



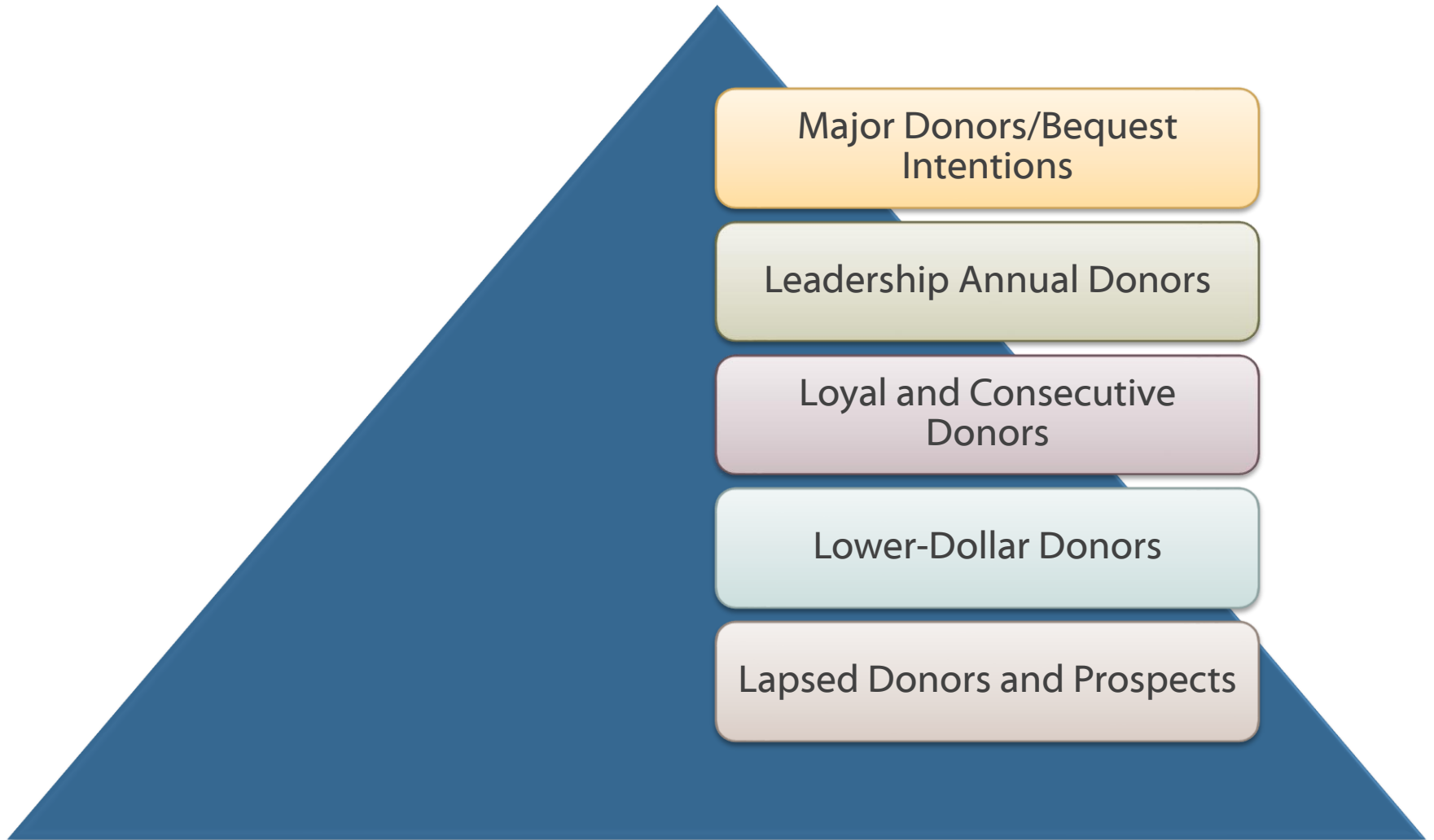
FUNDAMENTALS OF ANNUAL FUND:

Retention, Acquisition and Driving Total Dollars

GG+A Webinar
Wednesday, October 10, 2018

Presented by:
Adrian Salmon, Vice President
Anna Swanson, Senior Vice President

THE DONOR PIPELINE



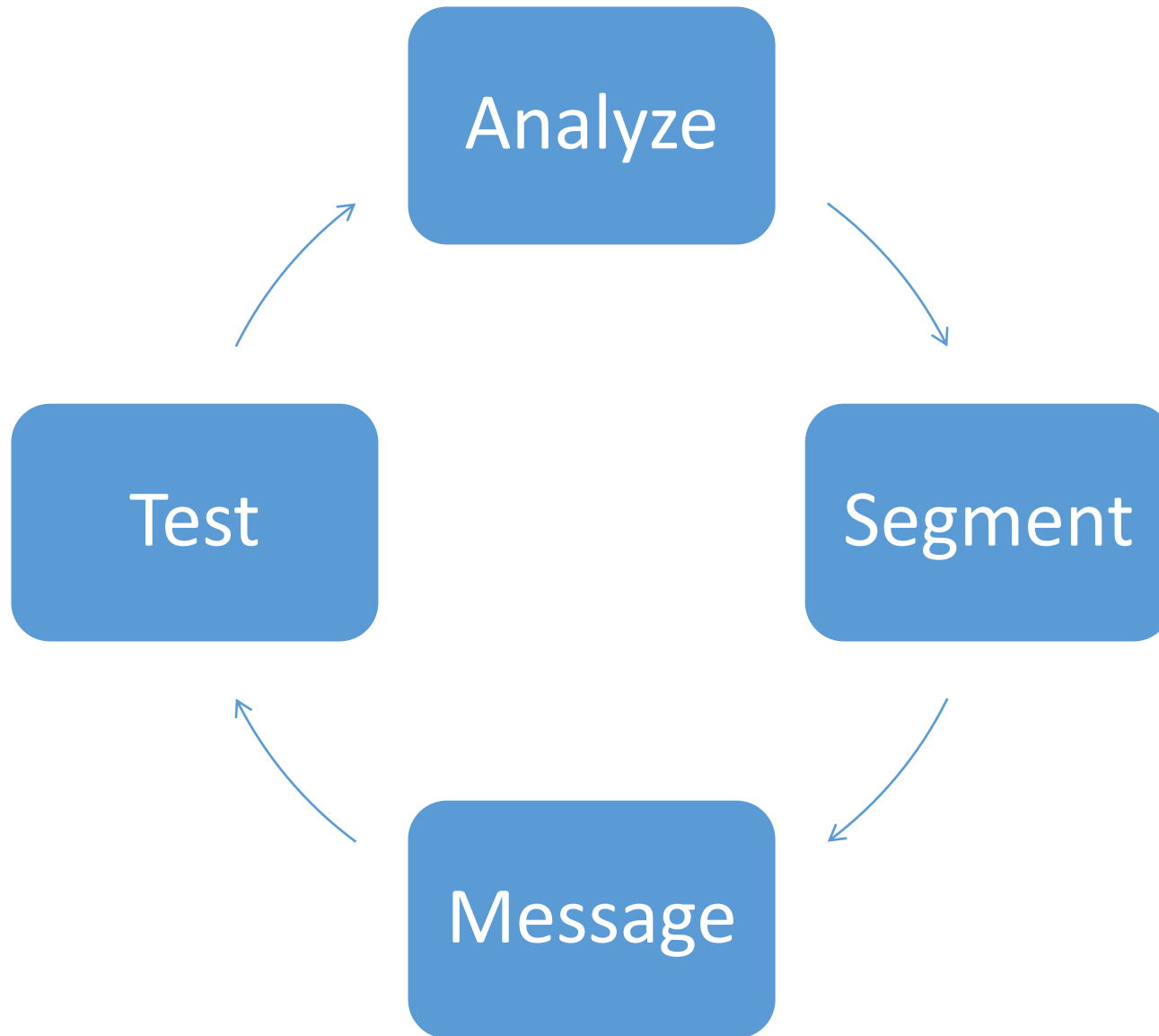


ANNUAL GIVING HEADWINDS

912 Institutions reported to CAE/VSE Survey in 2016 and 2017:

- 62% experienced a decline in participation, at an average of 8.8% lower than the previous year
- 81% have grown their alumni of record; on average, the alumni of record has increased by 7.8%
- 47% saw an increase in overall Alumni Giving
- Overall giving increased... more important to identify your best donors and ask them appropriately

ANNUAL FUND PATH

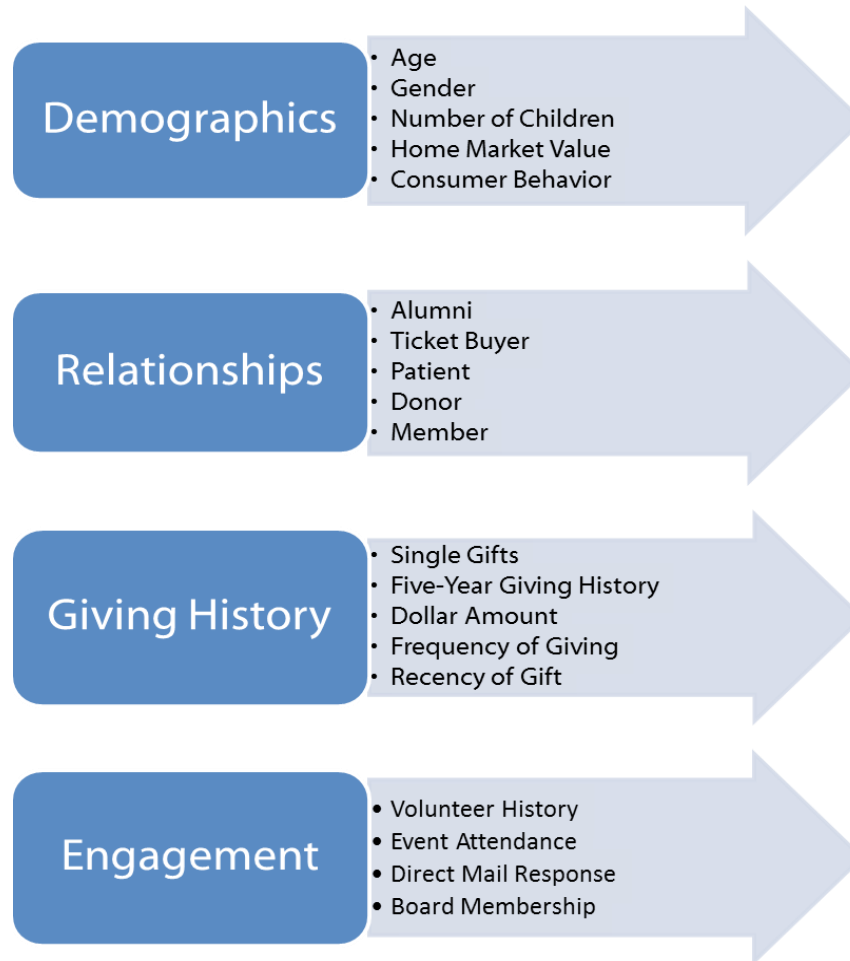






ANALYZE

ANALYZE



ANALYZE

PROPENSITY RATINGS (PCR)

Propensity Rating (PCR) Analysis

PCR Code	# of HH	# of Donors	% Donors	# of Recent Donors	% Recent Donors	Average Largest Recent Gift	Average Lifetime Total Giving
P1	4,345	3,195	73.5%	1,318	30.3%	\$5,011	\$14,124
P2	6,418	4,509	70.3%	1,706	26.6%	\$3,305	\$8,935
P3	4,789	3,171	66.2%	1,169	24.4%	\$1,479	\$4,015
P4	10,245	6,580	64.2%	2,433	23.7%	\$2,175	\$5,119
P5	27,603	14,478	52.5%	5,797	21.0%	\$1,862	\$3,309
P6	74,599	26,530	35.6%	11,073	14.8%	\$864	\$1,628
P7	48,866	7,815	16.0%	4,290	8.8%	\$347	\$587
Grand Total	176,865	66,278	37.5%	27,786	15.7%	\$1,479	\$3,433

ANALYZE: STEWARDSHIP



Stewardship and Donor Satisfaction Scorecard

Metric	Giving Last Five Years						Adjusted Score
	% Answering "High" All Respondents	\$100k+	\$25k to \$99.9k	\$1k to \$24.9k	<\$1k	Non-Donors	
Accurate and prompt receipting	84.1	81.8	86.2	87.0	77.5	72.2	78.9
Process of making gift was easy	79.9	78.4	85.0	80.1	81.6	72.2	78.3
Acknowledgement or recognition	75.5	78.7	84.7	77.1	61.9	56.8	69.0
Gift used as intended	72.5	72.9	83.3	75.8	51.3	51.4	64.7
Interactions about gift were personalized	65.2	73.6	81.7	64.4	42.1	48.6	61.6
Know whom to contact	61.9	74.7	71.7	58.3	45.9	58.3	63.3
Communications about gift	61.1	62.1	69.5	62.7	45.0	51.4	57.7
More likely to give in future	50.0	63.5	57.6	49.6	35.9	24.3	43.6
University did a good job asking me	47.8	61.3	54.5	45.1	36.1	38.2	46.7
Saw impact of gift	37.8	42.7	55.2	35.7	21.6	30.6	39.8
Average by gift level	63.6	69.0	72.9	63.6	49.9	50.4	

80-100 = Excellent, 60-79 = Fair, Less than 60 = Needs Improvement. Adjusted score weights gift level score based on distance from overall score.

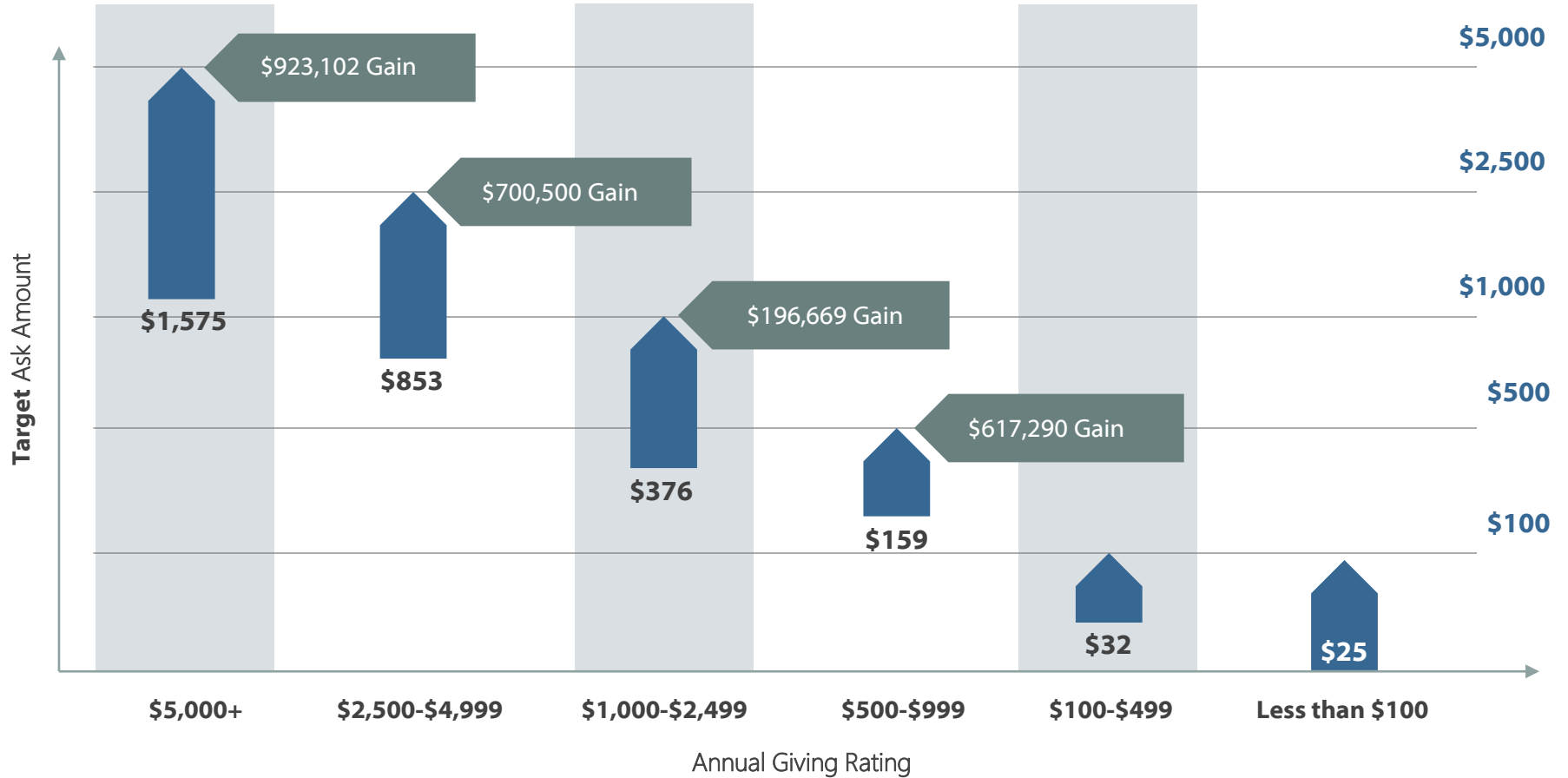
Overall Score:

60

ANALYZE

The UPGRADE Opportunity

(4:1 Success Rate)







SEGMENT



SEGMENTATION BASICS

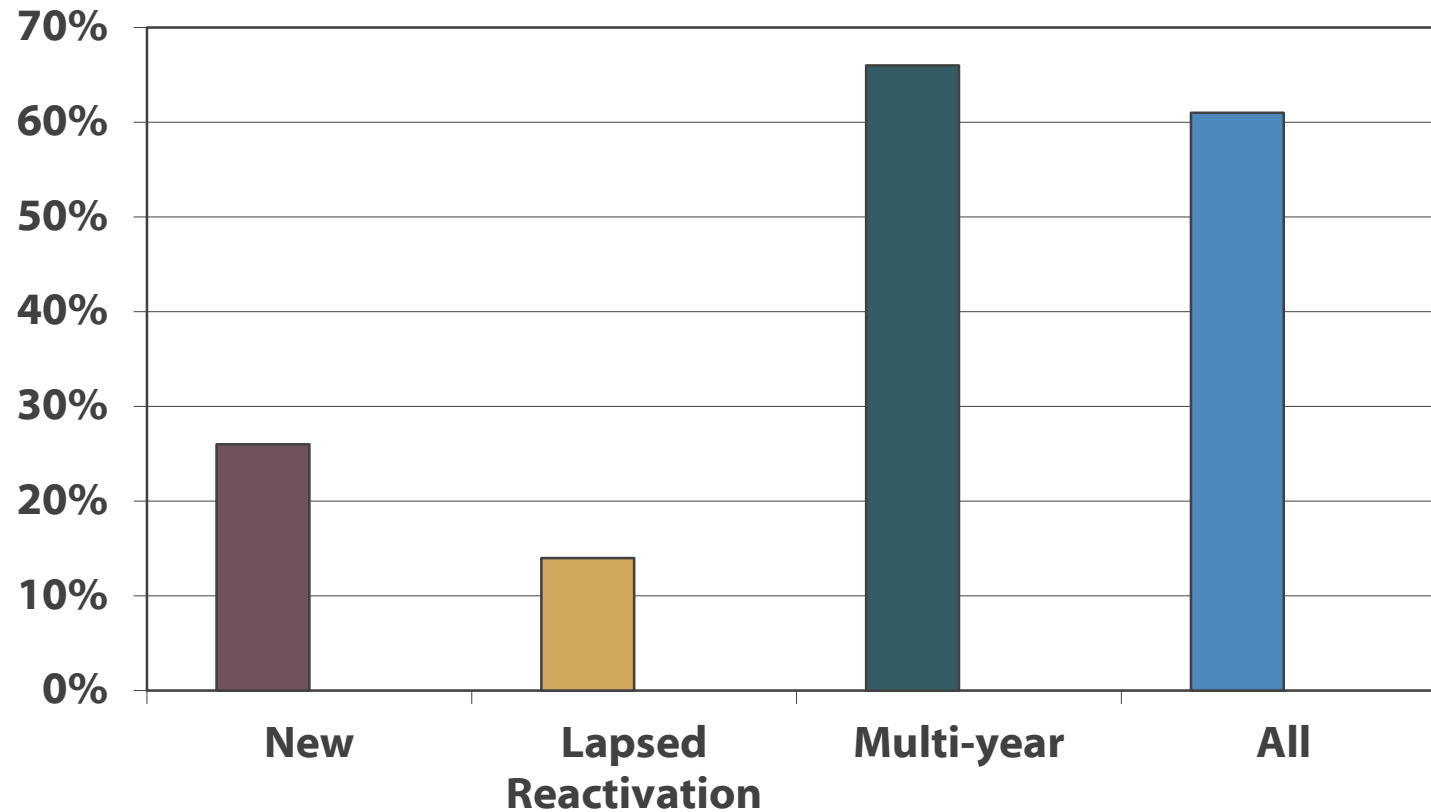
- Segmentation should allow for all members to receive the same treatment
- Segments should be large enough that once you've tested, you feel confident in your results.
- Segment of one is crazy. Direct Marketing should give the illusion of customization
- Segments share characteristics with which they identify



SEGMENT TO EFFICIENTLY USE RESOURCES

- Through analysis of data, determine how you efficiently segment the data to maximize results
 - Ask donors with recent giving more frequently
 - Segment never-donors into less costly communication channels
 - Use predictive modeling or propensity scores to direct efforts toward best opportunity

SEGMENTATION FOR REPORTING



DONOR RETENTION RATES BY LOYALTY, US UNIVERSITIES

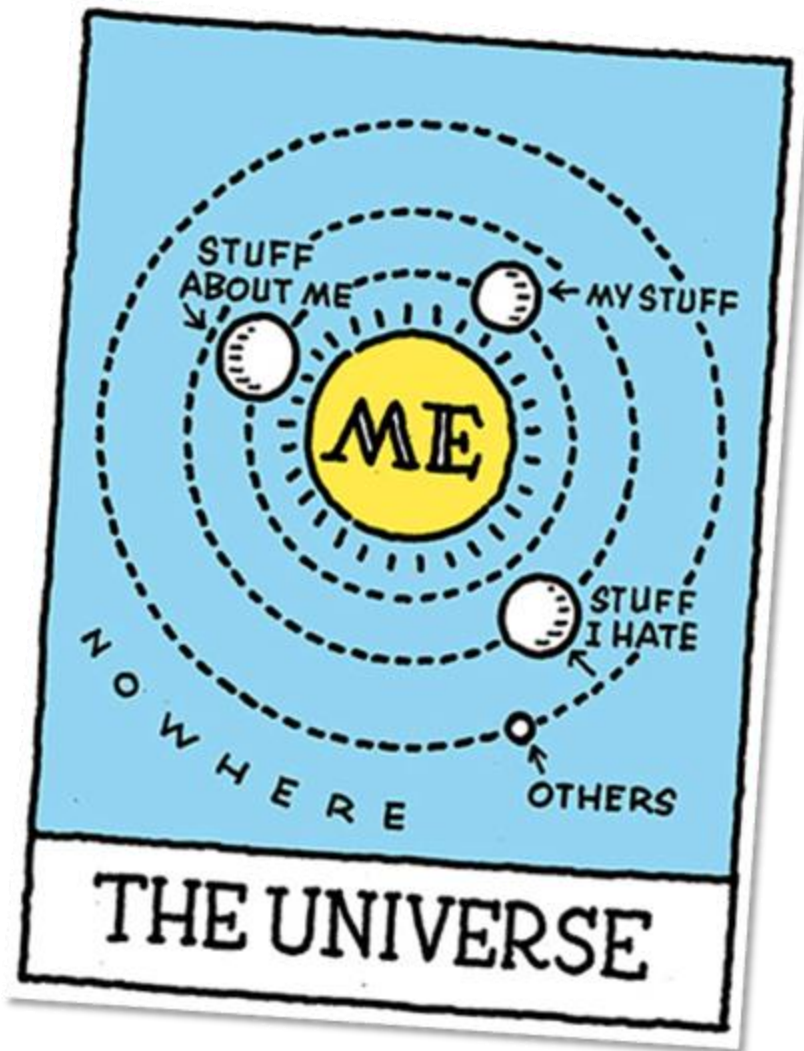
Source: Target Analytics 2014.



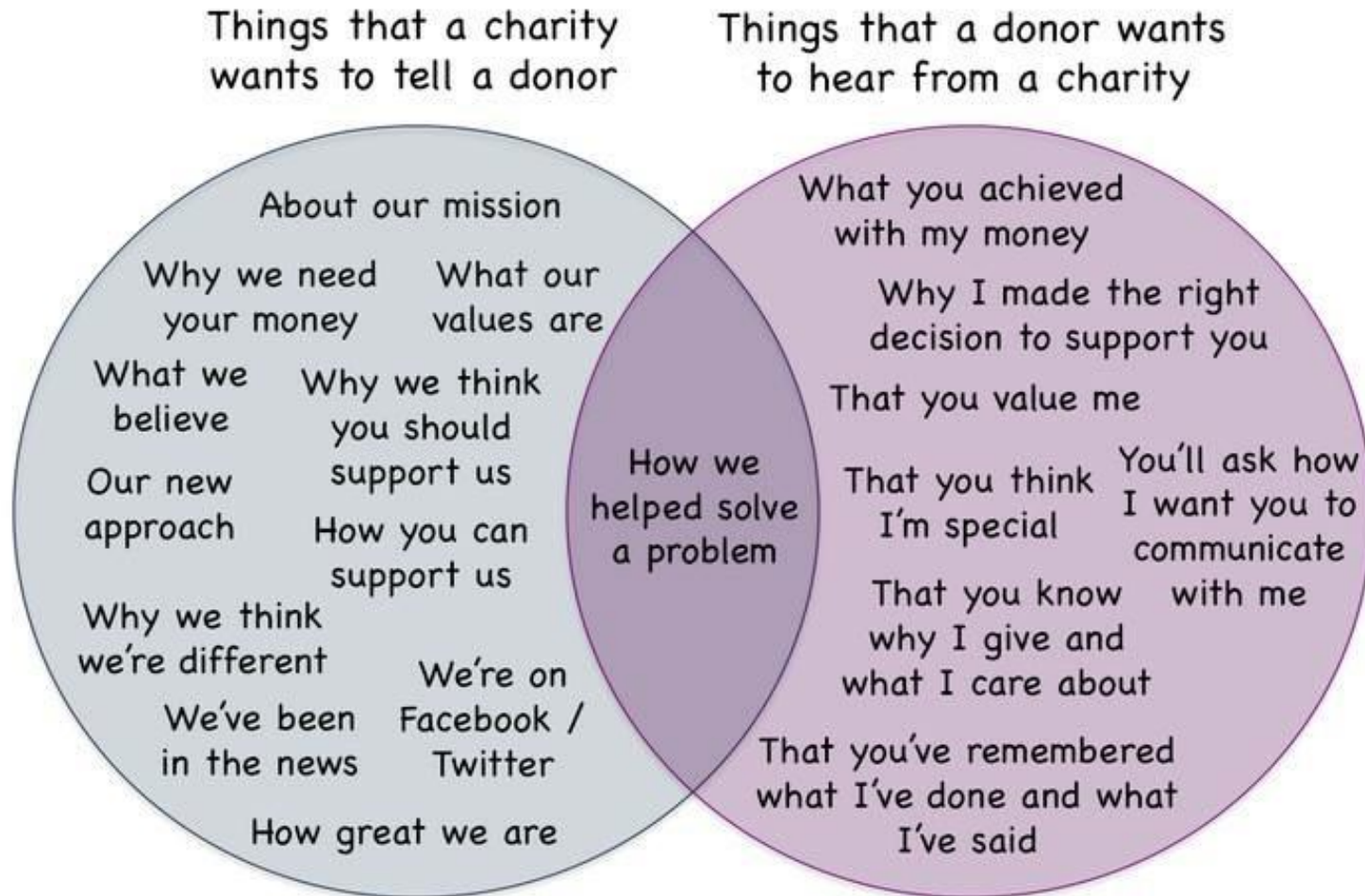
MESSAGE



What do Alumni/Donors *care* about???



EFFECTIVE MESSAGING



Wish you were here?

Memories of the University of Leeds



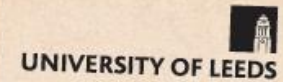
As this picture shows, trams ran down Woodhouse Lane into Leeds city centre until 1959.



There's no sign of a laptop in the 1964 computer science lab.



Can you see any familiar faces or sights? These photos were sent to us by students who were contemporaries of yours at the University of Leeds.



Anti-nuclear protests were common on campus in the eighties and even made an appearance on these Headingley student houses.



What are your memories of Leeds? If you would like to share them, you can upload photographs at www.alumni.leeds.ac.uk/flickr

Your university today

Many aspects of university life are just the same

Sunny days in Hyde Park, the Otley Run and playing sports at Weetwood – in many ways, being a student at Leeds today is as it has been for generations. The campus remains at the heart of everyday life with over 33,000 students taking full or part-time courses.

Come graduation day, degree ceremonies still take place in the Great Hall. After that, we hope our graduates and post-graduates will continue to keep in touch with the University and remain part of our community of students, staff and alumni.



Leeds is a great place for students academically and socially.



Hyde Park is still a wonderful place to sit on a sunny day.



Graduation day – an important day in any student's life.

Our priority: increasing the number of scholarships available

We need to ensure that the University of Leeds continues to attract the best students, whatever their financial circumstances. That means being in a position to offer more scholarships to students from poorer families. Many former students are helping – either by funding or part-funding a scholarship.



Funding has undergone rapid change

50s	In the post-war years, local education authorities paid student tuition fees.
1962	Student maintenance grants were established to cover tuition fees and living costs.
1963	At this time, nearly 70% of students received grants from public funds.
1980	Student grants increase to £1,430 (from £380).
1990	Means-tested grants, bursaries and top-up loans introduced.
1998	Students are required to pay a contribution to their tuition fees. The student grant is abolished and replaced by means-tested student loans.
2006	A new system of variable tuition fees is introduced in England.
Oct 2012	Teaching grant to universities cut by 80% – tuition fees of £9,000 a year introduced.



The Parkinson Building remains a much-loved feature of the University. 'Meet me on Parky Steps' – it's still the meeting place for students.



Centenary Alumni Scholarships are awarded to students who get three As at A-level and come from a low income household. With the financial help they receive, scholars are able to buy course books and avoid taking on paid work at times that will conflict with their studies. They also take great encouragement from the fact that people whom they have never even met are prepared to help them realise their dream of a university education.



Please help give a university education to someone who might otherwise miss out

File Message ADOBE PDF Tell me what you want to do...


Ignore Delete Reply Reply All Forward More Meeting Move OneNote Mark Unread Categorize Follow Up Translate Find Related Select Zoom Dynamics 365


Thu 11/16/2017 6:09 AM

charity: water <team@charitywater.org>

Your donation this month is going to Rwanda!


To

 If there are problems with how this message is displayed, click here to view it in a web browser.



YOUR MEMBERSHIP MEANS

Clean water for
every single person
in Rulindo District





This month, we're thrilled to share that your donation is going to Rwanda to help us complete clean water coverage in the Rulindo District. With your help, we will close out seven years of work in Rulindo and eagerly begin a new chapter in the Gicumbi District right next door.



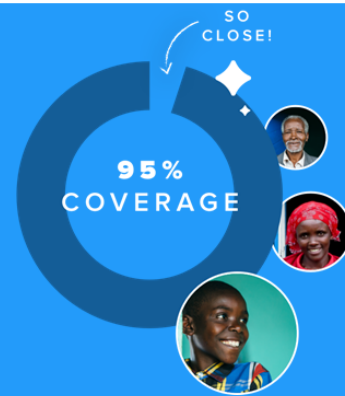
When we began working with our local partner in Rwanda, Water For People, we took on a challenge: to support them in their goal to bring clean and safe drinking water to every family in the Rulindo District.



THE RULINDO DISTRICT:

A 219 square mile block in the Northern Province of Rwanda. It's made up of 17 sectors, and it's home to more than 288,000 people.

Since 2010, we've funded 724 water projects to bring clean water into communities, schools, and clinics in Rulindo. Right now, we're 95% of the way there. With your help this month, we'll reach complete coverage.



Thank you for being part of this community and helping us hit an incredible milestone. We can't wait to share stories about your impact in the coming months.

SHARE THE GOOD NEWS



THE JOURNEY

Join our Storyteller, Tyler, as he experiences life without water and meets the incredible people of Cambodia.

START WATCHING



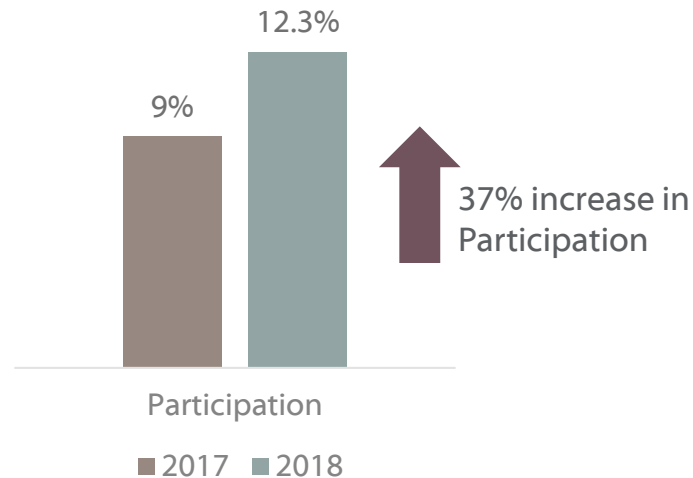


VIRGINIA TECH CASE STUDY

- **Goal:** Increase participation from 9%-22% from 2018-2022
- **Approach:**
 - 5 year plan (incorporating planned increased in alumni)
 - Analyze database and split into two– most likely givers and least likely using propensity score
 - Multi-channel communication approach

VIRGINIA TECH CASE STUDY

■ One year's progress:



Total Dollars →

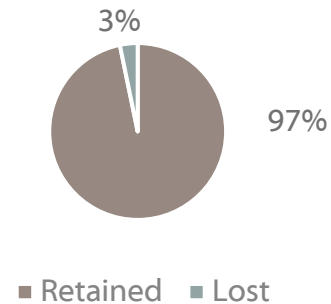
Academic Annual Fund

+ 20%

Overall Annual Fund

+ 8%

5+ Year Consecutive donor



Reactivated
2017 → 2018

31.7%

QUESTIONS?

- Submit questions via chat function at the top of your screen
- Thank you!

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