

# Annual Giving Trends

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# What will we cover?

## Traditional Annual Giving Methods

Phone, Mail and E-solicitation, Personal Solicitation

## General Strategies

Segmentation, Stewardship, Alumni Participation

## New Online Technologies

# “Traditional” Annual Giving

## Phonathons — the Bad

- Higher attempts, lower contacts
  - Caller ID and screening
  - People are just so darn busy!
- Cell phones
- What are you struggling with?

# “Traditional” Annual Giving

## Phonathons — the Good

- The phone still means \$\$\$s—and its still growing!
- Cell phones
- What are some bright spots for you?

# “Traditional” Annual Giving

## Phonathons — Recommendations

- Strategic segmentation
- High quality training
- Good customer service
- What are your recommendations?

# “Traditional” Annual Giving

## Direct Marketing — the Bad

- Are we lost in a sea of snail mail and e-mail?
- Costs are continuing to rise.
- What are you struggling with?

# “Traditional” Annual Giving

## Direct Marketing — the Good

- Still the best methods for reaching many people quickly.
- The level of sophistication continues to rise.
- E-solicitation continues to grow
- What are some bright spots for you?

# “Traditional” Annual Giving

## Direct Marketing — Direct Mail Recommendations

- Very high level personalization
- Know what your audience is comfortable with
- Decide whether acquisition is worth it—it probably isn't.
- What are your recommendations?

# “Traditional” Annual Giving

## Direct Marketing — E-solicitation Recommendations

- Experiment...
- ...but understand the realities.
- Don't overdo it—communicate with other areas on campus
- What are your recommendations?

# “Traditional” Annual Giving

## Personal Solicitation— the Bad

- Budget
- Competition with major gift staff
- Legitimacy
- What are you struggling with?

# “Traditional” Annual Giving

## Personal Solicitation — the Good

- Mechanism to reach segments we are missing
  - Mid-level donors
  - Young alumni
- Laying the groundwork for the future.
- What are some bright spots for you?

# “Traditional” Annual Giving

## Personal Solicitation—Recommendations

- Create buy in—and foster cooperation
- Provide excellent training
- What are your recommendations?

# General Annual Giving Strategies

## Segmentation

- The “given” strategies
  - Giving history
  - Degree Area
  - Faculty/Staff
  - Friends
  - Parents

# General Annual Giving Strategies

## Segmentation

- Generational Segmentation-Method
  - Civics: Direct Mail
  - Boomers: Direct Mail and Phone
  - Generation X: Phone and E-mail
  - Generation Y: E-mail, Facebook...who knows?!?!?

# General Annual Giving Strategies

## Segmentation

- Generational Segmentation-Message
  - Civics: Institutional loyalty
  - Boomers: Seek to create change
  - Generation X: Cynical global thinkers
  - Generation Y: Too early to tell BUT they have a global view and see education as a right, not a privilege.

# General Annual Giving Strategies

## Segmentation

- What about...
  - Underrepresented populations
  - Women v. Men?
  - “Non-graduate Alums”
  - Scholarship recipients
  - Participants in campus activities
  - What else??

# General Annual Giving Strategies

## Stewardship

- Its all about accountability
- Saying thank you is not enough
  - Donors want to know the impact of their gift
  - They want to be able to see their gift in action

# General Annual Giving Strategies

## Stewardship – Recommendations

- Thank you notes and calls
- Convey the stories in magazines and newsletters
- Be accountable and transparent

# General Annual Giving Strategies

## Alumni Participation

- US News and World Report “@#\$\$%s”
- Are you still being evaluated on this number?
- No recommendations...other than to track it but not live by it.

# **New Online Technologies**

**Facebook**

**My Space**

**Twitter**

**YouTube**

**LinkedIn**

**Internal Applications**

**– CySpace**

**– Convio**

# Discussion

What are your best practices?

What are your questions for your peers?

What did we miss?