

BUILDING AN ANNUAL GIVING PROGRAM FROM SCRATCH

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AGENDA

My path

University of Wisconsin-La Crosse

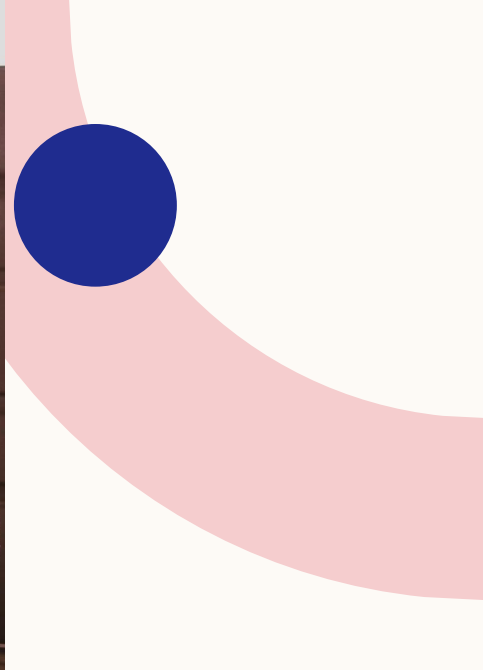
Annual Giving 101

Fundamentals & digging into the pillars

Stewardship

Evaluating

Q&A



UWL 2016-2023

Summer 2019 – AGN research



ANNUAL GIVING 101

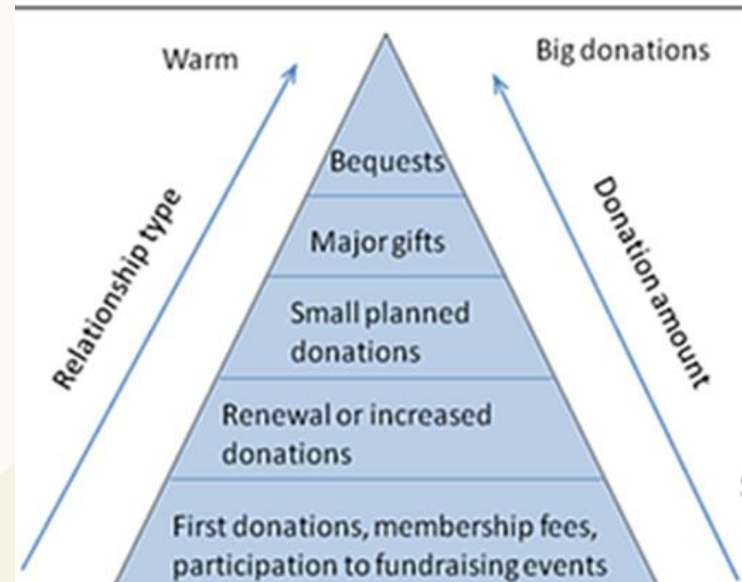
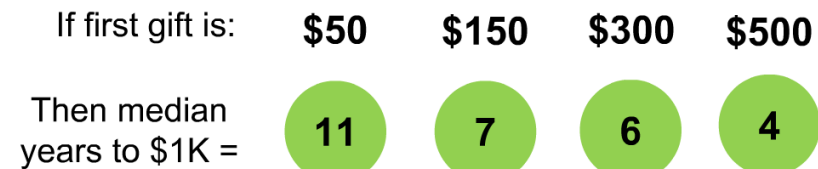
- What is Annual Giving?
 - Unrestricted giving?
- Why is it important?
- When does it happen?
- Who is involved and who is impacted?

Annual Giving and Pipeline

Path to leadership giving: typical individual donors







First gift size matters



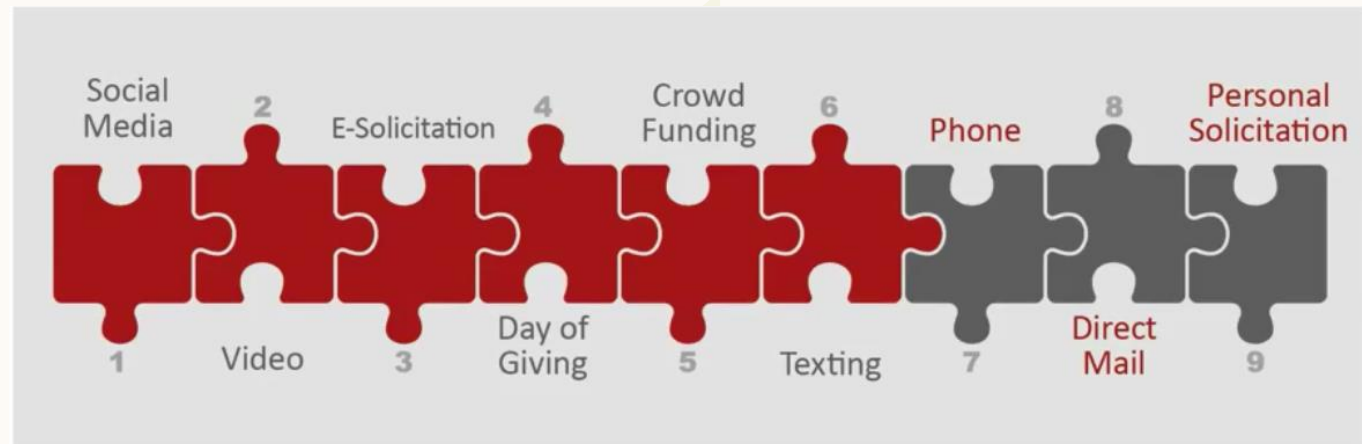
FUNDAMENTALS

Acquisition – Retention – Increased gifts – Reactivation

- Omnichannel approach to engage donors.
- Understand your audience – segmentation!
- Planning & Goal setting

CHANNEL (2018)	GEN Z	MILLENNIALS	GEN X	BOOMERS	MATURES
 Online thru Website	28%	40%	37%	35%	38%
 Mail	9%	13%	14%	27%	43%
 Social Media	21%	17%	9%	11%	6%
 Text/SMS	4%	8%	8%	3%	3%

The Next Generation of American Giving blackbaudinstitute.com



ROADMAP FOR LONG TERM GOALS

	Current	Year 1	Year 2	Year 3	Year 4	Year 5
Alumni Participation %	8%	9%	10%	11%	12%	12%
Alumni of Record	65,000	65,650	66,307	66,970	67,639	68,316
Alumni Donors	5,200	5,909	6,631	7,367	8,117	8,198
Retention Rate	60%	61%	62%	63%	64%	65%
# Retained Donors	NA	3,172	3,663	4,177	4,715	5,276
# New/React Donors	NA	2,737	2,967	3,189	3,402	2,922

DIRECT MAIL



BROWN ANNUAL FUND

Finding a humanitarian voice

Drashti Brahmabhatt '19 has big plans for

WHY GIVE EVERY YEAR?

You make a difference
University to reach new
impact locally and globally

You support your passion
that's meaningful to you
and programs across the

You belong to a community
parents, and friends be
donors who give every
makes you part of this



**THANK YOU
Patricia!
YOUR
GENEROSITY
DIRECTLY
IMPACTS UWL
STUDENTS!**

In 2018, 80% of gifts to UWL were less than \$100. *Every gift works together to support students.*

Please renew your 2018 gift to the UWL Health Ed Dept.

Last gift date	Last gift amount	Last gift fund designation
5/29/2018	\$25	UWL Health Ed Dept

- Sent to 558 leadership donors
- Total cost \$430
- 8% return rate
- \$45K in gifts

Univ
This courtesy

☐ \$25

Total Amount

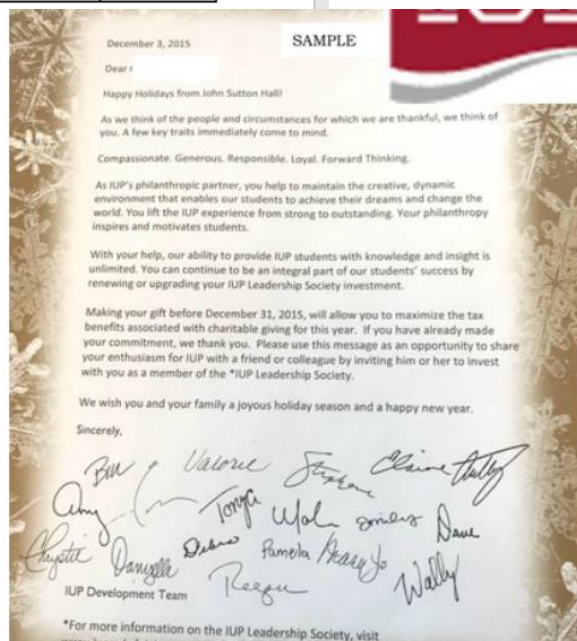
☐ Check

☐ Compl

section

☐ I have already made a bequest to benefit UWL in my will or trust. OR I would like info on how to do so.

120848
Patricia Hymanson
1240 Fragrant Spruce Ave
Las Vegas, NV 89123-5356



**Thank you for
being UWL Proud!**

M MICHIGAN ROSS

your gifts are supporting
ts with scholarships
ing and research at
and institutes
ience-based opportunities for all
nts in degree programs at Ross

**Will you make
YOUR difference?**

ough a solicitation channel, it's
l concrete with your case.

SEGMENTATION

Consider audience segmentation options

- Giving Society Members
- Giving Society Eligible
- Leadership Society Members
- Volunteers
- Alumni Couples
- Alumni Parents
- Non-Alumni Parents
- Student Leaders
- Former Callers
- Reunion and Non-Reunion
- Giving Frequency
- Geography/Region
- Generational
- Demographic
- Class Year
- Young Alumni
- Scholarship Recipient

UNIVERSITY OF WISCONSIN - LA CROSSE

WE LOVE ALWAYS DONORS!

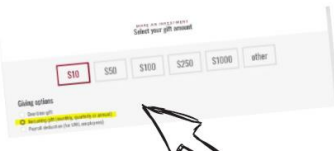
ALWAYS donors
are proud UWL donors who have chosen to
make a monthly gift. It's an easy, hassle-free
way to never forget to give back to UWL!

Annual Gift	Per month amount
\$1,000 (Chancellor's Circle level)	\$83.34
\$750	\$62.50
\$500	\$41.67
\$250	\$20.84
\$100	\$8.34
\$60	\$5.00

www.uwlax.edu/foundation

Giving options: Recurring gift

As a special thank you for being an ALWAYS donor, set up
your monthly gift and we'll send you a small UWL themed
token of appreciation!



UNIVERSITY OF WISCONSIN - LA CROSSE

DOUBLE YOUR IMPACT!



**Check with your employer to see if your organization is affiliated
with a matching gift program!**

Visit www.uwlax.edu/foundation/about-giving

10

IVY STONE SOCIETY DECEMBER DRIVE 10,000 Members by December 31st!



Dear Colin,

As an educator in Philadelphia for 37 years, I
experienced firsthand the waves of impact that begin
on Penn's campus and wash over our proud city in
ways unmeasurable. **Over the past 25 years, I've
given to The Penn Fund as an Ivy Stone Society
Diamond member because of the incredible
power that is Penn** – a prestigious university
attracting young people from across the globe who
aspire to one day achieve their dreams as a Quaker.

**Join me in giving to The Penn Fund by year's
end to join the prestigious Ivy Stone Society
and help make the December Drive a success!**
With each gift, I know my contributions make a Penn
education possible for undergraduates that will one
day change the world. Will you join me as an Ivy
Stone Society member?

JOIN NOW!

Thank you in advance for your loyal support of
The Penn Fund!

For Pennsylvania,
Mary Anne Pasqualella, GW53 GPD95

PLANNING!!!

Touchpoint	Date	Channel
1	5/1/2019	Postcard Direct Mail
2	5/7/2019	Teaser Email
3	5/7/2019	Teaser Social Media Post
4	5/31/2019	Phonathon - Message
4	6/1/2019	One Week Away Email w/ Video
5	6/1/2019	One Week Away Social Media Post
6-13	6/9/2019 Day of Giving	3-4 Emails
		Peer Email
		Digital Ads
		Retarget (if applicable)
		4-5 Social Media Posts
		Text Message
14	6/10/2019	Thank You Email w/ Video
15	6/10/2019	Thank You Social Media Post
16	6/26/2019	Thank You Postcard Direct Mail
17	7/5/2019	Thank You Call Phonathon

Action Item	Plan
Meet with unit to determine strategy	10/1/2017
Art requested from unit/design student	10/5/2017
Copy requested from unit	10/5/2017
Submit data request	10/5/2017
Art received from unit/design student	11/14/2017
Copy received from unit and sent to communications for edits	11/14/2017
Art edits sent to unit/design student	11/16/2017
Data received and reviewed	11/13/2017
Art sent to EBK for approval	11/16/2017
Art approved by EBK	11/16/2017
Copy received from communications	11/16/2017
Copy sent to EBK for review	11/26/2017
Copy approved by EBK	11/27/2017
Data completed and sent to EBK for review	11/26/2017
Data finalized	11/26/2017
Proofs created by Deb	11/26/2017
Proofs reviewed and edits sent to Deb	11/26/2017
Revised proofs created by Deb	11/27/2017
Proofs approved	11/28/2017
Proofs sent to unit for review	11/28/2017
Proofs approved by unit	11/30/2017
Proofs sent to EBK for review	11/30/2017
Proofs approved by EBK	11/30/2017
Drop Date	12/5/2017

POWER WORDS:

OPPORTUNITY

IMPACT

TRANSFORM

CATALYST

MOMENTUM

EMPOWER

UNLEASH

PIONEER

LIFE-CHANGING

THRIVE

INVEST

THOUGHT LEADER

EXCEL

GROUNDBREAKING

PHONATHON & TEXTING



**Elephants never forget.
Neither do Eagles.**



But just in case, Thomas and Sharon, we're sending you this friendly reminder about your fall commitment to UWL.

The easiest way to fulfill your pledge to support UWL students is online at: www.uwlax.edu/foundation/give-now/fall-22-phone/

If this message and your gift have crossed in the mail, please accept our apologies and biggest thanks!

What is the UWL Fund?

The UWL Fund supports the entire UWL experience. Funds go right where they are needed most to help students, faculty & staff.

THANK YOU!

Pledge Date: 10/13/2019

Amount: \$25 | You have specified your gift to support: UWL Fund

- ☐ Check enclosed payable to the UWL Foundation
- ☐ Complete your pledge using a credit card online at www.uwlax.edu/foundation and click "Give Now" (please add FALL PLEDGE) in the notes section.

**PLEDGE
REMINDER**

133242

Thomas & Sharon Stuckey

Text:

pay attention to frequency

provide value

use common language

respond ASAP

DIGITAL: EMAIL, SOCIAL MEDIA

Hi Elizabeth,

I know we can count on you as a loyal member of The Gator Nation. We have until midnight to start the school year off right with 2,500 donors.

Collectively, gifts of all sizes make a HUGE difference by supporting scholarships, research, and student life. Together, we can change the world.



University of Wisconsin-La Crosse

★ Favorites · 4h · 🌐



Shout out to Kyle '09 and Laura O'Brien '10 and Paul '77 & Karen '76 Koeller, loyal alumni who are sponsoring today's Cash Cab!

Today from 9 a.m.-3 p.m. on campus, students can take a ride in the cab for a chance to answer trivia and win funds for any area of campus.

#livemaroon

Give Now! uwlax.edu/go/givingday



Drake
UNIVERSITY

University Advancement

Your generosity.
is changing lives
at Drake.



97.3% #71 3 100%

of students in the class of 2022 were employed or began graduate school within six months of graduation

best value school, ranked by U.S. News & World Report

22-23 Fulbright Scholars

of first-year, full time students receive a Presidential Scholarship

Last year at this time you made your gift to Drake. Thank you for your continued support! As you look back on your past year of giving, we hope it's clear just how valued and important you are to the Drake community. This institution is exceptional because of your generosity.

The possibilities that lay ahead to transform lives and strengthen communities will become realities with your continued generosity. [Renew your support today](#) and your gift goes to work immediately, impacting students and accelerating growth at Drake.

Make a Gift

Drake University University Advancement 2507 University Ave, Des Moines, Iowa 50311

T 1-800-44-DRAKE, x7 or 515-271-2500 [w alumni.drake.edu](http://w.alumni.drake.edu)

SPECIAL EVENTS – 5k's, GIVING DAYS, CROWDFUNDING



ONE DAY FOR UWL IS BACK



OCT 17-OCT 18
9 AM TO 9 AM
#LIVEMAROON
UWLAX.EDU/GO/GIVINGDAY

[SOE One Day video](#)

[One Day for UWL](#)



Get your pair of exclusive **One Day** for UWL socks when you make a gift of \$60 or more.



EAGLES GIVE
UWL'S ONLINE CROWDFUNDING PLATFORM

STEWARDSHIP

In case you didn't notice, you are on a roll! You've made a gift to the University of Iowa two years in a row—and we are so grateful for your support. As a Hawkeye who gives back, **you are making a big impact across campus** through your generosity. Thank you for being a treasured member of our UI family.

Visit foriowa.org to learn how you make a difference at Iowa and find ways to stay connected with your fellow Hawkeyes.

Go Hawks!

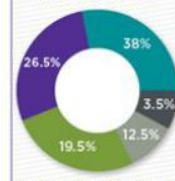


Prioritize and plan stewardship as much as acquisition

THANK YOU FOR MAKING YOUR FIRST GIFT TO NYU!

There's a first time for everything. Your first gift makes a difference and speaks volumes about the generosity of the NYU community. Thanks to you, students can experience their own "firsts" at NYU - from a first visit to NYC, to a first internship, first museum tour, study away site, or job offer. You enable students to live the one-of-a-kind NYU experience. Thank you - and welcome to our family of dedicated donors!

WHAT MATTERS MOST TO YOU



Scholarships and Fellowships
Academic Departments
Faculty, Staff, Research
Where it's needed most
Capital, Equipment, Technology

OVER 43,000
ANNUAL FUND DONORS
gave over
\$33 MILLION
in FY 17

4th Ranked among 65 top private colleges enrolling low- and middle-income students

21% of freshmen are Pell Grant eligible because of exceptional financial need

Learn more about the impact of your gift at nyu.edu/giving/yourimpact



Nana Apraku (STERN '18)
1831 Fund Scholarship Recipient



Emmanuel Lopez (TSOA '18)
Multicultural Scholarship Fund Recipient

"You so much for your gift to NYU this year. Being admitted into NYU was a life changing achievement for my mother is an immigrant from Ghana and was able to attend college, but she instilled in me the importance of receiving a quality education. I am enjoying my time here at NYU and, although I encounter some challenges, I simply remember that people like my mother are counting on me to succeed. Your gift means so much. Thank you for everything!"

"Attending NYU has been an incredible life decision. Without your help I wouldn't be here. My family is able to pay for a very small amount of my tuition. I'm so grateful to have your support. This scholarship has inspired me to work even harder because I know that you believe in me and in my goals. Thank you — you have really motivated me to make you as proud as possible!"

Develop a Stewardship Matrix

[illegible]

EVALUATING

Create a snapshot of your results

Solicitation Method-All Gifts	FY18 Final		FY18 YTD		FY19 YTD	
Personal Solicitation	\$6,009,530.24	2,395	\$2,599,527.65	1,100	\$4,143,960.68	1,757
Phone	\$381,051.75	3,906	\$187,716.39	2,283	\$217,624.74	2,318
Direct Mail	\$2,821,111.39	2,774	\$678,121.67	1,112	\$208,112.32	690
Other/General	\$592,539.47	574	\$376,594.94	469	\$270,988.13	449
Email/Online	\$369,636.88	839	\$201,271.82	454	\$379,650.64	1,292
Events	\$359,725.43	230	\$294,502.93	203	\$298,461.00	171
Emerging Technologies	\$137,219.44	1,097	\$104,953.86	915	\$430,305.69	1,746
Unknown/Blank	\$2,226,729.94	5,515	\$2,151,859.16	5,226	\$373,381.67	74
Total	\$12,897,544.54	11,254	\$6,594,548.42	6,931	\$6,322,484.87	7,754

Direct Mail	Phonathon	E-Mail
Response Rate $\frac{\# \text{ of responses}}{\# \text{ of pieces mailed}}$	Complete Rate $\frac{\# \text{ of completed records}}{\text{Total records}}$	Open Rate $\frac{\# \text{ opened}}{\text{total sent} - \text{bounces}}$
Cost Per Piece $\frac{\text{total spend}}{\# \text{ of pieces mailed}}$	Contact Rate $\frac{\# \text{ records with response}}{\# \text{ of completed records}}$	Click Rate $\frac{\# \text{ clicked}}{\text{total sent} - \text{bounces}}$
Cost Per \$ Raised $\frac{\text{total \$ raised}}{\text{total spend}}$	Pledge Rate $\frac{\# \text{ of pledges}}{\# \text{ records with response}}$	Bounce Rate $\frac{\# \text{ bounced}}{\text{total sent}}$
Cost Per Donor $\frac{\text{total donors}}{\text{total spend}}$	Average Pledge* $\frac{\$ \text{ pledged}}{\# \text{ of pledges}}$	Conversion Rate $\frac{\# \text{ actions}}{\text{total sent} - \text{bounces}}$
Average Gift* $\frac{\$ \text{ raised}}{\# \text{ of gifts}}$	Pledge Fulfillment $\frac{\# \text{ gifts or \$ raised}}{\# \text{ of pledges or \$ pledged}}$	Average Gift* $\frac{\$ \text{ raised}}{\# \text{ of gifts}}$

APPEAL PERFORMANCE SUMMARY

PROJECT NAME:

UNIT/DEPT:

DROP DATE: 10/5/16

QUANTITY MAILED: 500

TOTAL COST: \$710 production + postage; Cost per piece: \$1.42

DOLLARS RAISED



To date: 12/1/16

NUMBER OF GIFTS



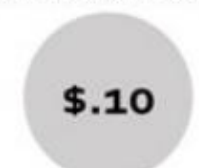
6% response rate compared to 3% for this piece last fall; 2 gifts were long-lapsed renewed donors; of the 32 respondents, 3 have a MG capacity of \$25k+

AVERAGE GIFT



Average gift for this piece last year was \$200.00

COST TO RAISE A DOLLAR



The total return on investment for your piece, excluding staff time, is \$7,290 cash. Alternate ROI value: 3 Major Gift leads

RECOMMENDED NEXT STEPS:

- Evaluate online giving activity for mail non-responders
- Schedule April intake meeting for FY18 mail piece



Q&A

**THANK
YOU**

Taylor Wilmoth
twilmoth@uwlax.edu