

Auditing Your Annual Giving Operations | 03.30.2015

Brian Daugherty

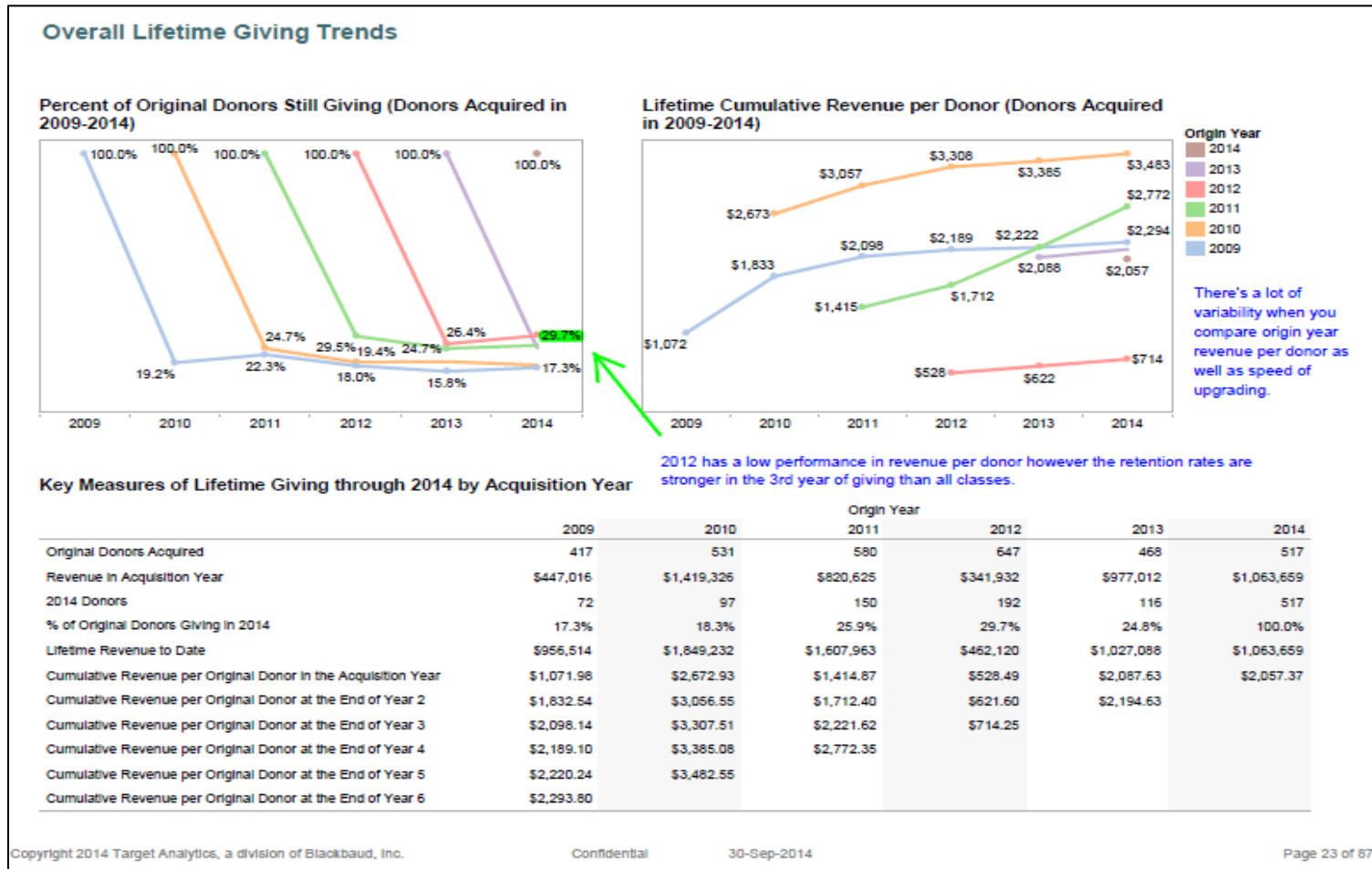
Please find a list below of additional resources from the “*Auditing Your Annual Giving Operations*” webcast. These resources will help you to objectively measure the success of your annual giving program. If you wish to print only certain resources, you may click their respective links to jump directly to them in the packet.

Pre-Webcast Resources

1. [OVERALL LIFETIME GIVING TRENDS](#)– Page 2
2. [OVERALL GIVING WITHIN SOURCE CHANNEL, 2009-2014](#) – Page 3
3. [FY10 CHRISTMAS SOLICITATION](#) – Page 4 - 5
4. [WIKIPEDIA THANK YOU LETTER](#)– Page 6
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6. [OVERALL GIVING TRENDS, 2009-2014](#)– Page 8
7. [EXCEL SPREADSHEET FILE](#)

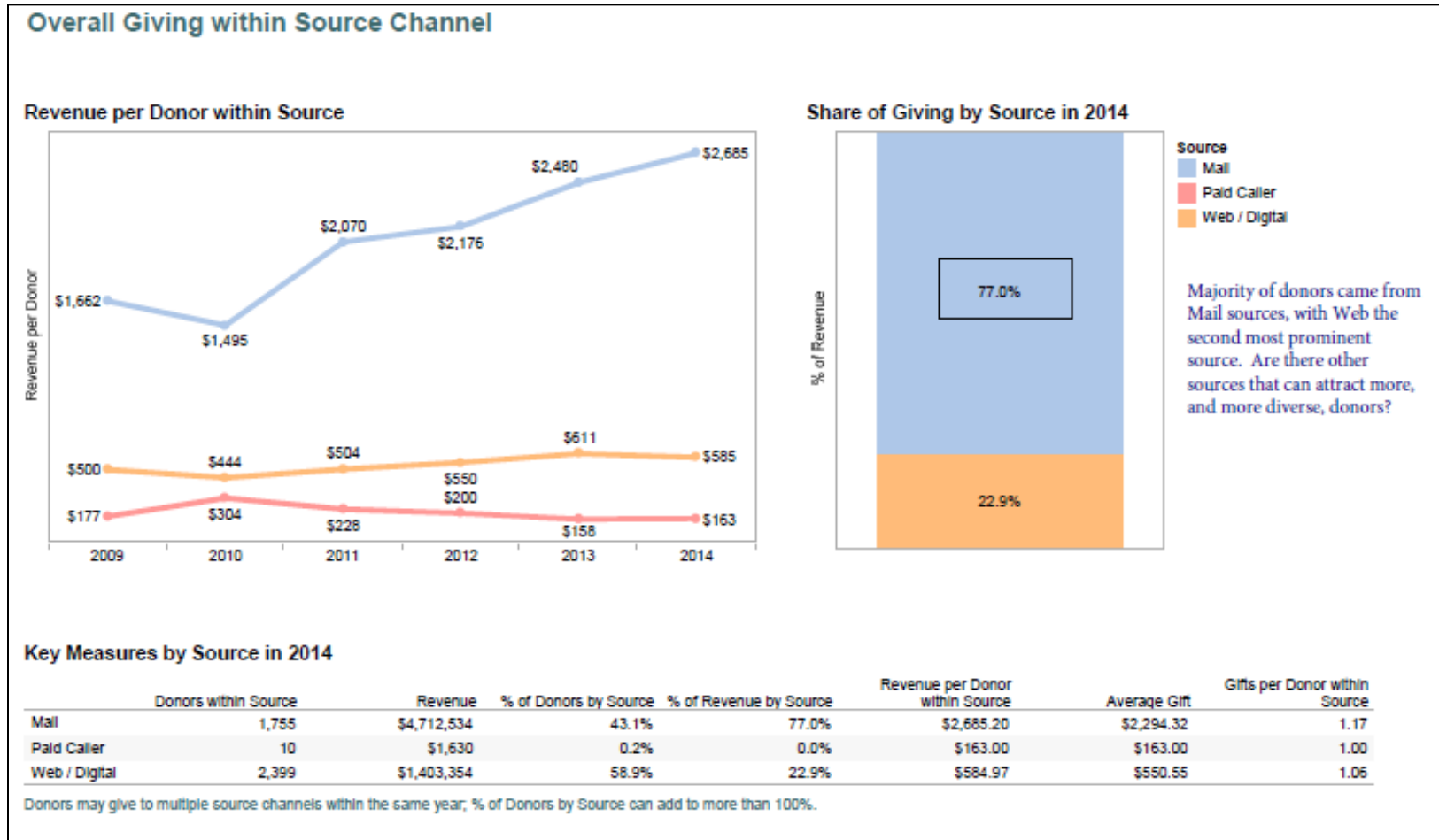
AUDITING YOUR ANNUAL GIVING OPERATIONS
 March 30, 2015 | 1:00-2:30 p.m. EDT

RESOURCE: OVERALL LIFETIME GIVING TRENDS | SOURCE: TARGET ANALYTICS



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RESOURCE: OVERALL GIVING WITHIN SOURCE CHANNEL, 2009-2014 | SOURCE: TARGET ANALYTICS



FY10 Christmas Solicitation (10M1AG04)

Mail Date: December 1

Audience: Most of solicitable constituents, with non-donors and long-lapsed constituents with very low propensity scores excluded (alumni with a score below about 36).

Quantity: 69,987

Cost: \$58,056

Package: Printed, designed piece similar in look and tone to the FY09 Christmas solicitation piece. Photo on cover of student involved in service project in Central America. Brief text inside focusing on the value of education to students' lives. Separate pledge form and return envelope.

Segmentation: Specific segments include: Managed Prospects, Qualification Prospects, Rated-Unassigned Constituents, Parents, Lybunts, Sybunts years FY04-FY08, Long Lapsed and Non-Donors with a Propensity Score of 200-plus. Removed: basketball season ticket holders, trustees, trustees emeriti, former trustees, constituents who already made a current-use gift in FY10.

Ask Ladders: Set ask amounts for all segments – pre-printed on pledge card; ranging from \$100 to \$5,000.

Mailing: first class for all. Real stamps used for prospects, \$500-plus Lybunts, and 1,000 constituents in the test segment.

Production: all assembled at BulkMail Services

Testing: Use real stamps rather than indicia for a random group of 1,000 constituents. The response rate for the "stamp" test group is actually lower than the indicia group (0.60% vs. 0.95% response), but the average gift is much higher for the stamp group (\$151 vs. \$91), making the "stamp" group more profitable. The sample size of donors was small enough to make these results questionable, and so a repeat of this test a possibility for FY11, to see if results differ at all from these findings. The "high-end" group that automatically received the mailing with a real stamp responded extremely well, as we expected: 5.59% response rate, \$1,372 average gift, and \$75.82 profit per piece.

Results (as of 5/18/10):

| | |
|-------------------------|--------------------------------------|
| Response Rate | 1.10% (stretch goal – 1.75%) |
| Dollars Raised | \$241,152 (stretch goal – \$250,000) |
| Average Gift | \$311.97 (stretch goal – \$275) |
| Donors | 773 (stretch goal – 1,050) |
| Profit per Piece Mailed | \$2.62 (stretch goal – \$2.70) |
| Cost per Dollar Raised | \$0.24 (stretch goal – \$0.24) |

Notes: Response was fairly strong even though the October Lybunt mailing did so well ahead of it. Average gift was very strong compared to previous Christmas direct mail solicitations – the highest in
(over)

5/21/2010

the past four years. We reached our stretch goal for cost per dollar raised and may yet reach the goal for profit per piece mailed. We will fall short of our goals for number of donors and response rate, and will likely fall just short of our goal for dollars raised. Overall, this mailing did very well, outpacing the FY07 and FY08 Christmas mail solicitations, even though those years preceded the economic downturn and included season ticket holders, which this year's piece did not.

Managed Prospects bounced back well with this mailing, with a 6.12% response rate, very high \$1,239 average gift, and a profit per piece of \$74.91.

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RESOURCE: WIKIPEDIA THANK YOU LETTER

Dear Brian,

Thank you for donating to the Wikimedia Foundation. **You are wonderful!**

It's easy to ignore our fundraising banners, **and I'm really glad you didn't.** This is how Wikipedia pays its bills --- people like you giving us money, so we can keep the site freely available for everyone around the world.

People tell me they donate to Wikipedia because they find it useful, and they trust it because even though it's not perfect, they know it's written for them. Wikipedia isn't meant to advance somebody's PR agenda or push a particular ideology, or to persuade you to believe something that's not true. We aim to tell the truth, and we can do that because of you. The fact that you fund the site keeps us independent and able to deliver what you need and want from Wikipedia. Exactly as it should be.

You should know: your donation isn't just covering your own costs. The average donor is paying for his or her own use of Wikipedia, plus the costs of hundreds of other people. **Your donation keeps Wikipedia available for an ambitious kid in Bangalore who's teaching herself computer programming. A middle-aged homemaker in Vienna who's just been diagnosed with Parkinson's disease. A novelist researching 1850s Britain. A 10-year-old in San Salvador who's just discovered Carl Sagan.**

On behalf of those people, and the half-billion other readers of Wikipedia and its sister sites and projects, **I thank you for joining us in our effort to make the sum of all human knowledge available for everyone. Your donation makes the world a better place.** Thank you.

Most people don't know Wikipedia's run by a non-profit. **Please consider sharing this e-mail with a few of your friends to encourage them to donate too.** And if you're interested, you should try adding some new information to Wikipedia. If you see a typo or other small mistake, please fix it, and if you find something missing, please add it. There are resources here that can help you get started. Don't worry about making a mistake: that's normal when people first start editing and if it happens, other Wikipedians will be happy to fix it for you.

I appreciate your trust in us, and I promise you we'll use your money well.

Thanks, Sue

Sue Gardner, Executive Director, Wikimedia Foundation

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RESOURCE: USD THANK YOU LETTER, ADAPTED FROM WIKIPEDIA MODEL

Dear Brian,

Thank you for donating to the University of San Diego School of Law. Your gift makes a tremendous impact on our efforts, and as a donor I want to ensure you understand the return on your investment in our law school.

In today's world there are so many worthy organizations that need support, and I'm glad you have chosen to support USD School of Law. Your gift provides a margin of excellence for all that we do. Alumni have many reasons why they give back to their alma mater. Some give back to make an impact on a program or a faculty member that was important to them, others give back because they received a scholarship while they were in school and they want to "pay it forward". Whatever your reason, rest assured we are doing all that we can to not just deliver a world-class legal education for our students, but to make an impact on our community and the world through our programs and research.

You should know: your donation is coupled with the gifts of other like-minded alumni and friends of the law school. Combined, these gifts make an impact far larger than the sum of its parts. They help provide vital scholarship funding to increase the diversity of our law school and legal system, they assist us in providing over \$2M annually in pro-bono legal services through our legal clinics and they support programs like our Children's Advocacy Institute that has been working through research and advocacy to improve the lives of children for over 25 years. You may not have known it when you made your gift to USD School of Law, but your support provides the resources we need to continue to build on the efforts listed above and expand the impact we make on our community. On behalf of our students, the clients of our legal clinics, children that have benefited from the work of the Children's Advocacy Institute, and so many others, I thank you for joining our efforts to make the sum of our law school better not just for our students, but for our entire community. Your donation helps to make this all possible—thank you!

If you would like to learn more about what's happening at the law school please visit our website at www.sandiego.edu/law. And, if you are so inclined, please consider sharing this e-mail with a few of your fellow alumni to encourage them to support our efforts.

I appreciate your trust in us, and assure you that your investment in our efforts will be put to good use!

Sincerely,

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