# Table of Contents

- About AGN .......................................................... 3
- Report Overview .................................................. 4
- Key Findings by Domain ........................................ 5
  - Constituencies ......................................................... 6
  - Marketing ................................................................. 11
  - Cultivation ............................................................... 20
  - Stewardship ......................................................... 25
  - Analytics ................................................................. 29
  - Management ......................................................... 34
- Benefits of AGN Plus Membership .......................... 39
- Contact Information ................................................ 41
Annual Giving Network (AGN) helps connect annual giving programs to information and ideas. Why? Because their work matters!

AGN training webinars and workshops are led by the industry’s top annual giving experts, bringing experience and best practices from world-renowned educational institutions. AGN founder, Dan Allenby, is an author, speaker and consultant who has worked with educational and nonprofit organizations for 20 years to help them design, execute and evaluate their annual giving strategies. He is the recipient of the CASE Crystal Apple Award for teaching excellence.

Learn how AGN can help recruit, train and evaluate your annual giving team by contacting info@annualgiving.com or 888.407.5064.

Visit AnnualGiving.com for more information.
For the fifth consecutive year, AGN has produced a special report to share trends and best practices in the field of annual giving. AGN research is based on data collected from annual giving programs at over a thousand educational institutions around the world.

This year’s report highlights more than 25 live interactive webinars offered by AGN in 2016. Each page summarizes data from event poll results and other research and offers a useful example from a specific webinar. Want to learn more? Every page also includes a link to view that webinar in its entirety via AGN’s on-demand training library.

**AGN Plus Member** institutions enjoy unlimited free access to all live and on-demand AGN webinars. They also receive special access to experts; opportunities to network and benchmark with other members; and exclusive research, publications and case studies.
The key findings described in this report are organized into the following six sections, reflecting the domains of AGN’s own training curriculum:

- Constituencies
- Marketing
- Cultivation
- Stewardship
- Analytics
- Management

Each of these domains represents a fundamental element of annual giving. They are the basis for AGN’s educational programming and content, including articles, case studies and special publications.
CONSTITUENCIES
Engage and communicate with key audiences
**Students: Commence Before Commencement**

Institutions that teach students about the impact of philanthropy and engage them in giving before they graduate tend to raise more money and have higher alumni participation rates.

- **74%** of annual giving professionals don’t feel that their institution has a strong culture of philanthropy

- **60%** of annual giving teams don’t collaborate regularly with student affairs/student services

University of California Irvine promotes participation from the graduating class by encouraging seniors to donate $20.16 in honor of their graduation year.

Click here to view AGN’s webinar on: Student Philanthropy Programs
Faculty and staff are instrumental in creating a culture of philanthropy at your institution.

- **68%** of annual giving programs run a faculty and staff campaign
- **75%** of faculty and staff campaigns are run over a one-month period of time
- **53%** of annual giving programs have a formal role for faculty and staff volunteers

The Ohio State University created a downloadable “Ambassador Toolkit” to assist faculty and staff volunteers for its campus campaign.
Young Alumni: #EngageThemEarly

Understanding what motivates recent graduates to give is key to long-term success.

• 80% of annual giving programs define “young alumni” as grads of the last 10 years

• 60% have a separate solicitation strategy for young alumni

• 63% do not have a discounted gift requirement for young alumni who want to join their leadership giving society

Click here to view AGN’s webinar on: Young Alumni Giving

Rice University uses hashtags and cheeky references to engage its young alumni as part of the #TwiceAsRice young alumni challenge.
The national alumni participation rate has been declining year-over-year for more than two decades.

• **63%** of annual giving programs saw alumni participation rates decline again last year

• **70%** have held or are planning a giving day to help boost alumni participation

**Click here to view AGN’s webinar on:**
**Increasing Alumni Participation**

**Denison University** runs a “No Place Like Home” competition between residence halls to see which one can boast the highest alumni participation.
MARKETING
Plan and execute successful broad-based efforts
Digital strategy today requires an integrated mix of email, video, crowdfunding and social media, and it needs to be coordinated with traditional marketing and communication efforts.

- **60%** of annual giving programs are spending more of their budget on digital programs than they were five years ago.

- **56%** include giving-related content on their institution’s alumni Facebook page on at least a monthly basis.

The University of Chicago found that hyperlink text generated more clicks and “naked” URLs yielded more gifts when testing both options during its online sock giveaway campaign.

Click here to view AGN’s webinar on: Digital Strategy
Email Strategy: Go Green to Get the Green $$$

Email appeals have become an essential ingredient in today's annual giving toolkit, but it’s harder to make emails stand out as your prospects’ inboxes fill up.

- **75%** of annual giving programs format their email appeals so that they’re mobile-responsive

- **62%** say that past donors would receive at least five email appeals each fiscal year

University of Florida coordinates “microburst” email campaigns: each one includes three emails within a 10-day window, each with its own goal and theme.
Crowdfunding has excited the nonprofit world in recent years, but many colleges, universities and independent schools are still figuring out how to integrate it into their annual giving efforts.

- **50%** of annual giving programs have tried crowdfunding
- **55%** would describe their program as technologically “behind the times”
- **78%** do not have a significant volunteer effort

Click here to view AGN’s webinar on:
Building a Crowdfunding Program

University of Connecticut provides its crowdfunding volunteers with guidelines and a project checklist to help ensure its campaign’s success.
Direct Mail: Alive and Well

Despite the growth in online giving in recent years, direct mail is still a significant source of donors and dollars for most annual giving programs.

- 58% of annual giving programs have seen an increase in direct mail revenue over the past several years

- 69% feel they should do more segmenting of their direct mail efforts

- 55% spend a minimal amount of their time analyzing direct mail efforts

Rutgers University includes simple “buck slips” in its direct mail appeals to highlight important activities such as events or a “Double Your Dollars” challenge.

Click here to view AGN’s webinar on: Successful Direct Mail
End-of-year goals and deadlines can create a sense of urgency for your donor base that—if used correctly—can really boost your results.

- **89%** of annual giving programs do not set monthly goals
- **54%** say they would invest in video or online advertisements if given an extra $5,000
- **78%** say that their calendar year-end appeal efforts are aggressive

Click here to view AGN’s webinar on: **End-of-Year Appeals**

**U.S. Air Force Academy** incentivizes year-end giving by offering a free wall calendar for making a gift of any size before December 31.
Branding: Putting a Face on Your Program

Annual giving symbolizes something very important for your institution, which is why your program needs to leverage brands in a thoughtful and strategic way.

• 78% of annual giving professionals say there is no clear difference between the “annual fund” and “annual giving” at their institution

• 60% say that their institution’s annual fund’s brand is strong

Click here to view AGN’s webinar on: Branding for Annual Giving Success

University of South Carolina held a contest called “Get Cocky, Y’all” to identify two “faces” of the young alumni campaign, asking for graduates to share their personal stories by posting comments and videos through social media.
Recurring gifts help to acquire young supporters, increase retention rates and upgrade existing donors to higher levels.

- **83%** of annual giving programs describe their recurring gift strategy as “passive”

- **86%** say they focus their recurring gift efforts on loyal donors and young alumni

Click here to view AGN’s webinar on: Recurring Gift Programs

**Sample Monthly Donations**

<table>
<thead>
<tr>
<th>Monthly Donation</th>
<th>Annual Donation</th>
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<tbody>
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<tr>
<td>$208.33 per month</td>
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</table>

"Being able to use a credit card to give makes it a part of our monthly budget. We enjoy making it possible for students to attend such a phenomenal place."
Charlene ’67 and Stephen Weickel ’67

"I love the credit card monthly option because it’s simple. I set up my monthly contribution and I can forget it. I know that I can budget and so can the University. Try it, you’ll like it!"
Brian Fogelson ’75

"My recurring monthly contributions are automatically paid with my dividend miles credit card and help me earn points towards free travel."
Mark Husey ’91

**Rider University** collects donor testimonials about recurring gifts and posts them on its website as a way to encourage others to sign up too.
When developing a case for support, crafting appeals or producing gift acknowledgements, good writing can increase the impact and effectiveness of your efforts.

- **97%** of annual giving professionals believe writing is a skill necessary for their success

- **64%** report that the majority of their appeals are “traditional letters” using black text on white paper

- **55%** say that their appeals are written by someone outside of the annual giving team

Click here to view AGN’s webinar on: **Writing for Annual Funds**

Westminster College’s appeal letter describes specific examples of gift impact firsthand from the student signatory, inspiring donors to give.
CULTIVATION
Prepare to make asks that result in a “yes”
Personal solicitations are the most effective way to secure gifts, which is why it's so important to be prepared when you meet with a prospect.

- **61%** of annual giving professionals are responsible for face-to-face solicitations
- **86%** admit that they do not regularly “practice” conducting solicitations

**Middlebury College** engages gift officers in interactive games that involve finishing sentences, telling embarrassing stories, and awkward silences to help them improve their personal solicitation skills.

Click here to view AGN’s webinar on: **Face-to-Face Solicitations**
Identifying prospects who have high capacity and inclination, and then organizing them in a way that is manageable for gift officers, takes constant attention and a well-defined plan.

- 73% of annual giving programs assign prospect portfolios to their gift officers

- 65% of all programs do not feel they have a good way to evaluate gift officer productivity

Click here to view AGN’s webinar on: Research & Prospect Management

University of Colorado developed “activity cards” to track and evaluate the performance of annual fund gift officers.
A strong partnership between annual and major gift teams will not only help both to raise more money, but it will also ensure that your institution has a healthy pipeline of donors for years to come.

- **69%** of annual giving officers meet with major gift officers on a regular basis

- **65%** say their advancement program encourages “dual asks”

**Penn Law School** created a “dual ask pledge form” to make it easier for gift officers to encourage annual giving when soliciting major gift donors.
Online Volunteers: Never Fear, It’s Peer to Peer

Providing volunteers with training and tools to conduct fundraising online gives volunteers more positive experiences and strengthens your institution’s campaigns.

• **70%** of annual giving programs find it very difficult to recruit good fundraising volunteers

• **50%** say online volunteers are beginning to be an important part of their strategy

• **56%** admit to needing clearer measurable goals for using volunteers online

Click here to view AGN’s webinar on: Engaging Volunteers Online

Washington & Lee University formed WLUSocial, an online community of volunteers that encourages engagement and support throughout the year.
STEWARDSHIP
Keep your donors happy and coming back for more
Stewardship: Your Best Donor Is Your Current Donor

Stewarding annual fund donors goes beyond sending acknowledgments and producing donor rosters; it also includes demonstrating the impact of annual support.

- **60%** of annual giving programs measure the effectiveness of their stewardship in terms of donor retention and/or upgrades

- **83%** of annual giving professionals believe you can thank a donor “too much”

**Boston College** offers its loyal donors monthly campus photos that can be downloaded as digital wallpaper for their computers and smartphones.

Click here to view AGN’s webinar on: Stewardship for Annual Fund Donors
Successful gift society programs make sure that members are treated like insiders, have access to school resources and receive communications that are highly personalized.

- **59%** of annual fund leadership gift societies provide members with tangible benefits

- **31%** require members to give more than $1,500 each year

Gettysburg College coordinates the production of personal handwritten thank you letters from students and sends them to members of its leadership gift society.
Donor Retention: Stop the Leaky Bucket

Your current donor is your most important donor, which is why retention is the cornerstone of a strong annual giving program.

- **64%** of annual giving programs track retention rates regularly

- **74%** say their strategy for soliciting last year’s donors is unique compared to other donor segments

University of Pennsylvania offers tech tags to loyal donors to help them show pride and customize their computer keyboards and mobile phones.

Click here to view AGN’s webinar on: **Increasing Donor Retention**
ANALYTICS
Utilize data to drive decisions and improve results
Data-Driven Strategy: Avoid Analysis Paralysis

Today’s annual giving programs use data and analytics to evaluate past performance, assess future opportunities and develop better strategies.

- **63%** of annual giving professionals describe themselves as data driven
- **75%** say they need access to more data and reports

**University of Portland** developed an annual fund dashboard to track and analyze key metrics and then report the program’s progress to senior management and colleagues.

Click here to view AGN’s webinar on: Analytics for Annual Giving
At any point in your fiscal year, it's important to be able to articulate annual fund results to your boss, your volunteers and your colleagues.

- **71%** of annual giving programs prepare different reports for different audiences

- **65%** of programs define “annual giving” in some way other than “unrestricted”

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### University of California San Diego

tracks channel migration in order to determine where changes to donor giving preferences are occurring.

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**Reporting: You’ll Manage What You Measure**

Click here to view AGN’s webinar on:

**Reporting Annual Fund Results**
Predictive models can help annual giving and alumni relations programs prioritize prospects and identify winning segments.

- **54%** of annual giving professionals have access to an analyst or statistician who works within their organization

- **55%** of annual giving programs have never used predictive models before

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</tr>
</tbody>
</table>

Massachusetts Institute of Technology analyzes “coefficients” to assess how different variables will predict a prospect’s likelihood to donate, volunteer or attend an event.

Click here to view AGN’s webinar on: Predictive Modeling
Segmentation: Group Therapy Works Wonders

Categorizing donors and prospects into segments based on giving history, constituency, affinity, behavior or demographic characteristics is the first step in developing personalized appeals and stewardship.

• 74% of annual giving professionals would not describe their institution’s annual giving strategy as highly segmented

• 71% of programs have segmented appeals based on donor “capacity”

Oregon State University created a simple checklist of standard exclusions to help them remember which groups should be excluded from appeals.

Click here to view AGN’s webinar on: Segmentation Strategy
MANAGEMENT
Take your program and your career to the next level
Developing a Plan: Exceed Your Goals

Managing the transition from one year to the next is essential when it comes to raising more money and securing more donors for your annual fund.

- **89%** of annual giving programs end their fiscal year on June 30
- **68%** of annual giving professionals have been part of a formal planning process
- **67%** say they do not typically have a plan in place prior to the start of a new fiscal year

St. Joseph’s University conducts a “stakeholder audit” at the beginning of its annual fund planning process each year to remind the team that they depend on many different individuals and groups to achieve their goals.

Click here to view AGN’s webinar on: Developing an Annual Fund Plan
Comprehensive campaigns create an opportunity to highlight all of an institution's priorities and needs—including annual giving.

- **100%** of annual giving programs report that their institution is either in a campaign or planning one

- **63%** of annual giving programs have established long-term goals that span beyond the current fiscal year

**University of Michigan** made sure its capital campaign didn’t overshadow the need for continued annual support by highlighting annual fund donors on its campaign website.

Click here to view AGN’s webinar on:
Annual Giving in a Campaign Setting
Over the past decade, declining contact rates and other trends have caused some programs to question the value of telemarketing as a fundraising channel.

- **84%** of annual giving programs have never even considered eliminating their phonathon program

- **41%** of phonathon programs expend resources to support areas that are outside of the annual fund

**Boston University** rebranded its call center as the “Student Philanthropy Center” and is using it not only for phonathon work but also as a meeting place for student volunteers, a library of philanthropy publications, and a space for students raising money for campus groups and activities.

Click here to view AGN’s webinar on: **Rethinking Phonathons**
New media, evolving technology, and changing donor attitudes and expectations have put pressure on annual giving programs to think outside the box and find innovative ways to appeal to their prospects.

- **74%** say their annual giving strategy is more institution-centric than donor-centric
- **84%** say their annual fund plan is too similar to their plan from the prior year

**Pomfret School** didn’t mince words when it sent the “perfect letter for busy people” with cliché fundraising catch phrases stamped over text that read “blah blah blah….”

Click here to view AGN’s webinar on: **Innovative Annual Giving for Independent Schools**
AGN Plus is a preferred membership program that allows annual giving professionals at nonprofit organizations to get the most out of all that AGN has to offer.

Membership applies to your entire institution, so everyone can take advantage of the following benefits:

- Free registration for all live interactive webinars
- Unlimited use of AGN’s on-demand training library
- Special access to our experts
- Opportunities to connect and benchmark with other members
- Exclusive publications, research and case studies

For more information on AGN Plus Membership, contact members@annualgiving.com or call 888.407.5064
Ideas for Annual Giving—Pea Pods, Parachutes and Other Designs for Boosting Alumni Participation is the new book by AGN’s founder, Dan Allenby.

Discover practical guidance and playful metaphors to provide readers with a modern yet timeless “design” for building an effective annual giving program.

Through real-world techniques, examples and tips, this publication shows how to increase annual fund revenues and elevate the number of alumni who make charitable gifts ever year.

Click here to order a copy of the book!