

MOVING BEYOND COLLABORATION: INTEGRATING DONOR RELATIONS AND ANNUAL GIVING FOR A HOLISTIC DONOR EXPERIENCE



PRESENTERS



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SESSION GUIDEPOSTS

1. Introductions
2. Recap 2022 ADRP Webinar
3. Rationale/Case for Integration
4. Team Structure
5. Functions/Responsibilities
6. KPIs/Metrics
7. Questions & Discussion


Division of Development & Alumni Affairs Mission: We engage the institution's constituencies and garner philanthropic resources in support of Wayne State University's mission to positively impact lives and communities near and far.

2022 ADRP WEBINAR RECAP

- Two separate teams with distinct strategies and KPIs reporting to the same senior director
- Collaboration on solicitation and stewardship strategies of two donor groups
- Collaboration on timing impact pieces with appeals on some special projects
- Results of occasional collaborations:
 - 20%+ increases in giving to appeals timed with impact pieces
 - 25-30% higher retention rates in donor groups with collaborative solicitation/stewardship strategies
 - Positive feedback from donors on design, content, giving experience, etc

RATIONALE

- Collaboration
- Integration
- Innovation
- A holistic approach to the donor journey/experience



TEAM STRUCTURE (BEFORE)

REPORTING TO
SENIOR DIRECTOR, INDIVIDUAL GIVING

ANNUAL GIVING

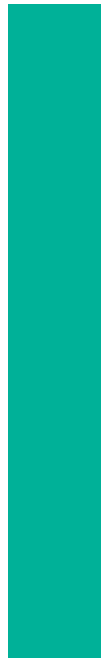
director, senior annual giving officer,
two annual giving officers

DONOR RELATIONS

associate director, two donor
relations officers, donor relations
coordinator, writer (part time),
student assistant (part time)

INDIVIDUAL GIVING OFFICERS

three officers with leadership annual
giving portfolios covering two schools
or colleges each



TEAM STRUCTURE (NOW)

REPORTING TO
**SENIOR DIRECTOR, DONOR
EXPERIENCE & INDIVIDUAL GIVING**

DONOR EXPERIENCE (DX)

director, two officers (DXOs), coordinator,
writer (PT), two student assistants (PT)

ANNUAL CAMPAIGNS (AC)

associate director, officer (ACO)

DIGITAL & INTEGRATED CAMPAIGNS (D&IC)

associate director, officer (D&ICO), Digital
Philanthropy Center (DPC) manager, 20
student fundraisers

INDIVIDUAL GIVING (IG)

eight officers (IGOs) focused on one school
or college each



INTEGRATED FUNCTIONS

IMPACT & ENGAGEMENT

SOLICITATION STRATEGIES

INDIVIDUAL SOLICITATION



INTEGRATED IMPACT & ENGAGEMENT

ACKNOWLEDGEMENT

STEWARDSHIP

IMPACT REPORTING

DONOR ENGAGEMENTS

RECOGNITION

RETENTION/REENGAGEMENT



INTEGRATED SOLICITATION STRATEGIES & INDIVIDUAL SOLICITATION

WAYNE LOYAL*

INSPIRE FROM WITHIN*

FALL APPEAL


GIVING TUESDAY

CALENDAR YEAR-END

GIVING DAY*

SPRING APPEAL

*FEATURED IN EXAMPLES SLIDES



INTEGRATION EXAMPLES



WAYNE SOCIETY



OLD MAIN SOCIETY



WAYNE LOYAL



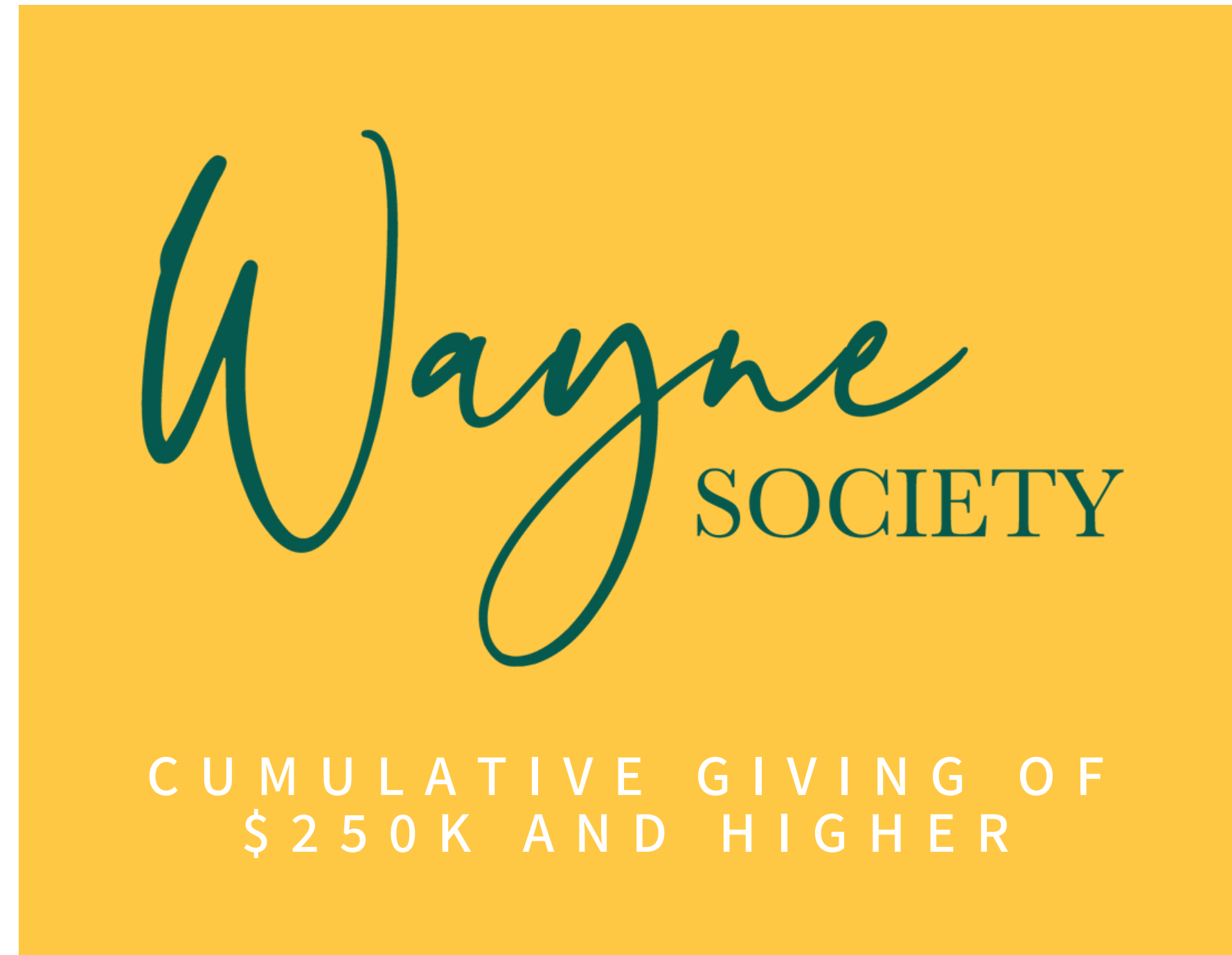
INSPIRE FROM WITHIN



FIRST TIME GIVERS

GIVING SOCIETIES & DONOR GROUPS

- Recognizes the commitment of Wayne State University's leading donors.
- Receive standard AC and D&IC solicitations, with some exceptions.
- DX executes a custom stewardship and engagement strategy in addition to standard stewardship programs.
- IGOs conduct individual solicitation strategies for retention and acquisition.



Giving threshold was increased in 2021. Donors who were welcomed into WS at past giving thresholds are grandfathered into group.

- Recognizes donors who have documented gifts to Wayne State in their estate plans.
- Receive standard solicitations from AC and D&IC.
- DX collaborates with the Planned Giving team on targeted stewardship and engagements in addition to standard stewardship strategies.
- IGOs donor prospects are some of our best Planned Giving prospects and their work is central to continuing the pipeline of donors who give in this way.



ESTATE PLANNING

- Wayne State's most accessible donor group that honors our most loyal supporters.
- Strategy for solicitation, stewardship and engagement of WL donors is wholly integrated across DX & IG team.
- Retention of WL donors falls between 79% and 83% annually.
- This population is particularly prevalent in the work of the IGOs



- Wayne State's faculty/staff campaign and donor group that recognizes employees who make a gift or pledge during the fiscal year.
- Strategy for solicitation, stewardship and engagement of IFW donors is wholly integrated across DX & IG team.
- Participation generally hovers between 18 and 22% of eligible employees. Retention rate averages 85-90%.



INSPIRE *from* WITHIN

FACULTY & STAFF GIVING

- First Time Givers (FTGs) receive three stewardship pieces during the 11 months following their first gift to prime donors for renewal appeal.
 - FTG postcard within first month of gift
 - Thank you call from student six to eight weeks after first gift
 - Letter signed by DX Director 11 months after first gift
- AC/D&IC sends FTGs anniversary ThankView and renewal appeal one year after first gift.
- Developing a strategy to engage IGOs in the solicitation of FTGs is in the works.



FIRST TIME GIVERS

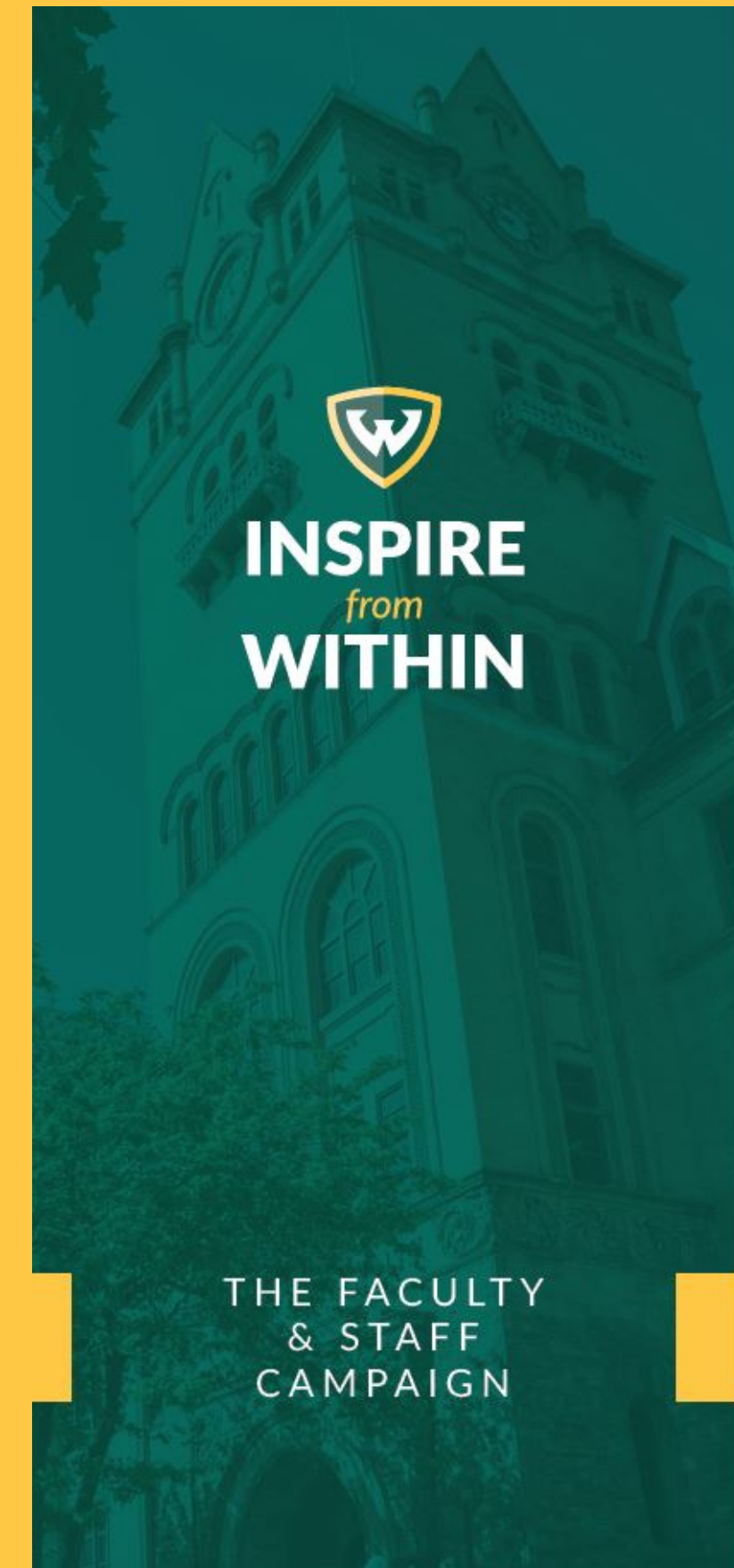
WL APPEAL

- DIGITAL FIRST (E-APPEAL > DIRECT MAIL > E-APPEAL)
- ACO & DXO COLLABORATE ON LANGUAGE/CONTENT FOR APPEAL
- IGOs MAKE FOLLOW-UP CALLS TO WL DONORS IN THEIR PORTFOLIOS
- DPC CONDUCTS OUTREACH DURING THE CAMPAIGN DURATION
- WELCOME PACKETS MAILED TO ALL NEW WL DONORS RECRUITED THROUGH APPEAL IN FOLLOWING QUARTER



IFW APPEAL

- DIGITAL FIRST (E-APPEAL > DIRECT MAIL > E-APPEAL)
- ACO & DXO COLLABORATE ON SOLICITATION, STEWARDSHIP AND ENGAGEMENT
- DIGITAL MARKETING AND SOCIAL MEDIA POSTS HIGHLIGHTING IFW DONORS THROUGHOUT CALENDAR YEAR TO PROMOTE CAMPAIGN
- DPC CONDUCTS OUTREACH FOR THIS POPULATION DURING THE CAMPAIGN DURATION



GIVING DAY

- DIRECT MAIL APPEAL SENT TO WL, IFW AND DONORS WITHOUT EMAIL TO DRIVE EARLY GIFTS
- TARGETED AND MASS EMAIL SENT LEADING UP TO GIVING DAY AND DAY OF, THROUGHOUT DAY
- DPC CONDUCTS SOLICITATION CAMPAIGN
- IGOs CONDUCT PERSONAL SOLICITATION STRATEGY
- SOCIAL MEDIA AND FOCUSED DIGITAL ADS
- SCHOOL/COLLEGE CUSTOMIZED THANKVIEWS SENT TO DONORS THROUGHOUT THE DAY BY DXOs
- THANKVIEW W/ GIVING DAY RESULTS SENT TO ALL GIVING DAY DONORS POST-CAMPAIGN



We want you to be a part of our biggest Giving Day yet!

Dear <<Salutation>>,
In just a few weeks, alumni and friends from around the world will come together for our 7th annual Giving Day. On April 13 our goal is simple: inspire our community to demonstrate their Warrior pride and provide essential funding for students and critical programs.

You can make your Giving Day gift online right now at givingday.wayne.edu/earlyaccess. Your early gift will inspire others to act and fuel our collective impact on Wayne State's future.

Together, we are Warrior Strong. Thank you!

Your early gift of any size to any area of the university counts toward our Giving Day goals. Let's make Giving Day 2023 on April 13 our best one yet!

Support Giving Day 2023 Today



Renew your past support today and help inspire others to give on April 13. Your gift will help us reach our goal of 2,000 donors!

MAIL YOUR GIFT



Use the enclosed envelope to make a check or credit card gift

DONATE ONLINE



Use the QR code above or give securely at givingday.wayne.edu/earlyaccess

SHARE WARRIOR PRIDE



Use #GiveGreenBeGold on Facebook, Instagram and Twitter and follow us @waynestatealum

To participate in special day-of challenges, please make sure you visit us at givingday.wayne.edu on April 13.

If you have any questions, please contact the Office of Donor Experience at givingday@wayne.edu.
Mail gifts to: Wayne State University, PO Box 674602, Detroit, MI 48267-4602 or contact us at 313-577-2263.

DE



KPIs & METRICS

DX and IG KPIs

- Total Fundraising Production
- Total Number of Annual Donors
- Overall Donor Retention Rate
- Total Gift Closures (\$1,000+)
- Total Gift Solicitations (\$1,000+)
- Total Significant Contacts

OTHER DX AND IG METRICS

- | | |
|--|---|
| • Total WL, IFW, WS, OMS, "EGOT" (donors in all 4) | • Total Number of Cash Pledges (\$1-\$49,999) |
| • FTG to WL Conversion | • Customized Donor Touchpoints |
| • WL & IFW Retention | • Donor Engagements |
| • Stewardship/Engagement Impact | |



DX & IG TEAM ACCOMPLISHMENTS

- Giving Day 2023 brought in nearly \$1.1M in gifts from over 1,880 donors. Our biggest Giving Day success yet!
- Exceeded our total fundraising production goal by 19% in FY22.
- Achieved an overall donor retention rate of 64% in FY22 — 112% of goal!
- Added seven new FT positions (salary lines) to team in FY23.
- Promoted three FT staff into new leadership roles.
- Anecdotal feedback from team members: feelings of being well-resourced, supported and collaborative in new team model.

WHAT'S NEXT?

- Integrate Community-Centric Fundraising Principles into our team's core values
- Adopt recommendations from our Division's DEI Committee into values and workplans
- Continue to assess structure and functions; make adjustments as needed

QUESTIONS?

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WSU ACRONYMS

a key to understanding the
acronyms you may have noticed
throughout this presentation

DX: Donor Experience

IG: Individual Giving

AC: Annual Campaigns

D&ICO: Digital & Integrated Campaigns

DPC: Digital Philanthropy Center

DXO: Donor Experience Officer

IGO: Individual Giving Officer

ACO: Annual Campaigns Officer

D&ICO: Digital & Integrated Campaigns Officer

WS: Wayne Society

OMS: Old Main Society

WL: Wayne Loyal

IFW: Inspire from Within

FTG: First Time Givers