

**Giving Days**

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ANNUAL GIVING NETWORK

# Agenda

- Understanding the opportunities
- Planning your activities
- Promoting the event
- Executing on the big day

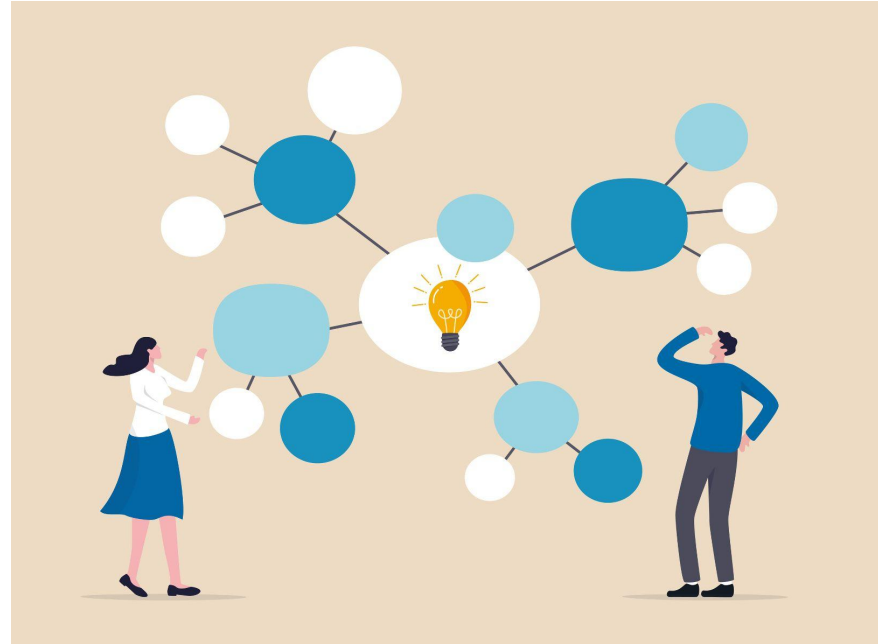
# UNDERSTANDING THE OPPORTUNITIES

# Reflect on the origin of “Giving Days”

- Events had not historically been a driver of alumni giving
- Alumni participation rates were declining (especially among young alumni)
- Traditional acquisition channels were changing (e.g., call centers)
- Industry marketers began to leverage the concept of “a day” (e.g., Cyber Monday)
- #GivingTuesday began as a way to kick off the season of giving
- Columbia University launched the first school giving day
- Today, the vast majority of schools report having Giving Days

# Consider different models

- #GivingTuesday
- Single day
- Several days/week
- Multiple events throughout the year



# Appreciate the benefits

- Create excitement, urgency, and focus
- Engage all of your donors
  - Every constituency (especially young alumni)
  - Donors at every level
  - Volunteers and influencers
  - New and lapsed donors
- Highlight priorities (annual giving, participation, specific funds)
- Test donor interest in specific areas (second asks)
- Develop culture, collaboration and tradition

# Be mindful of the pitfalls



- A lot of work, time and expense
- Not a silver bullet
- May create expectations that can be hard to fulfill (e.g. senior staff, boards)
- Can disrupt current donor cycles and attract new donors that may not renew
- Become stale and hard to keep fresh

# Recognize the various stakeholders

- Annual Giving - planning and coordination
- MarCom - design, branding, and content
- Alumni Relations - recruiting volunteers and hosting events
- Gift Officers - securing challenge sponsors and securing
- Donor Relations - assisting with stewardship and communication
- Advancement Services - processing gifts and reporting
- Campus partners - schools and units, athletics, student life, etc...



# PLANNING YOUR ACTIVITIES

# Do your research (12 months out)

- Reflect on your institution's experience
- Read and learn
- Talk with peers
- Take inventory of institutional priorities, schedules, and interest



# Establish preliminary goals (11 months out)



- How will you measure success?
  - Donors vs. dollars
  - Acquisition vs. retention
  - Specific funds vs. unrestricted
  - Small gifts vs. big gifts
- What are the soft goals (e.g., awareness, culture, engagement, testing, launching)
- What other priorities will you be competing with?
- What if the needle doesn't move?

# Get internal buy-in (10 months out)

- Who needs to support the concept (e.g., senior staff, campus partners, boards)?
- Are certain individuals more/less important than others?
- What does the “buy-in” process look like?
- Do they appreciate the pros and cons?
- Do they understand preliminary goals, timelines and costs?



# Determine *when* to have it (9 months out)

- Study industry best practices (~80% in the spring)
- Reflect on your purpose (e.g., acquisition, retention, awareness)
- Work around holidays and campus events (e.g., homecoming, reunion, family weekend, calendar/fiscal-year end)
- Consider school-specific traditions (e.g., Founders Day)
- Give yourself enough lead time (allow more time the *first time*)

# Develop a budget (8 months out)



- Don't assume you need to spend a lot of money
- Consider the many things you could invest in
  - Technology
  - Marketing (mailing, social ads)
  - Swag/gifts
  - Venues
  - Food/refreshments
- Explore options for budget sharing with campus partners

# Identify technology needs (7 months out)

- Marketing/promotion
- Processing gifts
- Empowering volunteers
- Considerations
  - Ease-of-use (gift processors, volunteers)
  - Customization
  - Integration with CRM
  - Cost
  - Value-ad (strategy, best practices, trends)



# Secure challenge sponsorship (6 months out)



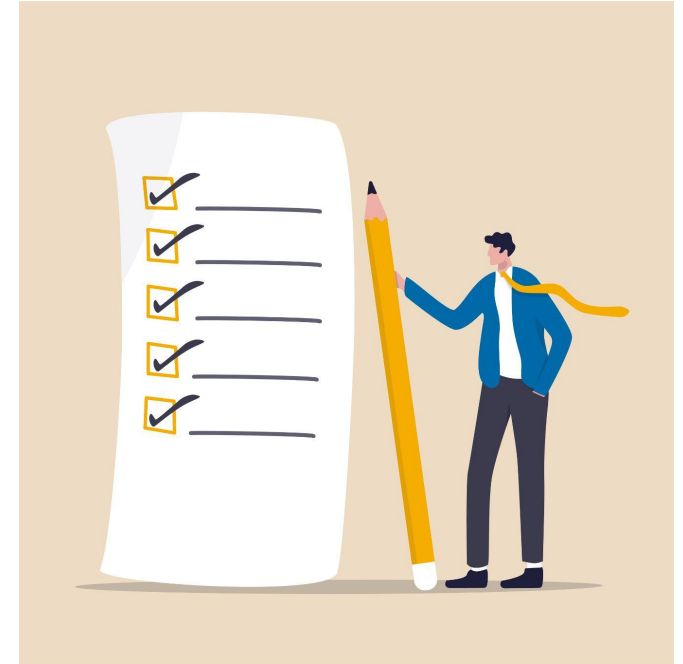
- Consider different models (e.g., collective goal, matches, competitions, hourly)
- Prioritize based on needs and prospects and make sure they're aligned with goals
- Work proactively with gift officers to identify and talk with potential sponsors
- Suggest as a leadership gift opportunity like reunion gifts or term scholarships



# PROMOTING THE EVENT

# Develop a marketing plan (5 months out)

- Segment your audiences (e.g., acquisition, retention, reactivation, leadership)
- Prioritize your channels (e.g., website, email, social, direct mail, phone, staff)
- Craft messages (e.g., explain the event, emphasize goals, challenges, impact)
- Develop a brand (e.g., name, logo, slogan)
- Create materials (e.g., webpages, postcard, scripts, fliers, toolkits, swag)



# Share internally (4 months out)



- Host an initial kick-off meeting to share an overview
- Coordinate individual meetings with key units/stakeholders
- Provide a way to address questions and collect feedback
- Send regular email updates leading up to the event

# Recruit volunteers (3 months out)

- Define different roles (chair, committee, ambassadors)
- Identify prospects (existing volunteers, donors, influencers)
- Be clear about how they can help (share, recruit, give)
- Provide them with training, tools, templates...and swag!



# Launch the “silent phase” (2 months out)



- Offer insiders a chance to make their gift early
- Allows you to start the day with some progress toward goal
- Set clear guidelines and develop systems for processing/accounting
- Good talking point for gift officers and student callers

# Announce publicly (1 month out)

- Position as a “save-the-date”
- Use a variety of channels (e.g., email, social, postcards, magazine ads, callers)
- Follow-up with regular emails in the weeks leading up to the event
- Clarify call-to-action (e.g., mark calendar, sign up to volunteer, plan to give)



# Create a buzz (1 week out)



- Get increasingly aggressive
- Strike an excited and fun tone
- Mix up senders, content, and channels
- Countdown the days

# Get them ready (1 day out)

- Create a sense of urgency
- Use a day/hour ticker countdown
- Highlight challenges and special events
- Encourage them to spread the word





# EXECUTING ON THE BIG DAY

# Take the lead

- Host a morning kick-off in a designated “command center”
- Create a briefing document for staff and volunteers
  - Hour-by-hour schedule of activities
  - Summary of planning communications and talking points
  - Managers and key contacts for key area
  - Method for communicating issues (e.g. text)
- Send regular updates throughout the day
- Prepare a wrap-up for the end of the day
- Coordinate coverage for after work hours

# Promote throughout the day



- Prepare content in advance
- Keep messages short and sweet
- Highlight purpose, goals, challenges and progress
- Focus call-to-action on “give now”

# Make the most of each channel

- Website - track progress, feature leaderboards, test often
- Email - segment thoughtfully, send frequently
- Social - manage centrally, encourage sharing, monitor for highlights/issues
- Phone - optimize students and volunteers, use texting
- Gift officers - encourage them to communicate with their prospects



# Engage through events



- Give people opportunities to show up and participate
- Provide information, updates, giveaways and fun
- On-campus events for students, faculty, and staff
- Regional events for alumni, parents, and friends
- Virtual events for various affinities

# Prepare for the unexpected

- Create an internal communication system (e.g., text chain)
- Anticipate issues (e.g. website down, short of goal, negative comments)
- Develop contingency plans
- Stay focused on your priorities
  - Functioning website/giving form
  - Email
  - Social posts
  - Volunteers



# Send a wrap-up email

- Prepare it in advance and send first thing the next day
- Take a positive, grateful and inclusive tone (e.g., *Thank you, we did it!*)
- Have multiple versions
  - Internal (colleagues, campus partners)
  - External (donors)
  - VIPs (e.g., president, board members, volunteers, challenge sponsors)
- Share preliminary results - use “we’re still counting”, if needed
- Include a video
- Celebrate regardless of the results

# Coordinate follow-up activities

- Send gift acknowledgements and receipts to *each and every* donor
- Steward special segments (e.g., volunteers, large gifts, second gifts)
- Fulfill premium/incentive offers
- Allocate funds to challenge winners
- Feature through school/advancement newsletters and communications
  - Explain the purpose and describe impact of support
  - Highlight donors and volunteers
  - Share interesting anecdotes/social posts from the day
- Ask for feedback; send a survey to volunteers, colleagues and donors



# Analyze results

## Metrics

- Revenue
- Donors/participation rates
- Average gift

## Lenses

- Constituency group
- Donor segment
- Gift amount/level
- School/until
- Class year
- Region/state
- Volunteer group

# Debrief with stakeholders



- Consider different approaches for different groups
- Establish a sense of closure
- Share results and highlights
- Get feedback and take a pulse
- Identify lessons learned
- Start thinking about next year

# Key takeaways

- Start planning well in advance
- Know your purpose and how you'll measure success
- Get the timing right
- Don't underestimate the effort it will require
- Work through colleagues and volunteers
- Don't be shy - *over communicate!*



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