 **LEARNING OUTCOME**

After participating...

...you will be able to identify whether a one-month approach will help you grow your faculty and staff donor ranks.

ai ACADEMIC
IMPRESSIONS 2

AGENDA

- Institutional Context
- The Compressed Model
- Program Messaging, Marketing, And Going Paperless
- Budgeting & Buy-in
- Ancillary Issues
- Translating The Model To Your Setting



#Altraining

INSTITUTIONAL CONTEXT



TEXAS CHRISTIAN UNIVERSITY



- North Texas region
- Private university
- 7,500 undergraduate students
- 1,200 graduate students
- 1,800 employees



PROGRAM RATIONALE & MISSION

- Program began prior to 1992
- Mission:
 - Provide another source of support and donors
 - Provide motivation to alumni, parents, corporations, foundations ("Our campus community supports TCU - I hope you will too.")
 - Helps educate on the importance of fundraising at your institution



RESULTS

Year	Participation
2015	81%
2014	80%
2013	78%
2012	75%
2011	73%
2010	70%
2009	68%
2008	66%
2007	64%
2006	60%

A Strong Ten-Year Trend



RESULTS

Department/College	Giving Rate
Academic Affairs/Provost	74%
Academic Support	94%
AddRan College of Liberal Arts	66%
Administrative Services	97%
Admission	100%
Athletics	84%
Business Services	89%
Chancellor's Office	100%
Bob Schieffer College of Communication	83%
College of Education	100%
College of Fine Arts	57%
College of Science & Engineering	75%
Finance	77%
Harris College of Nursing & Health Sciences	82%
Library	68%
John V. Roach Honors College	75%
Marketing and Communication	97%
Neeley School of Business	88%
Physical Plant	91%
Ranch Management	100%
Student Affairs	61%
Information Technology	61%
University Advancement	100%

2014 breakdown



#Altraining

THE COMPRESSED MODEL



■ INTRODUCING THE MODEL

- Campaign length: One month
 - Employees only solicited once a year (including leadership giving) by advancement
 - April
 - Historical background
 - Doesn't seem to be the norm
- Short duration, simpler management, and no burnout are the keys to success



DESIGNATIONS

- Annual gifts are emphasized in communication pieces
- But we do stress “A gift to any area will count” (more visible in follow-up communication)
 - Scholarships (named in honor of former employees)



COUNTING GIFTS

WHO IS COUNTED?

- All full time employees
- No retirees (They are in regular pool)
- Some part-time
 - If they choose to give
 - If they request a packet
 - If they are already set up on payroll deduction



COUNTING GIFTS

CAN BE DONE MANY WAYS

- What works best for us:
 - Campaign based on calendar year
 - Request list from January 1 to start of campaign of all gifts and active pledges
 - These people still get a packet
 - Most usually give again
 - Payroll deduction
 - Starts on fiscal year (6/1) and continues until notified to stop
 - Comprises the majority of our gifts



TRACKING

ALL GIFTS ARE TRACKED IN ACCESS IN ANNUAL GIVING OFFICE PRIOR TO BEING "OFFICIALLY" ENTERED

- Allows easy access to data for our office
 - Reporting
 - Managing follow-up communication
- Time consuming but worth it!



PARTICIPATION VS DOLLARS

- Only publicize participation goal
 - Don't want to discourage the gifts in \$1 to \$99 range
 - Adds up in the end
 - Dollar total mentioned in thank you email at completion
- *Example:* Physical plant employees have consistently high participation rates



CHOOSING CAMPAIGN CHAIRS

WE TYPICALLY USE CO-CHAIRS (ONE EACH FOR FACULTY/STAFF)

- Provides a diverse selection each year
- Face to face meetings to discuss the role
 - Normally the chairs from the faculty senate chair and staff assembly
 - We do select someone different from these areas if we think it is necessary



■ CHOOSING CAMPAIGN CHAIRS

CO-CHAIRS

- They must be donors
- They are provided expectations up front
 - Letter signer (along with email)/ambassador
 - Presentation responsibilities
- Sometimes there are exceptions to this rule



■ REPRESENTATIVES

- One or two selected for each department, college, and division (total of 22 for 2014 campaign)
- Deans, Vice Chancellor, Unit Heads select the reps (we occasionally provide recommendations)
- Once selected, they are sent notifications with brief intros



■ REPRESENTATIVES

THANK YOU / INSTRUCTION LUNCHEON

- Thank you for their service
- Great way to put out all instructions
- Provide best practices for volunteers



■ REPRESENTATIVES

JOB DESCRIPTION

- Review roster of names, and provide corrections (helps reconcile records)
- Hand out packets to employees in their area (if doing paper campaign)
 - Saves money
 - We have access to corrections



REPRESENTATIVES

JOB DESCRIPTION

- Serve as ambassadors (not trained as “fundraisers”)
 - Talk to peers / present at meetings / encourage
 - Provide updates on results
- Hardest part of job: getting packets out
- Doesn’t seem to be issue of “burnout” due to duration of campaign
- No formalized description (all expectations are communicated at the meeting)



#Altraining

PROGRAM MESSAGING, MARKETING,
AND GOING PAPERLESS



CHECKLIST

- Develop new checklist each year
- Organize by month
 - Organization is the key
- Don't worry about items on list until that month appears



RESOURCE

Campaign Checklist

- FACULTY/STAFF CAMPAIGN
- December
 - Select Gift
 - Reserve meeting space for lunch
 - Set campaign dates (with extension added)
 - January
 - Set up face to face meetings with potential chairs
 - Get on faculty senate and staff assembly calendars
 - Send in data request
 - Identify total # of employees
 - Need alumni / employee information also for special segment
 - Need all employee TCU email addresses
 - To segment donors out for follow-up emails
 - Send requests HR to request an employee list
 - Both lists should be reconciled.
 - Submit advance notice to TCU This Week
 - Scan chair signatures
 - Order supplies
 - Letterhead, large white envelopes (for packets), return envelopes, F/5 labels (4x6), paper for colored inserts, extra colored ink cartridge for color printer, #10 envelopes for thank you letter. #Print deadline on label.
 - February
 - Update ppt. presentation
 - Make several versions for different offices
 - Update Q & A form
 - Email should be sent from Chair to VCs and Deans
 - Regarding reps – no later than Feb. 15
 - Keep Sandy Callahan (Needles) in mind for rep – reference Julie White
 - Meet with web manager
 - Website updates
 - Emails
 - Review handling procedures with gift processing
 - Receive database (first look) Feb. 16
 - Get materials from writer

■ ALUMNI SEGMENTATION

- Added this segment to campaign about four years ago
- Materials identified alumni employee as a graduate
- The segment has continued to increase each year



■ ITEMS FOR CAMPAIGN PACKETS

- Cover letter/ Personalized email
- Pledge form
- Results from previous year
- FAQ's
- Employee stories



RESOURCE

Cover Letter Example

Dear «PrefName»:

As a member of the Horned Frog community, you play a vital role in the University's success! Whatever your job, you have an impact in providing an unequalled, day-to-day experience for our students. Students like Megan Farrelly, a senior business information systems major from Fort Worth. "Being involved on campus has allowed me to develop the essential skills to be an effective leader, including teamwork and communication," Megan explains. "Scholarship and financial aid offers were more than a significant factor in determining where I would attend college. I graduated a semester early from high school to attend Tarrant County College. This allowed me to transfer into TCU with an academic transfer scholarship."

We appreciate the many contributions you already make to help provide rich, life-changing experiences for students like Megan.

We can be proud that 78 percent of our faculty and staff made a gift last year. I hope that we can count you in this year. You can be confident that every dollar will directly benefit TCU students.

While Megan makes plans for her future, she is confident she will stay involved with the University after she graduates in May. "I wanted to continue the family tradition that spans four generations," Megan explains. "I couldn't imagine my life without having Horned Frogs around me. TCU has given me so much and significantly influenced my past and future. I couldn't be prouder to call myself a Horned Frog and a part of the global TCU family."

Thanks for your support and for all you do to provide a truly special university experience for our students!

Sincerely,

 Janice Kraus, Ph.D.
 Assistant Vice Chancellor of Annual Giving Programs

P.S. Please consider how important it is to keep a TCU degree attainable. A whole new generation of Horned Frogs is depending on us!

RESOURCE

FACULTY-STAFF ANNUAL CAMPAIGN
 TCU BOX 207440 • Fort Worth, TX 76129 • 817-257-7800

Pledge Payment / Payroll Deduction Form

Name: «PrefName», «LNAME» PeopleSoft/TCU I.D. #: «ID#»

Your gifts from June 1, 2012 to May 31, 2013 were «LastFY_Total»
 Your current payroll deduction per pay period is «PSY_Ded».

Yes! I want to support TCU!

To make a gift online, visit www.academicimpressions.com

Payment Method:

\$ _____ **Check** (please enclose check payable to TCU)

\$ _____ **VISA/MC/Discover/AMEX** Exp. Date: _____

Payroll Deductions: (check one year in June 1 - May 31) Pay year:

New payroll deduction of \$ _____ per pay period. Bi-Weekly Monthly

Change my payroll deduction to \$ _____ per pay period. Bi-Weekly Monthly

Leave my payroll deduction the same as last year. (show above)

My spouse works for a Matching Gift Company: _____ (Name of Company)

For more information on matching gift companies, visit www.matchinggift.com

I authorize payroll to deduct the above amount from my payroll check starting June 1, 2014. I understand this deduction will continue until I notify payroll to cancel it.

Signature _____ TCU ext _____ Date _____

Please use my gift to support:


Designations:	
<small>Please indicate the amount or percent of your gift to be applied for each designation.</small>	
<input type="checkbox"/> University's Greatest Good	<input type="checkbox"/> College of Fine Arts
<input type="checkbox"/> TCU Student Scholarships	<input type="checkbox"/> College of Science & Engineering
<input type="checkbox"/> TCU Frog Club (Athletic Scholarships)	<input type="checkbox"/> Home College of Nursing & Health Sciences
<input type="checkbox"/> Mary Cook Burnett Library	<input type="checkbox"/> John V. Roach Honors College
<input type="checkbox"/> Student Affairs	<input type="checkbox"/> Hensley School of Business
<input type="checkbox"/> Adolphus College of Liberal Arts	<input type="checkbox"/> Ranch Management
<input type="checkbox"/> Bob Schieffler College of Communication	<input type="checkbox"/> Brita Duvilly School
<input type="checkbox"/> College of Education	

Other (please specify): _____

The B.M. and Frances Britton Society _____ TCU is included in my estate plans.
 _____ I would like more information about including TCU in my estate plans.

To view your giving history, visit my.tcu.edu and click on gift register under employee self-service. ©2013 Academic Impressions, Inc.

Pledge Form (front)



RESOURCE

Pledge Form (back)

Be counted as a donor to TCU!

Office of Annual Giving
The Annual Fund provides operating budget support to directly benefit every student and faculty member. Unrestricted resources for current use help defray operating expenses and also underwrite scholarships, research and athletics. The University can apply these funds where they are needed most.


The Clark Society
The Clark Society honors TCU's leadership donors (gifts of \$1,000 or more per year) through special programs including educational seminars, tours and recognition events.


The Addison & Randolph Clark Society:			
Member	\$1,000 a year	\$83.34	\$38.46
Director	\$2,500 a year	\$208.34	\$96.15
Dean's Council	\$5,000 a year	\$416.67	\$192.31
Chancellor's Council	\$10,000 a year	\$833.34	\$384.62

TCU Frog Club
TCU has been competing in intercollegiate athletics for over a century. Since 1940 the TCU Frog Club has been supporting our student-athletes through fund raising to underwrite scholarships for young men and women who participate in Horned Frog Athletics.
A \$1,000 gift to the Frog Club also qualifies you as a member of the Clark Society.

Making your gift is easy and can be done several ways:

- 1) Complete and form and send to: Faculty-Staff Annual Campaign, TCU Box 297446, Fort Worth, TX 76129
- 2) Make a gift by credit card or payroll deduction online at <http://www.annualfund.tcu.edu/facultystaff>
- 3) In person-The Annual Fund office is located at Sadler Hall, Suite 3000
- 4) Call us at 817-257-7800 to make a credit card gift over the phone.






RESOURCE

Our FAQ - sample of questions

What can we give to?
You can give to anything you wish. We hope you will consider supporting one of the University's key priorities: the Annual Fund. Since fully funding the annual operating budget is essential to TCU's financial well-being, helping make sure we have a balanced budget every year is important to us all. If you wish to restrict your gift to another area, you should complete the bottom section of your pledge form, labeled "Other," specifying the name and amount/percentage of your total gift you would like to designate this way. Many employees elect to split their gifts between the Annual Fund and a non-Annual Fund designation.

What is the Annual Fund?
The Annual Fund exists to support TCU's budget and to encourage alumni, parents, friends, corporations, foundations and faculty staff to make contributions. These resources are critical. By design, the University keeps its doors open to students who will benefit most from a TCU education by holding tuition at a comparatively modest level (Even with recent tuition increases, TCU still has one of the lowest tuition rates among our peer institutions.). While the cost of higher education in the United States has escalated over the last decade, tuition and fees at TCU have not grown proportionately. TCU students pay about three-fourths of the cost of their education. The University makes up the difference - between these true costs and what is actually charged for tuition - with endowment, income and gifts to the Annual Fund. Donors may designate which areas within the University they wish to support. The breakdown of Annual Fund gift opportunities includes:

University's Greatest Need	Student Affairs	AddRan College of Liberal Arts
TCU General Scholarships	College of Education	College of Communication
TCU Frog Club	Neelley School of Business	College of Fine Arts
Mary Clous Burnett Library	Ranch Management	Harris College of Nursing & Health Sciences
Brite Divinity School	TCU Research Fund	College of Science & Engineering



OUR REQUEST FOR EMPLOYEE STORIES

How TCU Changes Lives

Share your story about how TCU changes lives! This can be a story about a student, an alum, a professor, a member of the community — anyone who has benefited from this university! These stories will be featured prominently in materials, such as The Campaign for TCU. *No story will be used without your final approval and the approval of the person you are writing about.*

You can fill out this form or submit it online. You can write as much or as little as you like, but the following details are essential: the name of the person you're writing about and how TCU has changed that person's life, as well as your name, department and phone number.

Here are a few examples that already have been shared with us:

- The applicant who, when applying to some other universities, was told not even to attempt the rigorous pre-med program because of a physical handicap. TCU believed in him, and today this Horned Frog graduate is a distinguished physician who has helped patients for more than two decades.
- The student who came to TCU to major in speech pathology and got the chance to work with her own clients, dealing with their speech and language disorders first-hand. Without strong scholarship support, she couldn't have attended a private university.
- The graduate of two of the world's most prestigious universities who considers his most important year of schooling to be the one he spent at Starpoint. Here he learned how to function optimally in spite of several learning disabilities.

(page space on back of form)

Your name _____
 Department _____
 Extension _____

Send to: TCU Changes Lives, TCU Box 297070, or submit online at <http://www.annualfund.tcu.edu/facultystaff/>.

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OUR EMPLOYEE NEWSLETTER ARTICLE

Contributions are more vital than ever, notes faculty/staff annual campaign co-chairs

This year's faculty/staff annual campaign begins on April 2.

"And it's more important than ever to make a gift to our university," says campaign co-chair Sheri Neill.

"Financial need for many of our students is increasingly significant. Student retention of freshman from fall to spring semester was 96 percent this year. Spring enrollment is up one percent over last year, countering national trends. Increased financial aid was key to both of these achievements and will be vital if our enrollment is to remain stable."

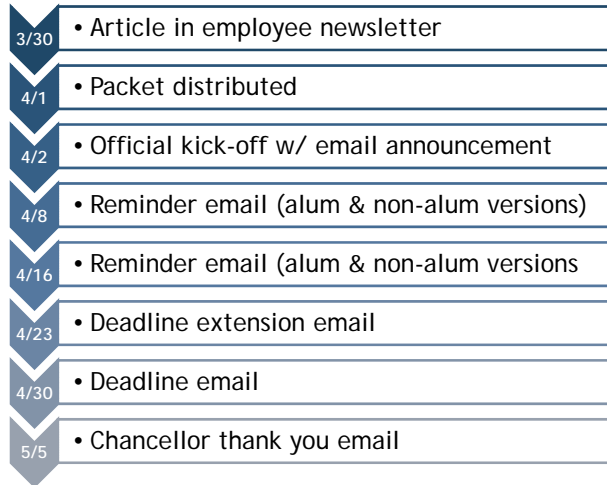
"Students are the direct beneficiaries of our gifts and the gifts of our many alumni and friends who contribute annually," notes Larry Kitchens, also a campaign co-chair. "Since we are those closest to the University, our gifts — regardless of their size — will be a vote of confidence in TCU."

While support for TCU remains strong, the national trend is that donors are supporting fewer causes, but are more committed than ever to the one or two most important to them. "When you consider the contributions you make this year, we hope you'll put TCU among that number," Larry adds.

An informational packet and an e-mail about this year's faculty/staff annual campaign will be coming your way soon. "Your gift will strengthen the University," Larry observes, "not just with critical dollars and cents, but also by example."

32

SAMPLE SOLICITATION CALENDAR



GOING PAPERLESS

- Went paperless four years ago
 - Exception for physical plant and campus police
- Reps review department list
- Email is personalized
 - Using mail merge to send detailed information

**GOING
PAPERLESS**

- Pushing for online gifts
 - Requesting checks be sent back via campus mail
 - Blank pledge form attached to email
 - Large response on first email
- Ability to review employee giving history online
- Saves paper, time, and money



RESOURCE

“Paperless Campaign” Emails



FIRST EMAIL

Sent to all employees

COUNT ME IN! **BE COUNTED FOR TCU**
FACULTY / STAFF ANNUAL CAMPAIGN

April 1, 2013

Dear Ramiro:

As a member of the Horned Frog community, you play a vital role in the University's success! Whatever your job, you have an impact in providing an unequalled, day-to-day experience for our students. Students like Tiana Lewis, a strategic communication/graphic design double major from Omaha, Nebraska. "It absolutely amazes me how much everyone at TCU is willing to give students to ensure that they have a quality education," she says. "Without the help of TCU through grants and scholarships, I wouldn't have had this opportunity."

We appreciate the many contributions you already make to help provide rich, life-changing experiences for students like Tiana.

"Without the help of TCU through grants and scholarships, I would not have had this opportunity."
—Tiana Lewis

We can be proud that 75 percent of our faculty and staff made a gift last year. I hope that we can count you in this year. You can be confident every dollar will directly benefit TCU students.

While Tiana makes plans for her future, she is confident she will stay involved with the University after she graduates in 2015. "TCU gives you the opportunity to create the life you want," she adds. "When something has a chance to take hold

MAKE A GIFT TODAY

Giving Information:
June 1, 2011 - May 31, 2012

Your 2012 Fiscal Year Gifts: **\$0.00**

Payroll Deduction Per Pay Period: **\$0.00**

Gift Designation(s) FY2012: **N/A**

Campaign Deadline:
April 24, 2013

Important Links:
[Make a Gift Online](#)
[Online Payroll Deduction Form](#)
[Print Payroll Deduction Form](#)
[Visit the Faculty / Staff Website](#)
[Frequently Asked Questions](#)
[Learn about Matching Gifts](#)
[TCU Gift Recognition Levels](#)
[2012 Department Participation](#)

You can make a one-time or recurring gift online using credit.

37

OUR REMINDER EMAIL

COUNT ME IN! **BE COUNTED FOR TCU**
FACULTY / STAFF ANNUAL CAMPAIGN

There is still time to support TCU in the Faculty/Staff Annual Campaign! Deadline is April 24th.

MAKE A GIFT TODAY

Important Links:
[Make a Gift Online](#)
[Online Payroll Deduction Form](#)
[Print Payroll Deduction Form](#)
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[Frequently Asked Questions](#)
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[2012 Department Participation](#)

You can make a one-time or recurring gift online using credit, debit or bank draft, by clicking <http://www.makeagift.tcu.edu>.

To establish, change or leave your payroll deduction the same please, click this link and complete the information online. (Please remember your payroll deduction gift will continue until you notify Janine Kraus at j.kraus@tcu.edu.)

Football Season Tickets: If you are renewing football scholarship seating and/or parking, you should have received a renewal from the Athletic Office. We are receiving this info from Athletics and it will count in the Faculty/Staff Annual Campaign.

Did you know that you could also provide a lasting influence by including the University in your estate plans? It can be as easy as listing TCU as one of the beneficiaries of your retirement plan or life insurance policy. It's a simple way to recognize the university that has been so important to you. As one Horned Frog put it, "I love the thought of helping new generations after I'm gone."

If you intend to include the University in your estate plans, please let us know so that we may recognize you as a member

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OUR ALUMNI
REMINDER
EMAIL



BE COUNTED FOR TCU

FACULTY / STAFF ANNUAL CAMPAIGN

There is still time to support TCU in the Faculty/Staff Annual Campaign!
Deadline is April 24th.

As a **graduate and employee of TCU**, you make a difference every day, sharing your time, talent and purple pride. There's another way you can help – by making a gift through the Faculty/Staff Annual Campaign. In addition to benefiting students and the University, giving back is a way to show you believe in the mission of TCU, in the work we do, and in the students we educate.

Scholarships are still a top priority. You may designate your gift to TCU Student Scholarships to make an immediate impact on deserving students like Tim Cason, a senior Communication Studies major.

Last year, the University celebrated a record-breaking 75 percent participation rate in the Faculty/Staff Annual Campaign! This year, we hope to set a new record. Every gift — **regardless of size** — makes a difference to our university. **Your gift does double-duty**, also strengthening the alumni



"Without financial aid and scholarships, I would have missed out on the life-changing experience that has been TCU."
— Tim Cason

MAKE A GIFT TODAY

Important Links:
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[Print Payroll Deduction Form](#)
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Football Season Tickets: If you are renewing football scholarship seating and/or parking, you should have received a renewal from the Athletic Office. We are receiving this info from Athletics and it will count in the Faculty/Staff Annual Campaign.

OUR EXTENSION
REMINDER
EMAIL



BE COUNTED FOR TCU

FACULTY / STAFF ANNUAL CAMPAIGN

Deadline Extended!

We're close to reaching our goal, so the deadline for the Faculty/Staff Annual Campaign has been **extended through April 30!**

As a **TCU graduate and employee**, you make a difference every day. Last year, TCU celebrated a record-breaking 75 percent participation rate in our Faculty/Staff Annual Campaign. Giving back is an additional way to show you believe in the mission of the University, in the work we do, and in the students we educate. Your support also demonstrates your appreciation of the education you received here. **Your gift does double-duty** by strengthening the alumni participation rate.



"TCU was my top choice university to attend, and with scholarships, it became a reality."
— Brianna Ortals

"TCU was my **top choice university** to attend, and with scholarships, it became reality," says Brianna Ortals, a senior nursing major. "There is no way my experience at another university could have compared to my experience at TCU. The opportunities I've had and the amount I've grown as an individual are unmatched." You may designate your gift to TCU Student Scholarships to make an immediate impact on deserving students like Brianna.

MAKE A GIFT TODAY

Important Links:
[Make a Gift Online](#)
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[Print Payroll Deduction Form](#)
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Football Season Tickets: If you are renewing football scholarship seating and/or parking, you should have received a renewal from the Athletic Office. We are receiving this info from Athletics and it will count in the Faculty/Staff Annual Campaign.

OUR DEADLINE EMAIL



BE COUNTED FOR TCU

FACULTY / STAFF ANNUAL CAMPAIGN

MAKE A GIFT TODAY

Today is the last day for the Faculty/Staff Annual Campaign!

We are 15 people away from reaching a new faculty/staff giving record! Please help us reach 76 percent.

As a member of the TCU family, you make a difference every day, sharing your time and talents. Giving back is another way to show you believe in the mission of the University, in the work we do, and in the students we educate. Last year, TCU celebrated a record-breaking 75 percent participation rate in our Faculty/Staff Annual Campaign. Please help us exceed that rate this year!



"Without financial aid and scholarships from TCU I would not be able to attend here."

— Nick Morales

Scholarships are still a top priority. "TCU has had the greatest impact on my life," says Nick Morales, a junior political science major from Mansfield. "It has made me grow up and mature to become an overall better person. Without financial aid and scholarships from TCU I would not be able to attend here." You may designate your gift to TCU Student Scholarships to make an immediate impact on deserving students like Nick.

Important Links:
[Make a Gift Online](#)
[Online Payroll Deduction Form](#)
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OUR WEBSITE COMMUNICATION



ALUMNI DEVELOPMENT DONOR RELATIONS

MAKE A GIFT

TCU Faculty / Staff Annual Campaign



Be Counted for TCU


As a member of the Horned Frog community, you play a vital role in the University's success! Whatever your job, you have an impact in providing an unequalled, day-to-day experience for our students. Students like Megan Farrelly, a senior business information systems major from Fort Worth.

"Being involved on campus has allowed me to develop the essential skills to be an effective leader, including teamwork and communication," Megan explains. "Scholarship and financial aid offers were more than a significant factor in determining where I would attend college. I graduated a semester early from high school to attend Tarrant County College. This allowed me to transfer into TCU with an academic transfer scholarship."

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We can be proud that 80 percent of our faculty and staff made a gift this year. You can be confident that every dollar will directly benefit TCU students.

While Megan makes plans for her future, she is confident she will stay involved with the University after she graduates in May. "I wanted to continue the family tradition that spans four generations," Megan explains. "I couldn't imagine my life without having Horned Frogs around me. TCU has given me so much and significantly influenced my past and future. I couldn't be prouder to call myself a



MAKE A GIFT

ONLINE PAYROLL DEDUCTION FORM

2014 Faculty Staff Campaign Progress: 80%

Faculty / Staff Campaign

[Faculty / Staff Campaign Home](#)
[FAQs](#)
[Learn About Matching Gifts](#)
[Departmental Participation Chart](#)
[TCU Gift Recognition Levels](#)

Making A Gift

[Online Payroll Deduction Form](#)
[Print 2014 Payroll Deduct Form](#)
[Online Gift with Credit Card](#)

Post all items on website:

- Pledge form
- Previous results
- FAQs
- Employee stories

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Academic Impressions

21

THANK YOU/ STEWARDSHIP

- Thank you letter
- Thank you email from chancellor
 - We control this message
 - Provide accurate totals due to tracking of gifts in the annual giving office
- Small gifts
 - Always less than a dollar
 - Something sent in envelope with thank you letter (magnet, notepad, mascot sticker)
- Auto thank you email from online gift
- Employee receipt



OUR AUTO THANK YOU EMAIL FOR ONLINE GIFTS

On behalf of TCU, thank you for your recent Faculty/Staff Annual Campaign gift. For tax purposes, an official University receipt will be mailed to you.

Your support ensures that our students receive a world-class, values-centered university experience. Thank you for everything you do to make TCU a great university!

Gratefully,

A handwritten signature in cursive script that reads 'Janine Kraus'.

Janine Kraus, Ph.D.
Director of Annual Giving



SAMPLE ONLINE RECEIPT

Mrs. Frog
123 Frog Drive
Fort Worth, TX 76129

Payroll Deduction Receipt for January 1, 2009-December 31, 2009

Gift Amount:	\$ 100.00	Date:	December 31, 2008
Goods/Services Received:	0.00		
Net Gift Amount:	\$ 100.00	ID:	H000000

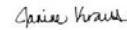
Per your instructions, your gifts were designated as follows:

University's Greatest Needs	\$ 50.00
Frog Club	50.00

As a member of the TCU family, you contribute day in and day out, sharing your time, talent and expertise. Last year, 70 percent participated in the faculty/staff annual campaign, placing us among some of the most elite universities in the nation in terms of employee giving. What a wonderful example for our students, alumni, parents and other friends!

Thank you for your support and all you do to help our students flourish!

Sincerely,



Janine Kraus, Ph.D.
Assistant Vice Chancellor,
Annual Giving Programs

P.S. Our records indicate that your spouse works for a matching gift company. Please obtain a matching gift form from your employer's Human Resources office and send it to Matching Gifts, TCU Box 298240, Fort Worth, TX 76129. You may contact us at (817) 257-7812 or matchinggifts@tcu.edu.

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OUR THANK YOU LETTER

Thank you for your gift to TCU through the Faculty/Staff Annual Campaign. As you probably know, annual gifts like yours underwrite every element of the TCU experience, from strengthening academic programs and building scholarships to supporting faculty endeavors. Your participation counts, not just in dollars, but also as a vote of confidence in our university!

Without a doubt, mentoring teacher-scholars and accomplished, caring staff members like you enable TCU to make a difference today and ensure it will continue to have an impact for generations to come. That impact has been felt by students like Kalekia Adams, a nursing student and scholarship recipient from Bedford who plans to graduate in December 2014: "TCU has made a difference by really challenging me to elevate myself and my efforts to the highest level. I'm grateful for the experiences I have been privileged to have and the inspiring and amazing people I have met at TCU."

Your participation in the Faculty/Staff Annual Campaign shows that you believe in TCU's mission, in the work we do, and in the students we educate. We appreciate your gift and all you do here!

Sincerely,

Janine Kraus, Ph.D.
Assistant Vice Chancellor of Annual Giving Programs

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OUR THANK YOU EMAIL FROM CHANCELLOR

Many thanks for your gift to the Faculty/Staff Annual Campaign!

This year's Faculty/Staff Annual Campaign achieved a participation rate of 80 percent, surpassing last year's record 78 percent! This level of support is found at very few colleges and universities in the country and reflects a remarkable commitment to TCU and our students!

Gifts to this campaign totaled just over \$690,000. Each of those dollars will strengthen the exceptional TCU experience and directly benefit our students. Your gift is a vote of confidence in the University and serves as a model of participation for students, alumni and other friends as they make their own decisions about giving to TCU.

I am exceedingly grateful for your support of the Faculty/Staff Annual Campaign and the unique role you play at this great university.

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PRESENTATIONS

- Staff assembly
- Faculty senate
- Physical plant
- Academic services
- Offer to speak at any gathering
- Adding in social media component

PRESENTATION TAILORING

- Physical plant
 - Every gift makes a difference
 - Brag about their participation
- Faculty senate/staff assembly
 - Comparison of the groups (competition)
 - Quotes from other faculty and staff
- Academic services
 - Staff volunteers to help in presentation
 - Quiz game and testimonials



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BUDGETING & BUY-IN



BUDGET ISSUES

- Small gifts
 - Always less than a dollar
 - Fit in #10 envelope
- No postage cost
 - Volunteers deliver packets
 - Thank you letters sent via inter-office mail
- Much of the packet is on plain paper
 - Only special orders are for letterhead
 - All printing done in office
- Go green



BUILDING BUY-IN

- Key relationships to develop
 - Leadership donors/employees
 - Making “friends” in different groups
 - Volunteering
 - Example: Student affairs committee/events
 - Making sure co-chair will be an ambassador
 - Opening the door with others
 - Example of first experience with chair



■ BUILDING BUY-IN

- Customer Service (obvious, but important)
 - Always maintain a positive attitude (news spreads fast)
 - Example: Be positive with cancellations
- Partner with HR (year round)
 - New employee orientation
 - Welcome letter with directory
 - Proposing new alumni/employee welcome letter



■ GETTING FACULTY & STAFF INVOLVED

Suggestions from article in CASE Currents (2010)

- Speaker for alumni relations events
- Recognize fundraising faculty
- Alumni professorships



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ANCILLARY ISSUES



EXTERNAL CAMPAIGNS

- TCU participates in United Way
 - United Way takes place in the fall
 - Faculty/Staff Campaign takes place in spring
- Try to keep space between the two



RECESSIONARY ECONOMY

- Make it low key
- Ask higher administration to distribute message
 - Example: Ask president to send out kick-off message



RECESSIONARY ECONOMY

MESSAGE SHOULD REMIND EMPLOYEES HOW IMPORTANT AND SPECIAL THEY ARE TO THE INSTITUTION

- Even if participation is low, you can still focus on educating
- Focus on a soft ask



OUTCOMES & NEXT STEPS

CYCLE STARTS OVER AGAIN

- Is the person a major gift prospect? An annual fund prospect?
- What about further cultivation?
- Who to be involved? Inside the institution and externally?
- When do you decide to drop this person as a major gift prospect?
- Use the results to your benefit - share success with alumni in hopes to gain alumni participation



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TRANSLATING THE MODEL TO YOUR SETTING



SMALL INSTITUTION/ SHOP SUGGESTIONS

- Ask for assistance from others in your shop
 - Are there other admin assistants who can help?
 - Ex: Everyone in our office helps with packets
- Are there donor employees that can assist with campus presentations? Can chairs take a more active role?
- Consider extending the timeline on your task checklist (can make it easier with multiple responsibilities)



LARGE INSTITUTION/ SHOP SUGGESTIONS

- Many of the same suggestions for a small shop can apply to a large shop, due to the opposite extreme.
- Ask for assistance from others in Advancement because you are going to have more employees than a small institution



■ LARGE INSTITUTION/ SHOP SUGGESTIONS

- Are there donor employees that can assist with campus presentations?
 - Can chairs help? (You'll have more groups to visit)
- Recruit more volunteers per segment (department, school, group)
 - Assuming there will be more employees, this will help make the volunteers job easier
 - They will have a better experience and project a positive attitude



■ ALUMNI EMPLOYEE CHAPTER

- Ground work for the “ask”
- A great way to make alum employees feel special and connected without fear of another solicitation
 - Event-driven
 - Happy hours
 - Lectures
 - Holiday contests
- Collaboration with other areas of advancement is a must
 - Ex. Alumni relations





TAKEAWAYS


- Make your program manageable
 - Duration
 - Volunteer burnout
 - Organization
- Think through reports and procedures
 - Your procedures for processing gifts may become more detailed and lengthy
 - It's worth it - it can serve the overall reporting better




TAKEAWAYS

- Create a competition
 - Encourages participation
 - Involve co-chairs and reps
- Obtain buy-in on campus
 - Leadership involvement
 - Get involved on campus
 - Committees
 - HR



 **TAKEAWAYS**

- Stick with campaign even if you get low results (build a tradition)
- Try to come up with ways to keep your employees connected (i.e.: group events without solicitation or fears of solicitation)



 **QUESTIONS**





EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

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