



Education
Advisory
Board

Advancement Forum

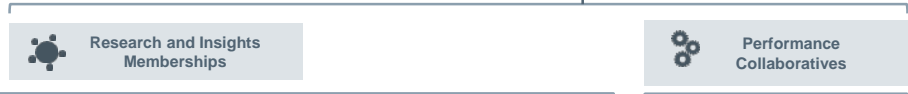
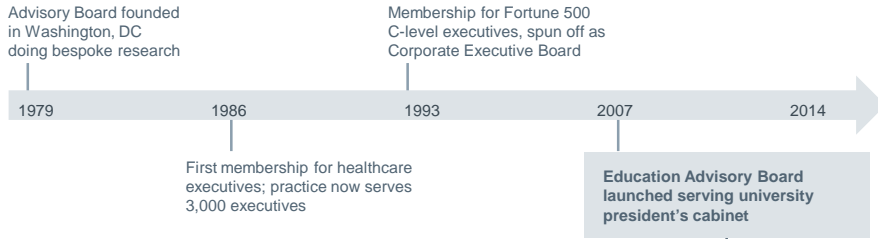
Capitalizing on the “Overlooked **Middle**”

How Donor Relations Can Drive Renewals
and Upgrades from Mid-Level Donors



EAB – The Higher Ed Practice of the Advisory Board

Thirty Years Serving Health Care, Half a Decade with Colleges and Universities



Academic Affairs Forum
 Strategy advice and research for provosts, deans, and other academic leaders on elevating performance in teaching, research, and academic governance.

Student Affairs Forum
 Research for student affairs executives on innovative practices for improving student engagement and perfecting the student experience.

Advancement Forum
 Breakthrough-practice research and data analytics to help Advancement professionals maximize philanthropic giving and support institutional goals.

University Spend Collaborative
 Business intelligence and price benchmarks to reduce procurement spend

Business Affairs Forum
 Research and support for college and university chief business officers in improving administrative efficiency and lowering costs.

COE Forum
 Breakthrough-practice research and market intelligence to help universities develop and grow continuing, professional, and online education programs.

Community College Forum
 Strategy advice and research for community college presidents on improving college finances and campus management.

Student Success Collaborative
 Predictive modeling and degree tracking to improve retention and completion

The Anatomy of a Study

EAB Research Process Overview



3



Comprehensive Literature Review

- Scholarly publications and dissertations
- News articles
- Social media and blog updates



125+ Interviews

- Vice Presidents of Advancement
- Directors of Donor Relations and Stewardship
- Directors of Annual Funds
- Consultants and Industry Thought Leaders



Data and Benchmarking Resources

- Association of Fundraising Professionals (AFP)
- Cygnus Applied Research
- Council for Aid to Education's (CAE) Annual VSE report
- Target Analytics Benchmarking Data



Longer Timeframes, Bigger Goals

Modern Campaigns Rely on Major Gifts to Hit Ambitious Targets



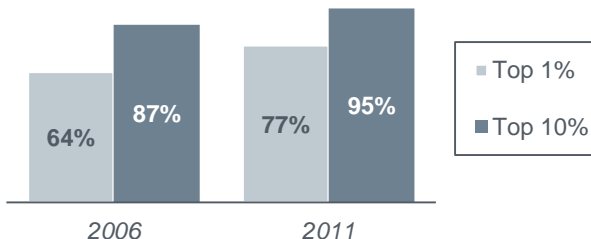
Burgeoning Campaign Goals

18% Longer timeframes for current campaigns than for past campaigns (2011)

43% Growth in median campaign goals from 2000 to 2011

Percentage of Total Campaign Dollars Provided by Top Donors

CASE Campaign Report (2011)



Change at the Top

“I’ve been looking a lot at how fundraising has changed over the past 20 years. We all know the 80/20 rule—20% of donors will give 80% of the funds we bring in. The problem now is that 80/20 doesn’t hold up anymore. It’s changing. It’s more like 90/10, or even 95/5. That’s the order of the day in shops like this.”

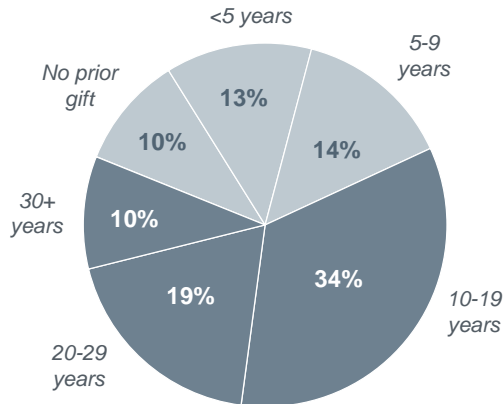
*Ron Cohen
Vice President of University Relations
Susquehanna University*

The Campaign Pipeline

Today's Core Supporters Progressed through the Annual Fund



Length of Top Donors' Giving Histories Prior to Biggest Gift
Philanthropy Leadership Council, 2006



Small Starts, Big Potential

9x

Increased likelihood that a donor who upgrades consistently will become a major donor

80%

Of alumni major gift donors make consistent gifts in first 5 years after graduation

\$255

Average first gift amount from major donors at the University of Virginia

Source: Barry F. "Cultivating Lifelong Donors: Stewardship and the Fundraising Pyramid," *Blackbaud*, 2010, https://www.blackbaud.com/files/resources/downloads/Book_CultivatingLifelongDonors.pdf; Philanthropy Leadership Council, *Enduring Relationships: Stewarding Donors to Deepen and Sustain Institutional Ties*, Advisory Board Company, 2008: 6; Meer J. "The Habit of Giving," *Economic Inquiry* (March 2013), <http://onlinelibrary.wiley.com/doi/10.1111/eicn.12010/abstract>; Alumni Relations Task Force, "Appendix C: The Link Between Alumni Engagement and Alumni Giving," *The Scenes of their Youthful Studies: The Next Era in Alumni Relations*, University of Virginia: 2004, <http://www.virginia.edu/virginia/ARTFReport20040629.pdf>; EAB interviews and analysis.

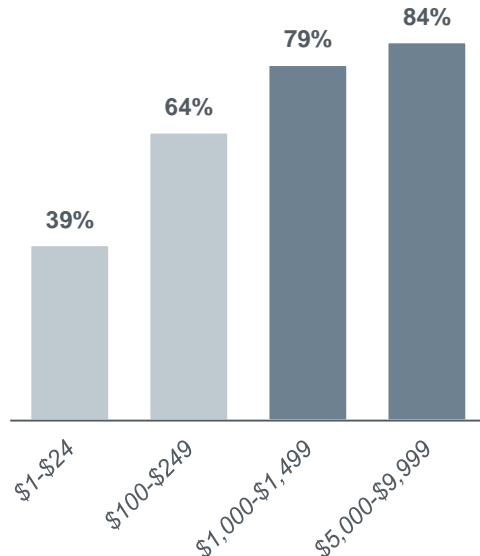


A Turning Point at the Mid-Level

The \$1,000 Threshold: An Indicator of Affinity and Potential

Overall Donor Retention Rate by Giving Level

Target Analytics, 2014



Even More Room for Growth

“The mid-level donors are the people we need to pay attention to. They’re the ones consistently giving \$2,500 to \$10,000 a year—which aren’t small sums. They have the most potential for growth. We really need to focus here.”

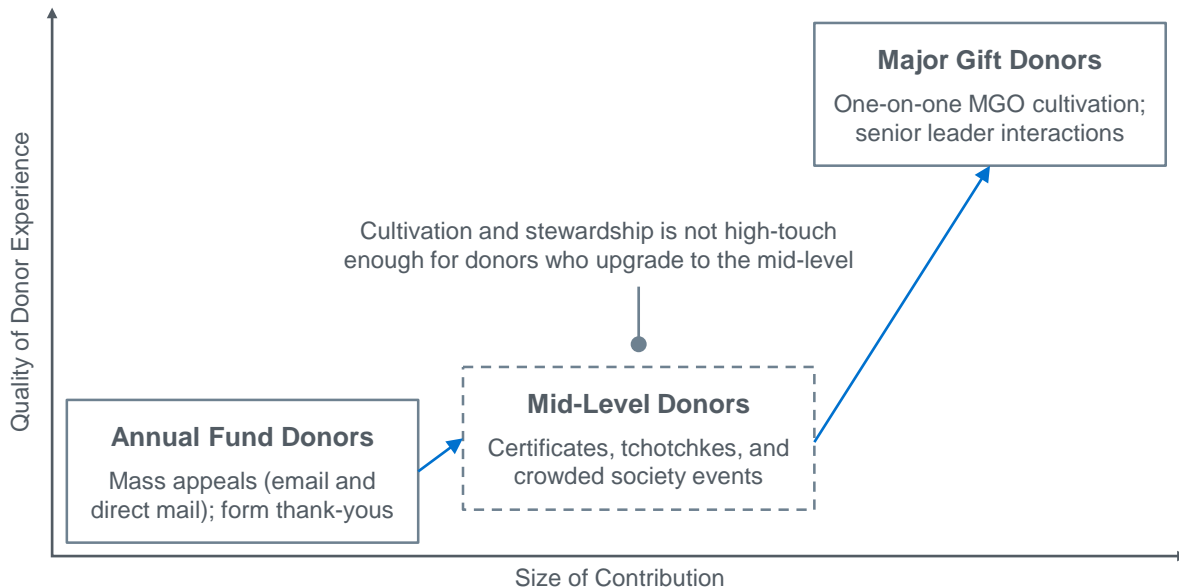
*Becky Zrimsek
Director of the Annual Fund
Carleton College*

Disappointed Expectations in the Middle

Donor Experience Fails to Keep Pace with Upgrades in Giving



Quality of Donor Experience Relative to Size of Contribution





“It’s Hurting Us Now and in the Future”

The Consequences of an Undercapitalized Middle

Short- and Long-Term Effects



“

Threatening Our Sustainability

“This is really taking a toll on our fundraising. We’re not getting the most out of the donors we already have in the pipeline—the ones who are most loyal to us. On top of that, I’m worried about our next campaign. When we close this one out and start thinking about an even more ambitious goal for the next one, will our donors be ready to step up their gifts? As it stands, I think the answer’s probably ‘no.’”

*Chief Advancement Officer
Private Research University*

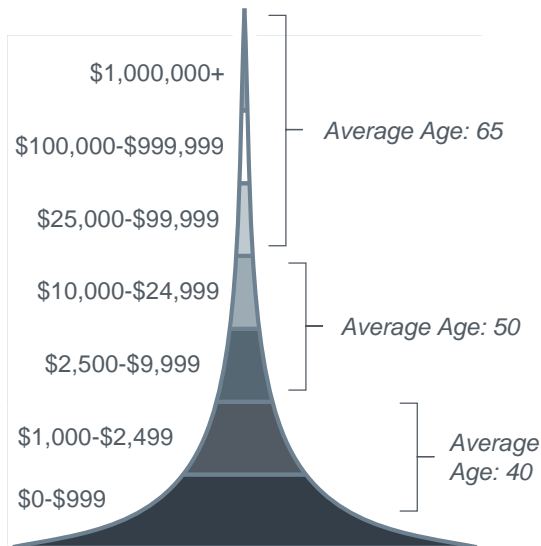
Fewer Donors “On Deck”

Inattention to Mid-Level Creates Empty Bench for Future Major Gifts



9

The Tapered Major Gift Pipeline



“

Attrition at the Top

“Yes, it’s true that 95% of your money will come from the top. But the top won’t be around forever. And if you’ve ignored the rest of the pyramid and you’re left with just a few donors giving right below that major-gift level, you better hope that all those donors are billionaires. Otherwise you’re out of luck.”

*Director of Alumni Programs
Public Research University*

New Approaches to Mid-Level Giving



Study Road Map

Meeting Today's Campaign Goal

1



**Accelerating
Donors Up the
Giving Pyramid**

2



**Surfacing
Untapped Major
Gift Capacity**

Cultivating Tomorrow's Campaign Base

3



**Enhancing
Exclusivity
and Access**

4



**Scaling
Digital Impact
Reporting**



Enhancing Exclusivity and Access

Engaging Mid-level Donors
as Stakeholders

- Password-Protected Presidential Blog
- Tiered Leadership Programming
- Strategic Donor Engagement Councils



Seeing Themselves as Benefactors

Mid-Level Donors Want Access to Senior Leaders

Donor Expectations Escalate with Gifts

\$20 Gift <i>"Sure, I can spare some pocket change"</i>	\$100 Gift <i>"I know it's not much, but it's something"</i>	\$500 Gift <i>"This should really help some students"</i>	\$1,000 Gift <i>"I expect some VIP treatment for this"</i>
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Wanting a Seat at the Table

45%

Of donors gave again after a thank-you call from a senior leader (compared to **33%** after calls from students)

61%

Of Millennials want access to the leadership of the organizations they support

75%

Of Millennials want to help senior leaders plan the strategic direction of organizations they support

Source: "How to Reach Young Donors," AFP (2010), <http://www.afpnet.org/Audiences/ReportsResearchDetail.cfm?itemnumber=4455>; Burk P, "The Burk Donor Survey," Cygnus, 2013, http://www.cygnusresearch.com/files/2013/2013-Burk-Donor-Survey_Report_US-PW.pdf; EAB interviews and analysis

A Problem of Scale

Mid-Level Donors are Too Numerous for VIP Treatment

Number of Events Required to Serve All Major and Mid-Level Donor

EAB Analysis

Activity	\$100K+ Donors (n=100)	\$1K-\$100K Donors (n=2,250)
Presidential Dinner <i>(10 attendees)</i>	10 events	225 events
Briefing with VP of Enrollment Management <i>(5 attendees)</i>	20	450
Private Lab Tour <i>(3 attendees)</i>	33	750
Meeting with Provost and Dean <i>(1 attendee)</i>	100	2,250



Questioning the ROI

“Our Leadership Donors (\$1K - \$50K) want to be engaged similarly to how we manage major donors \$100K+. But really, it is getting harder to justify the ROI of doing that, even though it is important to building our pipeline. We simply wouldn’t generate the same amount of money as we would at the major donor level, and with budget constraints we need to strategically allocate to where we get the highest return. This is forcing us to be more creative and innovative with our engagement and stewardship programs with Leadership and lower end Major Gift donors.”

*Brian Otis
Vice President for Development
University of Connecticut*

A Seemingly Quick Fix

Institutions Turn to Gift Societies for Answer to Mid-Level Problem



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“

The Standard Solution

“Our gift societies are the main way we show mid-level donors we care about them. The society format helps us organize and scale our efforts. It’s kind of a one-size-fits-all approach, but we like to think that the donors value being a part of that elite club. I hope they’re framing their certificates and putting them up on their walls. And we of course love having them back to campus for the big annual gala with all their fellow society members.”

*Chief Advancement Officer
Private University*

Common Leadership Society Benefits

An Abundance of Mailings and Tchotchkes



Society certificate



Form thank-you and tax receipt



Annual report and honor roll



Lapel pins

Infrequent All-Society Programming



Annual on-campus gala



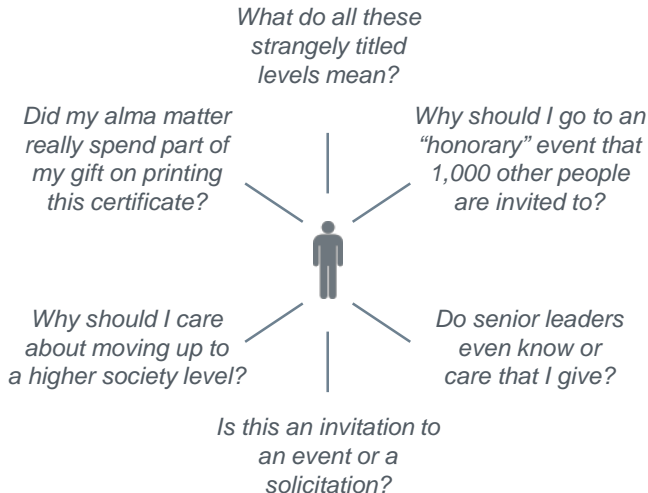
Regional member gatherings



The Gift Society Problem

Focus on Recognition Ignores What Donors Really Want

Common Donor Questions and Complaints



Unappreciated Incentives

73%

Of donors who received plaques or certificates threw them out

83%

Of gift society donors said it had no influence on their giving

+12%

Change in number of donors since 2003 who said gift clubs have no influence on their giving

Enhancing Exclusivity and Access

Three Approaches for Colleges and Universities



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Leverage Digital Channels for Elite Access



Presidential Elite
Insider Blog



Ithaca College

Increase Exclusivity with Each Gift Upgrade



Tiered Leadership
Programming



University of Delaware

Select Priority Donors for Presidential Interactions



Strategic Donor
Engagement Councils



Drexel University

Insider Access Through Digital Channels

Ithaca's Password-Protected Presidential Blog



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Key Elements



Exclusive access for
\$1,000+ donors



Frequent posts
(bimonthly)



Board-level topics
and tone



Comment function to
facilitate interactions

“

Exclusive Insights

“Part of giving at this level is becoming an insider. Part of becoming an insider at Ithaca is being able to read and comment on things going on in the mind of the president sooner or sometimes more exclusively than everyone else. This is what engages donors.”

*Chris Biehn, Vice President for Institutional Advancement
Ithaca College*

“A Community of Leaders”

Blog Gives Mid-Level Donors VIP Access to President’s Vision



Ithaca College’s Alumni Leaders’ Blog

ITHACA COLLEGE Apply Now | Site Index | Directories Search site, people, and majors

Ithaca College » Alumni, Parents, and Friends » Giving to IC » President's Associates » Exclusively for President's Associates Jennifer Susanne Gabriel (log out)

Blog

Among Leaders

A forum for the exchange of thoughts among a community of leaders, guided by Tom Rochon's insights into the moments that shape the Ithaca College experience.

[Previous](#) [Next](#)

MONDAY, NOVEMBER 18, 2013

Student for a Day

Posted by Thomas Rochon at 1:50PM | 3 comments

[f](#) [t](#) [g+](#) [v](#) [e](#)

One of my greatest pleasures is to meet with small groups of students to hear their thoughts about life at Ithaca College. It is probably a good practice for the CEO of any organization to listen carefully to its customers, and I suppose that is what I am doing. But the joy in the exercise comes from the fact that IC students are not just customers in the normal sense of the word. The campus is their home; their fellow students are their closest friends; the faculty are their mentors and the staff are their guides. The entire residential college experience is closely bound up in who they are and whom they hope to become.

So when I walk into the lounge of a first-year residence hall, bringing milk and cookies with me for "study break with President Rochon," I am not just the CEO getting customer feedback. I am the face of an institution that students are part of and about which they feel deeply.

One question I always ask at such gatherings is, what would students change about the college if they were president for a day? Before anyone can speak up, I quickly add that there are lots of things the president can't do, including abolishing tuition or guaranteeing all As on a transcript. With that settled, I listen closely as students describe their longings for customized information on campus events, for extended hours in the dining hall, and for an unlimited wireless pipeline to the Internet.

Last week, after the "president for a day" conversation had offered some good food for thought, a student turned the question back on me: what if I were student for a day? What would I do differently, or in other words what would I hope students might do differently? I was floored by this question and did not have a good answer in the moment, but I promised a blog post in response to this excellent question. And here it is.

Branding focuses on exclusivity and access

Presidential webcast adds multimedia element to the blog

Page header casts society members as valued insiders

Posts reflect on institution's strategic priorities

Creating a Sustainable Process

Staff Members and Volunteers Play a Key Role



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Creating New Blog Posts



President or leadership society director drafts post on high-priority topic



Communications or prospect management director edits post



Leadership society volunteer chairs receive email teaser and offer feedback



Advancement services staff market the new post to \$1,000+ donors through email

Brokering Presidential Interactions

When donors comment on posts...



Leadership society director flags comments requiring a response



President responds to flagged responses in comments thread or privately



MGOs follow up on comments left by prospects in their portfolios

Eagerly Awaiting Posts

Donors Enjoy Opportunity for Online Interactions with President



Generating More Viewers, More Frequently, For Longer

52%

Average open rate for emails with new blog posts

262%

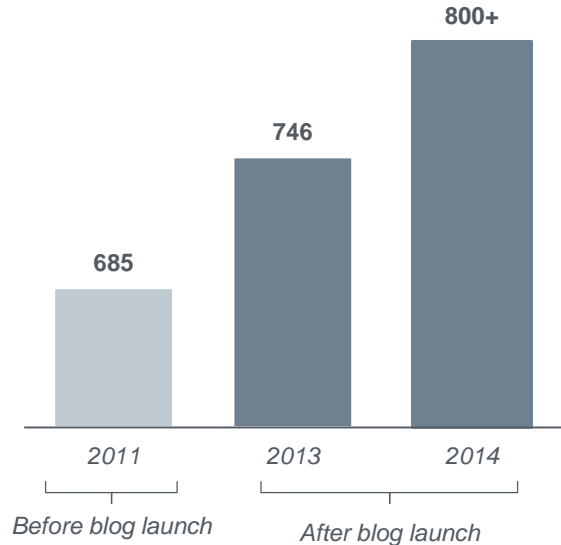
More traffic on website during months with blog posts

2m 28s

Average time donors spent on April 2014 blog post

Number of President's Associates Donors

2011 - 2014





Rethinking Leadership Societies



Delaware Diamond Society Revamp at the University of Delaware

Before

Society Relaunch Steps

After

One level of access for most donors

All donors received a welcome package, lapel pin, athletic tickets, and one event per year, regardless of level

Result: Low average gifts, slow upgrades

1 Rebranded society levels and messaging

2 Inserted additional giving tiers to facilitate upgrades

3 Added exclusive events to match giving levels

4 Created proactive marketing strategy to reach current members and prospects

Graduated access for upgraded donors

As donors move up the giving ladder, their level of exposure to senior leaders increases

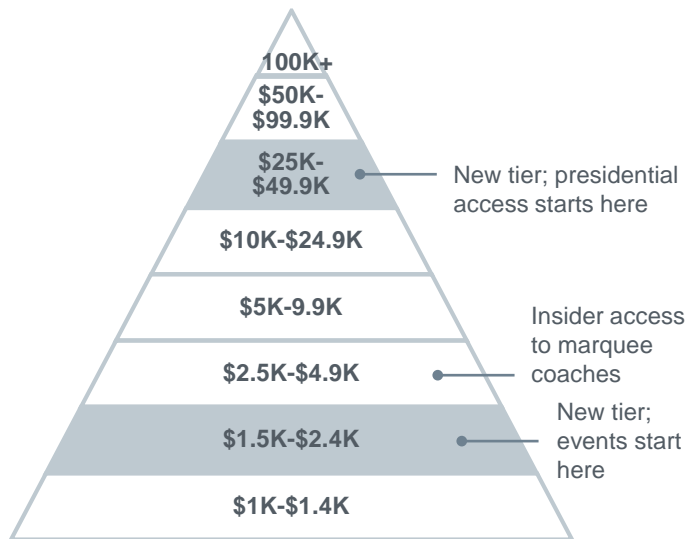
Goal: Higher average gifts, faster upgrades

The New Delaware Diamond Society



Additional Ladder Rungs Make Donors' Climb Easier

New Tiers and Revised Benefits



An Upgrade Incentive

“We’ve seen that donors really want to be invited to exclusive events with senior leaders, so they might up their giving from \$1,000 to \$1,500. Donors have increasingly been upgrading their gift to the next levels to get that greater recognition, stewardship, and engagement.”

*Dave Morris
Senior Associate Director of
Leadership Giving
University of Delaware*

Building Buzz and Enthusiasm

Relaunch Emphasizes Delaware Diamond Branding



The Rollout Process



Train Staff

Hold meetings and inform all advancement staff of new branding and messaging



Circulate Publicity Materials

Send new materials and messaging to the UD community through direct mail, email, and phone calls



Educate Gift Officers

Train gift officers on how to use new society structure as a stewardship and upgrade tool



New publicity materials are sent to...

University of Delaware Community

- Alumni magazine
- Website pages
- Email campaigns

Prospective Society Members

- Gift officer visit materials
- Targeted emails
- Phone scripts

Delaware Diamond Society Members

- New member welcome packet
- Messaging for events
- Event invitations

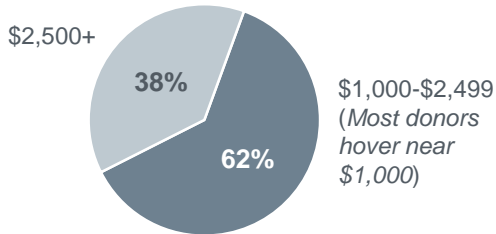


Driving Upgrades

New Society Model Brings More Donors to Higher Giving Levels

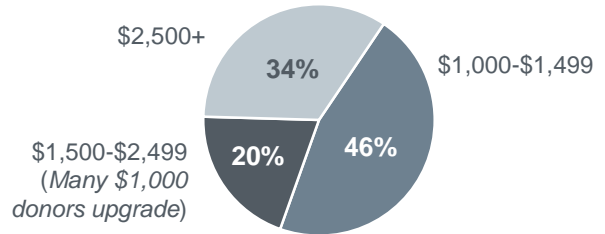
Percentage of Donors at Society Levels

Before Revamp (2012)



3,102 total society donors

After Revamp (2014)



3,716 total society donors



Driving Revenue Gains

20%

Increase in society members
(2012-2014)

15%

Increase in median gift size,
from \$1,300 to \$1,500
(2012-2014)

\$14M

Given by society members
(2013)



Scaling Digital Impact Reporting

Communicating Results in Sustainable Ways

- Beneficiary Email Narratives
- Crowdsourced Student Thank-You Videos
- Social Media Impact Ambassadors
- Virtual Insider Series
- Personalized Donor Dashboards

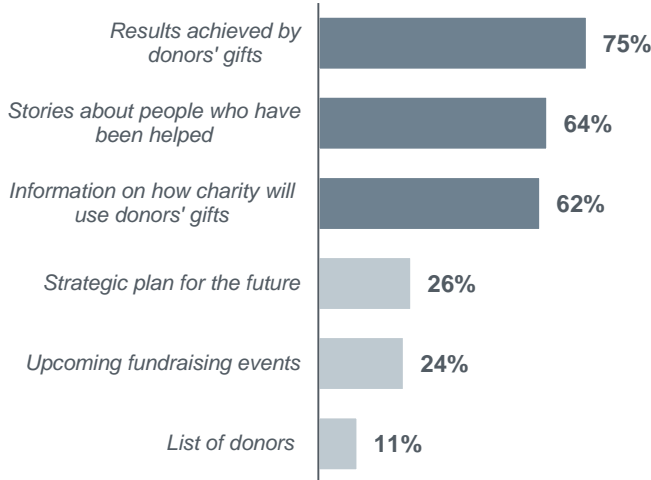
Donors Crave Results and Impact

But Non-Profits Struggle to Address These Needs



Percentage of Donors Whose Giving is Influenced by Various Donor Communications

Cygnus Donor Survey, 2013



Missed Opportunities

85%

Of donors don't receive information on gift outcomes

84%

Of donors would give more to charities that showed them results

77%

Of Millennial donors would stop donating if they don't see gift impact

Source: Burk P, "Attrition Getting You Down?," Cygnus, 2007, http://www.cygnusresearch.com/files/articles/Attrition_Getting_You_Down.pdf; Burk P, "Donor Communication and Recognition: A Right or a Reward," Cygnus, 2007, http://www.cygnusresearch.com/files/articles/Donor_Communication_and_Recognition-A_Right_or_a_Reward.pdf; "Millennial Donors Report 2011," JGA and Achieve (2011) http://cdn.trustedpartner.com/docs/library/AchieveMCON2013/MD11_Report.pdf; EAB interviews and analysis.



Digitizing Donor Relations

Meeting Donors' Needs with Low-Cost Tools

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Donors Look to the Web

70%

Of donors have a social media account

57%

Follow at least one non-profit on social media

47%

Of Americans like to learn about causes through online channels



Full of Opportunity

"I think the digital space is full of opportunity that's not been used. For some, it's the best way to stay engaged. For others, it's just easier to give. I think it's a missed opportunity to not use the web in ways to promote fundraising and stewardship priorities alongside more traditional engagement initiatives."

*Ryan Catherwood
Director of Engagement Strategy
University of Virginia*

Source: Burk P, "The Burk Donor Survey," *Cygnus*, 2013, <http://www.cygresearch.com/files/2013/2013-Burk-Donor-Survey-Report-US-PW.pdf>; "12 Must-Know Stats About Social Media, Fundraising, and Cause Awareness," *Non-Profit Tech for Good*, 2013, <http://www.nptechforgood.com/2013/04/22/12-must-know-stats-about-social-media-fundraising-and-cause-awareness/>; EAB interviews and analysis.

Five Approaches to the Digital Realm

Tactics for Immediate Implementation and Future Innovation

Implement Today

Prepare for Tomorrow

Beneficiary Email Narratives



Crowdsourced Student Thank-You Videos



Social Media Impact Ambassadors



Virtual Insider Series



Personalized Donor Dashboards



Profiled Institutions

Boston College	University of Connecticut University of the Pacific	UC Davis Skidmore College	World Wildlife Fund	University of Maryland University of Washington
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Beneficiary Email Narratives

Boston College Delivers Concise Stewardship Stories Quarterly




29

“Thank You from #17” Lacrosse Student Email

Dear Theresa,

My success as an Eagle both on and off the lacrosse field is possible because of donors like you.

I came to the Heights just over two years ago and it's been a fantastic experience all around. As a freshman, I was honored to be named to the All-ACC team and, in my sophomore year, I started in all 20 games. This year our Eagles have made it to the NCAA tournament for the second time in history. Helping BC compete against great teams is what fuels me and allows me to play hard in the midfield. Lacrosse is my passion and I'm lucky to play with so many other talented athletes.



Off the field, I'm an orientation leader and mentor for BC's First Year Experience program. Working with FYE has helped me develop my interpersonal skills and introduced me to many people I wouldn't have met otherwise. Perhaps most important, I get to express my love for BC to others, hoping to inspire their own passion for a place I've come to call home. How great a job is that?

My BC experience has also challenged me academically. This summer I'll be applying what I've learned as a finance major in the Carroll School of Management at an internship with Morgan Stanley in New York City. I'm excited to see what the business world has in store and where the internship will take me.

When you support Boston College, regardless of where you have given, you're changing the lives of students like me. Without people like you, my dreams of attending BC on scholarship wouldn't have been possible and for that reason and many more—I want to say thank you. Your generosity has allowed me—and other students and student-athletes like me—to receive a phenomenal education, meet inspirational people, and explore great opportunities. I'm so grateful that you have chosen to give back and I hope one day to do the same.

Thank you,

Mikaela Rix '15

Boston College's Past Focus Areas

- Scholarship recipient with a history of community service
- Psychology professor's neurological research discoveries
- Children from the neighboring Catholic school

Elements of a Successful Snapshot

✓	Addressed directly to the donor
✓	Short and heartfelt
✓	Written in the voice of the beneficiary
✓	Distributed every 3 to 4 months
✓	Rotating themes touch different donor interests



A Tidal Wave of Responses



Focus on Impact Yields Positive Donor Feedback



Capturing Mindshare

51%

Open rate after 4th quarter email compared to 30% average open rate

100+

Donor responses received after fourth quarter email

A Sampling of Donor Responses



Thanks for the letter, it's much appreciated to put a face on my donation!

It is people like you that make it so rewarding for my wife and I to contribute to the BC scholarship fund.

We are so happy that we are able to help and are so proud of what you have accomplished and continue to accomplish at BC.



Stewardship as Cultivation

"At its heart, these are stewardship and cultivation emails. We are laying out the case for when we make an ask at a later date."

*Theresa Lee, Executive Director of Annual Giving
Boston College*

Beyond the Generalized Results Narrative

Taking a Step Towards Personalized Impact Reporting



The Next Frontier



Personalized Donor Dashboards

Beneficiaries are identified and profiled through portals that map to individual supporters' giving histories

Key Advantages	
✓	Provides a one-stop shop for donors to review giving history, see impact, and give again
✓	Streamlines stewardship and solicitation processes
✓	Outpaces non-profit peers in the stewardship realm



Impact at the Center

“Giving donors a central place to see the ongoing, direct impact of their gifts exceeds donors’ expectations. That’s the future of stewardship.”

*Chief Advancement Officer
Private University*


Charities and Nonprofits Take the Lead

Donors Choose already Provides Personalized Dashboards




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Donors Choose Giving Page



Donors Choose.org
Teachers ask. You choose.



I'm a teacher »

Projects Gifts About Help Hi, Elizabeth ♥ 

Elizabeth in arlington, VA first name anonymous custom

The Junie B. Jones Project

Updated




Total cost: \$400
Highest Poverty
Illinois

Mrs. Kipfer ♥

"Junie B. Jones is a new friend to many first and second graders in our school and an old friend to many third and fourth graders and beyond. All were thrilled to see their friend in brand new shiny bo..." [more](#)


Completed!
Apr 12, 2014
\$400 given
6 donors

Half-off thanks to 

Share ▼

National Geographic Science Magazines and Books

Updated



When students are searching for books in the library, they are constantly asking for books relating to what they are learning in their science class. By contributing to our science library... [more](#)

My students need 16 books in the library relating to science.

Total cost: \$378
Bayou Community Academy (Highest Poverty)
Thibodaux, LA

Mrs. Bryan ♥

"It is with humble gratitude that I thank you for contributing to my project to provide my students with additional science reading materials in our school library. You are a part of establishing a med..." [more](#)

Completed!
Apr 11, 2014
\$378 given
8 donors

Share ▼

Too Difficult to Replicate

Higher Ed Institutions Seem Too Complex for Personalized Pages



33

Obstacles to Implementing Donor Dashboards in Higher Ed



Silos between financial aid and advancement impede information-sharing



Students and faculty members neglect to submit information in a timely manner



Donors' dollars are distributed widely across several beneficiaries



Staff do not have capacity to manually communicate outcomes to individual donors

University of Washington's Giving Portals



Personalized Donor Dashboards Offer Interactive Experience

Dashboard User Interface

Donor contacts mapped to giving history

Contact info updates surface donors seeking additional engagement

Itemized gift history with options to easily renew past gift

Current year giving, lifetime giving, and society membership prominently displayed

Printable gift receipts

My Giving | My Giving Contacts

Mr. [REDACTED]
Spouse: Ms. [REDACTED]
ID - 0000 [REDACTED]

[Update My Info](#)

Presidential Laureate
President's Club
Expires June 30 2015
W Alumni
Lifetime Single Membership

Lifetime Giving ⁱ \$12,692,864.41
Fiscal Year 2014 ⁱ \$135,500.00
★ Donor Since 1974

Open Pledges

Date	Gift Fund	Unit	Amount
10/27/2011	Husky Stadium Renovation	Intercollegiate Athletics	\$100,000.00 / \$200,000.00 Details

[Make a Gift](#) | **Gift History** | [Annual Receipt](#)

Date	Gift Fund	Unit	Amount
1/17/2014	Luxury Suites Fund	Intercollegiate Athletics	\$6,800.00 Details
1/17/2014	Tyee \$750 Fund	Intercollegiate Athletics	\$1,500.00 Details



By The Numbers



Dashboard Initiative Yields Early Wins



Donor Views and Dollars

2,378

Total logins

94

Donations made through portal

\$65,680

Gift revenue through portal

Giving Histories of Dashboard Users

November 2013 to June 2014



34%

\$2K+ annual donors



34%

Active prospects (donors and non-donors)¹



92

\$100K+ lifetime donors

¹) Active prospects and \$2K+ donors are not mutually exclusive.

Next Steps at UW

Expanding Dashboards to Showcase Gift Outcomes

Plan for Dashboard Development



Step 1

Fine-tune easy and secure log-in process



Step 2

Create a tab for endowment reports
(Fall 2014)



Step 3

Develop phase one of the impact section of the portal
(Late 2015)



Step 4

Continue to develop and refine portal
(Ongoing)



A Compilation of Impact

“The notion of a running compilation of impact is really powerful. When a donor looks at this portal, they won’t just see how much money they gave. They will see what kind of difference they made, the number of lives they touched, and the faces of the students who now have the opportunity to go to college thanks to them.”

*Mark Lanum
Director of Donor Services
University of Washington*

Looking Ahead: Impact-Driven Portals

Donors Will See Impact History and Gift History



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University of Washington Impact Portal¹

The image shows a wireframe mock-up of the University of Washington Impact Portal. The header includes the University of Washington logo, navigation links (UW HOME, DIRECTORIES, CALENDAR, LIBRARIES, MAPS, MY UW, UW BOTHELL, UW TACOMA), and a search bar. Below the header is a navigation menu with links for Discover the UW, Current Students, Future Students, Faculty & Staff, Alumni, NW Neighbors, and UW Medicine. The main content area is titled "My Impact" and features a grid of items. The first item is a profile for Suzy Jones, a Sophomore in the Art History major from Yakima, WA. It includes a photo of her and a quote: "I am so grateful for the opportunity to attend the University of Washington. My time here has been incredibly meaningful and has left an indelible mark on my..." The second item is a multimedia element featuring a video player and text about an expedition in 2009 led by University of Washington oceanographer Joseph Resing, who witnessed the fiery eruption and molten lava from a deep sea volcano named Hades. The video player shows a scene with a blue sky and a volcano. The text to the right of the video player reads: "Your Gift To: Hewlett Endowed Fund for Environmental Studies and Marine Affairs".

Specific designations with gift use information

Student profiles submitted by beneficiaries

Multimedia elements including videos

1) Wireframe mock-up of impact portal intended to show future user interface.

Minimizing the Administrative Burden

Streamlined System Will Prompt Beneficiaries and Automate Uploads



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Process for Collecting Beneficiary Narratives



Administrator loads donor funds and corresponding students into beneficiary tool



Beneficiary tool alerts students to fill out questions or complete an impact story



Students log into impact tool to complete assigned stewardship tasks



Beneficiary tool syncs data with impact portal and links to relevant donor pages

Work with the current processes and stakeholders to ensure that new tools are seamlessly integrated into existing workflows

Populations to Target for Impact Information

1 Students

“Our first target will be students since they have distinct stories and a designated donor fund”

2 Faculty

“Once we have the system figured out, we will replicate it for faculty members”

3 Generalized Funds





“Funds that don’t have an easily identifiable beneficiary will come sometime down the line.”

Transforming Donor Relations

Impact Portal Will Pioneer 21st Century Donor Experience



Anticipated Outcomes of Impact Portal

-  Higher usage rates and awareness of portal among donors
-  Increase in gifts made through the portal
-  Less time dedicated to manual stewardship collection
-  Reduced mailing costs for endowment reports, donor rosters, etc.



Exceeding Donor Expectations

“The donor portal as it stands now is not something you do for the ROI. It’s just a cost of doing business.... But when you move into the impact part, then it’s okay to ask about ROI. We’ll be going above and beyond what’s expected. For that, I will be looking at page hits on impact reports, frequency of visits—your typical web stats.... And I want to look at the retention rate—do donors give again?”

*Mark Lanum
Director of Donor Services
University of Washington*



Capitalizing on the “Overlooked Middle”

How Donor Relations Can Drive Renewals
and Upgrades from Mid-Level Donors