



**Maximizing
Campaign Events:
A Model For Strategic
Outreach and Moves
Management**

Gettysburggreat THE CAMPAIGN
FOR OUR COLLEGE

HOW DO WE TURN THIS...

NYC Regional Campaign Event – Spring 2016

Criteria Request – April 2015

1. All call:

All Alums and Alumni Non-grads
All Parents (Current and Past), who are rated or have given in past three years
All Rated Prospects
Donors of \$1,500 or more (who are not in those included above)
All former PLC (PAB) in this geographic area regardless of giving
(Within 50 miles of New York City including Trenton and Princeton, NJ; using I-195 as the dividing line for the Philly and NYC events)

2. Alumni, parents and rated prospects with work addresses with a 20-mile radius of NYC but not living within 50 miles.

3. The Board List includes (in entirety; est. 150 households):

Board of Trustees and Emeriti
Campaign Leadership Committee
Campaign Executive Committee
Alumni Board
BOLD Council
O&B Advisory Council
CMAC
PC
PLC
SCOB/SC Development



...INTO THIS??



***We are NOT just
planning a party.....***

***We are choreographing
MOVES!!!***



HOW CAN WE BE INTENTIONAL AND MEASURED IN OUR ENGAGEMENT?

Before the event?

- Communications Plan
- Outreach Strategy
- Event Strategy

At the event?

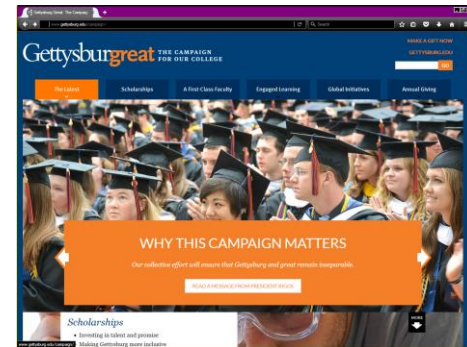
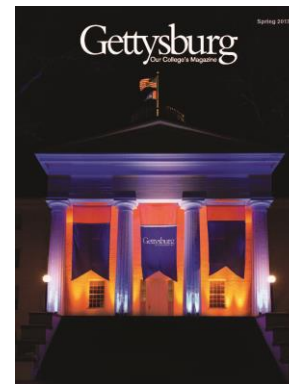
- Event Strategy Implementation

After the event?

- NPS
- Solicitation Emails
- Event Debrief and Next Steps

HOW DO WE GET THE PEOPLE WHO CAN MAKE AN IMPACT IN THE ROOM?

- **Develop a comprehensive communications plan**
 - Save the Date
 - Invitation
 - Magazine
 - Website
 - Alumni Newsletter
 - Reminder Emails



HOW DO WE GET THE PEOPLE WHO CAN MAKE AN IMPACT IN THE ROOM?

- **Identify top prospects - Who needs to be in the room?**
- **Develop a comprehensive strategy for prospect outreach**
 - Outreach from a board member, volunteer, or peer
 - Student calling
 - Outreach from other staff
- **Manage outreach tasks**
 - Follow up with gift officers on outreach strategy
 - Coordinate with student calling program
 - Coordinate volunteer outreach
 - Report back to DRS and other staff on status of outreach

OUTREACH DOCUMENT

	A	B	C	D	E	F
1	Outreach Strategy	Gift Officer	Prospect Name	Class Year	Major	Rating
2	GO will reach out	Emily Richards	Dr. Arthur Staples	1970	BIO	H1
3	GO will reach out	Emily Richards	Ms. Barbara James	1978	PSY	I2
4	GO will reach out	Emily Richards	Ms. Patricia Jackson	1971	HPE	F1
5	Emily Reached Out 2/18	Emily Richards	Mr. D. Wilbur Fry	1965	ECON	H3
6	GO will reach out	Emily Richards	Mr. Gregory Clarke	1992	MGT	H1
7	Trustee Outreach- Bob Jackson	Emily Richards	Mr. Bob Millionaire	1967	ECON	E2
8	GO will reach out	Emily Richards	The Hon. Wayne Friday	1967	MGT	J1
9	GO will reach out	Emily Richards	Mrs. Susan Bennett	1986	SOC	H3
10	Alumni Board Volunteer Outreach	Kevin McGraw	Mr. Michael Wagner	1968	BUS	J2
11	GO will reach out	Kevin McGraw	Ms. Karen Lafferty	1975	BIO	J2
12	GO will reach out	Kevin McGraw	Mrs. Lucy Forbes	1963		H3
13	Kevin Reached out 2/1	Kevin McGraw	Ms. Karen Pierce	1980	MBS	H1
14	Kevin Reached out 2/1	Kevin McGraw	Mr. John Scott	1981	BUS	J2
15	Kevin Reached out 2/1	Kevin McGraw	Mr. Kurt Gold	1969		H3
16	Emily will reach out	Kevin McGraw	Ms. Jane Donor	1963	ECON	H1
17	GO will reach out	Kevin McGraw	Mr. Robert Michaelson	1957	BUS	J1
18	Reunion Chair will reach out	Kevin McGraw	Mr. Bruce Salvatore	1971	POL	H1
19	GO will reach out	John Smith	Mr. Stephen Gilbert	1982		I1
20	GO will reach out	John Smith	Dr. William Lockwood	1963	BIO	J3
21	GO will reach out	John Smith	Dr. William Morgan	1971		I1
22	John Reached out 2/2	John Smith	Mr. John Saltzman	1990	MGT	H1
23	Trustee Outreach- Phyllis Almond	John Smith	Mr. Paul St. John	2000	MGT	J2
24	GO will reach out	John Smith	Mr. Paul Donovan	1964	POL	F1

RSVPs AND RESEARCH

They said, “YES!” Now what?!

- Ensure prospects are rated properly
 - Ensure the right prospects are assigned
 - Alert the gift officer
 - Identify any golden nuggets
 - Prepare to qualify
- 


THEY SAID, “NO.” GREAT!!!

This is still a touch point! The invitee took the time to RSVP. This means that they are paying attention to what your institution is doing and care enough to respond.

So, what now?

- Alert the gift officer
- Identify new prospects

STRATEGY MEETING – MAXIMIZE THE EVENT

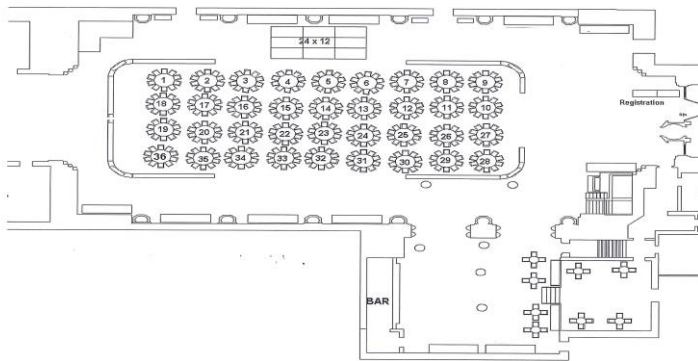
- Gift officer preparation
 - Qualification assignments
 - Don't forget key volunteers
 - President strategies
 - Campus partner strategies
 - Who's cheesin': Photo list
 - VIP arrivals: Zkipster notification
- 

STRATEGY DOCUMENT

1	Event Strategy	Gift Officer	Prospect Name	Class Year	Major	Rating
2	Emily to introduce herself	Emily Richards	Dr. Arthur Staples	1990	MGT	H1
3	Encourage her to explore Plank interactive; seat at Emily's table or maybe Provost's table	Emily Richards	Ms. Barbara James	1999	MGT	H2
4	Just have a good time	Emily Richards	Ms. Patricia Jackson	1958	MBS	W1
5	Qualification--Nicole to qualify		Mr. D. Wilbur Fry	1999		I3
6	Qualification--Nicole to qualify		Mr. Gregory Clarke	1993	MGT	J1
7	Photo list with president; VIP table with board member; Emily talk to him during evening; Trustee Bill talk to him?; Chem Professor to reach out about sciences	Emily Richards	Mr. Bob Millionaire	1958	CHEM	E1
8	Could be used to engage someone	Emily Richards	The Hon. Wayne Friday	1976	ECON	G1
9	At Emily's table; introduce to Wayne '76	Emily Richards	Mrs. Susan Bennett	1980	BUS	H2
10	Introduce to chair of parent leadership council	Kevin McGraw	Mr. Michael Wagner	2017		H2
11	Just have a good time	Kevin McGraw	Ms. Karen Lafferty	2006	PSY	J3
12	Introduce to chair of parent leadership council	Kevin McGraw	Mrs. Lucy Forbes	2019		G1
13	Qualification-- John to qualify		Ms. Karen Pierce	1981	SOC-A	I1
14	Kevin to thank for annual fund gift	Kevin McGraw	Mr. John Scott	1965	BIO	D1
15	Kevin to introduce himself and set up visit	Kevin McGraw	Mr. Kurt Gold	1963	HIST	H1
16	Have some time with her scholarship recipient (she will be seated at table)	Kevin McGraw	Ms. Jeanette Silver	1965	HIST	D1
17	Good connector	Kevin McGraw	Mr. Robert Michaelson	1971	CHEM	H1
18	Introduce to chair of parent leadership council	Kevin McGraw	Mr. Bruce Salvatore	2012		G1
19	Trustee; sit at VP's table	John Smith	Mr. Stephen Gilbert	1976	SOC	G1
20	Majestic/scholarships; seat with president	John Smith	Dr. William Lockwood	1966	ECON	E1

SEATING MEETING

- Create seating plan based on research and strategies.
- What is the best arrangement to move each relationship forward?



1	Mr. Benjamin S. Rupp		AD	1	Dr. Allison C. Singley		AD	1	Mr. James L. Chemel		1971	A		
2	Mr. Bob W. Garthwait, Jr.		1982	A	2	Mr. James A. Donnelly		2019	P	2	Mr. James N. Udden		FA	
3	Mrs. Carlotta Garthwait			FR	3	Mrs. Nina V. Donnelly		2019	P	3	Mr. Michael C. Heaney		2018	P
4	Mrs. Elizabeth Martin Critchley		1982	A	4	Mrs. Anne R. Engel		2016	P	4	Mrs. Patricia L. Heaney		2018	P
5	Mr. John N. Critchley		1982	A	5	Mr. Mark S. Engel		2016	P	5	Mr. Christopher J. Lagno		2012	PP
6	Mr. Mark G. Mensch		1986	A	6	Mrs. Maria Balady		2019	P	6	Mrs. Mary Claire Lagno		2012	PP
7	Michelle Mensch				7	Ms. Karenn Wahl Colby		2019	P	7	Mr. Robert C. Lagno		2012	A
8	Mr. Brian M. McGonigle		2001	A	8	Mr. Geoffrey Liggett		2018	P	8	Mr. James R. Thomas		1953	A
9	Mr. Andrew J. Hughes			AD	9	Mrs. Irene M. Blair		2018	P	9	Mrs. Lucille I. Thomas		1980	PP
10					10	Mr. Kirk A. Blair		2018	P	10	Mr. Jonah P. Lucas		2016	PA

Table 14				Table 11				Table 7						
1	Mr. Robert J. Kallin		2012	PP	1	Mr. Kevin P. McGuire			AD	1	Mrs. Laura A. Runyan			AD
2	Mrs. Barbara A. Keiser			FR	2	Mrs. Cynthia Slawek Wittstock		1986	A	2	Ashley Fernandez			
3	Mr. David W. Keiser		1973	A	3	Mrs. Marc Hopkins			FR	3	Mr. Martin R. Fernandez		2016	P
4	Mr. Peter G. Seiden		1973	A	4	Mr. Raymond M. Hopkins		1987	A	4	Ms. Itela Leafa		2016	P
5	Ms. Leslie Spiro			FR	5	Mrs. Susan Moretti Rogers		1988	A	5	Gina Grullon			
6	Mr. Troy M. Cassel		2002	A	6	Michael Bodson				6	Victor Rosario			
7	Zeke Stokes				7	Mrs. Debra Forsythe Littleton		1984	A	7	Mrs. Betsy Donovan Nolan		2017	P
8	Dr. Jack Ryan			AD	8	Mr. A. Bruce Chamberlin		1986	A	8	Mr. Manuel Ruiz			AD
9	Mr. Karl E. Held			FE	9	Dr. Kathryn A. Morris		1992	A	9	Mr. Andrew D. Whalley		2018	P
10					10	Mrs. Carol K. Morris		1992	PP	10	Ms. Fiona Galbraith		2018	P

WORK IT!!!



STRATEGIC FOLLOW UP

- NPS (Net Promoter Score)
- Solicitation Emails
 - To those who attended
 - To those invited, but did not attend

Dear Adrienne,

What a special *Gettysburg Great* evening in Baltimore—I am so pleased that you were part of it! I hope you were inspired by the amazing work of our students and faculty. They are representative of the many Gettysburgians around the world making a difference every day. Personally, I enjoyed the opportunity to celebrate with so many who love and care our College and its future. I invite you to [view photos](#) and [watch a video](#) from the fantastic evening.

While we've made terrific progress, we still have quite a way to go in the remaining fourteen months of the Campaign. To those of you who have not yet made a gift to our Campaign, this is the time. And if you have already made a gift, I'm asking you to consider what more you can do for Gettysburg.

- [Review funding opportunities.](#)
- Make your [gift](#), [multi-year pledge](#), or [sustaining gift](#) on Gettysburg's secure site.
- Or speak directly with a College staff member about opportunities to support the Campaign by calling 1-800-238-5528.

We need to take action now. This is our time to help make Gettysburg and Great inseparable. Thank you for your support.

Best wishes,



James L. Chemel '71
Chair, Gettysburg College Board of Trustees



Dear Adrienne,

Saturday was a very special evening for Gettysburg College! I wish you could have been among the many Baltimore-area Gettysburgians who joined us at the Sagamore Pendry to learn about our *Gettysburg Great Campaign* and how it will ensure Gettysburg's success today and into the future. I invite you to [view photos](#) and [watch a video](#) from this fantastic event.

I'm certain you would have been as inspired as we were by the faculty and students who shared the innovative and incredible work they are doing.

Moving forward, we must build a stronger and broader financial base to remain competitive and to continue our mission to provide students with an exceptional liberal arts education. In this Campaign, we've identified five critical areas of focus—Scholarship, Faculty Support, Engaged Learning Opportunities, Global Initiatives, and Annual Giving. [Learn more about our Campaign priorities.](#)

To date, we've raised more than \$130 million toward our \$150 million goal. While that is terrific progress, we still have quite a way to go in the remaining fourteen months of the Campaign. To those of you who have not yet made a gift to our Campaign, this is the time. And if you have already made a gift, I'm asking you to consider what more you can do for Gettysburg.

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This is our time to help make Gettysburg and Great inseparable. Thank you for your support!

Best wishes,



James L. Chemel '71
Chair, Gettysburg College Board of Trustees



DEBRIEF MEETING

How did it go?

- Google doc version of Strategy doc for conversation tracking
 - Who talked to whom?
 - Was the strategy carried out?
 - Next steps—who is responsible?
 - Board Chair, President, and Trustee follow up
 - Gift Officer follow up

METRICS

- NPS
- Moves made – Ex: Introductions, Qualifications, Visits Secured, Solicitations
- Gifts given on registration page
- Value of the room – Lifetime giving, ratings breakdown, gifts last year, gifts post event
- Email open rates and click-through rates
 - Invitations
 - Post-Event Solicitation

DR. ROSE: A SUCCESS STORY



**Before
the event**

**At the
event**

**After the
event**

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planning a party.....***

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QUESTIONS / CONTACTS

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