

## Auditing Your Annual Giving Operations | 03.30.2015

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#### Questions

**Q: What do you do differently when Annual Giving is competing with your organization's capital campaign?**

Ans: The key point here is to be able to differentiate annual giving from capital giving. Annual giving should have its own brand identity that demonstrates what needs it meets, which would not be capital funding. You would want to ensure that donors to the capital project are making that gift above and beyond what they provide for their annual support. As mentioned in the presentation from the Princeton example, annual giving is job one.

**Q: In overall giving within source channel, is this based on the channel of the ask or the gift made (e.g., solicitation by email, but gift made online or via mail)?**

Ans: This is based on the way the gift was made.

**Q: Re: your "communications of interest"...are those pieces of content that fit the identified interests of the donor? Or communications aimed toward identifying those interests? Or something else?**

Ans: They are communications that meet the identified interests of the donor. We have a number of tools to gather this information but we need to be sure it is being stored in our database in a way that is searchable. This allows you to pull information of those that are interested in the arts, for example, to communicate with them about an area that you already know they are interested in.

**Q: How do you deal with top-down goals that are not driven by analysis, but the needs of the organization? / Do you have advice for what to do when goals are effectively set at the E-level and then handed down? (resulting in largely arbitrary goals)**

Ans: The above questions are similar and are not easy to provide a quick answer for. I have certainly faced this situation in the past and when provided goals that were not reasonable or based on past performance I have provided my own goals of what I felt were obtainable. I would suggest trying to establish a working goal that is based on proper analysis and an aspirational goal that can be based on the "needs" or the arbitrary number picked by leadership.

In these instances there is a considerable amount of work that needs to take place to educate leadership about what is possible/reasonable to expect in relation to improving numbers in annual giving. I would expect that in most of these cases there is a pattern of not meeting the arbitrary goals that are being set and a case can be made for bringing goal setting in alignment with actual results.

**Q: Any suggestions for developing that 1-10 "rank" you presented at the beginning for scoring each item in the metric?**

Ans: This is really a subjective ranking that will best capture, in your informed opinion (from your data), how well each area performed over the last year. The data points I included in the presentation for some of the solicitation tools can be utilized to paint a picture of overall performance. It can be tricky to give an overall score sometimes because some KPI's can be headed in different directions. For instance, you direct mail revenue may be up but your donor counts and response rates are down. This type of information can be noted in the notes section in a short narrative to explain what is happening with each tool. What I feel is important is that this information is assessed in a thoughtful manner and that you, and your team, understand what is working and isn't working in relation to your overall tools and annual giving effort. This isn't meant to stand up to be included in a peer-review journal, but instead to inform our strategy as best we can for future efforts.