

Planning a Giving Day

October 1, 2015

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- MPA in Nonprofit Management
- 7+ years in Higher Ed. Annual Giving

Agenda

- Why Giving Days
- Goal Setting, Structure, Timing and Challenge Gifts
- Planning
- Marketing, Stewardship and Communication
- Volunteer Engagement
- Day of Logistics
- Impact on Giving

Washington and Lee University

- Founded in 1749
- Located in Lexington, VA
- 1,800 students
- Approximately 18k solic. UG alumni
- Culture of unrestricted support
- Alumni Participation above 50% the past 5 years
- \$10M+ Unrestricted Annual Fund
- 2 Successful Giving Days Conducted
 - April 2014: 4,703 donors, \$1,892,943*
 - March 2015: 5,048 donors, \$2,556,191*

includes challenge gifts



Poll #1: Have you conducted a Giving Day before?



WHY GIVING DAYS?

Why Giving Days?

- Institutions struggle to increase dollars and participation using “old school” tactics
 - Becoming harder to acquire new donors
- Donors are savvy and are looking for why your cause is different than the others they are being solicited for
- Opportunity for philanthropy education across campus
- Breathe new life into volunteer program (or start one!)
- Excitement, competitiveness and urgency revitalize your Annual Fund campaign
- Fun!

Donor Retention

- Donor Retention
 - Maintain and grow donor population
 - Know your donor retention rate
 - Nationwide nonprofit retention fell from 50% in 2006 to 43% in 2014.

Starting # of Donors	Attrition Rate (% lost)	Donors Remaining after 1 year	Donors Remaining after 3 years	Donors Remaining after 5 years
1,000	20%	800	512	328
1,000	40%	600	216	78
1,000	60%	400	64	10

A Guide to Donor Retention, bloomerang, August 3, 2015

Donor Acquisition

- Painful but necessary!
 - Acquisition costs are expensive
 - Direct mail can be great for cultivation but not acquisition
 - Necessary to replace the consistent donors you are losing each year



Raise More Money!

- Opportunity for 2nd time gifts from consistent donors
- Opportunity for increased gifts from loyal donors for challenge grants



Dollars raised from 2nd time donors:

W&L Give Day 2014	W&L Give Day 2015
\$583,335	\$364,404



GOAL SETTING, STRUCTURE, TIMING, AND CHALLENGE GIFTS

Goal Setting

- Know what your ultimate goal is!
 - Donors vs. Dollars
 - Clear and Concise
- Set an attainable yet stretch goal that seems like a true challenge
 - Consider dates or specific numbers that are significant to your organization
 - What drives your constituents?
 - Look at previous big giving days in your institutions history
 - What is most online gifts in one day?

Goal Structure

- Year #1: Consider “releasing” goals as the day progresses

Donor Goal	Range of Goal	Challenge Match
500	-	\$50,000
1,000	750-1,250	\$150,000
1,749	1,500-2014	\$250,000

- Year #2: Take a risk and go with one BIG goal!

24 hours. **5,000** donors.
\$1,000,000.

Timing

- When is the best time to have your Give Day?
 - Timing will influence focus
 - Timing considerations:
 - Campus traditions/events, holidays, school breaks, built-in opportunities (ex: #GivingTuesday)

*“In April of 2014, St. Lawrence launched our first short-term donor challenge **starting at the noon hour and concluding at the noon hour the following day** . Our idea, since our first one was a surprise challenge, was that we would have more time to actively be engaged with email and social media during normal day-time hours. This past year we extended the time frame to 1856 minutes, in honor of our founding year. We started at 10:04 am and ended the challenge at 5 pm the following day to coincide with the of the daily chiming of our chapel bells.”*

- Barb Knauf, St. Lawrence University



Challenge Gifts

- One of the most powerful tools on a Giving Day is matching funds!
- Work with your VP and colleagues in leadership gifts on identifying prospects or certain groups who might be interested in increasing their gift in honor of your Give Day
- Ideas for matches:
 - Dollar match for every donor threshold met (500 donors=\$50,000)
 - Every gift is matched with dollar amount (Gift of any size=\$50)

Poll #2: How much time is needed to plan a day of giving?

PLANNING

Where do I begin?

- 6-9 months of planning is ideal
- Start with informal brainstorming sessions with colleagues
- Develop an internal summary document
- Confirm technology needs (website and gift processing)
- Confirm Giving Day internal team

Give Day Responsibility	Team Member
Overall planning, goal setting, management of timeline and print comm.	SB
Giving Suite, class agent strategy/talking pts, post-GD TY video	LJ
E-communication: website, emails, social media and radio station	JB
On-campus event	HB
Student Phonathon	TW
Give Day supplies and catering	JM
Décor	RC

“The most important timing for your Giving Day is a timeframe that gives you a meaningful, inspiring connection with potential givers and adequate planning time.”

(Jamie McDonald, President of GiveCorps)

Timeline

- Draft Timeline
 - Months 1-3: overall monthly goals
 - Months 4-9: week by week goals
 - Clear accountability for all action items
- Schedule regular check-in meetings
- Start the fun!

Week of January 5, 2015:

- Review Give Day website and email template from 2014 and discuss any changes or improvements (SB & JB)
 - Discuss at 1/7 Give Day check-in mtg, JB to bring copies
 - JB to make updates to the email template and work on draft “footer” text for the emails
- Review PR team from 2014 and identify more people to assist (JB)
 - JB to coordinate with Morgan and Jamie - **DONE**
- Determine how many tables, linens, folding chairs, and trash cans from Facilities. (JM)
 - Meeting scheduled with JM, RC, LJ and HB for 1/19 (Giving Suite space & Living Room)
- Decide on any changes to logo, hashtag etc. (SB)- **DONE**
 - Mary drafting logo ideas as of 12/15
 - Logo finalized
- Identify how President Ruscio and other campus leaders should be involved (SB) **DONE**

Technology

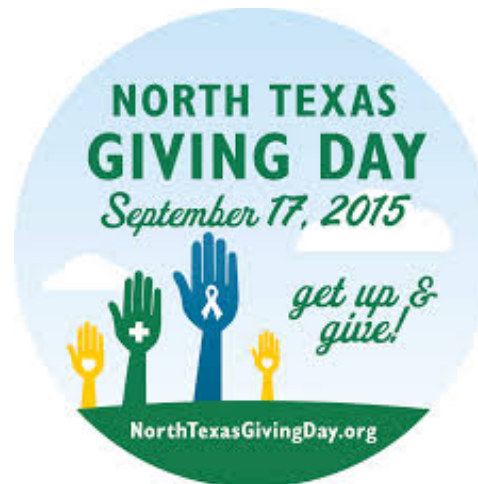
- Giving Days are centered on online giving so take time to think through your technology needs
 - Lots of options for gift tracking
 - You CAN manage it yourself with proper planning and manpower
- Considerations:
 - Who will design and manage day of website edits?
 - Is your website mobile friendly?
 - Simplify your online giving form (what information do you REALLY need)
- Update automated thank you language to reflect your Give Day (ie: Thank you, now spread the word)
- “Instant” Gift Reporting



MARKETING, STEWARDSHIP, AND COMMUNICATION

Logo

give day ^{#WLUgiveday}
WASHINGTON AND LEE



Prior to the big day

2015 ^{#WLUgiveday} give day WASHINGTON AND LEE

4,703 Give Day donors
helped make 4.24.14
a day worth celebrating.
But we didn't stop there...
are you ready for what's next?
March 26, 2015.
24 hours.
An even bigger challenge.

Follow the action on wlu.edu
starting at 12:01 a.m. on 3.26.15.

WASHINGTON AND LEE
UNIVERSITY
204 W. Washington Street
Lexington, Virginia 24450-2116

NONPROFIT
ORGANIZATION
U.S. POSTAGE & FEES
PAID
Washington and
Lee University



^{#WLUgiveday} give day WASHINGTON AND LEE

On **APRIL 24**, join fellow alumni,
parents, and friends of W&L
in giving back to the school we
all love.

Find out more at WLU.EDU on
Thursday, **APRIL 24**!

Please show your support for
Washington and Lee on Give
Day, and then spread the word by
phone, email, and social media.

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UNIVERSITY
204 W. Washington Street
Lexington, Virginia 24450-2116

Save The Date!
On
APRIL 24
something
BIG
is happening
at W&L

^{#WLUgiveday} give day **4.24.14** WA

^{#WLUgiveday} give day WASHINGTON AND LEE

Thank you for your commitment to Washington and Lee
University this year.

W&L has been challenged to reach a record number of
donors in 24 hours. Your pledge payment can help us
reach our goal of 500 donors and, in doing so, earn an
extra \$50,000 for the university.

Please consider making your pledge payment before or
on April 24, 2014 to amplify your impact with this one-
day-only challenge gift.

Join W&L Give Day on April 24 by making your
pledge payment:

- Online at support.wlu.edu/giveday
- Call us at 1-888-204-1882
- Mail your pledge payment—must be postmarked by
April 24 to count!

*Shh! Not everyone knows about W&L Give Day
yet. We wanted to give you a sneak peek as you
plan to make your pledge payment.*

On the big day!

- **#1: Homepage takeover**
- **#2: Dynamic micro-site**
 - What is challenge
 - How to give
 - FAQ
 - Who are the challenge donors
 - Progress
- **#3: Social Media**
 - All platforms
 - Multiple ambassadors (internal & external)
 - Videos
- **#4: Emails**
 - Simple
 - Easy to read on all devices

TODAY ONLY,
~~500 = \$50,000~~
DoNoRS
~~1,000 = \$200 K~~
1,749 = \$450 K
DoNoRS



Post the big day



- **#5: Share immediate results**
 - Website
 - Show initial results/recap the day
 - Ask for feedback
 - Reiterate thanks to challenge donors
 - Honor Roll of donors
 - Social Media
 - Share posts
 - Thank you email
 - Press release
- **#6: Thank donors**
 - Mail thank you card
 - Call from a student
 - Results video
 - [Thank You Video Year #1](#)
 - [Thank You Video Year #2](#)

Communication (Email)

Year 1: 2014

Email	Open Rate
Teaser	55%
1 st Challenge	54%
2 nd Challenge	41%
3 rd Challenge	40%
4 th Challenge	38%
5 th Challenge	47%
Thank You	48%

Year 2: 2015

- More segmented messaging
- 3 emails sent 2 days prior to Give Day
- Emails sent day prior to Give Day
- On Give Day
- Post Give Day

Considerations for email messaging

- How much is too much for your constituents
- How are opt-outs tracked
- Who will be responding to email inquiries in “real time”

Communication (Social Media)

Social Media	2014	2015
Instagram		
Instagram Posts	54	308
Twitter		
Twitter Link Clicks	599	428
Re-Tweets	216	237
Tweets “favorited”	197	294
Twitter Impressions	84,800	70,200
Clicks from Twitter to GD Website*	n/a	424
Click thru rate to giving form*	n/a	18.2%
Facebook		
Impressions	110,472	144,082
Unique Engaged Users	4,788	4,704
Clicks from FB to GD Website*	n/a	1,195
Click thru rate to giving form*	n/a	23.9%

**better tracking of social media in 2015*



VOLUNTEER ENGAGEMENT

Poll #3: Are volunteers already a key component of your Annual Giving strategy?

Volunteer Engagement

- Training webinar for Class Agents and other key fundraising volunteers
- Social Media PR Team
- W&L Celebrities in “Giving Suite”

WAYS TO GIVE

Give Now

 Give Online or Call 1-888-204-1882 

A celebrity team of your favorite W&L professors, staff and students is standing by to take your call. Check out the celebrity schedule below for a chance to make your gift to one of them over the phone.

The Team

 Art Goldsmith 8-9 am	 Marc Conner 9-10 am	 Beau Dudley '74, '79L 9-10 am	 Jim Farrar '74 9-10 am	 Mark Grunewald 9-10 am
				





DAY OF LOGISTICS

Campus Event

- Locate high foot traffic location on campus
- Awesome décor
- Philanthropy facts and trivia
- Giveaways
- Free food (and lots of it)
- Students/fac/staff signing TY postcards to donors
- Photobooth
- Student band or acapella group performances
- Development staff in matching shirts
- Stickers
- Campus radio station streaming live



Giving Suite & Give Day HQ

2015 **give day** #WLUgiveday
WASHINGTON AND LEE

NAME* _____

CLASS/AFFILIATION* _____ ☐ UG ☐ LAW ☐ PARENTS
☐ FACULTY/STAFF/STUDENT/FRIEND

ADDRESS* _____

CITY* _____ STATE* _____ ZIP* _____

UPDATED E-MAIL _____

UPDATED PHONE _____

GIFT RECEIVED BY* _____

*Mandatory Field

MY GIFT AMOUNT IS* \$ _____

☐ Visa ☐ Mastercard ☐ Amex ☐ Discover

ACCOUNT NUMBER _____

EXP. DATE _____ SECURITY CODE _____
M M Y Y

IS THIS A PLEDGE PAYMENT? ☐ YES ☐ NO ☐ UNSURE

MATCHING GIFT COMPANY _____

WILL MAIL CHECK ☐

GIVE DAY QUALIFYING GIFTS:
• ONLINE/PHONE GIFTS MUST BE RECEIVED BY 11:59 P.M. THURSDAY, MARCH 26, 2015
• CAN ALSO MAIL CHECK, IF POSTMARKED ON MARCH 26, 2015

Development
Headquarters
(Staff Only)

2015 **give day** #WLUgiveday
WASHINGTON AND LEE

- **Giving Suite:** hub of activity
 - Campus “celebrities” taking calls
 - Stickers
 - Food
 - Make your gift table
 - Simplified “gift” card
 - Gift processing staff present
- **Give Day Headquarters:** behind the scenes staff
 - Website editing
 - Gift tracking
 - IT support
 - Email blasts
 - Team huddles



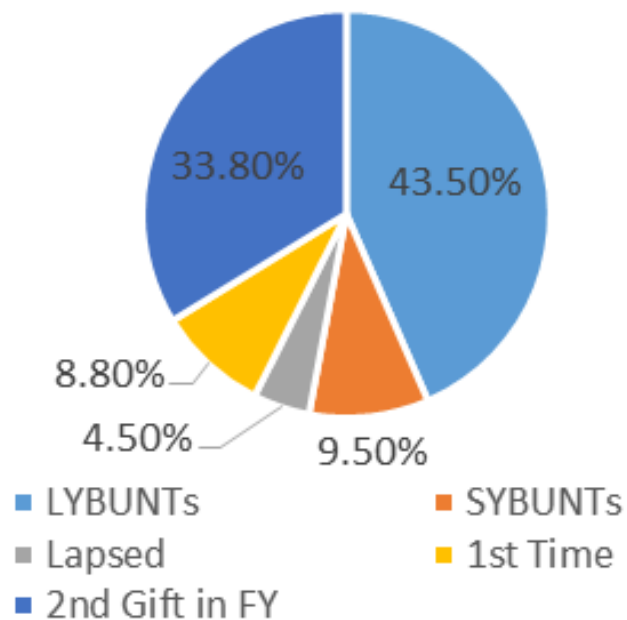
IMPACT ON GIVING

Overall Donors and Dollars

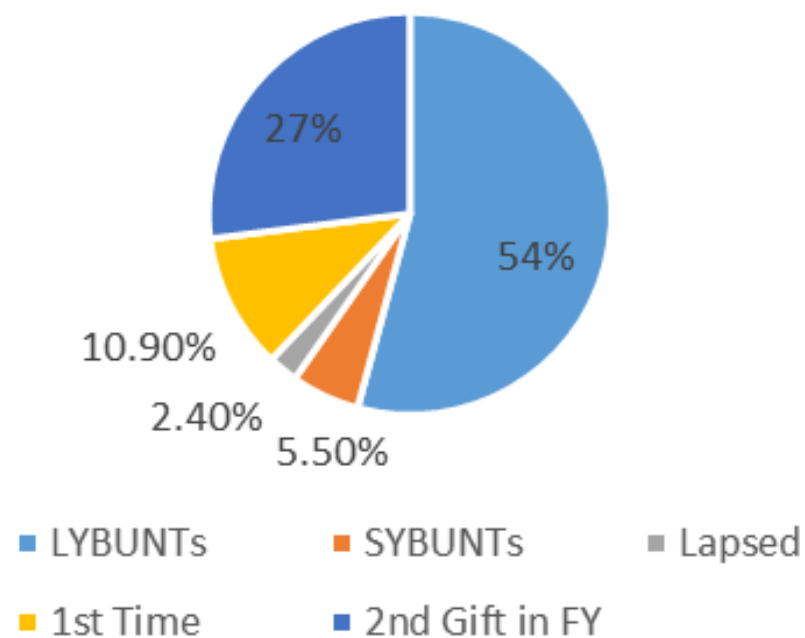
	W&L GD 2014	W&L GD 2015
Dollars Raised (excl. challenge donors)	\$1,242,943	\$1,556,191
Challenge Funds	\$650,000	\$1,000,000
Dollars Raised (incl. challenge donors)	\$1,892,943	\$2,556,191
Total Donors	4,703	5,048
Alumni	82% of total donors	78% of total donors
Friends	5.6% of total donors	7.6% of total donors
Students	3.3% of total donors	5.6% of total donors
Parents	9.4% of total donors	8.6% of total donors
Unrestricted Annual Fund Dollars	84% of total dollars	77% of total dollars
Other designations	16% of total donors	23% of total donors

Donor Category

Donor Category: 2014



Donor Category 2015



Pre-GD vs. Post-GD

	W&L GD 2014	W&L GD 2015
Pre-Give Day Total Cash & Pledges	85.93% of \$9M goal	82.10% of \$9.75M goal
Post-Give Day Total Cash & Pledges	96.98% of \$9M goal	92.01% of \$9.75M goal
Pre-Give Day UG Participation	26.99% (4,567 donors)	21.28% (3,663 donors)
Post-Give Day UG Participation	42.56% (7,205 donors) <i>*Gained 2,638 donors</i>	37.66% (6,481 donors) <i>*Gained 2,818 donors</i>

Note: Give Day 2015 was a month earlier in FY vs. Give Day 2014

Key Takeaways

- Get buy-in on why you are planning a Giving Day and what is the ultimate goal
- Set a reasonable but BIG goal
- Develop a strong internal team
- Give yourself time to plan
- Develop a plan and stick to it!
- Don't be scared by perceived technology limitations
- Come up with a logo and be consistent in your messaging
- Get your volunteers and campus community excited and invested
- Plan an awesome campus event to educate your students, faculty and staff on why philanthropy is important
- Celebrate and thank donors
- Have fun

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ANNUAL GIVING NETWORK