



Productive Advancement Efforts while Sheltering in Place.

A development officer's guide to the practical and tactical

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Philanthropic Consulting, LLC

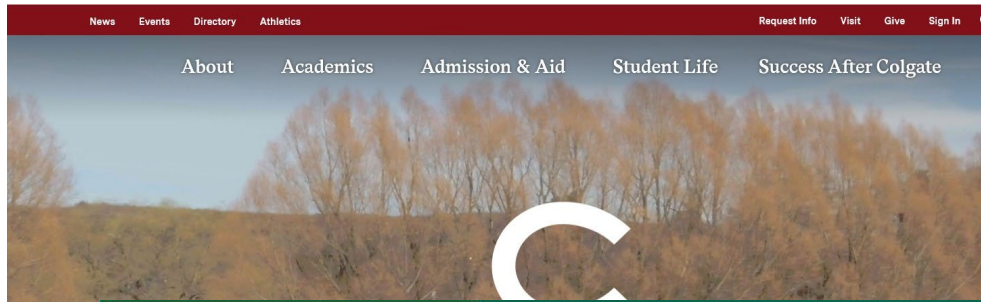
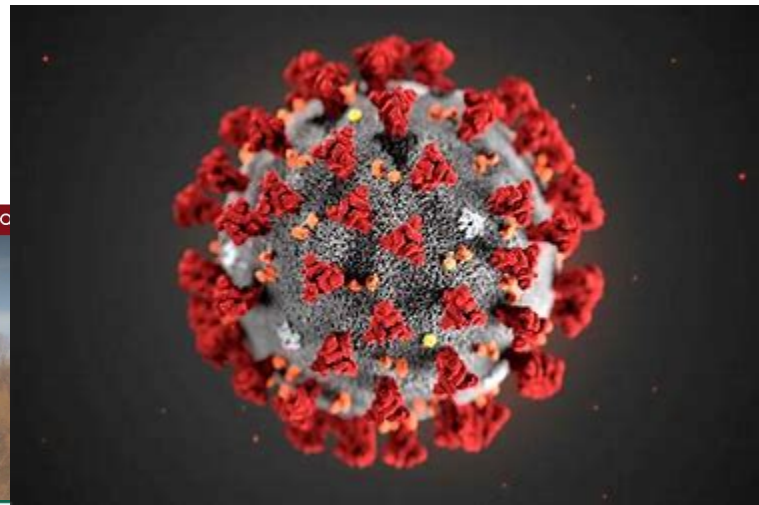


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Overview



Operational Impact



COVID-19
· UPDATES ·

Remote Learning at CSU has Started!

Click here to get all the information you need to **Keep Learning, Keep Teaching and Keep Working**

Health Alert

COVID-19 UPDATES: Visit our Coronavirus web page for important updates and information regarding the Coronavirus (COVID-19) and Elmira College...[Read More](#)

Students Faculty & Staff Families Visit Community

About Apply News Calendar Maps Careers Give



ELMIRA COLLEGE ADMISSIONS ACADEMICS STUDENT LIFE ATHLETICS ALUMNI

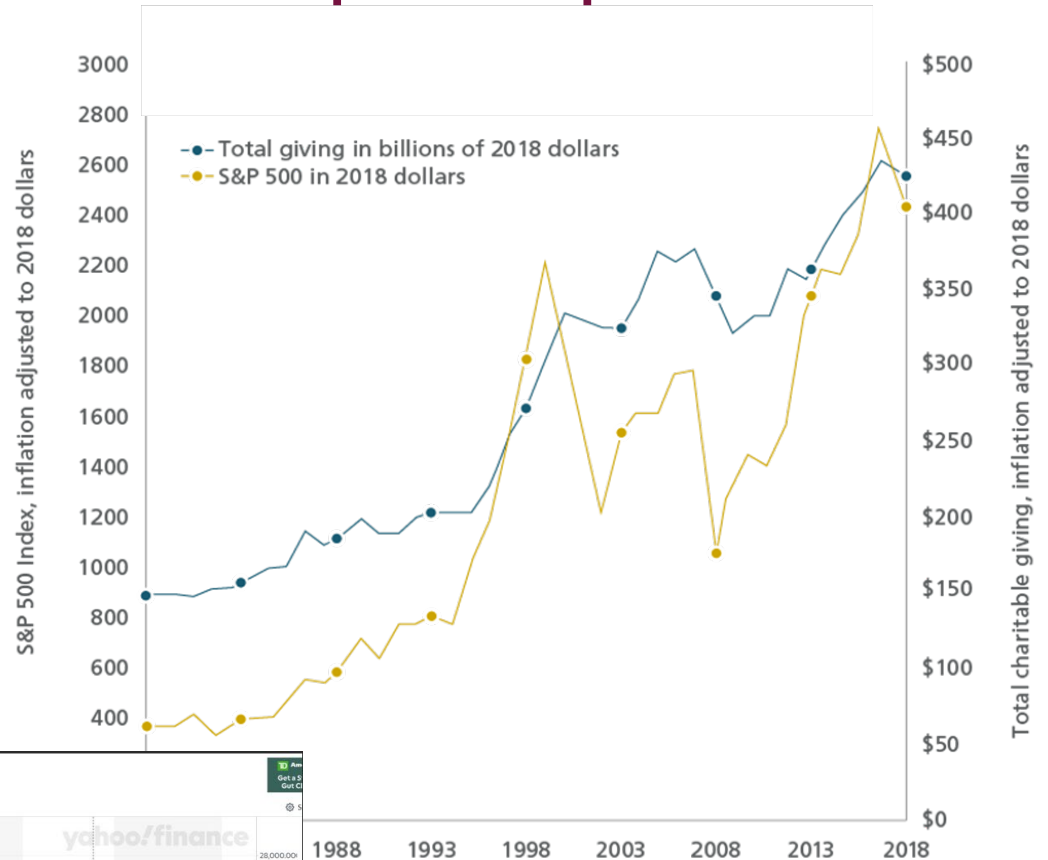
Search...



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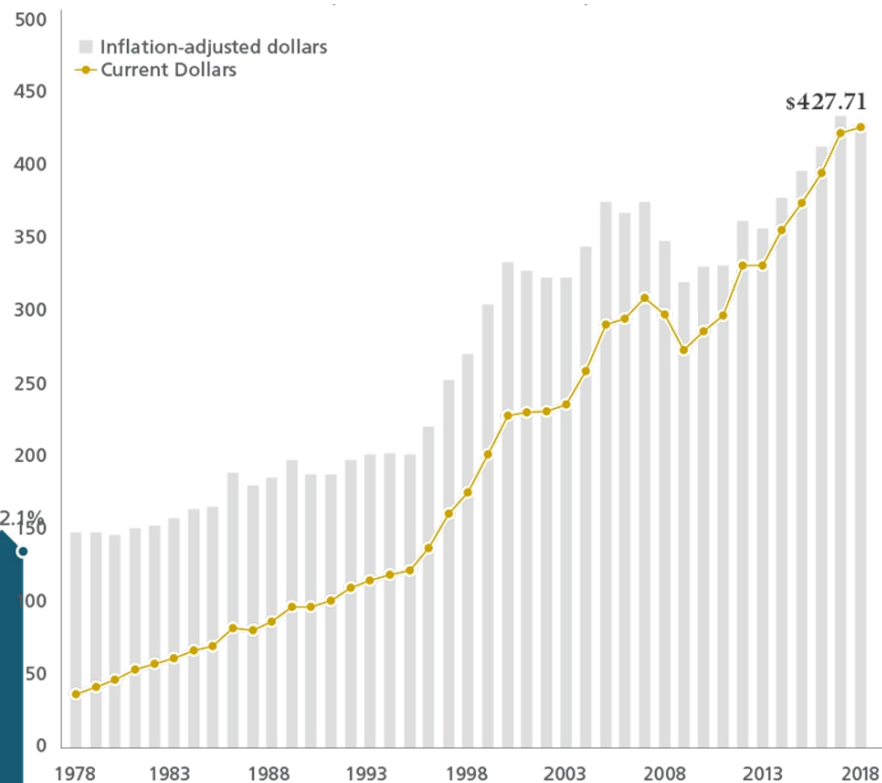
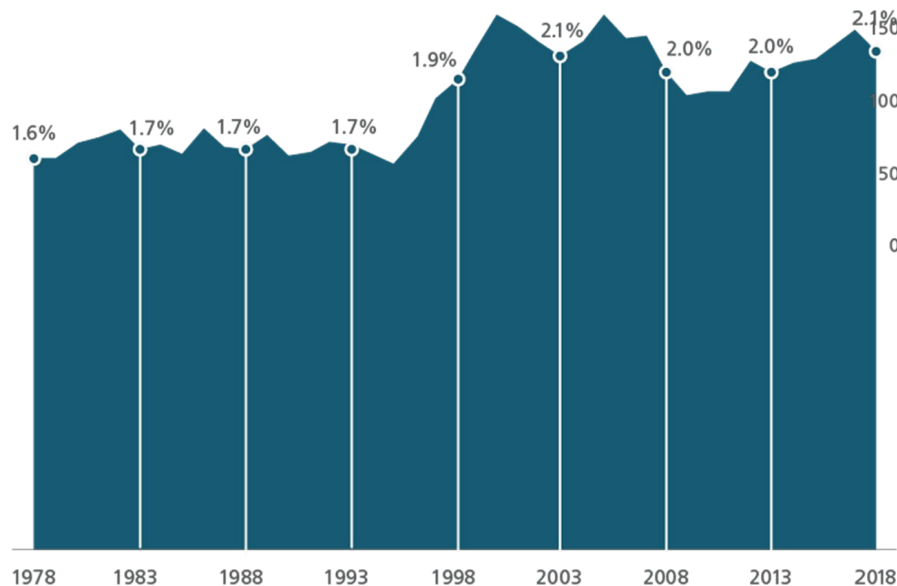
The Market & Philanthropic Impact

Historically, giving, particularly major gifts, track with the stock market



The Economy & Philanthropic Impact

- Charitable runs at 2% of Gross Domestic Product
- Giving usually is flat in a recession, except in 2009





Philanthropic Headwinds



Overall Retention Rate

43%

Growth in Donors

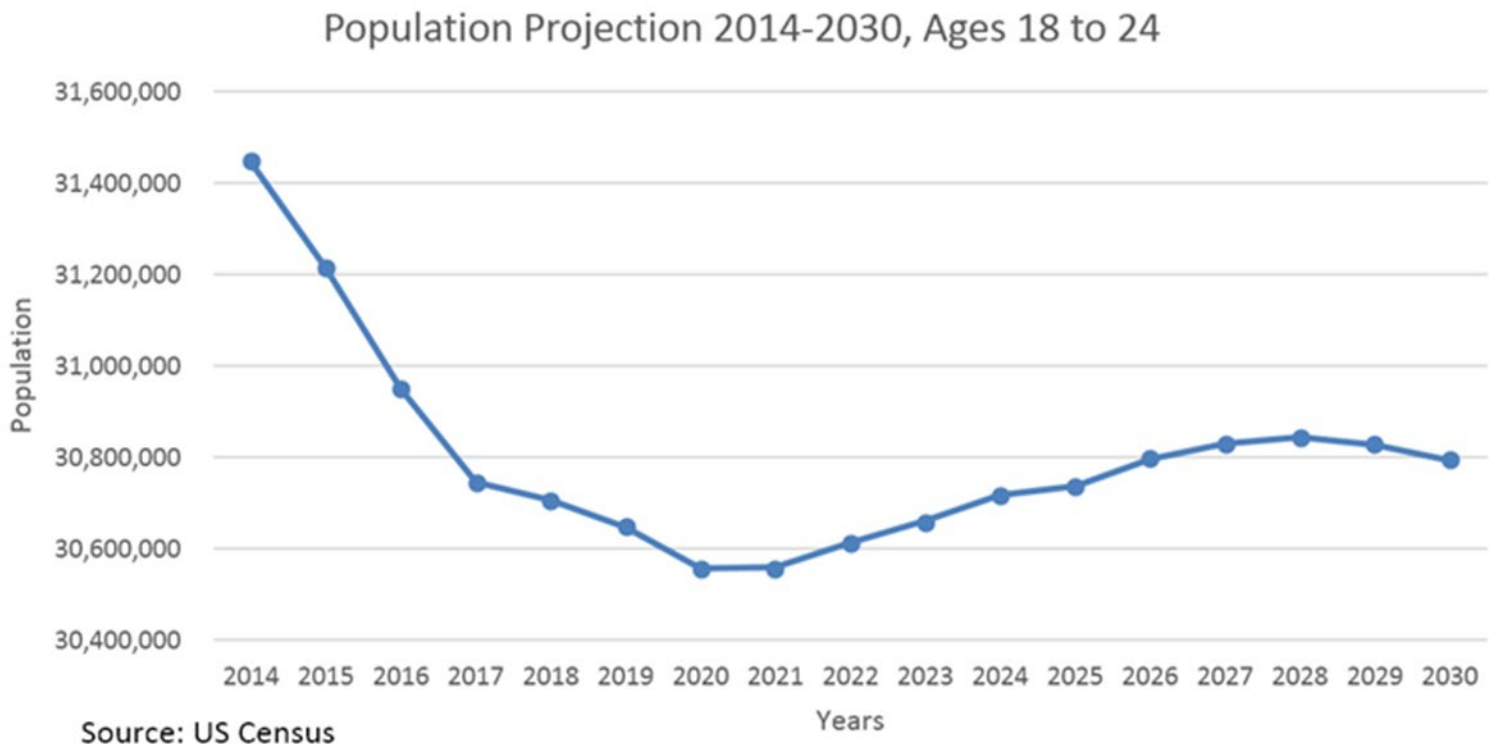


| 2017 | 2018 |
|--------------|--------------|
| 8.58 million | 8.34 million |

- Nationally and Internationally the number of distinct donors is declining
- And our retention rates reinforce the decline



Impact of College Population & Closures





What is different

- ✓ We had a bull market
- ✓ We had full employment
- ✓ We had a strong economy
- ✓ This is prophylactic shut down to avoid widespread disease and death
- ✓ The government has responded with an unprecedented stimulus package



The Hiatus Presents Opportunity

- To experiment with technology,
- Become creative,
- Revisit some very effective tools from the not too distant past and,
- Pair some approaches with new technology.

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Where to Start

Time to Organize



- This is the moment to clean-up, and organize our work
- From database to prospect lists to plans
- To prepare for the next wave



Start with your data base

- Data cleansing and normalization
 - Duplicate checks
 - Standard data entry, and affinity tables
- Missing external data
 - Phone numbers
 - Email (business and personal)
- Missing Internal data
 - Student activities: government, clubs, sports
 - Honors, awards, scholarships
- Value Proposition:
 - Higher contact rates for Annual Fund and
 - Improved scheduling for major gift officers and stewardship
 - Better segmentation

Wealth Screening

- Wealth Screening data has a life span of about 24-36 months
- Therefore if the database had a wealth / asset overlay completed prior to that, now would be the time to refresh
- This will help you triage and segment your prospect pool once the “shelter in place” order is lifted



- Consider augmenting the screening with analytics to leverage the data for additional insight and strategic planning
- All work in this environment can be done via email and video conference.

Call Reports, Status, and Proposals:

The screenshot displays the Salesforce CRM interface for a contact record. The top navigation bar includes the Salesforce logo, a search bar, and user information for Ross Layton. The main navigation menu shows options like Home, Dashboards, Reports, Leads, Contacts, Accounts, Line Items, and Invoices. The left sidebar contains a 'Create New...' button, a 'Shortcuts' section with 'Calendar' and 'Unresolved Items', a 'Recent Items' section with 'Ross Layton', 'Messages and Alerts', 'Custom Links', and 'Recycle Bin'. The main content area is titled 'Mr. Ross Layton' and includes a profile picture, social media icons, and a 'Show Feed' button. Below this, there are links for 'Campaign Activity', 'Subscriber Lists', 'Licenses', 'Desk.com Cases', 'Product Interactions', 'Campaign History', 'Apex Messages', 'Open Activities', and 'Activity History'. The 'Contact Detail' section includes 'Edit', 'Delete', and 'Clone' buttons. The 'Contact Information' section shows 'Account Name: Beaufort 12 Limited', 'Name: Mr. Ross Layton', 'Title: COO', and 'Email: support@beaufort12.com'. The 'Campaign Activity' section contains a table with columns for Action, Campaign, Activity, Activity Date, Activity Report, Bounce Reason, and URL Clicked.

| Action | Campaign | Activity | Activity Date | Activity Report | Bounce Reason | URL Clicked |
|------------|------------------------------------|----------|------------------|-----------------|---------------------------|-------------|
| Edit Del | Dropbox for Salesforce - Version 6 | Sent | 10/12/2013 01:40 | Sent | | |
| Edit Del | Dropbox for Salesforce - Version 6 | Opened | 10/12/2013 01:42 | Opened | | |
| Edit Del | American Express | Sent | 18/10/2013 00:00 | Sent | | |
| Edit Del | American Express | Bounced | 18/10/2013 00:01 | Bounced | Soft Bounce - DNS Failure | |
| Edit Del | American Express | Opened | 18/10/2013 00:09 | Opened | | |

Every gift officer can spend time updating records and call reports

Web Based Portfolio Review: Assigned v Unassigned

| | Gift Capacity Rating | Donor Proclivity | | | | | | Grand Total | |
|-----------------------------|----------------------------------|------------------|------------|--------------|--------------|-----------|--------------|---------------|-------|
| | | DS1-1 | DS1-2 | DS1-3 | DS1-4 | DS1-5 | DS2 | | DS3 |
| Assigned | C - \$10 Million - \$50 Million | 2 | | | | | | | 2 |
| | D - \$5,000,000 - \$9,999,999 | 1 | | | | | | | 1 |
| | E - \$1,000,000 - \$4,999,999 | 7 | 1 | | | | | | 8 |
| | F - \$500,000 - \$999,999 | 10 | 4 | | | | | | 14 |
| | G - \$250,000 - \$499,999 | 4 | 5 | | | | | | 9 |
| | H - \$100,000 - \$249,999 | 10 | 5 | 14 | 13 | | | | 42 |
| | I - \$50,000 - \$99,999 | 4 | 4 | 2 | 12 | | | | 22 |
| | J - \$25,000 - \$49,999 | 2 | 2 | 7 | 32 | 16 | | | 59 |
| | K - \$15,000 - \$24,999 | 1 | 3 | 1 | 18 | 26 | | | 49 |
| | L - \$10,000 - \$14,999 | | | | 9 | 5 | | | 14 |
| | M - \$5,000 - \$9,999 | | 1 | 3 | 14 | 10 | | 11 | 39 |
| | N - \$2,500 - \$4,999 | | | | 2 | | | 4 | 6 |
| | O - \$1 - \$2,499 | | | | 1 | 2 | | | 3 |
| | P - Unable to Rate | | | | 1 | | | 2 | 3 |
| Sub Total Assigned | | 41 | 25 | 27 | 102 | 59 | 17 | 271 | |
| Unassigned | B - \$50 Million - \$100 Million | | 1 | | | | | | 1 |
| | C - \$10 Million - \$50 Million | 4 | 1 | | | | | | 5 |
| | D - \$5,000,000 - \$9,999,999 | 2 | 3 | | | | | | 5 |
| | E - \$1,000,000 - \$4,999,999 | 20 | 15 | | | | | | 35 |
| | F - \$500,000 - \$999,999 | 25 | 40 | | | | | | 65 |
| | G - \$250,000 - \$499,999 | 16 | 41 | | | 1 | | | 58 |
| | H - \$100,000 - \$249,999 | 46 | 71 | 241 | 139 | | | | 497 |
| | I - \$50,000 - \$99,999 | 25 | 43 | 26 | 314 | | | | 408 |
| | J - \$25,000 - \$49,999 | 35 | 114 | 121 | 1,725 | 943 | | | 2,938 |
| | K - \$15,000 - \$24,999 | 30 | 146 | 146 | 1,745 | 2,856 | | | 4,923 |
| | L - \$10,000 - \$14,999 | 10 | 46 | 58 | 673 | 1,508 | | 4 | 2,299 |
| | M - \$5,000 - \$9,999 | 21 | 88 | 109 | 1,320 | 1,635 | 2 | 2,939 | 6,114 |
| | N - \$2,500 - \$4,999 | 6 | 9 | 18 | 295 | 445 | | 1,121 | 1,894 |
| | O - \$1 - \$2,499 | 4 | 2 | 5 | 44 | 90 | | 87 | 232 |
| P - Unable to Rate | | 8 | 7 | 116 | 144 | 1 | 317 | 593 | |
| Sub Total Unassigned | 244 | 644 | 734 | 6,368 | 7,606 | 3 | 4,468 | 20,067 | |
| Grand Total | 285 | 669 | 761 | 6,470 | 7,665 | 3 | 4,485 | 20,338 | |

63 Assigned,
High Capacity
& Proclivity

165 Assigned,
Lower Capacity
& Low Proclivity

526, Unassigned
High Capacity &
Proclivity

800, Unassigned,
Leadership Gift
Prospects

Tier the Prospect Pool





Classic Performance Metrics

VPC recommends that the following serve as goals for gift officer performance metrics. Gift officers that are new to the organization may have portfolios and expectations at the low end of the range

| Gift Level | Portfolio Size | Visits / Month | Proposals / Month |
|-------------------|----------------|----------------|-------------------|
| Principal Gifts | 50 – 75 | 5 | 0.5 |
| Major Gifts | 125 – 150 | 15-20 | 2 |
| Leadership Annual | 200 – 250 | 20 | 5 - 10 |



Reevaluate Long Term Strategies

| | |
|--|----|
| Prospect Name: Contact Information: | |
| Relationship to Foundation | |
| Board Member Relationship | |
| Prospect Solicitation Team | |
| Previous Philanthropic Activity | |
| Known Donor Advisors | |
| Project Alignment | |
| Discovery Visit Date & Insight | |
| Long Term Cultivation Strategy | |
| Engagement Activities and Dates | Q1 |
| | Q2 |
| | Q3 |
| | Q4 |
| Proposal Summary | |
| Target Gift | |
| Target Solicitation Date | |

- The pause in the economy and shifting priorities suggest we should re-examine the engagement plans and
- Both the personal and philanthropic priorities of our prospects



Remote prospect/donor stewardship and engagement





Stewardship and Donor Relations



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Annual Giving



Annual Giving: Impact of Recurring Gifts

- Introducing recurring gifts, increases alumni participation rates

| Segment | 2018 | 2019 | 2020 | 2021 | 2022 |
|------------------------------|---------------|---------------|---------------|---------------|---------------|
| Recurring Gift Acquisition | 6,296 | 6,467 | 6,639 | 6,810 | 6,981 |
| Recurring Gift Retention | 0 | 6,923 | 13,485 | 19,792 | 25,857 |
| Recurring Gift Conversion | 1,000 | 999 | 1,076 | 1,139 | 1,262 |
| Cash Gift Retention 5 yr+ | 6,406 | 6,038 | 5,806 | 5,904 | 6,400 |
| Cash Gift Retention 3 - 4 yr | 1,539 | 1,602 | 1,961 | 2,518 | 2,984 |
| Cash Gift Retention 2 yr | 1,017 | 1,526 | 2,054 | 2,241 | 2,917 |
| Cash Gift Retention 1 yr | 1,659 | 2,045 | 2,191 | 2,337 | 2,483 |
| Reactivation 1 yr Lapsed | 795 | 1,258 | 1,222 | 1,399 | 1,506 |
| Reactivation 2 - 5 yr Lapsed | 760 | 1,022 | 1,305 | 2,404 | 2,326 |
| Cash Gift Acquisition | 7,807 | 8,019 | 8,232 | 8,444 | 8,656 |
| TOTAL | 27,278 | 35,900 | 43,971 | 52,987 | 61,373 |
| Participation Rate | 11% | 14% | 17% | 19% | 22% |
| Senior Class Gift Recurring* | 396 | 594 | 792 | 990 | 1,188 |
| Senior Class Gift Cash* | 804 | 1,206 | 1,608 | 2,010 | 2,412 |

| Segment | Projected Fiscal Year | | | | |
|------------------------------------|-----------------------|---------------|---------------|---------------|---------------|
| | 2018 | 2019 | 2020 | 2021 | 2022 |
| Recurring Gift Acquisition | 0 | 0 | 0 | 0 | 0 |
| Recurring Gift Retention/Upgrade | 0 | 0 | 0 | 0 | 0 |
| Recurring Gift Conversion | 0 | 0 | 0 | 0 | 0 |
| Cash Gift Retention 5 yr+ | 6,743 | 6,690 | 6,772 | 7,226 | 8,189 |
| Cash Gift Retention 3 - 4 yr | 1,620 | 1,775 | 2,261 | 3,009 | 3,640 |
| Cash Gift Retention 2 yr | 1,070 | 1,650 | 2,299 | 2,506 | 3,200 |
| Cash Gift Retention 1 yr | 1,746 | 2,252 | 2,455 | 2,658 | 2,861 |
| Cash Gift Reactivation 1yr Lapsed | 795 | 1,324 | 1,226 | 1,342 | 1,376 |
| Cash Gift Reactivation 2yr+ Lapsed | 760 | 1,022 | 1,331 | 2,400 | 2,304 |
| Cash Gift Acquisition | 7,807 | 8,019 | 8,232 | 8,444 | 8,656 |
| TOTAL | 20,540 | 22,733 | 24,576 | 27,585 | 30,226 |
| Participation Rate | 8% | 9% | 9% | 10% | 10.8% |
| Senior Class Gift Recurring* | 0 | 0 | 0 | 0 | 0 |
| Senior Class Gift Cash* | 1,200 | 1,800 | 2,400 | 3,000 | 3,600 |



Annual Giving



- Consider starting your student calling program back up
- Software permits student callers to call and work remotely
- Consider using a third- party firm like Lead, or Catapult

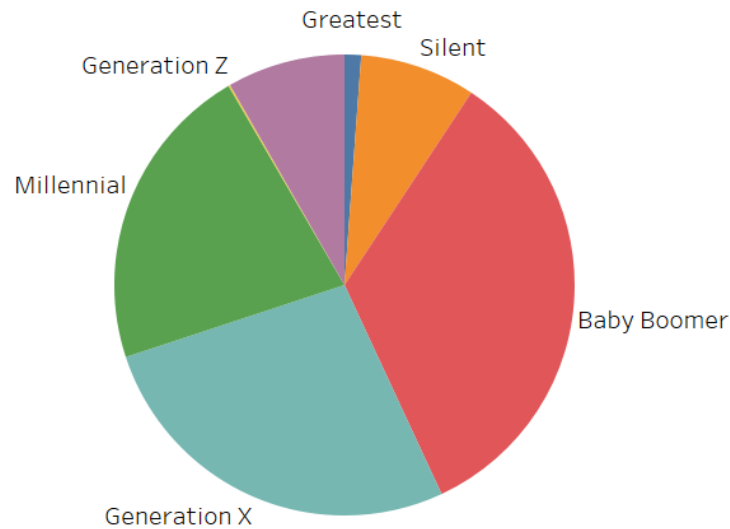
Annual Giving





Planned Giving Opportunity

| Key | From | To | Age |
|---------------------|------|------|---------|
| Generation Z | 1998 | | 22 - |
| Millennial | 1981 | 1997 | 23 - 39 |
| Generation X | 1965 | 1980 | 40 - 55 |
| Baby Boom | 1946 | 1964 | 54 - 74 |
| Silent Generation | 1928 | 1945 | 75 - 92 |
| Greatest Generation | | 1928 | 93+ |



Members of the Boomer and Silent Generations may be more receptive to deferred gift options versus current cash or assets, which they need for retirement



Planned Giving





VP's, AVP's Gift Officer Managers



VP's, AVP's Gift Officer Managers

HOW TO BE A GOOD MANAGER





Alumni Relations





Alumni Relations

- Move to an online format for updates and information sharing
- Utilize video conferences for board and committee meetings.
- Consider which events can (and identify those that cannot) be moved to an online experience.
- Engage alumni with remote video for outreach and engagement.
- Maintaining contact is essential, once this crisis passes, ***and it will pass***, stakeholders will be much easier to reengage if ongoing communication has been occurring.
- See the [University of Wisconsin Experience](#)
- See [Rockford University](#)

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Summary



In Conclusion



Impact on Higher Education

- The COVID19 virus experience has the potential to change the way higher education is structured.
- If institutions can make the online learning experience productive and successful, then more students and parents may expect that offering as a core component of undergraduate education.
- This experience, especially the longer it goes on, could be the catalyst that starts a move away from traditional bricks and mortar leaning to online education.
- If that does happen, it will have an unimagined impact on higher education institutions starting with the current class of soon to be graduates who may not have a formal commencement event.



Impact on Fundraising

- The fundraising landscape will be challenging for the remainder of FY 20 and most of FY 21
 - In some ways this is like what occurred in 2008/09 coupled with 9-11.
- The real loss of personal wealth your donors and prospects experienced will take some time to replace and recover
 - In 2008/09 most individuals did not recover their lost wealth in the market until late 2012/2013 and overall philanthropy did decline in 2008/09.
- We are certain that more can be done, these thoughts and tactics help cover the next three to four months and prepare for the time when the COVID19 crisis passes



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Thank you!

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