


#Altraining

REASSESSING  
DONOR  
RECOGNITION  
LEVELS




Debbie Meyers | University of Maryland | [debbie.meyers@gmail.com](mailto:debbie.meyers@gmail.com)



LEARNING OUTCOME

**After participating...**

...you will be able to work toward a more intentional approach to donor recognition by objectively assessing your existing programs.



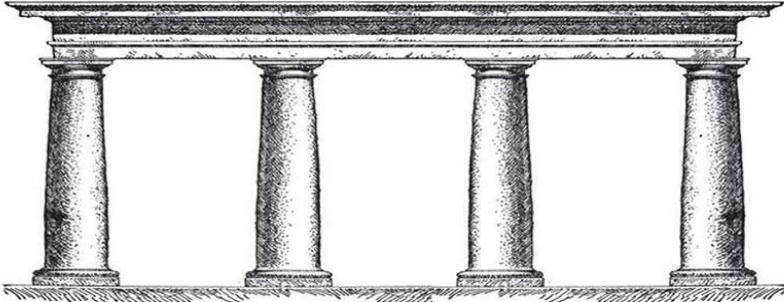
**AGENDA**

- Assessing your current donor recognition levels
- Understanding what donors are looking for from an organization
- Reestablishing your recognition levels: Moving to a ~~five~~ six-level model
- Transition/change management

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**FOUR PILLARS OF DONOR RELATIONS**

Acknowledgment Reporting Recognition Engagement



*Stewardship* *Donor Relations*

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## ASSESSING YOUR CURRENT DONOR RECOGNITION LEVELS



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### AUDITING YOUR EXISTING OFFERINGS


DONOR GROUP	Invitations to special events?	Insider information?	Access to key university administrators?	Honor roll recognition?	Tchotchkes?	Other
MAJOR DONORS						
PLANNED GIFT DONORS						
LEADERSHIP ANNUAL DONORS						
CONSECUTIVE DONORS						
FIRST-TIME DONORS						
STUDENT/YOUNG ALUM DONORS						



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**ASSESSMENT:  
WHY?**

1. To engage your donors
2. To learn more about them and what they want and expect (demographics)
3. To find how well or poorly you're doing
4. To justify more positions and budget




**ASSESSMENT**

DO:

- Have appropriate follow-up ready.
- Make it easy to participate.
- Offer the opportunity to provide testimonial language, which you can repurpose.

DON'T:

- Say "we need your help."
- Ask something you already know.
- Ask for a contribution.





## RESOURCE

### Sample Donor Surveys

<http://fluidsurveys.com/survey-templates/donor-satisfaction/>

<https://www.surveymonkey.com/mp/donor-feedback-survey-template/>

<https://www.surveymonkey.com/mp/non-profit-survey-templates/>



## ASSESSMENT


### SURVEYS OFTEN SHOW THAT DONORS:

- Don't know why they're in a particular society
- Perceive little benefit to belonging in one or for moving from one level to the next
- Don't care about and are not motivated to give more or again because of this type of recognition



**COMMON PITFALLS**

- Gulf between groups
- Lack of visual connection, recognition and awareness
- Confusion among other programs and eligibility requirements
- Not consistently administered over time




The Colonnade Society recognizes donors who make annual contributions of \$1,000 or more to any program or unit across the university. Corporations receive Colonnade Society status with gifts totaling \$5,000 or more. The consistent giving of these generous and loyal benefactors stimulates innovation and achievement in every corner of the university.

Colonnade Society giving is recognized at the following levels:

<b>Steeple Club</b>	\$25,000 and above
<b>Portico Club</b>	\$10,000 to \$24,999
<b>Pillar Club</b>	\$5,000 to \$9,999
<b>Pedestal Club</b>	\$2,500 to \$4,999
<b>Cornerstone Club*</b>	\$1,000 to \$2,499

\*\$500 for alumni one to five years from graduation  
\*\*\$100 for current students



## ASSESSMENT



Maximum

Extra

Extreme

Ultra

Double Force

## RECOGNITION SOCIETIES

- Can be confusing and costly
- Where are you going to store all those medallions and pins?
- What do you do with 16 cases of swag with last year's slogan?



## CHAT

# Why have donor recognition societies?



## WHY?

### IDEALLY, RECOGNITION SOCIETIES SHOULD:

- Engage and reward donors who deserve special treatment
- Provide staff with structure and focus on our most important donors
- Build communities that create a natural flow of donors from one society to the next





**WHY?**

**BOTTOM LINE: THEY CAN HELP INCREASE**

- Donor retention
- Our participation rate
- Overall giving: more gifts, larger gifts

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**TAKEAWAYS**

It costs seven times more to acquire a new donor than to retain a current one.



The infographic features a green background with a faint image of a US dollar bill. On the left, a large white arrow points upwards, accompanied by the text 'Every 100 donors gained in 2012'. On the right, a large black arrow points downwards, accompanied by the text 'was offset by 105 lost donors through attrition'. The numbers '100' and '105' are significantly larger than the surrounding text.

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## UNDERSTANDING WHAT DONORS ARE LOOKING FOR FROM AN ORGANIZATION



### CHAT

What kind of recognition do  
your top donors get?

How is it distinct from the  
recognition your leadership  
annual donors receive?



**ASK  
YOURSELF**

- What did your survey tell you?
- How can recognition programs help advance your institution's goals and mission?
- What behaviors do you want to reward?
- What's missing?



**WHAT  
DONORS  
*DON'T* WANT**

- Tchotchkes
- Newsletters with grip & grin pictures
- Refrigerator magnets
- Form letters
- Things they can buy in the bookstore
- Rubber chicken dinners
- Solicitations with every interaction



■ WHAT  
DONORS  
*DO WANT*

- Donors don't pay dues to be in a club
- Donors don't *give* to *get* this recognition
- It's not that they give, and thus are entitled to this recognition



■ CONSIDERING IRS  
REGULATIONS

- [Disclosure statements](#)



■ WHAT  
DONORS  
WANT

- Surprise and delight!
- Involvement
- Insider access
- Results
- Transparency
- Personal touches

 **QUESTIONS**

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## REESTABLISHING YOUR RECOGNITION LEVELS: MOVING TO A FIVE SIX-LEVEL MODEL



### RECOGNIZING

#### RECOGNIZE DONORS FOR WHO THEY ARE AND THE WAY THEY GIVE:


- Student or recent grads
- Consecutive donors
- First-time donors
- Leadership annual donors
- Cumulative giving
- Planned giving donors



**RECOGNIZING**


**HOW THEY BENEFIT YOU AND YOUR COLLEAGUES:**

- Cumulative giving
- Planned giving donors
- Leadership annual donors
- Consecutive donors
- Student and young alum circles




**CUMULATIVE GIVING**

OBJECTIVES	TACTICS
<ul style="list-style-type: none"><li>• Encourage major gifts</li><li>• More and bigger gifts</li><li>• Help identify planned giving donors</li></ul>	<ul style="list-style-type: none"><li>• Commemorative commissioned piece for inauguration and induction</li><li>• Intimate access events with leadership</li><li>• Insider communications</li></ul>




**PLANNED GIVING DONORS**

OBJECTIVES	TACTICS
<ul style="list-style-type: none"><li>• Encourage donors to document their intentions for campaign and other reporting</li><li>• Create a long-term source of support</li><li>• Inspire others to pursue estate planning</li></ul>	<ul style="list-style-type: none"><li>• Insider communications</li><li>• Tax, financial and estate planning updates</li><li>• Local recognition or enrichment events</li></ul>



**LEADERSHIP ANNUAL DONORS**


OBJECTIVES	TACTICS
<ul style="list-style-type: none"><li>• Create a pipeline for major gifts</li><li>• Help retain donors</li><li>• Strengthen participation rates</li></ul>	<ul style="list-style-type: none"><li>• Networking opportunities</li><li>• Piggyback with alumni events</li><li>• Pre-event receptions and access to leadership and celebrities on campus</li></ul>






### ■ CONSECUTIVE & FIRST-TIME DONORS

OBJECTIVES	TACTICS
<ul style="list-style-type: none"><li>• Create a pipeline for planned gifts</li><li>• Help retain donors</li><li>• Strengthen participation rates</li><li>• Encourage other types of donors to give annually, at any level</li></ul>	<ul style="list-style-type: none"><li>• First-time donor thank you/packet</li><li>• Commemorative swag for landmark years</li><li>• Commemorative swag for lifetime induction</li></ul>




### ■ STUDENT & YOUNG ALUM CIRCLES

OBJECTIVES	TACTICS
<ul style="list-style-type: none"><li>• Create a habit of giving</li><li>• Makes them aware of the importance of philanthropy</li><li>• Exerts a certain level of peer pressure</li></ul>	<ul style="list-style-type: none"><li>• Tassel or rope for graduation</li><li>• Asterisk in graduation program</li><li>• Special access to campus events</li><li>• Letter from president</li></ul>




**GOALS**

- Build consensus internally, for advocacy and credibility
- Create consistency and relativity of programs in offering *access, information and experiences*
- Implement a successful roll out plan and society administration




**CONSENSUS**

- Approval
- Research and benchmark
- Input from internal constituents
- Use your volunteers!



**DO THE MATH!**

**MINIMUM MAJOR GIFT**  $\times$  ? = **MINIMUM CUMULATIVE LEVEL**




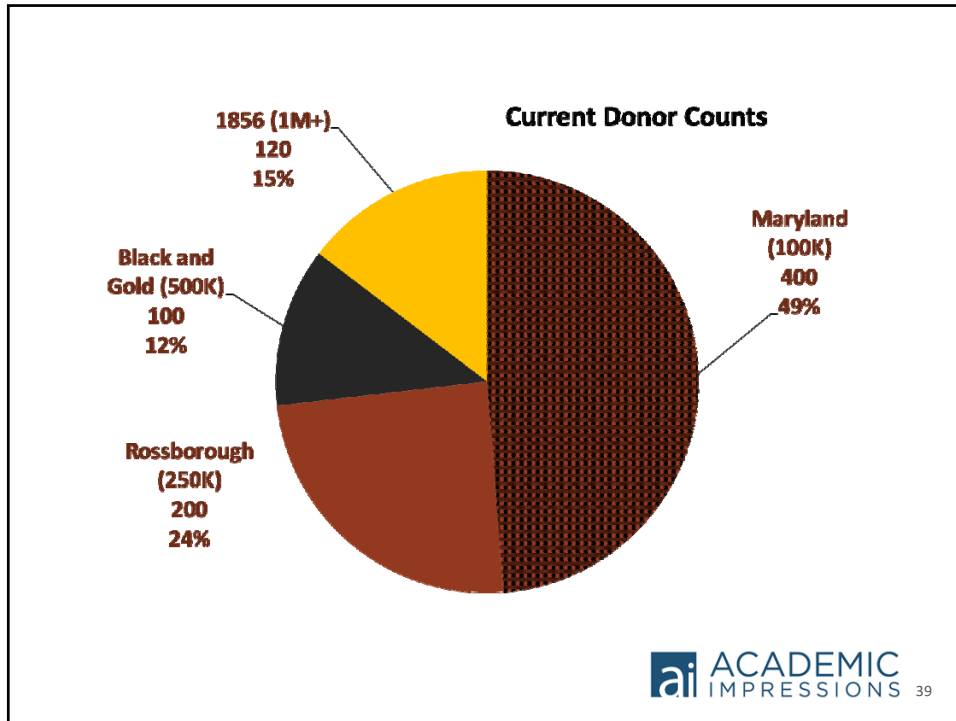
**DO THE MATH!**


# donors  $\div$  # Staff  $+$  Size of Budget

$=$

**NEW RECOGNITION CIRCLES**





 **CHAT**

Peer Pressure?

Is your leadership pressuring you to benchmark what other schools do? If so, why?

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## COMMITTEE STRUCTURE

- Development staff from:
  - Annual giving (first time, consecutive)
  - Leadership annual giving
  - Planned giving
  - Principal giving
  - Donor relations (cumulative giving)

## COMMITTEE STRUCTURE

- Marketing
- Data/Reports
- Benchmarking: internal and peer
- Institutional history
- College/unit representation
- Research

## ■ COMMITTEE'S ROLE


- Committee will help you determine
  - Overall mission
  - Administration
  - Eligibility requirements
  - Programming

## ■ ELIGIBILITY REQUIREMENTS

- Pick a rule and document it in an official policy statement
- Prepare yourself to defend it
- Gain as much internal consensus as you can
- Err on the side of inclusion
- Document your standards and communicate them as widely and frequently as you can


**PROGRAMMING**

- Make sure programming is:
  - Relative
  - Sustainable over time
  - Institutionalized, not personalized



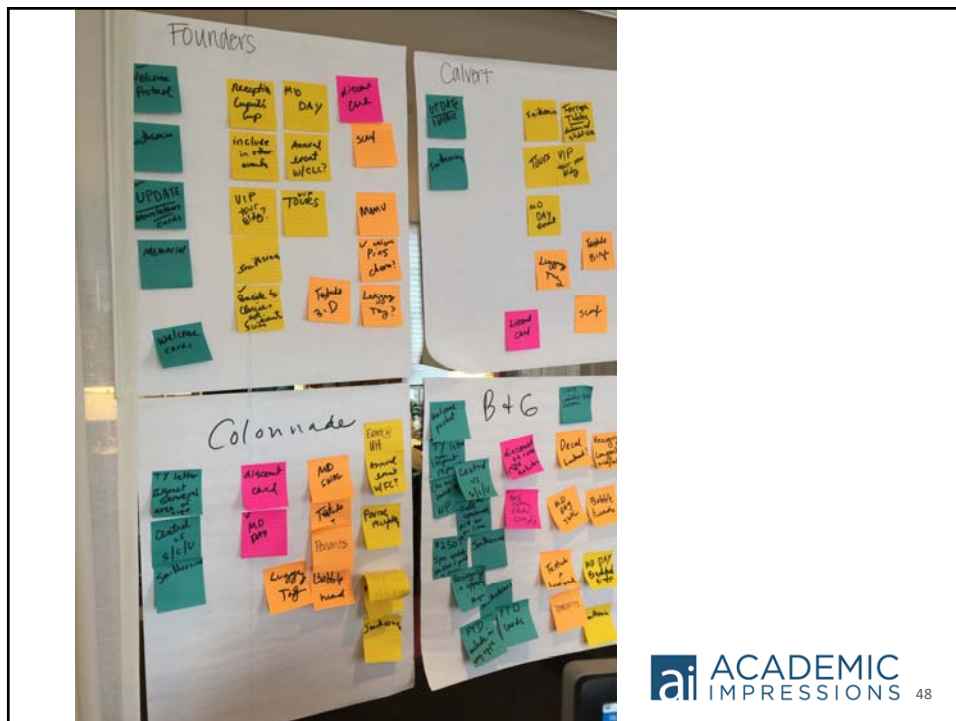
**PROGRAMMING  
CONSIDERATIONS**

- Keep tchotchkes to a minimum
- Add privileges that cost little or nothing
- Keep language as general as possible
- Offer concierge service



## ADDITIONAL PROGRAMMING CONSIDERATIONS

- Visual identity and names
- Frequency and type of communications
- Swag, gifts, perks and invitations
- Printed informational materials, welcome packets and stationery
- Web page







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## TRANSITION/CHANGE MANAGEMENT



## TAKEAWAYS

### Roll-out plan

1. Identify donor groups
2. Soft launch internally
3. Official launch with donors



## TAKEAWAYS


### Recognition programs should

1. Strengthen donors' ties with your institution
2. Provide donors access, information, experience
3. Offer focus and structure for development staff






 **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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