



WHY DONOR RELATIONS IS THE NEXT GAME-CHANGER

SPECIAL REPORT

A STRATEGIC ASSET TO YOUR FUNDRAISING PROGRAM

The field of donor relations has undergone a transformative few years. In the summer of 2014, we embarked on a comprehensive survey of more than 300 chief advancement officers at higher ed institutions and discovered more shops making a significant investment in their donor relations programs. With 35% of shops nationwide reporting making a 'strong' or 'very strong' investment in donor relations in FY2015, compared to 27% in FY2014, now is the time to consider your donor relations program and ensure it is strategically designed to support all of your advancement efforts. This brief includes key data from that survey as well as a few excerpts from our most popular articles from the last year highlighting how donor relations can strategically support all of your fundraising efforts.



Erika Bernal | Marshall B. Ketchum University

What Development Teams Get Wrong About Donor Relations

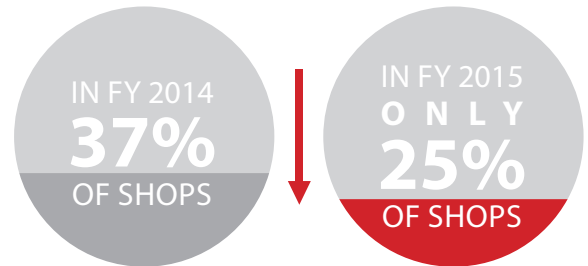
As an industry, we have segmented out donor relations and stewardship as separate efforts that take place after we have established relationships with our donors. But development officers don't need to fly solo until that first gift comes through the door. Consider involving donor relations early:

- Invite a donor relations professional to work with the development officer on donor engagement immediately after the first visit with the prospect. This will allow you to go deeper with your donor communications.
- Where marketing and public relations teams may develop communication beats, so should donor relations professionals to create awareness and deeper understanding of the prospect and donor interests that they represent.
- Tie a donor relations team member to your annual fund program or dedicate one to the engineering department on campus or the cancer institute at the hospital.

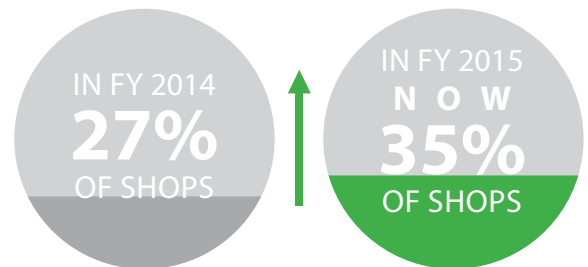
By doing this, you will create more meaningful prospect and donor relationships, with lasting ties to your institution, and the divide between development and donor relations efforts will diminish in time with increased trust, understanding and shared commitment to the cause.

Read the full article: <http://bit.ly/AiErika>

SHOPS MAKING "MINIMAL" INVESTMENT IN DONOR RELATIONS



SHOPS MAKING "STRONG" INVESTMENT IN DONOR RELATIONS



PERCENT OF SHOPS THAT ARE MAKING "STRONG" OR "VERY STRONG" INVESTMENTS IN DONOR RELATIONS

	FY 2013	FY 2014	Anticipated FY 2015
Small Shops	11%	21%	28%
Mid-sized Shops	23%	24%	30%
Large Shops	43%	43%	64%



Heather Greig | Bentz Whaley Flessner

You May Be Excluding Some of Your Most Loyal Donors from Recognition

By defining loyalty as consecutive giving, we are in fact, excluding some of our most loyal donors from recognition.

Most likely, many of your major donors have not made gifts each year, and while philosophically, we strive to create a culture that promotes annual giving among our top donors, the reality is that there will always be some who don't give every year.

I am not talking about the once-a-decade donor but about the donors that give almost every year. If someone is a seven-figure donor who occasionally misses a year between major contributions, are we serving the best interests of our institutions by not recognizing them as loyal?

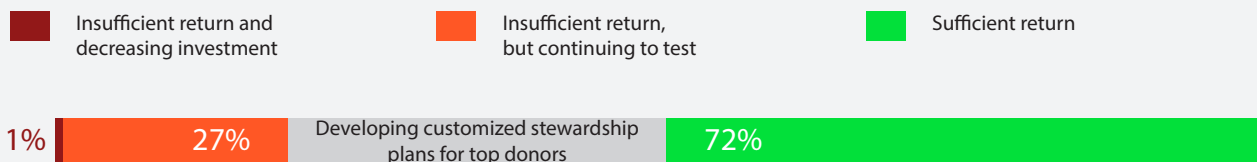
Consider creating a buyback program that allows donors to "buy back" years they have missed, or organize your donor recognition society so that you recognize lifetime giving not just in terms of dollars but in terms of consistency of giving over time.

Read the full article: <http://bit.ly/AiHeather>

Personalized Solicitation and Recognition was Cited as One Initiative Showing Promising Returns

In our 2014 survey, chief advancement officers shared that personalized solicitation and recognition was one of four initiatives showing higher-than-expected returns. Some examples of what CAOs are trying include:

- More personal visits to donors by the chief advancement officer, the director of the annual fund, etc.
- Individual donor visits for stewardship
- Personalized note requests
- Personalized impact and stewardship reports for donors





Lynne Wester | Donor Relations Guru

Giving and Recognition Societies -- We Can Do Better!

We need to sunset some of the giving societies and instead focus on donor relations and recognition based on *behavior* and not *giving level*.

For example, what are we doing for our loyal donors, for our married alumni, for those who have made the ultimate gift through planned giving? What happens when a lapsed donor comes back into the giving family? Are we recognizing behaviors or rewarding history?

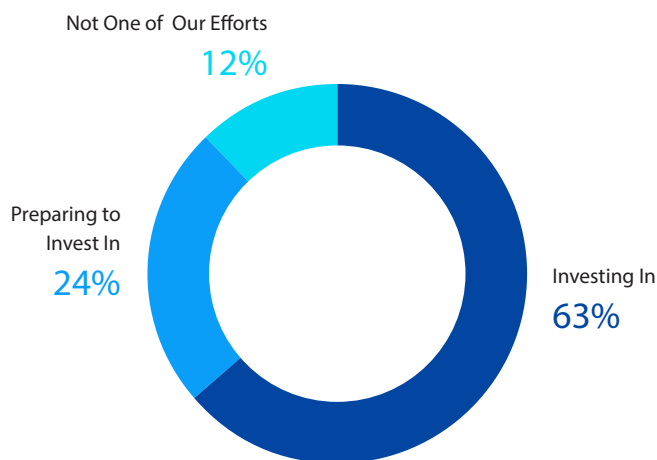
- Planned giving donors: What about creating webinars on financial planning and retirement resources? Are we meeting them in their reality or just sending them a paperweight for a desk that doesn't exist?
- Consecutive donors: What about inviting them to your donor recognition events, regardless of amounts? What about having someone who's been working at the organization as long as they've been giving contact them?
- First-time donors: How are we welcoming them? Phone call, card, what special recognition are they receiving? Are we telling their stories of why they give for the first time?

Recognition and giving societies are best used to build donor retention and to recognize certain behaviors. They should not be used to supplant proper acknowledgment and stewardship and are in no means able to replace proper engagement opportunities. We can and must do better!

Read the full article: <http://bit.ly/AiLynne>

Read more of Lynne Wester's expert advice in her bestselling guide, The 4 Pillars of Donor Relations <http://bit.ly/Ai4Pillars>

DEVELOPING CUSTOMIZED STEWARDSHIP PLANS FOR TOP DONORS



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Jim Langley | Langlely Innovations

The President as Steward

While virtually every advancement operation has a stewardship function, presidents would be wise to ensure that the totality of the stewardship obligation is not presumed to be the province of a single office (often led by a single person). Presidents can create a culture of accountability by speaking to the importance of private donors, not just fundraising totals, to students, faculty and staff at significant campus events and through major channels of communication.

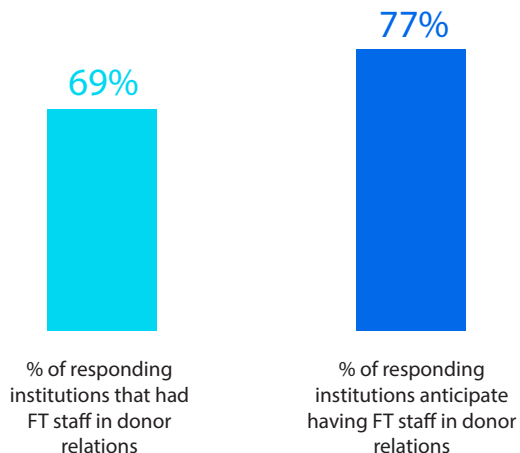
In addition, presidents should play a personal role in expressing gratitude for, and stressing the central importance of, private gifts. While gift acknowledgements and endowment reports are important and appreciated by donors, they are insufficient to the preservation of strong personal ties. Presidents can strengthen relationships with donors by being more personal and spontaneous. For instance, presidents might commit to writing personal notes to 50 significant donors over the course of the year. They might carry that list with them and express their gratitude as the mood fits and when the moment seems right.

Read the full article: <http://bit.ly/AiJim>

Read more from Jim Langley's bestselling book Fundraising for Presidents: A Guide <http://bit.ly/AiPresidents>

MORE SHOPS ARE INVESTING IN DONOR RELATIONS STAFF

FY 2014 FY 2015



Concluding Thoughts

As you can see, more shops of all sizes are investing in donor relations, seeing high return, and hiring full-time donor relations staff. If your shop is not already prioritizing similar investments for FY16, you'll be behind the game.

Contact the Academic Impressions Advancement Team

Are you doing innovative things across your advancement shop? We'd love to hear about them.



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