Managing a Multi-Channel Annual Giving Program

Serena A. Amerson, CFRE
Executive Director, Major Gifts & Annual Giving
EVMS
Presentation Objectives

- Opportunities for annual giving
- Outline components of comprehensive multi-channel program
- Review multi-channel strategies
- Products and services that can help you
Annual Giving

- Annual Giving has taken a back seat with the increased prominence of capital campaigns, principal gifts and major gifts

- Reasons Annual Giving isn’t a priority:
  - Increased alumni base (for education sector)
  - Generational changes
  - Increased philanthropic competition
  - Health of major donor pipelines
  - Capital campaigns are on-going
Annual Giving Offers

- Annual giving vs. campaign mindset
  - Annual timelines vs. campaign timeline
  - Perennial campaigns
  - Preparing for next campaign
- Cultural change
  - Annual giving vs. giving annually
  - Increase lead annual gifts
- Event-based fundraising/3rd party fundraising
- Major donor identification
- Donor engagement/Stewardship
Annual Giving

- **Opportunities**
  - Offset declines by *increasing participation* and donor numbers
    - Key Performance Indicators (KPI) / Metric analysis is key
  - **Develop a culture** that responds to each new campaign through growth
    - There is a continued need to seek and secure new donors that move through the donor continuum
  - **Align messaging** to focus on goals and understand the mission
    - Donors are outcomes oriented
    - Emphasize impact and how your organization is achieving its mission via philanthropy
Fundamentals

- Direct Mail
- Phonathon
- Email Solicitation
- Peer-to-peer & Staff-to-peer giving
- Data Analysis
- Building a culture of philanthropy
Today’s Priorities

- Robust direct marketing/digital marketing
- Peer-to-peer and staff-to-peer giving
- Micro-campaigns (giving days, crowdfunding)
Why Multi-Channel Marketing?

- Companies with extremely strong omnichannel customer engagement retain on average 89% of their customers, compared to 33% for companies with weak omnichannel customer engagement (Aberdeen Group).
- 55% of companies have no cross-channel strategy in place (The CMO Club).
- 64% of marketers cite lack of resources and investment as their top barrier to omnichannel marketing (The CMO Club).
- 98% of Americans switch between devices in the same day (Google Research).
- Over last 10 years, frequency, pieces and channels have changed in annual funds
- More noise and competition in marketplace
Good vs. Bad

Pros
- Better results (In time)
- More tools
- More precision
- More channel accountability
- Relevant analytics
- Big data
- Automation
- Real-time responsiveness

Cons
- More noise
- Need for increased frequency
- Static budgets
- Confusion
- Staff resources and familiarity with functionality
## Multi-Channel Campaign

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<thead>
<tr>
<th>GOAL</th>
<th>MEDIUM</th>
<th>INBOUND</th>
<th>TIMING</th>
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<tbody>
<tr>
<td>BUDGET</td>
<td>MESSAGE</td>
<td>OUTBOUND</td>
<td>FREQUENCY</td>
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Direct Mail Strategies

- Timing and Frequency
- Fundamentals are still the Fundamentals
- Installments
- Variable Data
- Lumpy mail or premiums
- Email triggers
- Augmented reality
Telemarketing Strategies

- Young alumni credit card/first ask (education sector)
- Affinity calling pools
- Long term pledges
- Retargeting for fulfillment
- Shorten fulfillment cycle
- 2\textsuperscript{nd}/3\textsuperscript{rd} ask strategies
- Append cell phone data
Digital Strategies

- Timing
- Re-send to opens only
- 94% of responses within 48 hours
- Subject line tests and preview copy
- Geo fencing: the use of GPS or RFID technology to create a virtual geographic boundary, enabling software to trigger a response when a mobile device enters or leaves a particular area.
- Snap filters
- Affinity champions/ambassadors
Peer-to-Peer

- Peer Relations
- IT IS NOT ABOUT ME
- Telling a story
- Sharing a perspective = the individual receiving
- Customize language
- Offers engagement opportunity for signer
Essential KPIs

- **Basic**
  - # of gifts, dollars raised, # of donors, retention rate

- **Lost Revenue**
  - Lapsed new, lapsed repeat, downgrade

- **Added Revenue**
  - New, recaptured, upgraded

- **Return on Investment (ROI)**

- **AFP Fundraising Effectiveness Project** – **Overall 45.5% Retention**
  - Every $100 gained in upgraded, new and recovered gifts was offset by $96 in losses from downgraded and lapsed gifts.
Case: Anniversary Campaigns

- Timeframe: Annual/Monthly

- Marketing Plan:
  - Month Prior:
    - Postcard (Mail 1)
  - Month of:
    - Mail in-house 1st week of month (Mail 2)
    - Email on the 15th of the month (Email 1)
    - Follow-up email on the 22nd to opens (Email 2)
  - Post gift:
    - Thank you call/note
Case: Micro Campaigns

- Giving Days
  - Requires planning and coordination:
  - Allows for constituent segmentation
  - Increases presence/purpose of fundraising
  - Short duration with potential big impact

- Crowdfunding
  - Great for groups/3rd party fundraising
  - Provide toolkit and guidelines to participants
  - Develop goals per participant
  - Potential for acquisition beyond current donors
  - Possible loss of revenue in future years
Why Affinities?

- Appeals to Millennials, disengaged donors/groups, and peer-to-peer strategy
- You know it will be of interest to them
- Provides information about affinity area and sense of urgency to act
- Factors:
  - Historical giving, potential giving
  - Social influencers, pre-established networks
  - Individual segmentation
Bringing All the Pieces Together

- Planning is key
- Increase communication with key team members
- Delineate roles and responsibilities
- Allow for flexibility and modify plan as needed
Data Analysis

- Understanding your data enhances your credibility and reinforces your decision making
- Determine how you can standardize reporting
- Change doesn’t happen overnight
- Historical/Cyclical information is paramount
- Goals = pledges and cash, fulfillment management = $ to your organization
- You should know who your loyal donors are = future pipeline
Annual Giving Products & Services
Creation

Video
- www.animoto.com
  - Share the power of video
  - A simple way to create marketing videos - in minutes - for social media.
  - Fast & easy to use, hosted in the cloud, customizable
  - No video editing experience required.

Crowdfunding
- Giving Day Campaigns, Social Ambassadors, Crowdfunding
- www.givecampus.com
  - Digital fundraising & volunteer management platform (for schools).
- www.hubbub.net
  - Fundraising technology for universities and nonprofits.
Creation

Design

- Infographic, Presentations, Reports, Flyers & Posters Maker
- No design experience, easy to create and share
- Template based
- Refer to blog for tips
- www.piktochart.com
Communication

P2P Texting for Nonprofits
- www.hustle.com/non-profit/
  - Boost marketing efforts
  - Targeted messaging
  - Two-way messaging
  - Secure
  - Call Tracking
  - Easy, Fast & Personal

Community Phonecast
- www.communityphonecast.com
  - Innovative solution to enhance engagement and build loyalty
Communication

- Social media management platform
- Dashboard view
- Save time - schedule social media posts
- Manage content with ease
- Track and prove social ROI
- www.hootsuite.com
Coordinate

Doodle
- www.doodle.com
  - Simplifies process of scheduling meetings, appointments
  - Online calendar tool

Jotform
- www.jotform.com
  - Ease to use online form builder
  - Get an email for each response
  - Collect data
Coordinate

- Monthly Engaged Giving (MEG)
- Helps boost giving and participation rates
- [www.twelvexgiving.com](http://www.twelvexgiving.com)
Check

Litmus

- [www.litmus.com](http://www.litmus.com)
  - Email testing tool
  - Spam testing, email analytics, email previews
Check

Thank View

- www.thankview.com
- Create and send personalized video

A Fully Branded Experience

Using your branding guidelines, we’ll customize every aspect of the experience to match your exact look and feel.

"Working with ThankView has been such a blessing. We were looking for an additional platform that would allow us to create messages of gratitude that were more than just an email. ThankView helped us do that within our extensive brand guidelines and in a way that gave an elevated donor experience.”

- Taunia Shoemaker, YMCA of Pierce and Kitsap Counties

See their ThankView!
Next Steps

- Give yourself time - be realistic
- Evaluate and prepare a summary for management
- Create an implementation plan
- Determine how/when you will incorporate testing
- Continue to stay aware of annual giving trends and tactics
Questions ???
Thank You!