


**ANNUAL GIVING: INTEGRATING EMAIL  
WITH YOUR OVERALL STRATEGY** *#AItraining*



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IMPRESSIONS

 **LEARNING OUTCOME**

**After participating...**

...you will be able to better plan your email strategy and integrate other digital platforms into your annual giving effort.

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## AGENDA

- Institutional Framework
- Leveraging Digital In Higher Ed
- Incorporating Best Practices
- Planning Proactively & Integrating Across Channels
- Next Steps

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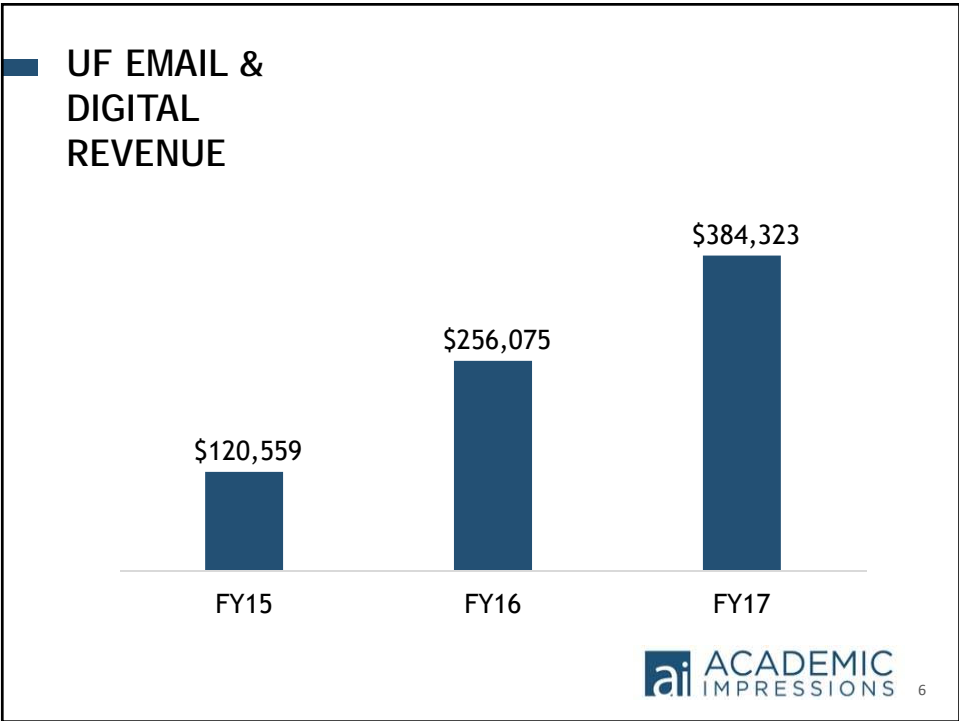
## INSTITUTIONAL FRAMEWORK

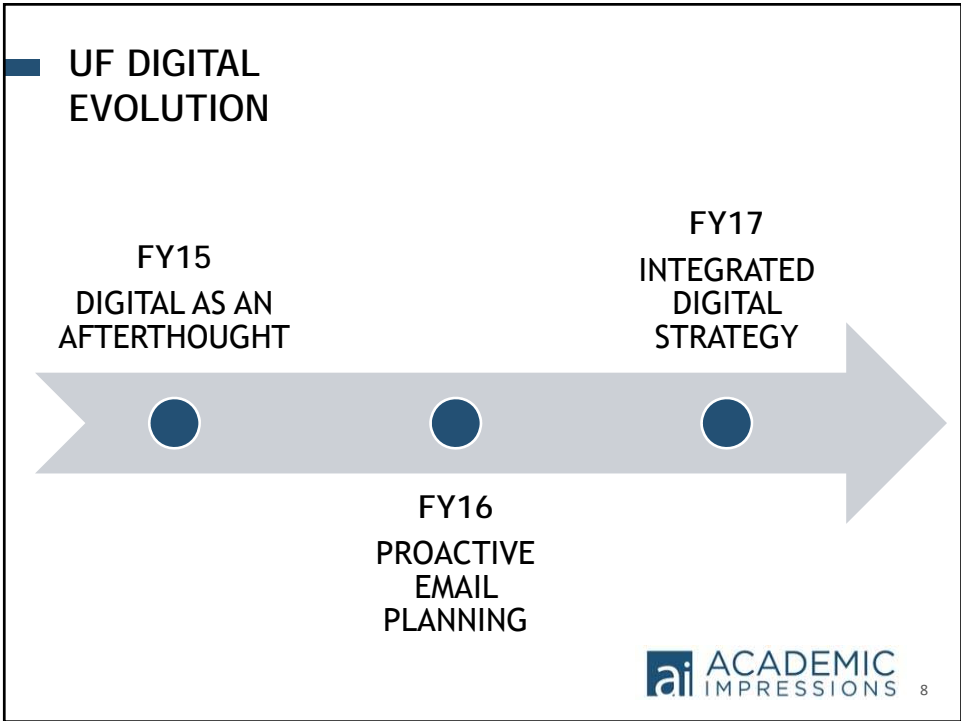
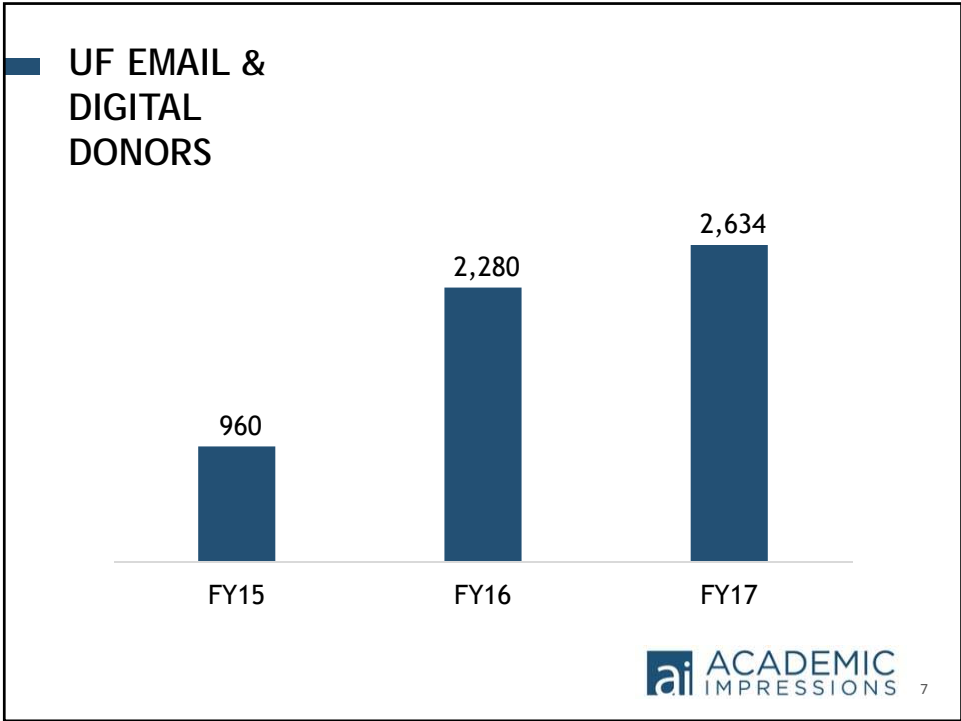
### ANNUAL GIVING AT UNIVERSITY OF FLORIDA

**PRIMARY CENTRAL SERVICE LINES:**

- Student Phonathon
- Direct Mail/Email/Digital
- Stewardship
- Leadership Annual Giving
- Special Campaigns
- Reporting and Data Analysis
- Program Evaluation and Support

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## LEVERAGING DIGITAL IN HIGHER ED




CHAT

Who does your institution  
compete with in the digital  
space?

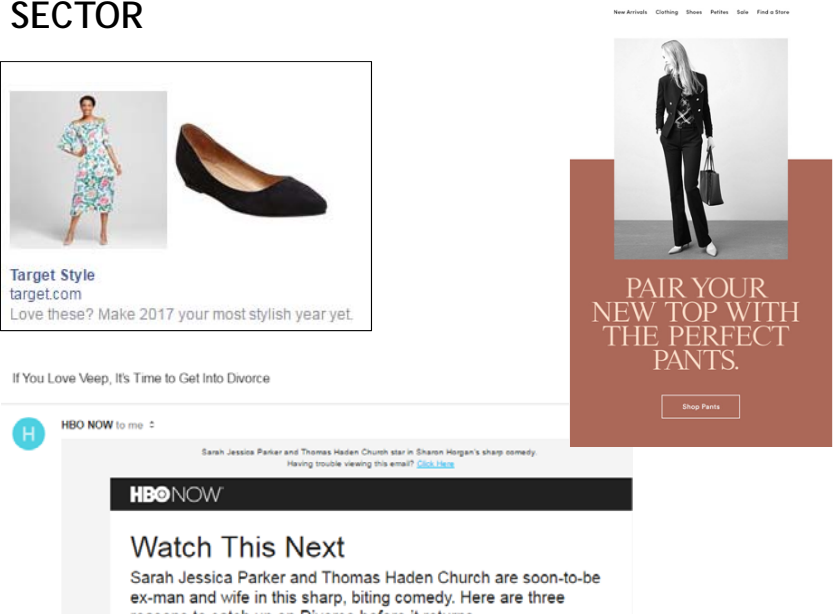


## DIGITAL MARKETING ACROSS SECTORS

<b>CORPORATE SECTOR</b>	<b>HIGHER EDUCATION</b>
<ul style="list-style-type: none"><li>• Integration across channels</li><li>• Customer-driven experience</li><li>• Mobile-first or responsive design</li></ul>	<ul style="list-style-type: none"><li>• Email as an afterthought</li><li>• Artificial segmentation</li><li>• Content retrofitted from print media</li></ul>



## CORPORATE SECTOR



**ANN TAYLOR**  
New Arrivals | Clothing | Shoes | Pillows | Sale | Find a Store

**Target Style**  
target.com  
Love these? Make 2017 your most stylish year yet.


**PAIR YOUR NEW TOP WITH THE PERFECT PANTS.**  
Shop Pants

**HBO NOW** to me 2  
Sarah Jessica Parker and Thomas Haden Church star in Sharrn Horgan's sharp comedy. Having trouble viewing this email? [Click here](#)

**Watch This Next**  
Sarah Jessica Parker and Thomas Haden Church are soon-to-be ex-man and wife in this sharp, biting comedy. Here are three reasons to catch up on *The Divorcee* before it returns.

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## HIGHER EDUCATION



University of Florida  
College of Veterinary Medicine

With just hours left to reach the \$100,000 Nicoletti Challenge, the College of Veterinary Medicine needs your help.


To date, we have raised \$93,000. [Your gift](#) of any amount, will be matched through the challenge and ensure that we secure an additional \$100,000 in support of the UF CVM Dean's Scholarship Endowment.

With just \$7,000 to go, not only can you help the college meet this challenge, you take it over the top.

[Make your gift](#) today!

[MAKE A GIFT ▶](#)

To learn more about the Nicoletti Challenge, visit our [website](#).




WHEN YOU GIVE BACK,  
FLORIDA MOVES FORWARD

It's a great time to be a Florida Gator, and here's why:

- **Our Leadership:** In January, the university welcomed its 12th president, Dr. W. Kent Fuchs. President Fuchs has 20 years of meaningful leadership experience in higher education and is committed to ensuring that UF continues its trajectory toward preeminence.
- **Our Ambition:** The university has set a goal of being among the country's top 10 public institutions. This is about taking what is already good and making it great; and taking what is already great and making it world-class.
- **Our Students:** This year, more than 14,000 students will accept their diplomas and join the 400,000-strong alumni community. These students came to UF during the most competitive admissions climate in the university's history. They will go out into the world armed with an innovative spirit and committed to investing in their alma mater.

Support from alumni like you makes all of this possible. Join your fellow alumni in celebrating this important time in UF's story by [making a gift](#) to the area of the university that means the most to you.

[MAKE A GIFT ▶](#)




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## BARRIERS TO LEVERAGING DIGITAL

- Limited resources
  - Human
  - Design
  - Content
- Technology and infrastructure
- Organizational buy-in



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## CHAT

What do you see as your  
biggest barrier to leveraging  
digital strategies?



## OVERCOMING BARRIERS

- Plan proactively
- Use data to drive decisions and demonstrate impact
- Integrate with mail, phone, and development officer activity





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# INCORPORATING BEST PRACTICES




## INCORPORATING BEST PRACTICES

MEASURES OF SUCCESS	
ACTION	METRIC
It was opened	Open Rate
Content was read	Click-through Rate
Call-to-action was completed	Response Rate




## OPEN RATE

BENCHMARKS	KEY DRIVERS
Non-Profit: 12%	• Sender
Higher Ed: 12%	• Subject Line
FY15 UF AG: 21%	• Email Preview
FY16 UF AG: 25%	• Day of the Week
	• Time of Day

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## SENDER

1. Stands out in inbox
2. Corresponds to the message
3. An actual person, not an organization

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## SENDER

Elizabeth, want to see the Democratic presidential candidates in person?

---

**Emily Gottschalk-Marconi, Democrats.org <democraticparty@democrats.org>** Jul 31, 2015, 11:03 AM

to:  
Elizabeth Keppel <ebkeppel@gmail.com>



Hi there, Elizabeth --

Everyone here at DNC HQ is getting super excited as the 2016 election gets underway because we're all really pumped to elect a Democrat as our next president. (I mean, have you listened to those Republicans?)


But before we get down to brass tacks of the primary, we want to give one lucky supporter (I'm thinking it could be you, Elizabeth!) the chance to fly out to Minneapolis to hear from each of the five Democratic presidential candidates in person at our annual summer meeting.

[Just start a monthly donation of \\$10 or whatever you can, and you'll be automatically entered for a chance to win.](#)

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## SENDER

INSTITUTIONAL		HUMAN	
Sender	Open Rate	Sender	Open Rate
University of Florida	11.4%	Leslie Pendleton	38.3%
Warrington Alumni News	18.4%	Heather Greig	47.4%
UF College of Pharmacy	13.8%	Emily Behrens, Class of 2016	37.4%




**SUBJECT  
LINE**

1. Matches the action of the email
2. Catches attention
3. Avoids spam filters



**SUBJECT  
LINE**

What these kids need Inbox x

 **Sherry Von Riesen** foundation@usoc.org via bounce.bluestatedigital.com  
to me ▾

**TEAM USA★FUND**

Elizabeth,

For 15 years, I've been the "Team Mom" for Team USA, wat

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## TAKEAWAYS

### OPEN RATE

- Send from a person
- Avoid spam filters
- Catch the readers' attention



### CLICK-THROUGH RATE

#### BENCHMARKS

Non-Profit: 0.40%

Higher Ed: 0.73%

FY15 UF AG: 1.12%

FY16 UF AG: .711%


#### KEY DRIVERS

- Personalization
- Content & Messaging
- Design



**PERSONALIZATION**

1. Relevant to the reader
2. Doesn't distract from content
3. Supports call to action



**PERSONALIZATION**



The image displays a personalized email layout with several data points and rewards:

- 2700** Points earned in 2013. [See your current points](#)
- 12** Reservations on the go
- \$40** in Dining Cheques. [Earn more](#)
- 0** Meals reviewed. [Help other diners](#)
- VIP**: You had 12+ reservations in the last 12 months!
- Traveler**: You dined in more than 2 metros!
- A Regular**: Sweet! You're loyal to your favorite spots.

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## PERSONALIZATION

Elizabeth--

The [University of Florida](#) can make a difference in the world. But we can't do it without your help. We have until midnight to reach our goal of 200 donors.

Through UF's One Health initiative, students and researchers at UF are improving global health by testing lake and farmed fish in Kenya for the presence of bacteria in an effort to help mitigate water and sanitation issues in the area.

But this is only one of many ways that UF is working to change the world -- students and faculty in the College of Journalism and Communications are working every day to make an impact on the quality of life for citizens around the world.

[A gift of \\$55 to the College of Journalism and Communications makes an impact across the globe. Are you in?](#)

Give now: [uff.ufl.edu/appeals/gator-good](http://uff.ufl.edu/appeals/gator-good)

Go Gator!

Heather L. Greig  
Senior Director of Development, Annual Giving  
College of Journalism and Communications, Class of 2004  
College of Liberal Arts and Sciences, Class of 2004

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## PERSONALIZATION

HI ELIZABETH,  
YOUR GIFT TO THE  
COLLEGE OF EDUCATION

IS THE GIFT THAT **KEEPS ON GIVING!**

YO  
G  
1

TOOLS FOR EDUCATION

HELP FUTURE LEADERS

GATORS EVERY DAY UF

YOUR RECENT GIVING TO UF:

2013	2014	2015	2016
X	X	X	

A BETTER WORLD

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## TAKEAWAYS

### CLICK-THROUGH RATE

- Personalize in a meaningful way
- Use graphics creatively
- Keep it short (above the fold)



### RESPONSE RATE

#### BENCHMARKS

Non-Profit: 0.07%

FY15 UF AG: .05%

FY16 UF AG: .11%

#### KEY DRIVERS


- Call to Action
- Timeliness
- Urgency
- Usability (mobile)






**CALL TO ACTION**

1. Clear
2. Easy to accomplish
3. Single CTA



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**CALL TO ACTION**

NEW IN | JACKETS & COATS | JEANS | SHOES | ACCESSORIES | A-Z OF BRANDS | T-SHIRTS 


**WANT TO WIN JUSTIN TIMBERLAKE TICKETS?**  
JUST FOLLOW @ASOS AND TAG YOUR #EPICSUMMER PICS. SIMPLE!  
[FIND OUT MORE >](#)

SUNDAY STEAL

**UP TO 70% OFF  
BRAVE SOUL**

It's time you got to know fly brand Brave Soul a little better. Plus, with up to 70% off, there's no reason not to.  
48 hours only. Ends midday Tuesday.\*

[SHOP NOW >](#)



**UP TO 70% OFF  
BRAVE SOUL\***

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## CALL TO ACTION



## TAKEAWAYS

### RESPONSE RATE

- Singular call to action
- Create urgency
- Pay attention to mobile

## OTHER METRICS

- Unsubscribe rate
- Complaint rate
- Deliverability
- # of good email addresses



## TAKEAWAYS

### KEEP YOUR EYE ON THE PRIZE

- Call to action → most important metric
- Open rates ≠ conversions
- Revenue & donors

**?** QUESTIONS

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**PLANNING PROACTIVELY &  
INTEGRATING ACROSS CHANNELS**

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**ALIGNING GOALS**

**5 KEY PERFORMANCE INDICATORS**


- 1. Revenue
- 2. Donors
- 3. Leadership Annual Giving Revenue
- 4. Leadership Annual Giving Donors
- 5. Retention



**ALIGNING GOALS**



```
graph TD; A[Direct Marketing Goal] --- B[Mail Goal]; A --- C[Phone Goal]; A --- D[Email/Digital Goal];
```





## POLL

How many emails do you  
receive from your favorite  
retailer in a year?




## CALENDAR CONSIDERATIONS


- Alternate high volume with rest periods
- Capitalize on traditionally strong fundraising months (CYE, FYE)
- Consider communications from other parts of campus (Homecoming, reunion, football, etc.)



**CALENDAR**

JULY REST	AUGUST Q1	SEPTEMBER REST
OCTOBER Q2	NOVEMBER REST	DECEMBER CYE
JANUARY REST	FEBRUARY Q3	MARCH REST
APRIL Q4	MAY REST	JUNE FYE

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- SEND MORE EMAILS**
- QUARTERLY EMAIL CAMPAIGNS**
- Alumni & parents
    - Alumni asked for unit of graduation
    - Parents asked for Student Affairs or Honors Program
  - 3 emails over 7-10 days
  - Balance of fun and building the case for support
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SEND MORE EMAILS



UF

**GATORS DON'T WAIT.**

GOAL: \$15,000  
BY OCT. 26

Hi Elizabeth,

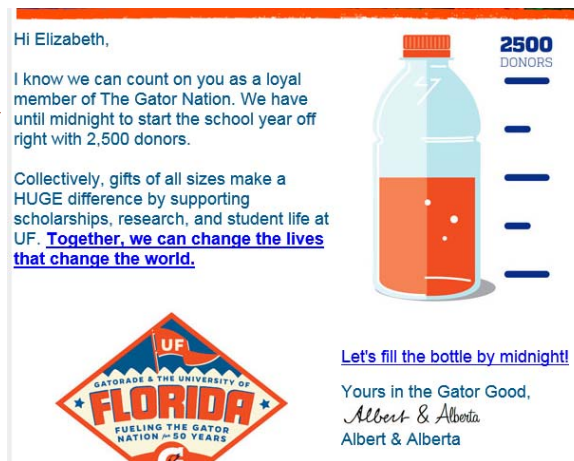
[Gators don't wait.](#) Our students start making a difference in communities around the state, nation and the world the moment they arrive. Through our recent Facebook photo contest, we highlighted several students' adventures this summer working in their field of study to gain experience and serve others. The photos offer a glimpse into what is possible for our students to achieve with support from donors like you.

Students in the [UNIT NAME] are focused on making a difference. Whether it's research or volunteer opportunities, your leadership support of these initiatives ensures that our students are optimizing their time while at UF, creating change long before receiving their degrees.



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SEND MORE EMAILS



Hi Elizabeth,


I know we can count on you as a loyal member of The Gator Nation. We have until midnight to start the school year off right with 2,500 donors.

Collectively, gifts of all sizes make a HUGE difference by supporting scholarships, research, and student life at UF. [Together, we can change the lives that change the world.](#)

2500 DONORS

Let's fill the bottle by midnight!

Yours in the Gator Good,  
*Albert & Alberta*  
Albert & Alberta



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## SEND MORE EMAILS

Hello Elizabeth,



Members of the College of Education Class of 2016 have done some incredible things – but they couldn't have done them without support from Gators like you. [In honor of the most recent class of Gator grads, I hope you will take this opportunity to make a \*monthly recurring gift\* of \\$10.](#) Your gift ensures that future Gators will continue to have amazing opportunities.

Thanks and Go Gators!

  
Heather L. Greig  
Senior Director of Development, Annual Giving  
College of Journalism and Communications, Class of 2004  
College of Liberal Arts and Sciences, Class of 2004

**HI ELIZABETH.**

**AFTER YEARS OF SHINING**



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## QUESTIONS



**PRODUCTION PLANNING**

**KEY CONSIDERATIONS**


- Top earning projects
- Top earning times of year
- Target audiences
- Major events (giving day, homecoming)
- How can channels complement each other?



**PRODUCTION PLANNING**

**CONSIDER STRENGTHS AND CHALLENGES OF EACH CHANNEL**


PHONE	MAIL	EMAIL/DIGITAL
Best at donor acquisition	Great for renewing donors	Highest average gift
Opportunity for person-to-person engagement	Cost-effective	Widest reach for cost
Expensive	Poor at acquiring donors	Spotty contact information



**SPECIAL CAMPAIGNS**

**CHALLENGE GIFTS**


THEN	NOW
<ul style="list-style-type: none"><li>• Incorporated into several mail pieces over 6 months</li><li>• Follow up emails after mail pieces</li></ul>	<ul style="list-style-type: none"><li>• Digital-first</li><li>• 5 emails over 10 days</li><li>• Postcard</li><li>• Social media</li><li>• Landing page</li><li>• Phonathon talking points</li><li>• Development officer collaboration</li></ul>

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**SPECIAL CAMPAIGNS**

**ALL SPECIAL CAMPAIGNS SHOULD HAVE A:**

- Goal
- Deadline
- Consistent look and feel

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**SPECIAL CAMPAIGNS**

Take the challenge, support pharmacy scholarships and

**DOUBLE YOUR IMPACT ON STUDENTS!**

Every dollar raised last year supported recruitment of **EIGHT TOP STUDENTS.**

Make a gift during Oct. 5-14 and Dr. Bob Crisafi '56, will match it dollar for dollar — **AGAIN!**

[pharmacy.ufl.edu/matchdrbob](http://pharmacy.ufl.edu/matchdrbob)

**Will you take the challenge?**

Follow us!

UNIVERSITY OF FLORIDA COLLEGE OF PHARMACY @UFPHARMACY

UNIVERSITY OF FLORIDA College of Pharmacy P.O. Box 103570 Gainesville, FL 32610

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UF COLLEGE OF PHARMACY

**20**

**10 DAYS. \$10,000.**

**THE CRISAFI CHALLENGE IS BACK!**

Dear Elizabeth,

Last year, we made a huge impact on students at the UF College of Pharmacy through the Crisafi Challenge. Every dollar raised supported the recruitment of the best and brightest students. [But our work has just begun.](#)

Each year, incredible students arrive with a passion for the health and welfare of others and leave ready to lead the profession in our state, across the country and around the world. Hanna Harper, a Crisafi Scholar, is one of those students. She wanted to attend UF to study in the College of Pharmacy's nationally-known pharmacogenomics program after completing her undergraduate

**SPECIAL CAMPAIGNS**

LESLIE HAHN PENDLETON  
December 6, 2016 - Gainesville

Big News: MFOS Alumni Giving campaign! Now through midnight, your gift to the MACHEN FLORIDA OPPORTUNITY SCHOLARS program will be matched dollar for dollar by Dr. James & Mrs. Sara Toussaint. That's a match gift!

Help us kick off our annual campaign by <http://bit.ly/2g0hVmo>

**UF MACHEN FLORIDA OPPORTUNITY SCHOLARS**

**10TH ANNIVERSARY** MAKE AN IMPACT

Dear Elizabeth,

In celebration of the 10th anniversary of the MACHEN Florida Opportunity Scholars program, we are challenging MFOS alumni to [give back before midnight on December 31.](#)

To kick off the campaign today, we have a limited time offer to **DOUBLE** your impact to the program. **Between now and midnight tonight, your gift to the MFOS program will be matched up to \$1,000 by two generous donors, Dr. James & Mrs. Sara Toussaint.**

As an alumnus of the MACHEN Florida Opportunity Scholars program, you understand the difference this program makes in students' lives. Each year, hundreds of students arrive at

Annual Alumni Giving Campaign starts today with a **Match Gift** from **Dr. James & Mrs. Sara Toussaint**

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**INTEGRATED DIGITAL CAMPAIGNS**

- Targeted online banner ads paired with concurrent direct marketing projects
- Can increase reach during crucial times (CYE)
- Lift demonstrated across channels



**INTEGRATED DIGITAL CAMPAIGNS**



Dear Elizabeth,

It's been an incredible year for the College of Health and Human Performance. Founded in 1946, we are celebrating our 70th anniversary of teaching and conducting groundbreaking research to enrich lives, influence healthy living and enhance human performance. This year, HHP's Dr. Joslyn Ahlgren was honored as the UF Teacher of the Year, 100% of our Athletic Training graduates



**INTEGRATED  
DIGITAL  
CAMPAIGNS**



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**OTHER  
OPPORTUNITIES  
TO INTEGRATE**

- Phonathon pledge reminder emails
- Development officer lead emails, follow up engagement touches
- Leadership Annual Giving Officer scheduling
  - Lead letter
  - Student phonathon call to schedule visits
  - 3<sup>rd</sup> attempt email
- Stewardship touches

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## NEXT STEPS




### ■ WHAT'S NEXT AT UF?

- Automated emails
  - Anniversary
  - Cart abandonment
- Triggered online banner ads
- True “journey building”



## OVERCOMING CHALLENGES


CHALLENGE	PROACTIVE SOLUTIONS
Unique unsubscribe count and unsubscribe rate	Move toward donor-centric ask and content (rather than unit-centric), consider excluding non-donors from some sends
Increasing complaint rate organization-wide	Continue to partner with web team, alumni association to ensure appropriate email send spacing
UF-wide saturation in email space	Cut underperforming email projects, plan unit special initiatives to replace (rather than add to) quarterly email campaigns

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## TAKEAWAYS

### 3 WAYS TO GET STARTED

1. Add calendar year end and fiscal year end email campaigns to your production calendar.
2. Add a digital element to an existing project.
3. Ask peers (and aspirant peers) for successful project examples.

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## TAKEAWAYS

### 3 WAYS TO IMPROVE CURRENT PROGRAM

1. Add a digital-first, multichannel campaign to your calendar.
2. Only allow one call to action (CTA) per email. Be ruthless.
3. Compare your email metrics against peers.



## 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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