

Reassessing Donor Recognition Levels | 05.17.16

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Please find a list below of additional resources from the “*Reassessing Donor Recognition Levels*” webcast.

Post-Webcast Resources

1. **Disclosure Statements** – <http://www.irs.gov/Charities-&Non-Profits/Charitable-Organizations/Charitable-Contributions-Quid-Pro-Quo-Contributions>
2. [Donor survey example](#) – Page 2-4
3. [Sample proposal for a giving societies overhaul](#) – Page 5-7
4. Article from Academic Impressions’ *Higher Ed Impact*: “**Donor Recognition Societies: What We Can Learn from American Airlines**” : <http://www.academicimpressions.com/news/donor-recognition-societies-what-we-can-learn-american-airlines>

Donor Survey

The primary purpose of this survey is to assess your satisfaction level with your giving experience at [REDACTED]. As an [REDACTED] contributor, we value your input as we continue to improve the effectiveness of our fundraising efforts and general stewardship procedures. All responses will be kept confidential, and there will be an opportunity at the end of this survey to offer any additional advice or comments. Thank you for participating!

Q1 How often do you donate to [REDACTED]?

- 44.5% *Annually*
- 3.3% *Bi-Annually*
- 6.1% *More than twice a year*
- 11.7% *Rarely*
- 30.7% *Never, Please go to Q11*
- 3.5% *Not Sure*

Q2 What is the primary reason for why you support [REDACTED] financially?

- 49.3% *I feel obligated to give something back/show my appreciation.*
- 14.1% *Because I was asked.*
- 22.3% *I believe in what [REDACTED] is doing now and want to support new initiatives.*
- 13.5% *Other*
- If you selected other, please explain.*
- 13.5%

Q3 Please tell us how satisfied or dissatisfied you are with each of the following:

	<i>Very Satisfied</i>	<i>Satisfied</i>	<i>Neutral</i>	<i>Dissatisfied</i>	<i>Very Dissatisfied</i>
The method by which [REDACTED] makes requests for donations	23.1%	51.0%	19.7%	3.4%	1.1%
Your ability to designate what your donation is to be used for?	29.3%	39.2%	25.1%	4.8%	0.6%
The information you receive regarding the use of your donation?	16.6%	40.0%	30.4%	10.1%	0.8%
The recognition you receive for being a donor?	22.5%	42.8%	29.6%	2.3%	0.3%
Overall, the relationship between [REDACTED] and yourself as a donor?	25.1%	47.6%	22.3%	3.1%	0.6%

How adequately informed do you feel regarding the positive impact your financial gifts have on [REDACTED]?

18.3% 42.0% 31.3% 5.6% 1.4%

Q4 Please tell us how much you agree or disagree with each of the following statements.

	<i>Strongly Agree</i>	<i>Agree</i>	<i>Undecided</i>	<i>Disagree</i>	<i>Strongly Disagree</i>
[REDACTED] effectively communicated its need for donations.	20.6%	56.1%	15.5%	3.4%	0.8%

My questions about donations were answered respectfully and completely.	22.5%	49.9%	19.2%	1.7%	0.3%
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Q5 In general, do you feel the University acknowledges your gift in a timely fashion?

83.1% Yes
2.8% No
13.0% Uncertain

Q6 After making a gift to [REDACTED], how would you rate the University's acknowledgment of your gift?

1.1% Too much acknowledgment
91.3% Just enough acknowledgment
5.1% Not enough acknowledgment

Q7 For each of the following, how would you rate each of them in terms of their importance to you as a donor? Use the 5-point scale, where 5 means "very important" and 1 means "not at all important."

	<i>5 Very Important</i>	<i>4 Important</i>	<i>3 Indifferent</i>	<i>2 Not Important</i>	<i>1 Not at all important</i>
How much do annual giving levels influence your decisions about how much to give the University each year?	2.5%	15.5%	38.6%	24.5%	17.7%
Acknowledgment of your donation by Standard Receipt	8.7%	38.6%	33.5%	9.9%	7.9%
Acknowledgment of your donation by personal thank you letter from President, staff, volunteer, or student	12.4%	33.8%	30.1%	13.0%	8.7%
Acknowledgment of your donation by Listing of your name in our annual Donor Report	12.4%	40.0%	29.9%	7.9%	8.5%

Q8 In our annual Donor Report, in what order do you feel donors should be listed?

13.0% Alphabetical
6.8% Listed by gift size or gift society
29.6% Listed by graduating class
38.6% Some combination of those above
10.7% Uncertain

Q9 Please recall your first gift to [REDACTED] - what prompted you to give to [REDACTED] for the first time?

51.3% Call from a student
14.4% Letter received in the mail
2.3% Personal visit from staff or volunteer
0.8% Senior class gift
0.6% Reunion class gift
20.0% None of the above - I decided to do it on my own

9.9% *Other*

If you selected other, please explain

9.9%

Q10 How do you prefer to be contacted about your annual gift each year?

29.6% *Telephone call from a student*

47.3% *Request through the mail*

13.8% *Email request*

1.7% *Personal visit from staff/volunteer*

0.8% *Personal visit or call from a classmate*

5.6% *Other/None of the above*

If you selected other, please explain

3.9%

Q11 Please answer this question only if you have never donated to [REDACTED] Which best describes the reason you have never donated to [REDACTED]?

5.3% *No one asked*

5.5% *Support other non-profits*

16.8% *Financial reasons*

4.9% *Other*

If you selected Other, please explain

5.1%

Q12 In closing, do you have any other comments, observations, or recommendations for either the Development and Marketing Division, or for the University as a whole?

28.1%

Q13 Please select the one category that best describes your present-day status.

10.4% *Faculty/staff*

4.1% *Friend of the University*

83.4% *Alumni*

If a graduate of [REDACTED], please list Class Year below.

66.0%

THANK YOU!

Recognition societies overhaul

OVERVIEW

The stewardship survey administered in 2013 showed that our donors

- don't know criteria of our recognition societies or why they're included
- don't care that much about benefits or recognition
- contribute because they want to give back to an organization that is important in their lives

To be effective, a recognition society must build a community of donors by offering three key benefits, things they can't get anywhere else: access, information and experiences. Simply listing names at various dollar levels does not recognize donors in a meaningful way. Rather, giving levels and giving behavior should identify the structure for the administration and programming.

In preparation for Maryland's next campaign, to boost stewardship efforts and engage our donors more meaningfully, a committee is reviewing and enhancing our recognition societies.

COMMITTEE STRUCTURE

NAME	ROLE	DEPARTMENT
Debbie Meyers	Chair	Donor Relations
Fulvio Cativo	Cumulative Giving Chair	Donor Relations
Lyn Culver	Leadership Annual Giving Chair	Leadership Annual Giving
Michael Graham-Cornell	Data and reporting	Business Applications
Jenn Kratz	Peer benchmarking	Donor Relations
Brian Logue	Consecutive Giving Chair	Annual Giving
John McKee	Planned Giving Chair	Planned Giving
Deb Rhebergen	History of Colonnade Society	BSOS
Tracey Themne	Branding, communications, roll-out	Marketing
Regina Tracy	Campus benchmarking	Colleges and Programs
Paula Whisted	Liaison to principal and leadership gifts	Research

The committee has met and initially is proposing four recognition societies based on the following giving behaviors: consecutive (new), leadership annual, cumulative and planned giving. Each group has its own sub-committee that will review or create its society, and their final proposal will address the following areas:

1. Overall mission – how will this society support UR's five strategic objectives?
2. Administration – who will oversee this society and support the programming with which staff and what budget?
3. Programming – what events, communications and other perks will be offered publicly and internally (programmatically) to offer information, access and experience?

Subcommittees report progress to the main group, where we make sure that elements are consistent across each group. Below is our status to date on each group.

PROGRESS TO DATE

CONSECUTIVE GIVING SOCIETY – To be named

Led by X

This newly created society will be a joint effort between annual giving and donor relations, with a focus on increasing participation rates and retaining donors. For the remainder of this fiscal year, we will work out logistics with data – reconciling athletics vs. general university giving histories – as well as eligibility criteria and administration, and annual giving will continue hand written thank-you notes for first time donors. As staff resources become more defined after the next fiscal year begins, we will commit to a plan of promoting and administering this program.

LEADERSHIP ANNUAL GIVING SOCIETY – To be named

Led by X and leadership annual giving staff

Currently, our leadership annual and cumulative giving societies identify levels with arbitrary names that show no perceived increased value or relativity. Rather than publicize and market these levels, staff will recognize donors in each level programmatically (internally), giving them flexibility in changing what they do without having to reprint promotional brochures or update websites. Special attention needs to be made to donors who make large leadership annual gifts that don't qualify them for cumulative giving benefits – e.g., \$50,000. LAG and donor relations will need to be mindful of and cover the stewardship gap between the LAG threshold and the lowest level of cumulative giving.

X is increasing the minimum recognition level to \$2,500, which is more in line with our peers.

CUMULATIVE GIVING – To be named

Led by X

To date, X has created a benchmarking report from our Big Ten peers, including a grid showing which school has which kinds of societies. From that report, we are comparing what these schools offer to their cumulative giving donors, and how they structure their societies. We have collected data about the number of our Maryland Society donors, compared with their actual giving histories. Most likely we will consolidate some of the lower levels and possibly add higher levels.

Next steps are to review the levels and create a list of proposed perks and programming, based on staff allocation for next fiscal year. We anticipate a rollout in six to 12 months.

PLANNED GIVING – Founders Society

Led by X

Founders Society is going strong, and X's donors are well stewarded. A new stewardship person is slated to join his staff this fiscal year and will focus on areas like a welcome protocol, an honor roll and co-sponsoring events with LAG's group. X also has contracted with a vendor to improve their promotional pieces and website.

For now, Founders Society will function as it always has but be integrated more with the other recognition societies as they emerge and progress.

BRANDING, COMMUNICATIONS AND ROLL-OUT

As noted, the consecutive and cumulative giving societies will be developed next fiscal year and rolled out in spring 2015. The committee envisions a soft launch, internally, of the new leadership annual giving society by the end of this fiscal year. Founders Society will remain the same.

DATA AND REPORTING

Overarching considerations will be the usual ones: matching credit, spouse/partner credit, cash vs. commitment, discount for recent grads and planned gifts. Beyond that, each society has unique reporting and data issues.

Consecutive giving poses a large challenge in terms of data analysis because of dual gift reporting systems in athletics and central. We will need to reconcile which athletics donors are actual donors to the university.

Leadership annual will require reporting that will show giving levels close to the minimum, so they can solicit those donors. For cumulative giving, donor relations will push a quarterly report showing donors who are almost at the next level.