



Productive Advancement Efforts while Sheltering in Place.

A development officer's guide to the practical and tactical

VISIONARY

Philanthropic Consulting, LLC

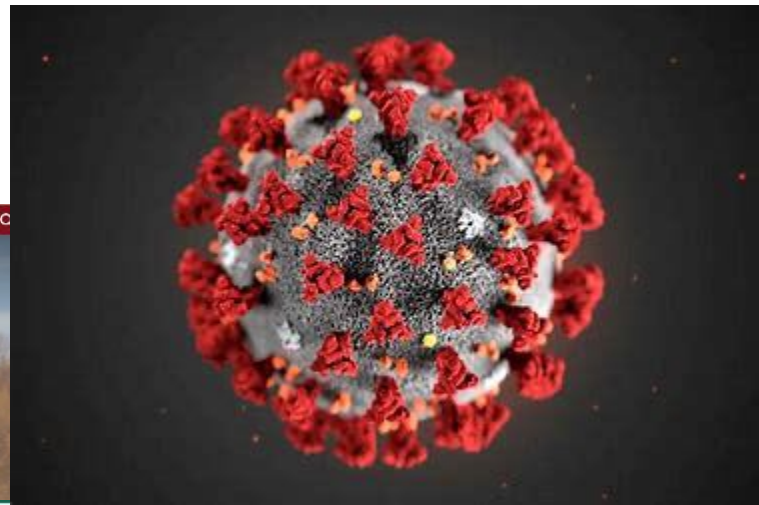


VISIONARY

Overview



Operational Impact



COVID-19
· UPDATES ·

Hide Video

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... 

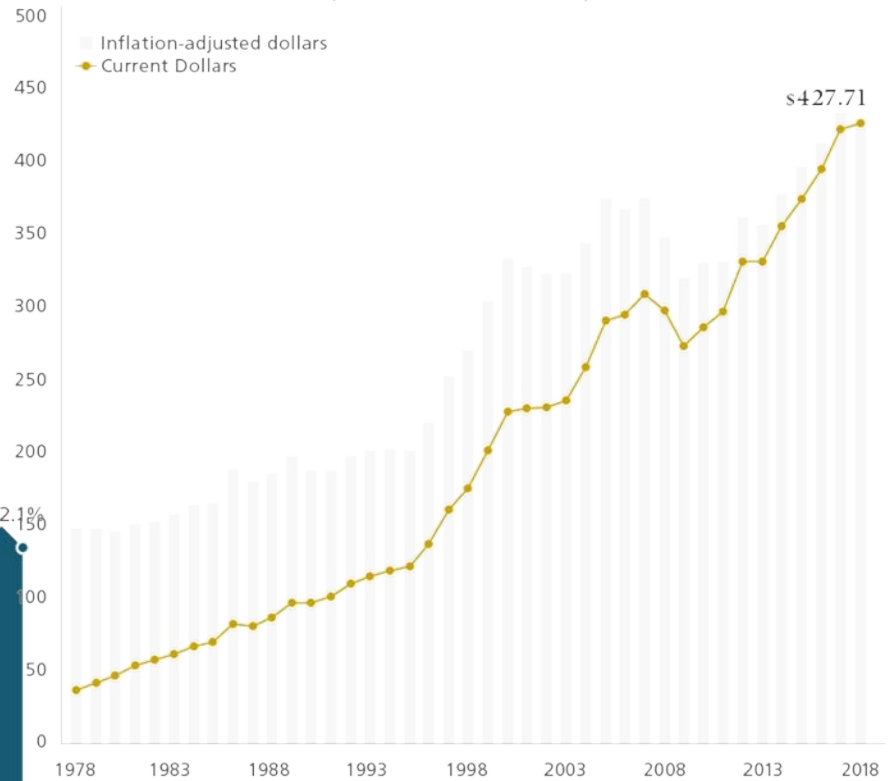
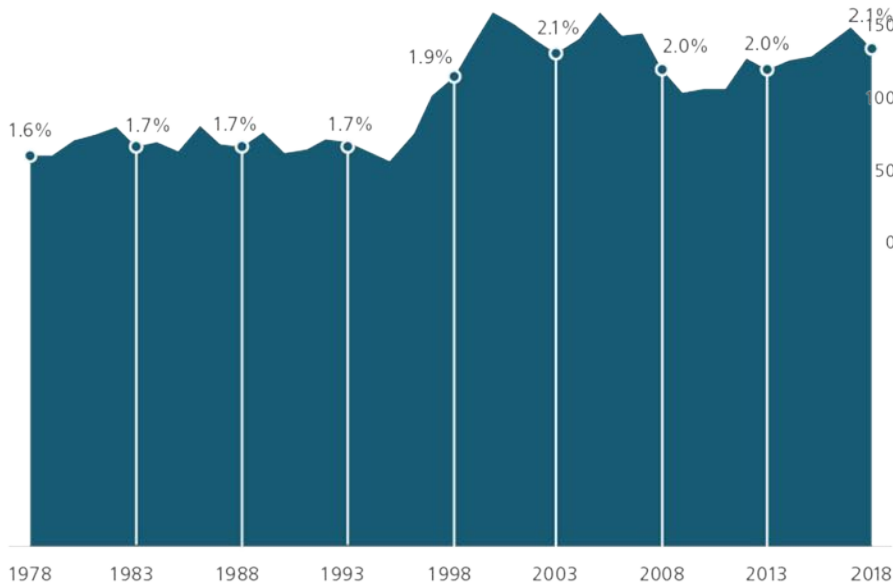
The Market & Philanthropic Impact

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



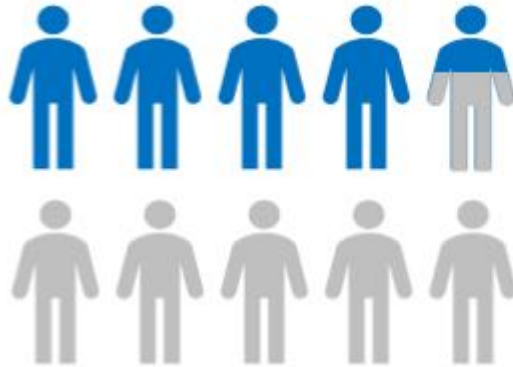
The Economy & Philanthropic Impact

- 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

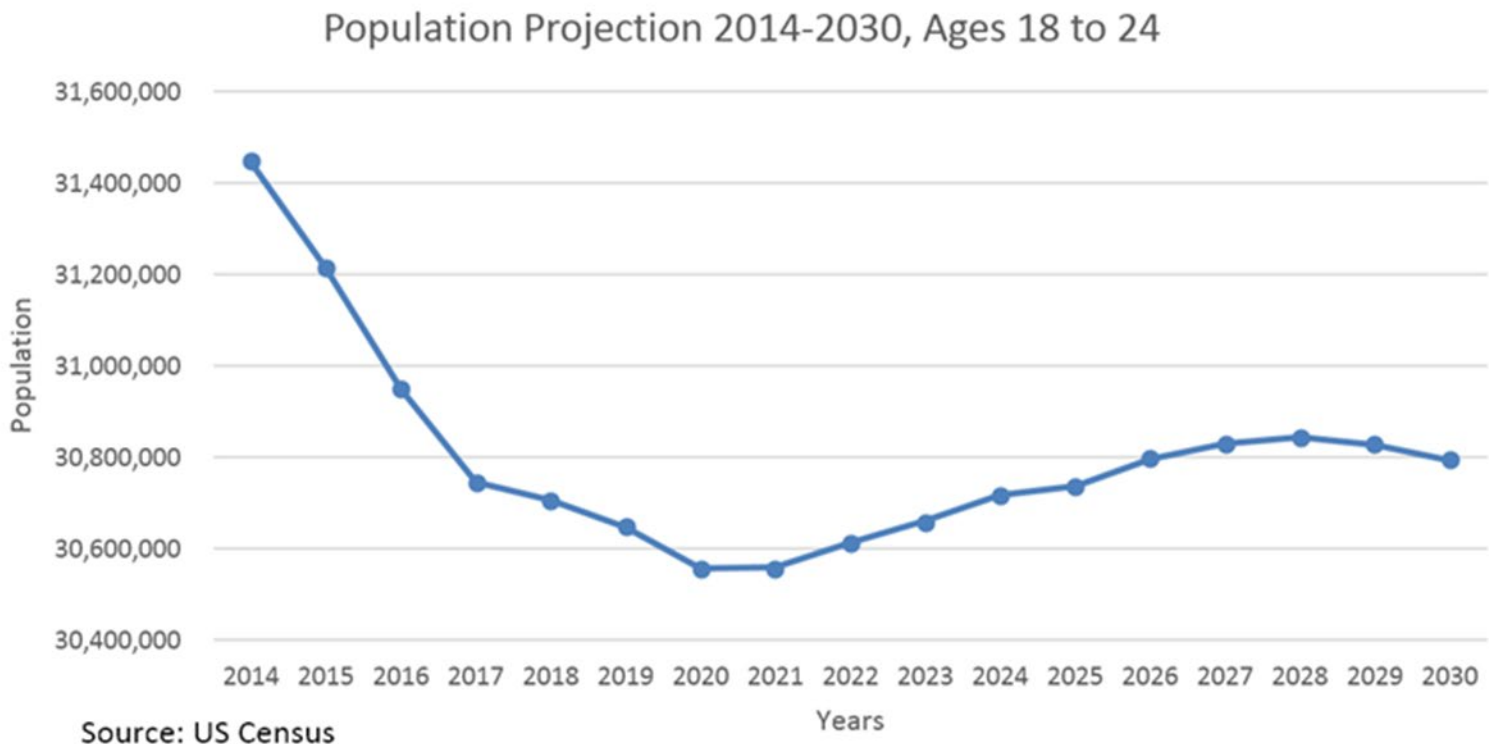


2017	2018
8.58 million	8.34 million

- 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.

VISIONARY

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 contact record for Mr. Ross Layton is shown, including a profile picture, social media links, 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 fields for Account Name (Beaufort 12 Limited), Name (Mr. Ross Layton), Title (COO), and Email (support@beaufort12.com). There are also sections for Product Interaction Summary, Dropbox for Salesforce, Address Information, and System Information. At the bottom, a 'Campaign Activity' table lists activities 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 5	Sent	10/12/2013 01:40	Sent		
Edit Del	Dropbox for Salesforce - Version 5	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	

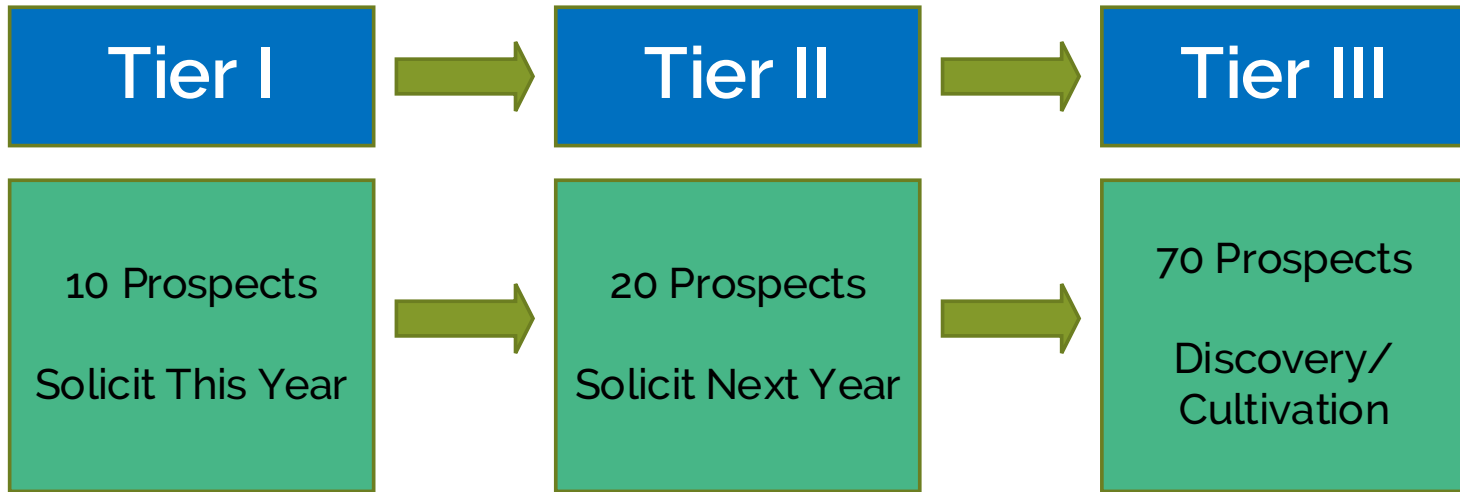
63 Assigned, High Capacity & Proclivity

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



This Photo by Unknown Author is licensed under [CC BY-SA](#)



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



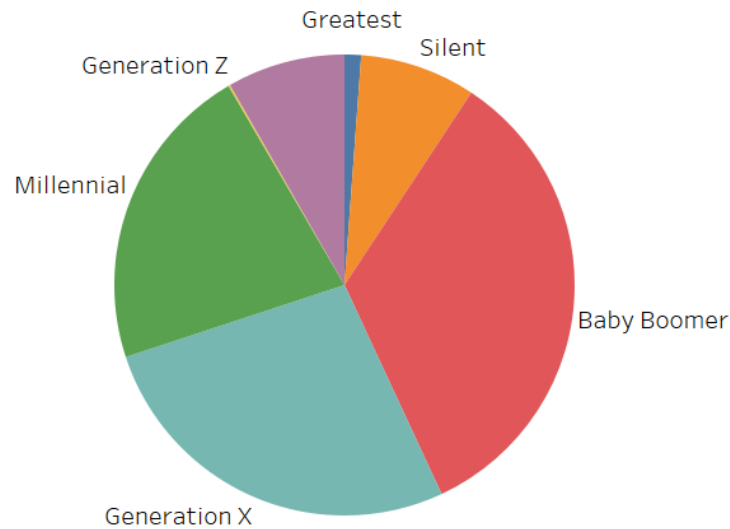
Annual Giving





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](#)

VISIONARY

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



VISIONARY

Thank you!

For more information contact Michael J. Shippam at
michael@visionaryphilanthropy.com