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

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SENIOR DIRECTOR, DONOR EXPERIENCE & INDIVIDUAL GIVING

HEATHER MOURER
DIRECTOR, DONOR EXPERIENCE
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.
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 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.

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Cumulative giving of $250k and higher

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.
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%.
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.
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
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)
- FTG to WL Conversion
- WL & IFW Retention
- Stewardship/Engagement Impact

- Total Number of Cash Pledges ($1-$49,999)
- Customized Donor Touchpoints
- Donor Engagements
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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a key to understanding the acronyms you may have noticed throughout this presentation