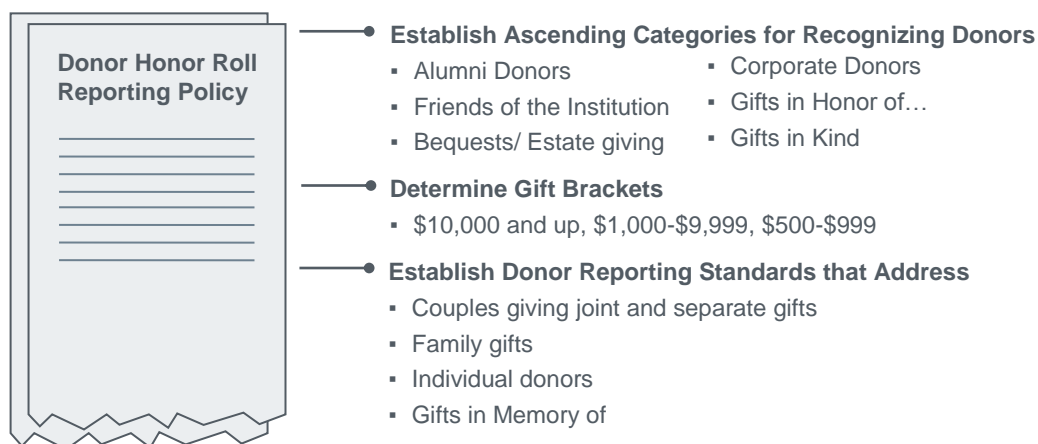
Contacts at **Institution D** plan to combine their annual honor roll with their biannual magazine starting in 2014 to reduce costs and increase honor roll impact. Combining these publications reinforces the connection between a donor gift and institutional programming.

Contacts at some institutions suggest maintaining print honor rolls for certain donor populations more accustomed to print media. For example, print honor rolls for elderly donors and alumni are more common as these groups are more likely to prefer printed communication over web-based publications. However, honor roll staff at institutions that publish print honor rolls and maintain an honor roll website will experience an increase in workload as these mediums require separate preparation for the different formats.

Implement an Institution-wide Honor Roll Policy to Streamline Honor Roll Production

A uniform honor roll format allows data officers to run a standard data query for all honor rolls rather than building custom queries for each honor roll according to the information needed, reducing the workload and turn-around-time for data officers. Regulating practices for determining gift level, gift type, name reporting and name organization can contribute to reduced formatting errors.

Establishing an institution-wide policy requires collaboration across advancement offices to develop a standard honor roll format, and with advancement data officers to ensure that requested data aligns with information collected in the database. Contacts at **Institution B** developed their honor roll policy over the course of a year working closely with their constituents across the university



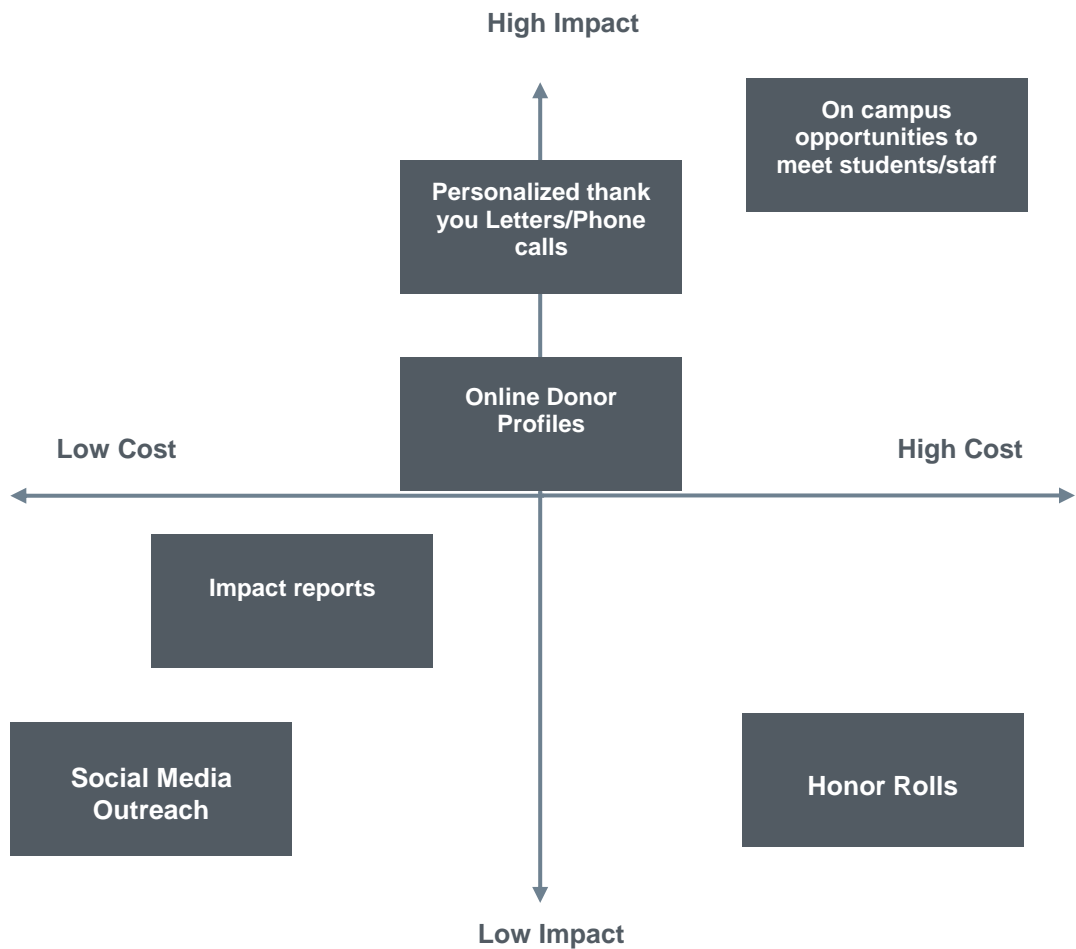
3) Alternative Gift Recognition Practices

Cultivate Donor-Institution Relationships

Use Donor Recognition Programming to Cultivate Donor-institution Relationships and Education Donors on Gifts' Impacts

Donor-centered gift recognition programs rely on donors' information to create a customized product that directly relates to his or her interests. Effective gift recognition makes the donor feel valued by the institutional community, deepens donor connections with the institution, and offers opportunities to cultivate the donor for additional gift requests. Lynne Wester advises donor relations officers to develop recognition programs that provide access, information, or experiences that are otherwise unavailable to the donor. Donor-centered recognition helps advancement officers avoid ineffective donor recognition strategies that fail to value the donor as an individual and community member.

Return on Investment of Donor Recognition Programming



Donors Value Behind-the-Scenes Opportunities to Meet Staff and Students

Donors appreciate customized on-campus experiences, which also provide advancement officers the opportunity to cultivate their relationships with donors and identify future giving opportunities. Donors who participate in these experiences are more likely to give again and increase their gift size. **Institution A** coordinates annual lunches between scholarship donors and student recipients to recognize donors. Most institutions recognize high-level donors (e.g., trustee level, presidents' circle, highest giving category) through experiential recognition programs. **Institution F** provides on-campus experiences for local donors, long-term donors, and first time donors.

Experiential recognition programs require significant time and financial resources. Costs associated with on-campus recognition include transportation, hotel bills, and meals during the donor's visit. Donor relations and major gift officers must collaborate to prepare an itinerary and the donor throughout his or her visit.

Strategies to Provide Donors with Information, Access, and Experiences

Information- Provide early access to institutional news

- Send donors presidential communications and announcements before a general release
- Impact reports outlining how donor gifts benefitted the university
- Inform donors of news-worthy information (e.g., hiring decisions, awards) before it hits the press

Access- Introduce donors to students or faculty who benefit from the donor's gift

- Organize lunch with scholarship recipients or professor of an endowed chair
- Offer access to dress rehearsals, or to meet performers after a student performance

Experiences- Expose donors to opportunities not available to the public

- Invite donors to give a guest lecture in an area of expertise on-campus
- Priority access to season tickets or special game day seats for sporting events

Emphasize Donors' Institutional Connections in Correspondence

Improve donor relations by implementing recognition programs that communicate gratitude for the donor as a community member as well as financial supporter.

Institution F maintains a donor appreciation website that profiles high giving and long term donors. Contacts also suggest implementing a donor recognition program that highlights recent graduates and young alumni donors to engage younger donor populations. These profiles tend to focus on the donor's relationship with the institution and the impact of their gift, rather than its size.

Donor appreciation websites and student-written thank you notes are among the most popular recognition programs to replace donor honor rolls due to their low cost and high



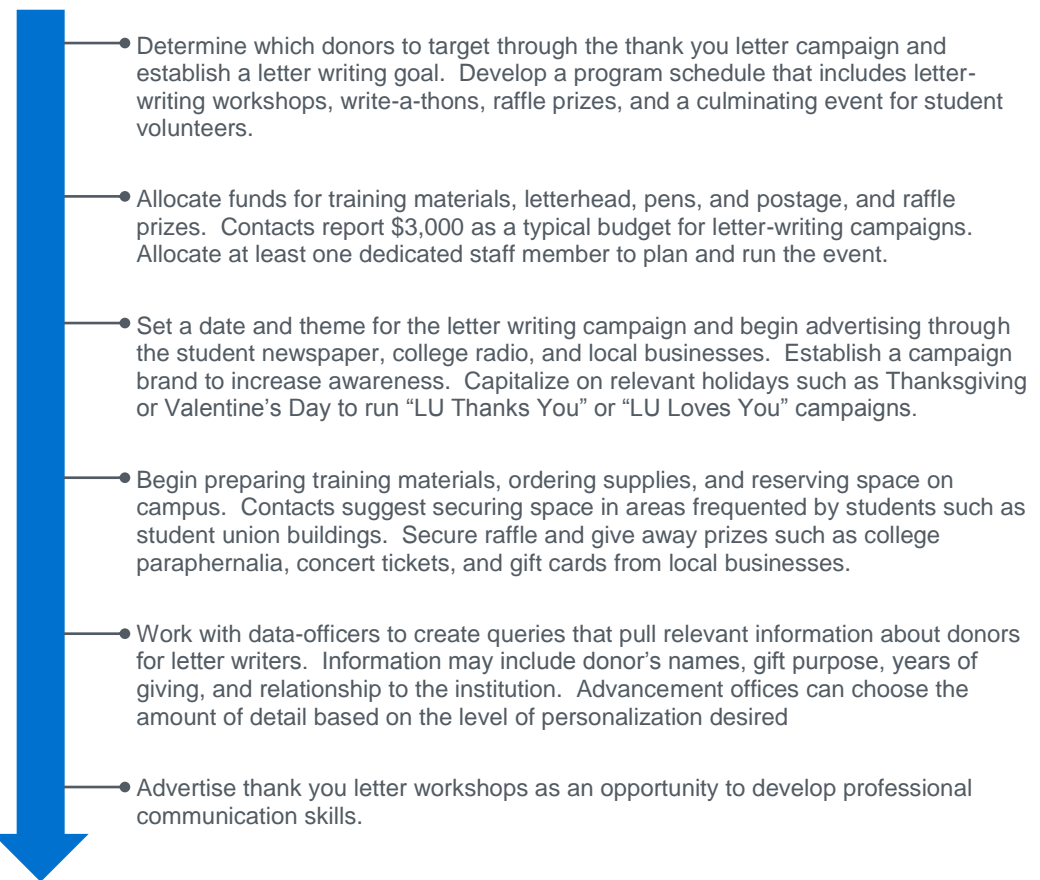
“Our donors love receiving student thank-you cards. Many of them contact me or their major gift officer to express their surprise and appreciation”

Forum Interview

impact. Using donor information kept by advancement offices to personalize thank you notes and annual correspondence leaves a lasting impression among donors. Although many of these communications can be automated, contacts agreed that a hand written thank-you note program to acknowledge donor gifts is a highly effective and low cost recognition strategy. Contacts with thank-you letter campaigns observed that donors value student-written thank you notes more than notes from the advancement officers.

At **Institution A**, donors who give \$25,000 or more receive a personal thank-you call from the president. Executive acknowledgement by deans and presidents are flattering to donors who seldom have access to senior leadership. Conversely, donors with regular access to the president may prefer student correspondence.

Design and Implement a Thank You Letter Campaign



For example, pair current engineering students to write letters to engineering alumni, donors to a new science facility or donors with a professional background in science.

Social Media and Mobile Apps

Use Social Media and Impact Reports to Give the Impression of Personalized Communication

In addition to personalized outreach and events, repurposing existing publications and using social media strategically can engage donors without significant cost or staff investment. In addition to providing access to student newspapers and performing arts and sports information, online outreach and impact reports about the funds donors gave give the appearance of personalized communication at low cost to the institution.

Social Media-Based Donor Honor Roll Alternatives



Use social media sites (e.g., Facebook, Twitter) to publicly recognize donors in real-time

Request alumni Twitter handles at the time of donation and develop a bi-weekly thank you announcement to recognize recent gifts. Contacts indicate that social media outreach can generate a giving culture among young alumni.



Develop Mobile Applications and Web Forms that Allow Alumni to Register for Community Perks

Extend perks already available to community members to donors or create special donor apps that reinforce community membership. **Institution F** developed a mobile web application that provides alumni with a map of downtown once they register their contact information with the advancement office. The map marks establishments where alumni can redeem discounts and benefits.



Inform low and mid-level donors of their contribution to the community through impact reports

Inform large groups of donors about the impact of their gift through impact reports that outline the use of the president's fund, general fund, or impact of institutional scholarship programs. These reports can also be sent to prospective donors to demonstrate the impact of giving.

4) Transitioning Away from Published Honor Rolls

Preparation

Strengthen Proposals to Eliminate Donor Honor Rolls with Donor Access Data

Advancement leadership is more receptive to arguments supported by data rather than anecdotal experiences. To emphasize low ROI of honor rolls contacts at **Institution E** included a summary of time spent by staff members to prepare and publish an online honor roll, and unique visits to the honor rolls online page. Track hours spent by the honor roll coordinators, data officers, major gift officers, and communications officers, preparing an honor roll for publication and tracking the fiscal resources associated with print publishing.



Tips for collecting Honor Roll ROI data

- Ask the honor roll coordinator and data officer to keep a time log to track the time spent on each step associated with honor roll publication
- Maintain a list other staff members and departments involved in the publication request estimates of time spent of each project
- Use website analytics to monitor online visits to the online honor roll or email open rates demonstrate donor engagement
- Include budget line items related to the preparation, publishing, and mailing annual honor rolls

Use Information on Cost to Publish and Donor Viewing Rates to Secure Support from Leadership to Eliminate Honor Rolls

Leadership buy-in is essential to successful changes in honor roll policy; however, contacts at most profiled institutions report reluctance among advancement leadership to “cut the strings.” Before formally requesting any change in policy, have an informal conversation with leadership to gauge their position and identify concerns. Communicating with advancement officers at other institutions to demonstrate cost savings, demonstrating the low impact of honor rolls on donor behavior, and emphasizing department- wide benefits are three strategies to win over leadership.

Contacts suggest proposing a multi-stage plan at institutions with printed honor rolls to allay leadership concerns and cultivate buy-in. Transitioning to an online honor roll will reduce costs, improve data collection, and allow leadership to test donor responses before eliminating an annual honor roll. Many institutions transition to online honor rolls before discontinuing publication all together. Contacts at **Institution E** note that data collected through the online honor rolls view rates was a key argument in their proposal to eliminate online honor rolls. Contacts agreed that multi-phase transitions cater to internal concerns more than donor preferences.

Suggest Alternative Recognition Strategies to Frame Honor Roll Retirement as a Transition to Better Donor Recognition

Discontinuing a familiar program without an alternative plan can be daunting to senior leadership. Rather than framing proposals as an end to honor rolls, present a proposal to improve donor recognition by outlining the short-comings of honor rolls and demonstrating the efficacy of alternative donor relations programs. Emphasize cost and labor saving programs, and include anecdotes of successful transitions by other

Informing Donors

advancement offices to make new donor recognition programs more appealing. The inclusion of honor roll alternatives will encourage dialog among advancement leadership to develop a comprehensive donor recognition strategy and streamline the transition away from honor rolls. Consultant Lynne Wester encourages advancement offices to introduce new recognition strategies as they retire honor rolls to distract donors and generate interest in the new program.

Institutions Have Great Flexibility Regarding How or If They Choose to Alert Donors to Changes in Honor Rolls

Most institutions include a small announcement in an annual publication at the time honor rolls would be published announcing its retirement. Honor roll coordinators can communicate changes to an institution's honor roll policy either via email or in print, however formal notification. **Institution C** mailed letters to donors to introduce the online donor roll, while the **Institution B** did not draw attention to the honor roll hiatus last year. Typically, announcements include a brief remark thanking donors for their contributions include a few reasons for the policy change.

Use Communication with donors regarding honor policy changes to introduce new donor recognition programming. This makes the transition appear intentional and seamless to donors. Plan ahead and draw on resources previously used for honor roll publication to develop a robust launch of the new program. For instance, donor recognition websites should already include donor profiles a thank you letter campaigns should already be underway.

Donors Respond Positively to Explanations of Cost-Saving

Donors rarely express negative reactions to changes in honor roll policy. While phasing out honor rolls, advancement officers found that framing cost saving initiative and outlining how funds were reallocated (faculty programming, scholarship programs or more strategic fundraising programs within the office, etc.) highly effective when talking curious donors. Contacts at universities that suspended or phased out their honor roll policies reported few inquiries and no negative donor responses.

5) Research Methods

Project Challenge

Leadership at a member institution approached the Forum with the following questions:

- How many profiled institutions regularly publish donor honor rolls and or giving societies?
- How frequently do institutions publish honor rolls?
- What content include in published honor rolls?
- What are the primary motivations to publish honor rolls?
- What staff resources and funding do contacts currently devote to publishing donor rolls?
- What are donor opinions and perceptions of published honor rolls?
- Do honor rolls influence donor behavior?
- How does the prevalence of social media impact the use of honor rolls?
- What metrics do contacts collect to evaluate the effectiveness of honor rolls?
- If contacts no longer publish honor roles, what motivated that change?
- How did they communicate to current donors about the removal of honor rolls?
- If contacts no longer publish honor rolls, what strategies have they implemented that instead to achieve similar results of maintaining and upgrading donors?
- What resources do contacts require to launch and maintain these strategies? What was the timeline to implement these strategies?
- What metrics to contacts collect to evaluate the effectiveness of honor roll alternatives?

Project Sources

The Forum consulted the following sources for this report:

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- Meyes, Debbie & Wester, Lynne. “The Pulse of Donor Relations Survey Results and Observations” Donor relations Guru, 2013.

Research Parameters

The Forum interviewed donor relations directors and honor roll coordinators at institutions with print and online honor rolls and institutions without honor rolls.

A Guide to Institutions Profiled in this Brief

Institution	Location	Approximate Institutional Enrollment (Undergraduate/Total)	Classification
Institution A	Midwest	16,400/24,400	Doctoral/Research Universities
Institution B	Mid Atlantic	21,000/33,900	Research Universities (high research activity)
Institution C	Mid Atlantic	22,100/18,400	Research Universities (very high research activity)
Institution D	Northwest	28,200/43,700	Research Universities (very high research activity)
Institution E	New England	12,500/14,900	Research Universities (high research activity)
Institution F	South	21,500/26,500	Doctoral/Research Universities
Northwestern University*	Midwest	21,500/9,200	Research Universities (very high research activity)

**Institution Profiled through Secondary Research*