



University of Colorado **Anschutz Medical Campus**

Rome Wasn't Built in a Day and Neither Was Our Digital Acknowledgement Program

November 17, 2022



Who We Are

Brian Kusior

Philanthropic Liaison, Patient Engagement
3 years in Benefactor Relations



Kailyn Gramly

Senior Stewardship Coordinator
8 years in Benefactor Relations



AGENDA

1. About Us
2. Project Overview & Goals
3. Program Planning
4. Implementation
5. Pivots, Successes and Key Takeaways



ABOUT CU ANSCHUTZ

We are a world-class medical destination at the forefront of transformative education, science, medicine and healthcare.

- Colorado's only academic medical campus
- UCHealth University of Colorado Hospital, Children's Hospital Colorado and the University of Colorado co-located on one campus
- Six schools and colleges
- 4,490 degree-seeking students
- Nearly 25,000 employees
- Over 1,500 health education courses offered in 42 fields of study
- 600 ongoing clinical trials at any one time
- Over 3,000 funds at any given time



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OFFICE OF ADVANCEMENT



- A growing team of 50+
- Office Structure
 - External & Internal Development Officers (DOs)
- External Relations Team
 - Communications
 - Patient engagement
 - Hospital Relations
 - Development Assistants
 - Human Resources
 - Benefactor Relations
- Benefactor Relations Team
 - Stewardship (5)
 - Events (2.5)

PROJECT OVERVIEW & GOALS



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Rome Wasn't Built in a Day...

Develop and implement transferrable process for digitizing available acknowledgements for gifts under school thresholds to acknowledge every single donor.

Goals & Desired Results

- Process development
- Metrics/Measurements
- Documentation for cross-training

FTE

- 1 project lead @ ~5-8 hours per week
- 3 support staff @ ~10-12 hours over a 2-month period



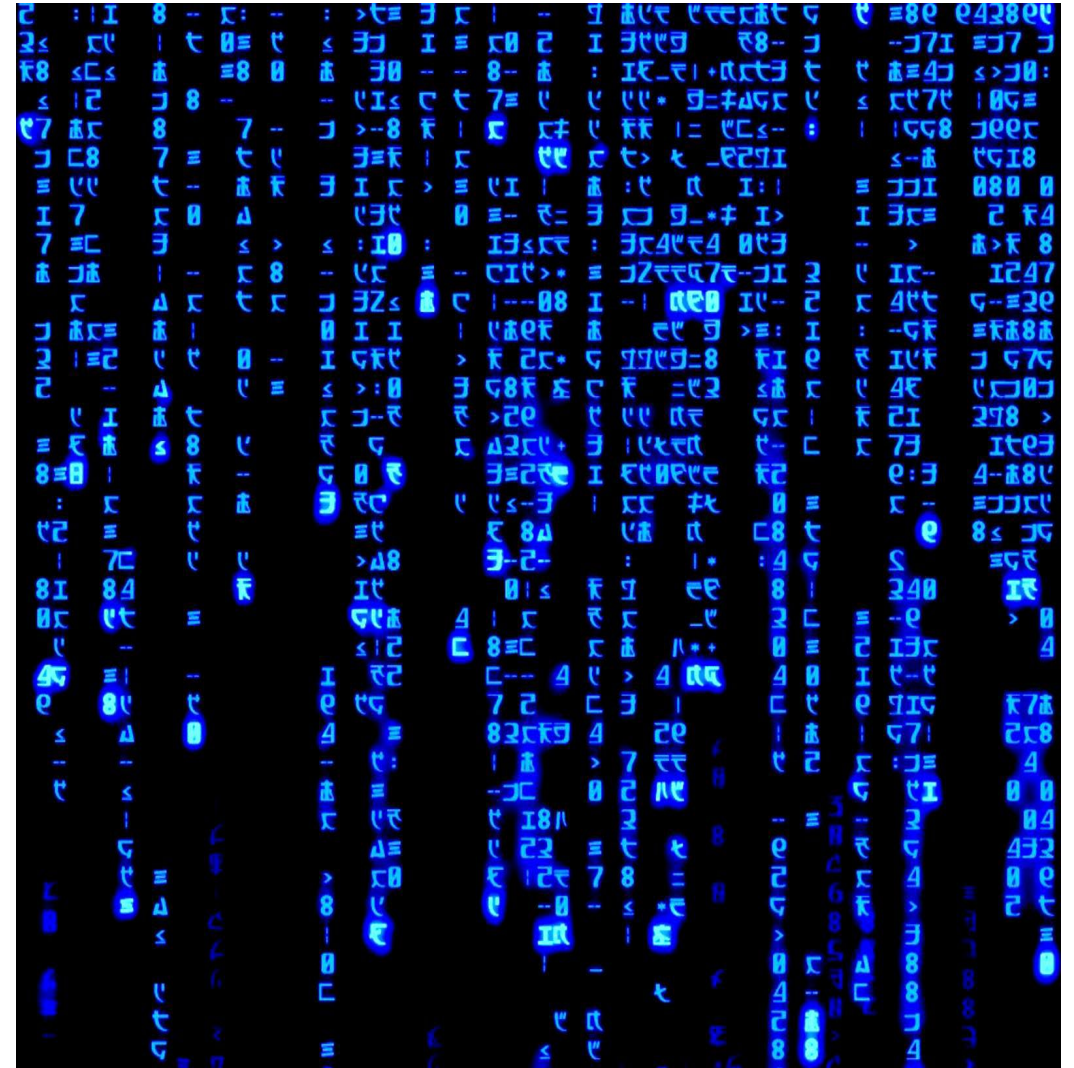
INITIAL PROGRAM PLANNING



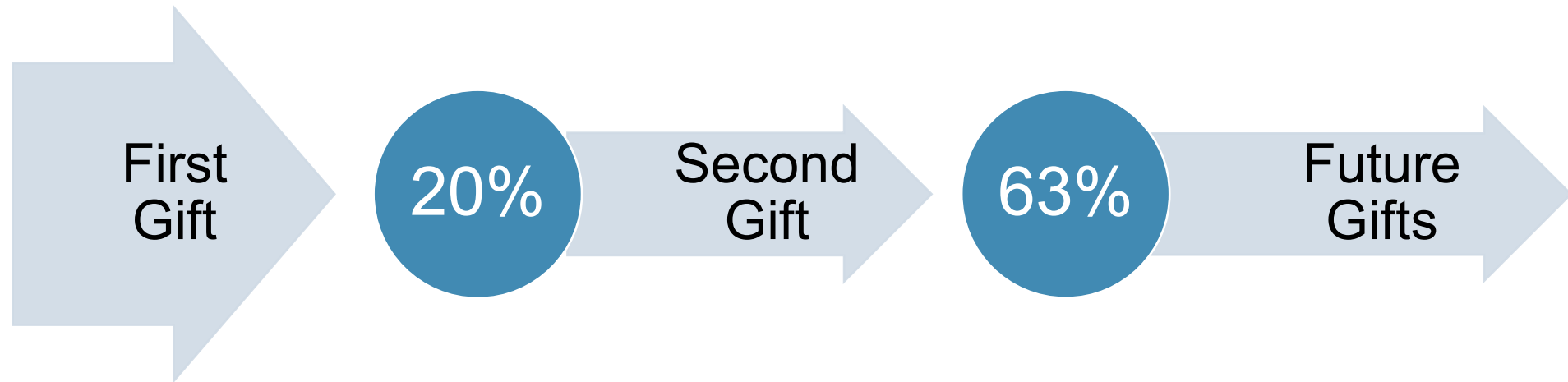
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Why Digital?

- Inexpensive
- Timely
- Reach wider audience
- Personalized
- Opportunity to gather information mail can't track
- Versatile
 - Repurpose language/process for quick turnarounds



Why First Time Donors?



Research

Past State for Acknowledgments:

- ❑ Chancellor Letters
 - Gifts \$10,000 and above
- ❑ School of Medicine Letters
 - Gifts of \$1,000 and above
- ❑ All other College Letters
 - All gifts to the College/School



1. Used data to determine new thresholds and need for digital acknowledgements
2. Technology Capabilities - Data Extensions and Dynamic Content Blocks

Research Continued

Current State for Acknowledgments:

1. Any gift of \$10,000 or more will receive a signed letter from Chancellor
2. School of Medicine:
 - Gift of \$2,500 or more = signed letter from Dean
 - Gift of \$2,499 or less = custom email from Benefactor Relations Manager
3. All other Schools/Colleges:
 - Gift of \$250 or more = signed letter from applicable Dean
 - Gift of \$249 or less = custom email from Benefactor Relations Manager
4. Campus wide funds:
 - Gifts below \$10,000 = custom email from Benefactor Relations Manager



Project Scope and Approvals

1. Data helped approval process internally
2. Requested support from central services
3. Determined content and sender
4. Created and approved content for email templates
 - Tests, tests, and more tests!

Dear [Joint First Name],

[First Time Donor Paragraph {Fund Name}] or
[Repeat Donor Paragraph {Fund Name}]

[Area of Giving Paragraph]

Common conclusion/thank you,

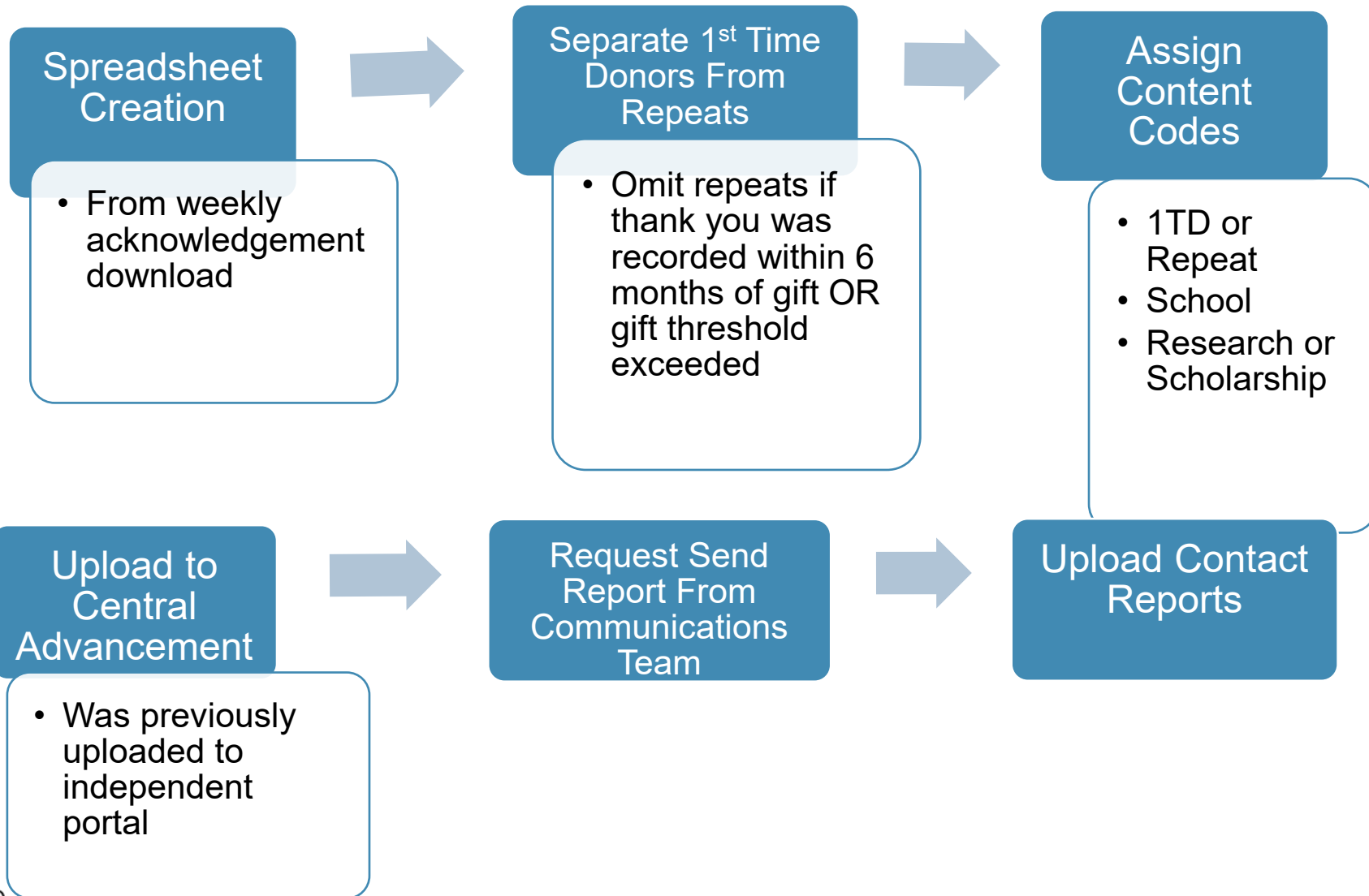
Signatory

Implementation



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Process



Implementation

- ~8-13 hours a week initially
- Down to 1-3 once kinks were worked out
- Realized limits of outsourcing technology


Dear [Joint First Name],

[First Time Donor Paragraph {Fund Name}] or
[Repeat Donor Paragraph {Fund Name}]

[Area of Giving Paragraph]

Common conclusion/thank you,

Signatory




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Dear [Kailyn]

[Thank you for your gifts to the [Class of 1967 Scholarship Fund] at the University of Colorado Anschutz Medical Campus. During these uncertain times, we are particularly grateful for the generosity of our philanthropic community.]

[Our students will soon become trusted physicians, respected researchers and leaders in our community. Your commitment to our educational programs is an investment today in the young professionals who will care for patients and their families tomorrow.]

We are incredibly grateful to have you by our side. You are making a positive impact at the CU Anschutz Medical Campus and beyond.

Sincerely,

Nicole Rodriguez
Office of Advancement | Benefactor Relations
University of Colorado Anschutz Medical Campus

This email was sent to: kailyn.gramly@cuanschutz.edu
This email was sent by the University of Colorado
[Manage your email preferences](#) | [Update your contact information](#)
Your CU ID: 003f400000mJINsAAO

PIVOTS, SUCCESSES, AND KEY TAKEAWAYS



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Pivots

- Lean in with initial partners
- Data upload process was longer turnaround, but the acknowledgement was still being delivered
- Unexpected obstacle with patient data



Successes

- ~5,500 benefactors reached via email for FY22
- Understanding boundaries with external partners
- Lower impact on bandwidth
For both staff and leadership
- Customized
Louisville Fire Relief

| | Emailable |
|--------------|-------------|
| Chancellor | 1034 |
| SOMR | 1752 |
| SOMS | 1752 |
| CON | 465 |
| SOP | 302 |
| CSPH | 182 |
| SDM | 50 |
| Total | 5536 |

Key Takeaways

- **Research**
Evaluate current state to inform future needs
- **Segmentation**
Shop specific, but can be effective
- **Be flexible with technology**
Staffing can change, tech can update, always have a backup plan!





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THANK YOU

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