

Annual Giving Digital Fundraising Diagnostic

This quick diagnostic tool will help you evaluate the strength of your digital outreach in your annual giving program. Tally your answers below to determine how well your team operationalizes existing and emerging digital fundraising strategies. Your responses will highlight your program’s areas of strength, as well as those with opportunity for improvement or further investment.

Note that some of the capabilities included in the diagnostic, while corresponding to real, observed marketing practice, may be beyond the native capabilities of many colleges and universities. That said, all are readily attainable via partnership with third parties.

1 Assessing and Growing Digital Impact

	Strategy/Capability			
1	We effectively use social media to engage our alumni network	☐ Always	☐ Sometimes	☐ Never
2	Digital strategies are integrated into our multichannel (i.e., direct mail, email, phone, and social media) solicitation marketing annual plan	☐ Always	☐ Sometimes	☐ Never
3 4 5 6	We track and monitor alumni who: • Attend virtual events • Update account information online • Engage with our digital content • Make regular donations via our giving sites	☐ Always ☐ Always ☐ Always ☐ Always	☐ Sometimes ☐ Sometimes ☐ Sometimes ☐ Sometimes	☐ Never ☐ Never ☐ Never ☐ Never
7	Alumni who are not actively engaged are solicited digitally at least twice a year	☐ Yes		☐ No
8	We track the channel migration of donors and adapt our outreach to optimize those communication channel preferences	☐ Always	☐ Sometimes	☐ Never
9	Email and web components are coordinated with direct mail to drive donors back to giving sites	☐ Always	☐ Sometimes	☐ Never
1 0	Our donors have an easy online giving experience (resulting in low abandonment rates)	☐ Always	☐ Sometimes	☐ Never
1 1	We can tie our annual giving marketing spend directly to incremental growth within fundraising	☐ Yes		☐ No
1 2	We can quantify the impact that different mixes of paper and digital media have on donor response rate	☐ Yes		☐ No
1 3	We have appropriate staff resources (skill set and role focus) needed to plan and execute a well-rounded digital program.	☐ Yes		☐ No
1 4	We run a full creative audit annually to ensure that consistent brand, messaging and best fundraising practices are in place across all channels	☐ Yes		☐ No

Summary

Count

Always/Yes = _____

Sometimes = _____

Never/No = _____

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2 Ensuring Effective Use of Digital Channels, Data and Analytics

	Strategy/Capability			
1 2	We effectively utilize: • Email • Social media	☐ Always ☐ Always	☐ Sometimes ☐ Sometimes	☐ Never ☐ Never
3	Our mailings and emails deploy on time during the most effective solicitation timeframes within the fiscal year and reflecting our donors' displayed time preferences	☐ Always	☐ Sometimes	☐ Never
4	We are satisfied with the percentage of our emails that reach the intended recipients (avoiding promotional or junk inboxes)	☐ Always	☐ Sometimes	☐ Never
5	We are confident that our messages display properly on mobile devices	☐ Always	☐ Sometimes	☐ Never
6	We use digital behavior to prioritize whom to target via phone, mail and other channels	☐ Always	☐ Sometimes	☐ Never
7	Our Day of Giving primarily utilizes digital channels (email communications, social, platform) as well as having specific goals and challenges supported through social media	☐ Always	☐ Sometimes	☐ Never
8	We strategically use crowdfunding to steward and retain affinity donors	☐ Always	☐ Sometimes	☐ Never
9	We can implement and test new digital strategies while maintaining our current programs	☐ Always	☐ Sometimes	☐ Never

Summary

Count

Always/Yes = _____
 Sometimes = _____
 Never/No = _____

Summary

Areas of Opportunity and Next Steps

Tally the count of strategies and capabilities in each category.



Areas of Evaluation	ALWAYS/YES	SOMETIMES	NEVER/NO	OUT OF
1 Assessing and Growing Digital Impact				14
2 Ensuring Effective Use of Digital Channels, Data and Analytics				9
OVERALL PROGRAM				23

Next Steps for Program Improvement

Action Item 1:

Action Item 3:

Action Item 2:

Action Item 4: