

Faculty & Staff Giving

Agenda

- Understanding faculty and staff
- Planning your efforts
- Making appeals
- Wrapping things up

UNDERSTANDING FACULTY AND STAFF

Consider why people work

- Earn money
- Gain professional experience
- Socialize
- Stay busy
- Be part of something



Consider why people work *in education*



- Believe in the mission
- Like the environment/culture
- Appreciate the benefits
- Enjoy tuition remission
- Seek stability
- Want to be part of something

Appreciate natural constituencies

- Students
- Young alumni
- Reunion alumni
- Parents
- **Faculty and staff**



Know what characterizes the faculty/staff relationship



- Dependency on the institution to make a living
- Frequent and physical proximity to campus
- Exposure to students
- Understanding of institutional operations
- Appreciation of the current culture
- Connection to the mission

Recognize motives for giving

- Support for the mission
- Desire to have a voice
- Pride in association with the institution
- Comfort in feeling part of a community



Anticipate objections to giving

- I already give back with my time
- I'm charged too much for parking, health insurance, etc.
- I haven't gotten a raise in years
- My department never gets the funding it needs
- There's plenty of money in the endowment/from high tuition
- This place wastes money
- I have no idea how decisions about money are made here

PLANNING YOUR EFFORTS

Define your goals

- Start with revenue and participation
- Base on past results and peer benchmarking
- Create awareness, understanding, and opportunity
- Enhance culture of philanthropy



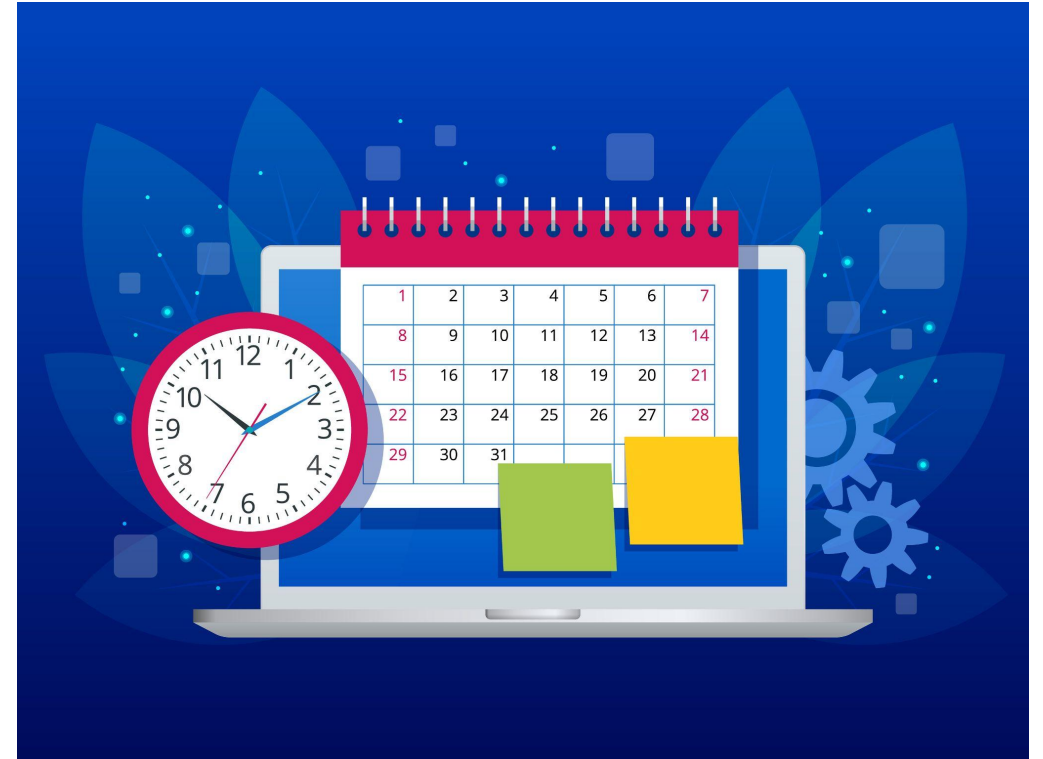
Involve leadership and key administrators



- President/Head of School
- Chief Advancement Officer
- Deans/Department Heads
- Human Resources
- Facilities

Consider timing

- Length of campaign—1 appeal, day, month, quarter, year?
- Time of year (e.g., spring)
- Opportunities (e.g., giving day)
- Competing activities and events



Avoid competing activities and events



- United Way
- Holidays
- Summer
- Matriculation
- Open enrollment
- Exams (midterms, finals)
- Commencement
- Reunion/homecoming/family weekends

Create a calendar of communications and activities

- Kick-off
- Info sessions
- Volunteer training
- Appeals
- Giving day(s)
- Wrap-up
- Stewardship



Recruit volunteers



- Current/recent donors
- Loyal donors
- Long-tenured employees
- People who are well known across campus
- Department heads
- Positions that require outreach
- People with good personalities
- People who get stuff done

Define their roles

- Participate as chairs, committee members, and ambassadors
- Create a balanced representation (faculty, staff, unit, department)
- Serve as signatories/faces/voices for communications and appeals
- Represent/speak at events, student calling shifts, etc.
- Post social content
- Produce thank-you notes, texts, and videos
- Provide you with feedback and advice (focus group)
- Lead by example with a gift

Give them tools

- Website
- Online giving form
- Talking points
- FAQs
- Videos
- Templates



Provide them with updates



- Meetings
- Emails
- Progress reports
- Metrics
- Highlights

MAKING APPEALS

Identify key segments

- Current/recent/loyal donors
- New employees
- Long-time employees
- Recently promoted employees
- Married couples
- Alumni (especially those who received tuition remission)
- Parents of current students (especially those who received tuition remission)
- Those who are active in the campus community

Optimize each channel

- Leverage peer-to-peer as much as possible
- Communicate through “work channels” only
 - Emails (no opt-outs)
 - Direct mail (intercampus delivery)
 - Phone (voicemail)
 - Text (peer-to-peer)
- Make the most of events, activities, and meetings
- Integrate and be thoughtful about frequency

Develop compelling messages

- Select signatories, faces, and voices who resonate
- Describe giving as an *additional* way they can have impact
- Explain impact and share stories—avoid sounding “needy”
- Profile donors with testimonials
- Personalize—especially for those who belong to other constituency segments
- Encourage competition
- Build community

Build community

- Write in the first person plural (i.e., “we”)
- Use community terms (e.g., belong, shared, roles, family, commitment)
- Don’t be overly formal (i.e., use first names)
- Refer to familiar cultural aspects (e.g., history, traditions, legends, terms, places)
- Look to the future
- Focus on institutional mission

Make relevant fund suggestions

Faculty

- Academic programs
- Merit-based scholarships
- Research
- Career development
- Restricted to their area

Staff

- Campus improvements
- Need-based scholarships
- Student activities/programs
- Athletics
- Unrestricted

Determine appropriate asks

- Raise sights while being sensitive to the relationship
- Be especially careful with new employees
- Make sure advancement, department heads, and volunteers lead by example
- Encourage recurring gifts payroll deduction to make giving easy
- Develop a system for upgrading those who give monthly
- Optimize giving society levels to secure leadership gifts
- Keep planned giving information and opportunities visible
- Don't lose sight of participation as the highest priority

Create incentives

- Challenges
- Competitions
- Premiums/perks
- Participation focused
- Fun



Provide multiple payment options



- Payroll deduction
- Recurring gifts
- Digital payments
- Pledges
- Planned giving

WRAPPING THINGS UP

Send an announcement

- Have it come from a leader
- Report results
- Take a celebratory tone
- Give general thanks and appreciation
- Reiterate *their* impact on the mission
- Reinforce the sense of community



Report results



- Dollars raised
- Participation rate
- Donor counts
- New donor counts
- Competition winners

Analyze your efforts

- Change compared to prior year
- Trends over time
- Comparison to peer programs
- Breakdown by area and key segment
- Volunteers and institutional leaders engaged
- Planned giving prospects identified
- Increased awareness and understanding
- Feedback from volunteers



Thank donors and volunteers

- Make sure *every gift* is acknowledged
- Provide donor rosters
- Leverage personal email/handwritten notes
- Tag on social media
- Feature in publications
- Include planned giving information with stewardship communications

Key Takeaways

- Understand unique characteristics, relationships, and interests
- Leverage volunteers
- Engage them at the office—not at home
- Make the most of meetings and physical presence
- Be forward-thinking and positive—rather than appearing needy
- Optimize payroll deduction, giving days, and planned giving
- Consider a culture of philanthropy to be your ultimate goal
- Build community

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ANNUAL GIVING NETWORK