

Illinois Wesleyan University
The Wesleyan Fund for Annual Giving
Strategic Plan: 2013 – 2022

VISION

To develop the Wesleyan Fund for Annual Giving into a solid foundation for IWU’s advancement program — by developing a culture of stewardship among alumni, and by engaging as many as possible to become annual fund donors — in order to help secure IWU’s future as a leading national liberal arts university.

Introduction

The Wesleyan Fund is a core part of Illinois Wesleyan University's advancement efforts, both as a source of unrestricted revenue and as an incubator for future major donors. During the lengthy and thorough process of research, examination, and discussion that resulted in the development of this strategic plan, several key points emerged, around which there was universal agreement:

1. The Wesleyan Fund alumni participation rate is a critical measure of IWU's success in fulfilling its mission.
2. IWU's participation rate lags significantly behind the other institutions in its peer / aspirant group.
3. A significant, dedicated, and sustained effort must be made, starting immediately, to increase participation.
4. Stewardship and engagement are the keys to addressing this problem and creating a major donor "pipeline."
5. The most significant barrier to progress is the need for a culture change at IWU, to develop and promote a culture of stewardship.
6. This situation has probably existed for at least 40 years, possibly longer, and no one person is to blame for it.
7. Change this fundamental in nature will not happen overnight, and a great deal of work will be required.
8. However, improvement is quite possible — ***in fact, it is highly likely*** — if the program outlined in this strategic plan is executed.

This strategic plan looks ten years into the future, recognizing the sustained effort over time that is going to be required for an effective solution to IWU's participation problem. However, functionally, this plan is actually ***two consecutive five-year plans***, with the second five years premised on a fundamental overhaul of the plan — based upon actual results — at the end of the first five years. Some incremental gains may be apparent rather quickly, with consistent improvement, but the real gains will be seen in ten years, when comparing the Wesleyan Fund in 2022 to the Wesleyan Fund of today.

Continual measurement, adjustments to the plan when indicated by results, and patience — especially patience — will be the keys to this plan's success.

This strategic plan lays out a success-oriented strategy to deal with something that everyone agrees must change. The result will be a stronger IWU, with more donors giving more dollars in support of IWU's mission.

IWU's Alumni Participation Rate Is in Crisis

Illinois Wesleyan University's annual fund participation rate has collapsed over the last eight years.

2011 Annual Fund Participation Rates at IWU's Peer / Aspirant Institutions

Rank	Institution Name	Rate
1	Carleton College	46.2 %
2	Kenyon College	35.1 %
3	Macalester College	33.7 %
4	Augustana College	31.9 %
5	Rhodes College	30.8 %
6	DePauw University	30.3 %
7	Knox College	30.3 %
8	Franklin & Marshall	27.3 %
9	Lawrence University	29.6 %
10	St. Olaf College	24.1 %
11	College of Wooster	23.7 %
12	Denison University	20.5 %
13	Illinois Wesleyan	18.6 %

SOURCE: Council for Aid to Education, Voluntary Support of Education Program, FY2011.

IWU's participation rate in FY2004 was 30.0 %. The FY2011 rate of 18.6 % represents a decline in participation of nearly two-fifths in just eight years.

**In real terms, this decline represents 1,717 alumni who
donated in 2004 but who did not give last year.**

Nationally, Illinois Wesleyan University's annual fund participation rate is in the bottom half of all private universities¹. And among the 13 liberal arts colleges in IWU's peer / aspirant group, Illinois Wesleyan ranks dead last.

It is not the purpose of this strategic plan to engage in either hand-wringing or recriminations over the present state of affairs. However, in order to fully appreciate the extent of the problem, and to point the way toward a solution, it is useful first to consider some additional data that will help to put the situation in its proper context.

The source of the statistics cited in this strategic plan, unless otherwise noted, is the Council for Aid to Education, Voluntary Support of Education Program survey data, provided by IWU's Office of Institutional Research, Planning and Evaluation. Dollar values are not adjusted for inflation.

¹ Target Analytics, "2010 Index of Higher Education Fundraising Performance," April 2011. The median participation rate for all private colleges and universities in the United States in FY2010 was 20%.

IWU's Participation Problem in Context

Looking at IWU and its 12 peer / aspirant schools over the last eight years, every school's general trend in participation was downward — except for Knox and DePauw, which both bucked the trend and went up by a modest +3.1 % and +6.3 %, respectively.

The average decline in donors for all 13 schools from FY2004 to FY2011 was -17.5 %. ***IWU's decline is more than double that average at -38.0 %.***

IWU started near the bottom of the pack in FY2004 and finished at the very bottom in FY2011. Denison started low and finished low (-20.5 %), as did the College of Wooster (-8.8 %), though Wooster's giving rate was generally steady over the last eight years with a consistently high average gift.

St. Olaf (-31.7 %), Lawrence (-28.7 %), and Rhodes (-28.7 %) are the three schools most similarly situated with IWU, with declines of slightly less than a third in the giving rate; however, the average gifts at these schools range from 30% to 80% higher than IWU's.

As expected, FY2009 was a difficult year for almost everyone, with participation down in the wake of the global financial crisis in the fall of 2008. Ten of the 13 schools experienced a drop in participation that year.

Of these ten, by FY2011, only two — Augustana and the College of Wooster — saw their participation rates return to FY2008 levels or better. The other 11 schools still have, on average, -12.1 % lower participation rates in FY2011 compared to FY2008. IWU is down -14.3% from FY2008 to FY2011.

However, roughly two-thirds of IWU's recent decline in participation happened prior to FY2009, so the economy does not appear to be the principal source of IWU's current participation problem.

Regardless of external factors, when compared with its peer / aspirant group, there is a great deal of room for improvement in IWU's participation rate.

IWU Alumni Giving and the Economy

Paradoxically, FY2009 was IWU's best year of the period studied in terms of gross revenue attributed to alumni giving².

IWU Total Gifts from Alumni: FY2004–FY2011

<u>FY</u>	<u>Alumni Gifts</u>	<u>PY Change</u>
2004	\$ 2,319,743	+49.1 %
2005	\$ 2,606,758	+12.4 %
2006	\$ 2,036,495	-21.9 %
2007	\$ 4,781,087	+134.8 %
2008	\$ 2,243,880	-53.1 %
2009	\$ 5,129,293	+128.6 %
2010	\$ 2,492,329	-51.4 %
2011	\$ 3,314,261	+33.0 %

SOURCE: Council for Aid to Education, Voluntary Support of Education Program, FY2003 through FY2011. NOTE: The "PY Change" column shows the percentage change over the prior fiscal year.

The worst of the recent financial downturn, starting in the second half of 2008, was roughly concurrent with FY2009. That year, unsurprisingly, only two other peer institutions (Augustana and Kenyon) saw an increase over the prior year — as IWU did — in gross revenue from alumni.

However, while it is true that IWU's gross revenue for FY2011 does represent a +47.7 % increase over FY2008, the last fiscal year before the economy soured, IWU's FY2011 revenue also represents a -35.3 % **decrease** from FY2009, the year of the crash itself. Lawrence is the only other peer school like IWU with a decrease in total revenue from FY2009 to FY2011, when all ten of the other schools saw an increase.

Again, it must be emphasized that problems with Wesleyan Fund performance in recent years cannot be blamed solely on the economy.

It is also important to keep in mind that a \$125,000,000 capital campaign has been underway at IWU for the last several years. The inclusion of multi-year pledges in

² IWU accounts for all unrestricted giving as "annual fund" giving, even if it comes from sources other than alumni making gifts of less than \$10,000 in response to an annual fund campaign — for example, the yearly \$1,000,000 unrestricted gift from State Farm is included in the Wesleyan Fund totals. It also includes bequests and multi-year pledges made in connection with the "Transforming Lives" capital campaign. The \$5,129,293 reported by the Council for Aid to Education as "alumni giving" to IWU for FY2009 includes revenue from these other sources. Evidently, no record exists of IWU annual fund giving accounted for separately from all other unrestricted giving, but it is estimated that alumni giving in the "annual fund" range (\$0.01 – \$9,999.99) was likely no more than \$1,500,000 that year. However, the larger figure is being used for the analysis in this section since it is the only "apples-to-apples" comparison with peer / aspirant schools that can be made using the available data. The issue of accounting for all unrestricted gifts as annual fund gifts will be addressed separately in a later section.

the alumni giving totals each year undoubtedly had a significant effect on the large differences in year-over-year total giving. The percentage changes were quite volatile.

For this reason, perhaps a more useful way of examining this question may be average gift (or “revenue per donor”), since it takes into account both the total amount of gross revenue **and** the total number of donors for each year. In such an analysis, if it were possible to separate annual fund gifts from other unrestricted gifts, the average gift would actually be **lower**, which simply illustrates this same point in even starker terms.

The general trend in average gift for the same 13 schools during the same eight-year period is upward. Only two of the ten schools, Kenyon and DePauw, experienced (gentle) downward trends in average gift, and Lawrence’s trend was essentially flat.

The average increase in average gift for all 13 schools from FY2004 through FY2011 was +30.2 %.

IWU’s average gift in the same period increased +51.5 % — it more than doubled — from \$ 414.76 to \$ 855.07.

However, IWU’s FY2011 figure was still -25.8 % lower than the 8-year mean of the average gifts for all 13 schools, which was \$ 1,151.90.

8-Year Mean of Alumni Average Gifts at IWU’s Peer / Aspirant Institutions: FY2004–FY2011

Rank	Institution Name	Average Gift
1	Kenyon College	\$ 2,204.85
2	DePauw University	\$ 1,521.06
3	Knox College	\$ 1,436.00
4	College of Wooster	\$ 1,316.38
5	Lawrence University	\$ 1,292.21
6	Augustana College	\$ 1,235.68
7	Denison University	\$ 981.94
8	Carleton College	\$ 928.07
9	St. Olaf College	\$ 911.94
10	Macalester College	\$ 881.02
11	Franklin & Marshall	\$ 872.63
12	Illinois Wesleyan	\$ 713.16
13	Rhodes College	\$ 679.79

SOURCE: Council for Aid to Education, Voluntary Support of Education Program, FY2004 through FY2011.

Revenue per donor is another aspect of alumni giving where IWU lags significantly behind its peer / aspirant group.

Why Increased Participation Is Important to IWU

While it may be true that IWU has been raising more money from fewer donors recently, a **“donors down, but dollars up”** mantra cannot be used to justify the declining annual fund participation rate.

**“Dollars up” is simply unsustainable over time
if “donors down” continues as a trend.**

IWU’s participation rate is also important for several other reasons.

First, an effective annual fund systematically builds the loyalty of future major gift prospects by keeping them connected as donors to the university.

It is unrealistic to expect a newly-minted alumnus to make a major gift (\$10,000+) to IWU immediately following graduation. It is equally unrealistic to expect an alumnus who has never given anything to IWU to suddenly make a major gift 25 years after graduation. Of course, both scenarios are possible, but both are extremely unlikely — and are certainly too rare to account for a significant source of regular funding for IWU.

However, with a careful and systematic program of cultivation over a long period of time, an effective annual fund can address both of those problems. First, by starting early — as soon as a student is accepted would be ideal — the Wesleyan Fund can be prepared to successfully solicit the largest practical percentage of newly-minted alumni to give a first gift of \$10 or \$25 immediately upon graduation. Second, the Wesleyan Fund can keep that new donor giving annually over time, to prevent an alumnus from becoming a 25-year “never donor” in the first place.

Simultaneously, the Wesleyan Fund can encourage alumni to slowly upgrade by increasing the amounts of their gifts over time, until they are prepared to become major donors as part of a gradual and natural progression.

So, an effective annual fund not only creates and maintains a larger pool of prospective yearly donors of amounts less than \$10,000, but it also cultivates a larger pool of potential \$10,000+ major donors in the future.

In fact, an effective Wesleyan Fund can help change the way that major gifts are solicited. Past giving behavior is a much more reliable predictor of future giving behavior than any “wealth indicator.” The importance of trying to identify wealthy alumni who are capable of making major gifts, but whose long-term giving history is sporadic (or non-existent), will diminish. Instead, there will be a growing pool of alumni who have given nearly every year since graduation, in gradually increasing amounts, a few of whom will have been making \$5,000 gifts annually for several years before being asked for \$10,000 or more. The Wesleyan Fund can and should be such a “pipeline.”

Second, the annual fund participation rate is widely viewed as a measure of alumni satisfaction with IWU, and it is widely used to rank IWU with other institutions. While IWU does not “chase” rankings, there is no harm in working to improve this metric for other reasons while seeing IWU’s ranking increase as a byproduct.

Third, there can be a powerful symbiotic relationship between the Wesleyan Fund and the volunteer alumni association. Just as volunteers are better prospects to become donors, donors are better prospects to become volunteers. If the two efforts work in tandem to emphasize both the importance of annual giving and the need for alumni to continue their involvement in the campus community, both efforts can help each other thrive. Stories of alumni volunteers mentoring undergraduates make a powerful annual fund appeal, which in turn helps spread more widely the news about what the alumni association is doing, and even promote opportunities for alumni to get involved. These programs can reinforce each other in a powerful way.

If one accepts the proposition that IWU’s undergraduates benefit from increased alumni involvement in the campus community, then the annual fund participation rate is important because of the salutary effect it will have on the recruitment of alumni volunteers.

In summary, driving up IWU’s participation rate is one of the most important goals of this strategic plan. And while there are several other critical objectives, all of them point toward increased participation as both a means and an end.

By teaching both undergraduates and alumni about their roles as stewards of IWU — and by offering alumni more opportunities for meaningful engagement with IWU — and by more effective use and integration of the communications channels available to reach alumni — this strategic plan is intended to create a “virtuous cycle” to drive up IWU’s participation rate over a ten-year period, increasing total annual fund revenue in the process.

If IWU can increase its participation rate while simultaneously increasing average gift, IWU has an opportunity to significantly increase the total revenue generated by the Wesleyan Fund. This can be accomplished through more effective retention and upgrading of existing donors, while more effectively acquiring and retaining new donors. And the key to that will be teaching stewardship and emphasizing alumni engagement.

In short, that is the aim of this strategic plan.

STRATEGY

There are five key strategic elements to this plan. Their effect is cumulative, so each one builds upon the foundation laid by the ones before it. They are:

- 1. Steward**
- 2. Engage**
- 3. Acquire**
- 4. Retain**
- 5. Upgrade**

Steward

A steward is a person with responsibility for taking care of something that belongs to someone else. In terms of IWU, however, the concept of stewardship must involve something that belongs not to someone else, but to all of us: the University, itself. This plan envisions developing and inculcating a culture of stewardship by teaching it as a tradition to current and future undergraduates, and by helping alumni share with each other their stories about their own personal stewardship connections with IWU³. We want to help alumni view IWU as a “cause” that is personally important to them, one that they want to support with intentional and regular donations.

Engage

A successful program of engagement will offer alumni numerous opportunities in multiple channels to stay connected with IWU. This must start well before graduation, as newly minted alumni are welcomed into the Alumni Association. In fact, the first five to ten years after graduation are the most critical⁴. In that period, the goal is to avoid “losing” alumni, thus requiring greater resources (or simply good luck) to get them re-engaged — when they could simply have been kept engaged in the first place.

³ Stewardship is the foundation of this strategic plan, but IWU is mostly starting from scratch, with very few traditions of alumni stewardship still in place. Some “traditions” will have to be instituted now and nurtured over the entire ten-year period that is covered by this strategic plan. For a more detailed treatment of the subject, please refer to Appendix A, “The Best Way to Start a Riot Is to Incite One: Creating a Culture of Stewardship at Illinois Wesleyan University,” by Scott Huch ’86.

⁴ While it is only one example of the engagement tools that will be deployed in this strategic plan, Class Reunion Campaigns are notable, mainly because this tool is presently underutilized at IWU. At a minimum, there must be an intense focus on the classes of 2016 through 2025, to develop a tradition of vibrant class reunions that assumes, encourages, and supports more involvement by alumni in the planning and execution, and that includes a giving component. This topic is discussed in Appendix B, “The Case for Class Reunion Campaigns at Illinois Wesleyan University,” by Josh Butts ’01.

Engagement involves a two-way conversation that continues over a long period of time, one that keeps alumni interested in — and concerned about — IWU and its mission.

Acquire

Acquisition: This fundraising term of art simply means getting a first gift from an alumnus. Ideally this, too, will happen before graduation. “Never” donors are unlikely to be a profitable acquisition source compared to recent graduates, and the longer the time after one’s graduation, the less likely a gift is from a “never” donor. The strategy is to prevent “never” donors by acquiring alumni donors “at birth”; that is to say, immediately upon graduation.

Retain

Great resources must be directed toward every donor from the prior year to ensure that a repeat gift is made for the current year. The more years a person has donated, the more of an effort is justified to solicit a current year gift to avoid allowing alumni to lapse as donors — when the cycle is broken and the donor must be re-engaged and re-acquired.

Upgrade

Over time, alumni must be carefully but systematically cultivated to make larger gifts. Many alumni will be loyal annual fund donors (no gift greater than \$10,000) all of their lives. However, with the proper care and attention, the annual fund can (and should) be a robust “feeder mechanism” that is constantly developing alumni from \$5 donors, to \$50 donors, to \$500, to \$5,000, so that by the time the major gift officers are ready to step in to ask for a \$10,000+ gift, the donor is already very well primed and in the “habit” of giving to IWU.

The Inter-Relational Nature of These Five Activities

While it is true that the five strategic elements of this plan are foundational and each one builds in some way upon the others before it, it would be mistaken to conclude that an annual fund donor would be engaged with each element in strict order and only one at a time.

A donor’s actual experience, prior to acquisition, would likely start with learning IWU’s traditions of stewardship (much of which is yet to be developed) and becoming engaged with alumni programming.

Once a donor is acquired, efforts to retain and upgrade donors will be continual. However, it will be necessary to constantly remind even the most loyal and consistent of donors about IWU’s culture of stewardship, and to constantly engage them through a variety of programs and communications channels.

If the five strategic elements of this plan are properly executed, there will be five basic steps to acquiring a lifetime IWU donor:

1. Every single IWU alumnus starts as a **suspect** as soon as he or she has accepted an offer of admission.
2. The next challenge is to teach stewardship to undergraduates while sustaining a closely coordinated effort — mainly through the Office of Alumni Relations and the Alumni Association Executive Board — to get alumni suspects to raise a hand and show some interest in engaging in IWU-related activities, converting a suspect into a **prospect**.
3. The job of the Wesleyan Fund is to turn the prospect into a **donor** by acquiring him through a carefully planned series of appealing offers made in multiple channels.
4. Then keep the donor so delighted with his experience that he is retained as a **multi-donor** (donates to IWU every year and would never think of missing a year).
5. Final step: Turn the multi-donor into an **advocate**, who tells every other alumnus he knows how wonderful it is to be engaged with IWU as an annual fund donor, thus “closing the loop” by reinforcing the on-going stewardship and engagement efforts aimed at new potential donors.

All parts of the tactical plan will be aimed at creating and sustaining a donor experience that largely unfolds as just described⁵.

⁵ Apart from the Wesleyan Fund team, there are several departments at IWU whose work involves interacting with alumni, including Advancement (major gifts), Alumni Relations, and University Communications; as well as the volunteer Alumni Association and others. It is important that both messaging and outreach activities are coordinated and managed in an integrated way. Integration contributes materially to both effectiveness — that is, delivering better outcomes — and efficiency, which is important in an environment where expenses must be carefully managed. Appendix C, “Strategic Approach: Integration for Efficiency and Effectiveness,” by Kathy Lewton ’70, provides background on the value of integration and details on how it can be executed at IWU.

Key Benchmarks

This strategic plan is intended to go into effect starting in Fiscal Year 2013 (August 1, 2012). This plan looks out ten years into the future, and envisions several outcomes by the end of Fiscal Year 2022 (July 31, 2022).

While evaluation of results will be conducted on a continual basis throughout each year and over the life of this strategic plan, there are several intermediate time horizons built into this plan:

- First year — End of FY2013
- Years 2 and 3 — Throughout FY2014 & FY2015
- Year 5 — Throughout FY2017
- Year 10 — Throughout FY2022

FIRST YEAR: By the end of FY2013, every single element of the annual fund program will have been critically examined and discontinued if it cannot be justified by results. No program will be continued simply because “that’s how it’s always been done.” Only activities that point directly to at least one of the five strategic elements of this plan will be executed. Emphasis on ROI (“return on investment”) will be critical. There are no sacred cows. It is expected that there will be a considerable amount of “learning by doing” during the first year, because the tactical section of this plan includes many tools that will be new to IWU’s annual fund program, or that have been un-used or little used in recent years. All of these new tools are being drawn from “best practice” efforts at similarly situated institutions, so none of them are truly “new” — just new to IWU. Put very simply, IWU is going to copy more of what’s working now at our peer / aspirant schools. This plan envisions no reinvention of any wheels.

YEARS 2 & 3: Throughout FY2014 & FY2015, adjustments will be made to this plan to “fine tune” expectations based upon actual results in the first and second years.

YEAR 5: During FY2017, a thorough evaluation of the entire strategic plan will be conducted. Ideally, this will involve key alumni volunteers, in a manner similar to the current process that resulted in this plan. Every element of this strategic plan will be “on the chopping block” — again, no sacred cows. Anything that is not working as expected, and that was unable to be appropriately adjusted in the previous five years, will be eliminated and replaced, if necessary, with something else that is reasonably believed to be more likely to yield the desired result. In fact, while this plan is written to cover the period 2013 – 2022, it can effectively be viewed as two consecutive five-year plans because of the extensive nature of the review and revision process that is expected during the plan’s fifth year.

YEAR 10: During the entire tenth year of this plan, FY2022, a review and evaluation process like the current one, and the one to be employed in this plan’s fifth year, will be undertaken for the purpose of completely taking apart the annual fund

program, evaluating what is working, examining what is not working, seeking alternatives and new tools, and then creating another ten-year strategic plan from scratch. The focus at that point will be mainly on this plan's long-term goals, since the short-term goals should already have been thoroughly evaluated and tactics adjusted. If the current plan yields the desired results, then it will not be possible simply to copy-and-paste a new set of dates onto this plan and call it a "new" plan. If the desired results of this plan are achieved, IWU's annual fund program in FY2022 will bear little resemblance to the program today. A completely new strategic plan will be needed to take advantage of the increased capacity that will be created under this plan.

A final note about the evaluation of results: The success of this plan relies upon changing certain things about the way progress is measured in connection with the annual fund program. The goal for FY2013 is a 20.1% participation rate. While important, it will not be good enough to know, week over week, that progress is being made toward the 20.1% goal. Instead, each week, another key question will be: Were 20.1 % of this week's attempts successfully closed? Engagement with alumni and participation by alumni donors in the annual fund is not something that should be scrambled toward as a deadline looms at the end of each fiscal year. A continual effort, week over week, to be in regular contact with alumni — and to successfully close annual fund donations from them — is critical.

What Will Be Measured?

In addition to specific annual goals for participation rates, average gift, and gross revenue, the following key metrics should also be tracked.

Total Amount of Alumni Annual Fund Donations (Gross Revenue)

The aggregate amount of all unrestricted \$0.01 – \$9,999.99 donations from alumni and friends in each fiscal year. (For more detail, refer to the following section: “The Definition of a ‘Wesleyan Fund Gift.’”

Total Number of Alumni Annual Fund Donors

Each individual donor is counted only once for all \$0.01 – \$9,999.99 donations in each fiscal year.

Average Gift (Donation) Amount – All Annual Fund Donors

Annual fund gross revenue divided by the total number of alumni annual fund donors in each fiscal year.

Participation Rate

The number of alumni annual fund donors divided by the total number of individuals in the solicitation base, expressed as a percentage, in each fiscal year. This figure should be calculated and tracked on an on-going basis throughout the year, and a final figure should be calculated at the conclusion of each fiscal year and recorded to track progress over time.

Average Gift (Donation) Amount – First-Time Donors

Looking only at donors whose original (first) gift is in the current fiscal year, the total amount of all donations from these individuals divided by the total number of such donors, expressed as a dollar value. This figure can be calculated and tracked on an on-going basis during the year. A final figure should be calculated at the conclusion of each fiscal year and recorded to track progress over time.

Average Gift (Donation) Amount – Retained Donors

Looking only at donors who made a gift in both the current fiscal year **and** the last fiscal year, this figure is the total amount of all current year donations from these individuals divided by the total number of such donors, expressed as a dollar value. This figure can be calculated and tracked on an on-going basis throughout the year, but a final figure should be calculated at the conclusion of each fiscal year and recorded to track progress over time.

Donor Retention Rate

The number of donors who made a gift in the last fiscal year **and** who also make a gift in the current fiscal year, divided by the number of donors from the last year, expressed as a percentage. This figure can be calculated and tracked on an on-going basis throughout the year, but a final figure should be calculated at the conclusion of each fiscal year and recorded to track progress over time.

First-Time Donor Retention Rate

Looking only at donors whose original (first) gift was in the last fiscal year **and** who also make a gift in the current fiscal year, this figure is the total number of such donors in the current fiscal year divided by the total number of donors whose original gift was in the last fiscal year, expressed as a percentage. This figure can be calculated and tracked on an on-going basis throughout the year, but a final figure should be calculated at the conclusion of each fiscal year and recorded to track progress over time. ***Significant growth in this particular metric each year will be a critical indicator of this plan’s effectiveness.***

Multi-Year Donor Retention Rate

Looking only at donors whose original (first) gift was **not** in the current or last fiscal year, **but** who also made at least one gift in each of the current year **and** the last fiscal year, this figure is the total number of such donors in the current year divided by the total number of such donors in the last year, expressed as a percentage. This figure can be calculated and tracked on an on-going basis throughout the year, but a final figure should be calculated at the conclusion of each fiscal year and recorded to track progress over time. **This metric is also a critical indicator of this plan's effectiveness.**

Donor Reactivation Rate

The total number of donors who made a gift in any prior year **except** the last fiscal year (expired donors) **and** who also make a gift in the current fiscal year, divided by the total number of expired donors at the start of each fiscal year, expressed as a percentage.

Donor Acquisition Rate

The total number of donors who make a gift in the current fiscal year **but** have never made a gift in any prior fiscal year, divided by the total number of alumni who have never made a gift ("never donors" or non-donors), expressed as a percentage.

Graduating Donor Acquisition Rate

The total number of donors who make a gift in the current fiscal year **and** whose graduation year is in the current fiscal year, divided by the total number in that year's class of graduating seniors, expressed as a percentage. This figure (and the previous one) may disregard prior donation activity as an undergraduate, since gifts from undergraduates will be actively solicited under this plan. The main focus here is on gifts made in the first year of being an "official" alumnus rather than on retention.

Total Revenue from Retained Donors

Looking only at donors who made a gift in the last fiscal year **and** who make a gift in the current fiscal year, this figure is the total amount of all such donations in the current fiscal year, expressed as a dollar value. This should be calculated at the end of each fiscal year and recorded to track progress over time. **This will help measure the effectiveness of the upgrading strategy and tactics set forth in this plan.**

Total Revenue from Reactivated Donors

Looking only at donors who made a gift in any prior year **except** the last fiscal year **and** who make a gift in the current fiscal year, this figure is the total amount of all donations in the current fiscal year from these donors, expressed as a dollar value.

Revenue Retention Rate

Looking at the total amount of donations from the last fiscal year, take the total amount of donations from the same donors in the **current** fiscal year and divide it by the total amount of donations from the last fiscal year, then express it as a percentage. **This metric is another critical indicator of this plan's effectiveness.**

As work progresses under this strategic plan, it may be necessary to modify this list. As repeatedly noted throughout this plan, the process of evaluating results and refining this plan will be continual, and will be especially intensive during the plan's first three years.

In fact, tracking progress is so essential to the success of this plan that currently updated data and frequent reports will be an absolute necessity — at least monthly, and weekly if at all possible. It would be especially helpful to select certain key metrics from this list and use them to create a one-page “dashboard” to track progress in real time, which could be distributed to key staff as part of a regular reporting process.

Eventually, it would be helpful to track annual fund expenses against revenue, to examine whether improvements to return-on-investment (ROI) may be made.

Additionally, it would be helpful to update the nomenclature used to refer to annual fund donors, in order to bring it into closer alignment with best practices in professional fundraising. The “PYBUNT / LYBUNT” model gives a false sense of comfort that does not adequately stress the importance of new donor acquisition and the need for greater efforts to prevent current donors from expiring. Four main categories of annual fund participants will be used, and their importance to the program’s success should be in the priority shown here:

1. Current
2. Lapsed
3. Expired
4. Non-Donor⁶

Current. Current donors have made at least one \$0.01+ donation in the current fiscal year. Rather than ceasing communications with current donors until next year, a sustained effort is needed to continually remind these donors of all the good work that is being done with their gift, and to prime them to make another gift in the next fiscal year.

Lapsed. Lapsed donors are an extremely high priority. Since they made a gift in the last fiscal year, they are the second best prospects for another gift in the current fiscal year. (These have been called “LYBUNTS.”) The only better prospect is a current donor. There must be a focused effort to convert all lapsed donors into current ones.

Expired. Expired donors did not give in the current or last year, but have made at least one gift in a previous year. (“PYBUNTS.”) The objective is reactivation.

Non-Donor. Non-donors have never made a gift to IWU.

With both expires and non-donors, a recency / frequency / monetary value model should be used to prioritize reactivation and acquisition efforts.

⁶ The only exception to this order of priority will be non-donors who are also current undergraduates, and, in particular, each year’s class of graduating seniors, who may be viewed as an even higher priority than current donors, given how important it is to obtain a first gift using the “acquisition-at-birth” model. IWU will never again, at any time during the lives of these future alumni, have such a cost-effective opportunity to target them with a sustained campaign of on-campus messaging intended to elicit a first gift that the donor understands in the context of a lifelong culture of stewardship toward IWU.

The Definition of “Wesleyan Fund Gift”

As noted in an earlier section, IWU accounts for all unrestricted gifts as alumni annual fund gifts — even if the source of the donation is not an individual or an alumnus — and this includes uncollected multi-year pledges.

This is not intended to minimize the importance of unrestricted giving or multi-year pledges, but in order to determine whether this strategic plan has achieved its intended result, it will be necessary to begin measuring and assessing unrestricted giving in a different manner.

First, there must be a more precise definition of “Wesleyan Fund Gift”:

In addition to being **unrestricted** and **repeatable**, a Wesleyan Fund Gift must also be from an **individual** who is an **IWU alumnus or friend**⁷ donating in response to the **Wesleyan Fund campaign**, in an amount **less than \$10,000** and received in the **current year**.

Some of these gifts will be obvious, such as donations generated by the Titan Talkers outbound telemarketing program or received in response to Wesleyan Fund mailings throughout the year. Some discussion will be necessary to identify other revenue that may qualify (for example, corporate matching funds associated with a Wesleyan Fund Gift); however, most unrestricted donations of less than \$10,000 from individual alumni will count.

Second, it will be necessary to track “Wesleyan Fund giving” separately from “all unrestricted giving.” When “all unrestricted giving” is reported, it will always include all Wesleyan Fund giving as it does now, but not *vice versa*.

This is absolutely critical in order to accurately measure growth in total alumni giving over time, as well as to measure growth in average gift.

Initially, total Wesleyan Fund revenue will probably appear to decrease, since the figure reported as Wesleyan Fund revenue has averaged a little more than \$3,000,000 over the last eight years, even though actual alumni giving to the Wesleyan Fund is estimated to be about half that amount each year, \$1,500,000.

Fortunately, there appears to be great potential for speedy improvement — with total revenue increasing at a rapid annual rate — if this strategic plan is executed and the intended results are achieved.

⁷ The definition of “friend” would continue to broadly include members of the University community who have traditionally been participants in IWU annual fund campaigns. This encompasses, among others, individual donors who are not alumni (*i.e.*, “Friends”), parents, Associates (*i.e.*, local businesses that donate \$250+ annually), and faculty and staff.

PARTICIPATION AND REVENUE GOALS BY FISCAL YEAR

<u>Fiscal Year</u>	<u>Participation Rate</u>	<u>Percentage Change*</u>	<u>Average Gift</u>	<u>Percentage Change*</u>	<u>Gross Revenue⁸</u>	<u>Percentage Change*</u>
2013	20.1 % ⁹	+8.06 %	\$ 749	+5.00 %	\$2,656,544	-19.85 %
2014	20.7 %	+3.00 %	\$ 786	+5.00 %	\$2,897,469	+ 9.07 %
2015	21.3 %	+3.00 %	\$ 826	+5.00 %	\$3,160,020	+ 9.06 %
2016	22.0 %	+3.00 %	\$ 867	+5.00 %	\$3,446,121	+ 9.05 %
2017	22.6 %	+3.00 %	\$ 910	+5.00 %	\$3,757,866	+ 9.05 %
2018	23.6 %	+4.35 %	\$ 956	+5.00 %	\$4,151,242	+10.47 %
2019	24.6 %	+4.35 %	\$ 1,003	+5.00 %	\$4,585,491	+10.46 %
2020	25.7 %	+4.35 %	\$ 1,054	+5.00 %	\$5,064,835	+10.45 %
2021	26.8 %	+4.35 %	\$ 1,106	+5.00 %	\$5,593,927	+10.45 %
2022	28.0 %	+4.35 %	\$ 1,162 ¹⁰	+5.00 %	\$6,177,899	+10.44 %

* Each "Percentage Change" figure for FY2013 is based on the most recent year for which statistics are available, FY2011. The final FY2012 figures were not yet known at the time this strategic plan was created in June 2012. Once that data is available, it will be necessary to revise this chart accordingly.

It is important to reiterate that the figures in this table will be adjusted periodically to conform with actual results. Evaluation of this plan's performance will be continual.

⁸ Gross Revenue is calculated using an estimated solicitation base of 17,500 for FY2012. After that, a net increase of 150 each year is assumed for these projections. When more accurate data is available, a more accurate attrition rate will be calculated and these figures will be revised. The Gross Revenue for FY2013 is down -19.85% from \$3,314,261 for FY2011, but the FY2011 figure includes at least \$1,000,000 in unrestricted giving that will not be counted as Wesleyan Fund giving moving forward. After FY2013, Gross Revenue is projected to grow by roughly 10% annually and surpass the FY2011 level in FY2016, the fourth year of this strategic plan.

⁹ The 20.1% goal for the FY2013 participation rate is intended to put IWU back into the top half of the national field. As previously noted, the median participation rate for all private colleges and universities in the United States in FY2010 was 20%. This is a symbolic starting point for the first year of this plan.

¹⁰ The projected FY2022 average gift is also symbolic. The mean of the average gifts at IWU's peer / aspirant institutions during the eight-year period from FY2004 through FY2011 was \$1,151.90. This goal for average gift would put IWU into "above average" territory.

TACTICAL PLAN

A variety of tactics will be employed to execute this strategic plan. All of them will be focused on one or more of the five main strategic objectives, with emphasis on tactics that can effectively address multiple strategies.

In order to successfully achieve a number of these objectives, there will be a need for collaboration and integration with other University departments, such as University Communications, Alumni Relations, and Admissions.

Tactics identified with an asterisk () are currently in practice.*

STEWARD

What is the objective?

A culture of stewardship is to be developed within and among IWU's campus community and its constituents. Ultimately, alumni must view the University as worthy of financial support, and they must want to give their own support regularly and in increasing amounts over time.

How will it be achieved?

An understanding and appreciation of the role of private support for the University will be inculcated over time as students learn IWU's traditions of stewardship, starting when a student contracts to enroll at IWU.

Prospective/new students

1. At the time of his acceptance, any student receiving merit or need-based gift assistance should be informed of the source of his grant money; he must know alumni donors help to subsidize his education at IWU
 - Admissions should include a donor profile in the acceptance packet of every scholarship and/or IWU grant recipient*
 - Language should be added to the paperwork in students' financial aid packages that identifies alumni donors as a source of the gift assistance included in the package
2. During orientation, new students should hear from a member of the Wesleyan Fund team and/or a member of the Alumni Association Executive Board (AAEB) about the impact of alumni and alumni donors on the life of IWU and its students

- The director of the Wesleyan Fund could give this presentation to new students on the first night of orientation, which in recent years has been reserved for traditions and school spirit*
 - A local member of the AAEB could give this presentation that night or could be worked into the daytime programming of orientation
3. During orientation, each new student should be required to write a note of thanks to an alumni donor during a scheduled 15-minute session
- This could come on the heels of the presentation given by the AAEB member referenced above

Current students

1. Recipients of named scholarships should be notified of the source of their gift assistance and should be required to write a note of thanks to their benefactor(s) —and attend the Benefactor Dinner or similar event where their benefactor(s) will be present
 - A letter to this effect from the director of the Wesleyan Fund should be enclosed with aid packages*
2. Recipients of named scholarships should receive notification on their financial aid proposals that by accepting their scholarship they agree to write a thank you note to their benefactor and attend the appropriate stewardship event(s)
 - Scott Seibring would need to agree to include this information
3. Educational/promotional material about the impact of alumni support should be visible in academic buildings and common areas of campus, as well as in campus publications and communications (*Argus*, Facebook class pages, etc.)
 - The Ames Library has display cases in prominent locations throughout the building; anyone can provide material for the cases if approved by the librarian; this material rotates quarterly*
 - A member of the *Argus* staff could write a regular article profiling alumni of note, listing upcoming alumni events and/or highlighting significant dates in IWU's history; NOTE: Jeff has requested a recurring space for just this type of promotion in the past and was told he could not write for the *Argus* —it must be done by a student
 - A student worker in Advancement could be dedicated to this, potentially
 - A Letter to the Editor from an alumnus could be another way to get this information in the *Argus*, potentially
4. An “alumni” banner should hang in the Hansen Student Center alongside the class banners to remind students of their future role as IWU graduates; this banner could be used at events such as a welcome during new student orientation, class dinners and as part of Commencement ceremonies

5. A physical space for alumni paraphernalia and success stories should be created on campus to inform/remind students of those who have come before them
6. A Tuition Freedom Day program should be developed to remind students annually of alumni donors who are subsidizing their educational experience—and to better illustrate how the University operates financially
 - Posters could be displayed all over campus that describe what IWU might be like if it operated solely on tuition revenue
 - Students could be given vouchers for a free drink at Hattie's or Starbucks if they would sit and write a thank you note to an alumni donor
7. The Inner Circle program should be extended so that members would meet multiple times over the course of their last semester on campus
 - The scope of the program should be broadened to better educate student leaders about how IWU operates—including challenges and successes of Admissions, Financial Aid, Advancement and the Hart Career Center
 - Members should be asked to pledge their support of the Alumni Association and the Wesleyan Fund, agreeing to become both alumni volunteers and regular donors
 - A local member of the AAEB, or possibly the president of the AAEB, should address the members at some point to welcome them to the Alumni Association
8. The class gift programs should strongly emphasize the importance of annual giving and its impact on students—allowing for multi-year pledging as part of the senior year campaign*
 - A distinction should be made between the one-time funding of a tangible item given as the senior class gift and the expectation that, as alumni, these individuals give annually to the Wesleyan Fund*
 - A balance must be struck between IWU's desires to move away from tangible class gifts and the desires of the students to have something to show for their contributions
 - The senior brick campaign, allowing student donors to sponsor a brick in their name on campus, must be continued
 - A new space must be found for student donor bricks to continue this relatively new, but successful, tradition
9. The director of the Wesleyan Fund should address students at loan exit sessions prior to graduation—to, among other things, remind students of the gift assistance they have received (in relation to the loan indebtedness they have acquired) and from where and from whom that assistance has come*
10. A member of the Alumni Association Executive Board should address graduates at the Senior Class Dinner to welcome them into the ranks of alumni and to again underscore the importance of being a regular donor to the Wesleyan Fund*

Alumni

1. Alumni donors should be recognized at alumni events and praised for the positive impact they have on the institution; this recognition should be a regular part of every event and need not single out donors but rather hold up all Wesleyan Fund donors as models
2. Wesleyan Society donors should be recognized at every opportunity
 - They should be acknowledged with special ribbons for their name tags at events
 - They should have a page dedicated to them in every *IWU Magazine* issue
 - They should get special mention in the *Annual Report*
3. Each and every Alumni Association volunteer should be encouraged by the chair of his respective group to support the Wesleyan Fund
 - The Director of Alumni Relations and the president of the Alumni Association should publicly and regularly declare their commitment to achieving 100% participation in the Wesleyan Fund among alumni volunteers
4. Various spokespeople and/or authors should be used to convey Wesleyan Fund messaging, among them faculty and staff and notable alumni
 - Solicitation letters should come from non-Advancement members of the campus community when appropriate; this could include faculty/staff and/or the President*
 - *IWU Magazine* ads could feature faculty/staff/alumni addressing the need on campus and/or why they give back*
5. Homecoming and class reunions should be used to bring alumni closer to the institution and each other, to inspire alumni attendees to become more active with IWU and to instill a sense of pride in being associated with the University
 - These events should emphasize the quality of an IWU education, recall significant/fun moments in IWU's history and underscore the tradition of success of our students and graduates, including alumni standouts
 - An accomplished member of the faculty could be the keynote speaker for the Alumni Luncheon at Homecoming every year, describing his or her recent research and work with students and describing ways in which he or she has collaborated with alumni to enhance the program for students
 - Whether through posters and signs around campus or more direct means of communication, more should be done during Homecoming weekend to feature the incredible accomplishments of our graduates over time
 - IWU history and/or trivia should be woven into these events so alumni feel a part of a long tradition

- Attendees should be made aware of opportunities to volunteer for IWU
6. Additional channels must be utilized to communicate the Wesleyan Fund message, including social media and multimedia platforms
 - The Wesleyan Fund Facebook page needs to be well thought out and must be regularly updated and monitored for it to be effective
 - The Assistant Director of the Wesleyan Fund should be responsible for overseeing the Wesleyan Fund Facebook presence
 - An alumni volunteer, or a small team of alumni volunteers, with expertise in this area should be involved in the planning and execution of this social media plan (Jessica Shull, Patrick Palmer?)
 - This would allow Wesleyan Fund staff to focus on higher priorities that can more directly/quickly raise revenue
 - A concerted effort should go toward the generation of short videos that would educate alumni and could be spread virally
 - How the University operates financially; the role of the Wesleyan Fund in meeting the budget and supporting students
 - Student need and the growing gap in financial aid
 - Admissions' challenges in recruiting and retaining students
 - Giving Circles: what they are and how they can be created
 7. Efforts must be made to encourage and enhance opportunities for peer-to-peer solicitations; the Giving Circle program should be more widely promoted and should be given sufficient support so that no internal process holds up a volunteer's ability to solicit fellow alumni
 - Mailings should highlight the Giving Circle program and encourage the creation of new Circles*
 - A volunteer who is enthused and ready to solicit friends must not wait more than two days to have a blog post ready for use
 - This includes a giving page specific to the volunteer's Giving Circle so that the volunteer may start soliciting on IWU's behalf

Faculty/Staff

1. Faculty and staff must be willing to engage in the conversation about the importance of annual support
 - Faculty should mention in the classroom, at least at the start of each semester, the role of alumni support in providing the kinds of facilities/opportunities that are available at IWU
2. Faculty and staff should be informed about the role of the Wesleyan Fund during their orientation as new Illinois Wesleyan University employees

- There should be promotional material about the Wesleyan Fund included in every new hire's packet of information, and a member of Advancement, preferably the VP of Advancement, should speak as part of the orientation program
3. Every new hire should receive a payroll deduction form as part of the packet of materials handed out during orientation
 4. Faculty and staff should receive an annual update regarding the status of the Wesleyan Fund; this update should extend beyond the remarks made by the president of the University at faculty and staff meetings and should include information about the impact of the Wesleyan Fund's status on departmental budgets
 5. At least once a year at the all-staff meeting, as well as at the faculty meeting, the president of the University should remind University employees that every single contact an alumnus has with IWU can potentially affect the welfare of the institution. Any faculty or staff member who interacts with an alumnus influences that person's perception of, and feelings about, the University—and could very easily influence that person's likelihood to support IWU financially. In short, every University employee has a role in development, just as they do in the admissions process.
 6. Long term, a faculty/staff fundraising campaign should be reinstated

How will the results be measured?

This document should be reviewed monthly during Fiscal Year 2013 and then scrutinized again at the conclusion of Fiscal Year 2013 to determine which of the tactics listed above are being successfully implemented. Simply put, employing these tactics is success in the short run. In the longer term, there are a number of ways to evaluate this activity, including: retention of donors who receive a new student thank you, the percentage of returning student scholarship recipients who write thank you notes to their benefactors; giving rates among Inner Circle members compared to their classmates; retention of donors in the first year following graduation; giving percentages among graduates with loans compared to previous years; giving rates among alumni volunteers; giving rates among event attendees compared to previous years; traffic on social media platforms where we post videos and Wesleyan Fund-related content; and giving rates among faculty and staff compared to previous years.

What will be considered a success?

If we can put into practice 75% of the tactics outlined here within a year's time, our short term goal would have been met. Understandably, some of these initiatives will be of higher priority than others, but there are few obstacles to completing the great majority of this list in short order. Longer term, improvements in our retention and acquisition of donors affected by the above tactics will constitute success. Ten years from now, we should have realized no less than a 10% increase in donor retention and no less than a 50% increase in donor acquisition from Fiscal 2012 levels.

What if this does not work as planned?

Most of the tactics listed above are fundamentally sound from a traditional fundraising perspective, and most will be somewhat difficult to assess early on. These tactics should not be abandoned if results are not immediately realized. The impact of a culture of stewardship will be spread over a long period of time and will manifest itself in many ways. That said, if there is no detectable progress on the metrics mentioned above after five years, a reevaluation of these tactics would be necessary.

ENGAGE

What is the objective?

Illinois Wesleyan must make every effort to stay connected to alumni in various ways across multiple channels so that one's affinity for IWU does not end at graduation. Because habits are hard to break, young alumni must not be allowed to disengage with the University as they transition from undergraduates to alumni. The first 10 years following graduation are critical to establishing a strong alumni bond with IWU, and only if alumni feel connected to, and invested in, their alma mater will they be receptive to appeals for financial support—in the short or long term.

How will it be achieved?

The University must remain relevant to its alumni, and alumni must feel both informed about the happenings at IWU and empowered to play a role in the future of the institution. As students near graduation, they must understand the opportunities available to them to stay connected with their school as alumni, and they must understand the impact of their continued engagement. IWU must then deliver on its promises to afford those opportunities or risk losing these alumni forever.

Prospective students

1. A letter of congratulations should be sent from the president of the Alumni Association to every admitted student at the time of his admission
 - This letter should be mailed independently of the acceptance packet from Admissions, and it should outline the benefits of IWU's Alumni Association as an enticement to enroll.

Current students

1. IWU should be intentional about increasing the number of contacts current students have with alumni
 - These contacts include, but are not limited to: the first year students' summer reading program*; alumni experts speaking in classrooms and at special events*; international students' day in Chicago sponsored by the Chicago chapter of the Alumni Association; alumni "host families" for international students and/or first year students; and alumni mentors helping guide students through their career search*; there is no end to the ways in which students and alumni could interact—and the ways to teach students about alumni engagement
2. During the senior year, and increasingly as the year progresses, students should be made even more aware of the opportunities for engagement that will be available to them as alumni
 - These include, but are not limited to: a lifetime IWU email account; the e-Connection electronic newsletter; the IWU Magazine; various social media outlets; lifetime access to the services of the Hart Career Center; activity

of regional Alumni Association chapters; and volunteer opportunities via the Alumni Association

- A welcome letter could be sent from the president of the Alumni Association at the start of the senior year, and a letter outlining the opportunities to be involved as alumni could be sent at the start of the second semester by the director of Alumni Relations
3. At each of the loan exit sessions conducted for seniors, and at the Senior Class Dinner, students should be reminded of the various ways in which they can stay connected to IWU
 - This information could be delivered by a speaker*
 - This information could also be included in literature given to attendees
 4. The Inner Circle program should be enhanced to further emphasize the importance and influence of leaders in the graduating class
 - These leaders should know the many ways in which they and their peers could engage with IWU
 - They should each be asked to volunteer for no fewer than one Alumni Association post
 - They should each be asked to pledge financial support for the first five years following graduation
 - They should each be asked to commit to assist with the class's one-, five-, 10-, 25-, and 50-year reunions
 5. The Alumni Association should have a greater role in Commencement activities in order to increase visibility for the Association

Alumni

1. IWU must reach out to recent graduates shortly after graduation to reinforce their welcome to the Alumni Association; a message of welcome should be sent via multiple channels and from multiple sources
 - The director of Alumni Relations should welcome new graduates to the Alumni Association via letter and email
 - Similar welcome messages should be visible on the University's social media platforms
 - Welcome letters and emails should be sent by the president of the Alumni Association
 - Regional Alumni Association presidents should welcome those alumni who have relocated to their respective regions
 - The president of the Parent Board should write a letter to all parents of recent graduates to thank them for their role in supporting their IWU grad and to make them aware of the continued good work of the Parent Board and Parent Fund—these parents should also be encouraged to update their recent graduate's contact information if what IWU has is out of date

- The chair of each Alumni Association organization should reach out immediately to any recent graduate who has elected to volunteer for their group
2. All members of the Alumni Association Executive Board must understand and agree to the expectation that they are to financially support IWU every year, regardless of the level of their giving
 3. IWU must continue to survey its alumni, both alumni donors and non-donors, and gather information about their preferences and perceptions; this should be done in various ways, including online, at events, over the phone and via committees and groups; this will help guide the future actions and decisions of the Advancement Office
 - Regional alumni chapter members should follow up with alumni event attendees to find out how they felt about the event they attended
 - Wesleyan Fund staff should develop a better understanding of why non-donors do not give—and why donors do
 - IWU should continue to participate in larger surveys that aim to uncover trends among different cohorts
 - The JGA/Achieve Millennial survey is a good example of this
 4. Students in the IWU Call Center must better engage with alumni over the phone; this channel is becoming less fruitful for schools as a rule, so IWU must do everything possible to make these decreasing contacts meaningful and significant; students in the call center must at all times be personable and professional because for many alumni this is the only personal conversation they have with a member of the University community all year; the purpose and content of these conversations must be scrutinized, and constant evaluation of this program is essential
 - Some schools evaluate their callers based on the average duration of their calls; IWU should consider this after consultation with Ruffalo Cody
 5. A more robust social media presence must be developed; IWU must determine objectives for utilizing social media and then decide who will represent the University in this space (potentially not limited to University employees); a plan that both fits the needs and/or expectations of users and is manageable for IWU staff is critical
 - It may truly be necessary to engage alumni experts in both the planning and execution of a social media strategy
 6. The University must find ways to create dialogue between current donors and non-donors; there is no better mouthpiece for staying engaged—or for supporting the Wesleyan Fund — than alumni who give, and IWU must empower current donors and give them a voice; social media may be a useful tool in harnessing the collective power of donors to move the Wesleyan Fund and the University forward

- Donors should be asked, as part of the gift acknowledgement process, to post on social media their reasons for giving

How will the results be measured?

Much like with stewardship, it can be difficult to measure the success of strategies intended to establish a program of engagement—at least in the short run. A comprehensive program of engagement will take time to influence alumni in a meaningful way, and the results will only be known as the program matures and the targets of these new devices display a pattern of behavior over time. That said, also like stewardship, tactics for engaging alumni can be simply evaluated on the basis of their completion. If the list of tasks above is being accomplished, that will serve as evidence of success in the short term. Looking ahead, it will be possible in future years to determine whether these strategies have truly affected engagement in a positive way, all the same. The level of alumni engagement could be assessed based on: attendance at alumni events and class reunions; rates of response to IWU surveys; open rates for IWU emails; duration of calls initiated by the IWU Call Center; and traffic on IWU-sponsored social media platforms.

What will be considered a success?

Little of this plan for increased engagement requires additional cost to the University, and much of it could be put into practice for Fiscal 2013. The greatest potential challenge would seem to be establishing an understanding between Advancement and Communications that this level of engagement is necessary—necessary enough to allocate existing resources to it in order to make the objectives outlined above a reality. With the exception of an enhanced social media presence and a more clearly defined outlet for current alumni donors to engage with non-donors, this entire list should be achievable during Fiscal 2013. As for long-term success, it is difficult to set a goal for each of these individual areas where we hope to see growth because the ways in which one engages with IWU today may be very different than the ways one will engage with IWU in 10 years. Therefore, increases in *active alumni* in ten years might be the best way to gauge success. That is, the number of alumni who engage with IWU in one form or another—be it by attending events or posting on Facebook or volunteering—should increase if the plan works. If 25% more alumni are engaged in some measurable activity with IWU in 10 years, that would be success.

What if this does not work as planned?

Engagement will be a relatively fluid process because of the changing nature of communications channels. What is popular today may not be tomorrow, and what works today may not a few years from now. Therefore, IWU must constantly monitor and evaluate alumni engagement so as to adjust when necessary. IWU should keep an eye on overall engagement, that is the number of alumni who are active with the University in one form or another, and adjust the individual tactics as needed.

ACQUIRE

What is the objective?

To secure its financial position now and in the future, Illinois Wesleyan must remain committed to bringing new donors into the fold each and every year. An alumni population in which less than one in five individuals is a donor makes sustaining the quality of an IWU education near impossible for the long term. The goal is to convert non-donors into donors, and this is best—and most inexpensively—done early in the life of an alumnus.

How will it be achieved?

As previously stated, each of the five main strategies identified in this document is closely linked to the other four, and none should be thought of as an independent entity. To that point, donor acquisition is made much easier and more cost-effective if supported by an established culture of stewardship and program of engagement. Therefore, provided IWU can make headway on the first two tasks laid out here, acquisition should become a much more realistic prospect. Still, there are action steps IWU can take in the more immediate future to help bolster donor count.

Current students

1. Potential donors to the class gift campaigns and senior gift campaign must understand the impact of their support
 - Information about the effect of participation on rankings, bond ratings, etc. should be included in class gift materials*
 - While they would not affect those rankings as students, they should be educated about the impact a habit of regular giving can have
2. Students should understand how their money is being used; making this clear in communications for the class gift campaign and senior class gift is important*
3. The process of making a gift must be as easy and convenient as possible

Alumni

1. The likelihood of an alumnus becoming a first time donor should be determined by his level of activity with IWU and how long since he has graduated; for a lapsed donor, the recency of his last gift, the frequency of his previous giving and the amount of his previous gifts should determine his likelihood to give and his potential impact as a reacquired donor
 - Once these likely donors are identified, they should be given greater time and attention than those less likely to give
 - Focus more, in the form of mailings, phone calls and visits, on them because they are more likely to give IWU better return on its investment*

2. The Giving Circle program is currently the most effective tool IWU has for alumni “never” donor acquisition, especially among young alumni; IWU must find ways to promote the program for greater visibility
 - Giving Circles should be highlighted via direct mail, social media, in personal visits from professional staff and over the phone via the call center
 - IWU should find ways to encourage and empower current Giving Circle leaders and members to share their experience with other alumni
3. IWU must find new ways to apply the Giving Circle model to potentially reach more prospective donors
 - The Rockford Region Giving Circle effort must be carefully evaluated to determine whether this model should be replicated in other alumni regions –or whether a modified version of this process would work in other regions
 - The Phi Beta Kappa Giving Circle process must be evaluated to determine what made it less than successful because there are many, many groups who could be identified and mailed in a similar fashion
4. Outside of the Giving Circle program, IWU must find ways to deploy current donors as proxy gift officers for the Wesleyan Fund
 - The reinvigoration of the Chicago Leadership Giving Council is one way to focus efforts on a specific audience and communicate a specific message
 - This program should be cultivated and enhanced over the 10 years of this plan
 - Make clear the expectations for members of the Council*
 - Establish and communicate clear goals for the group as a whole*
 - Make sure the work of the Council dovetails with the message and direction of the overall Wesleyan Fund effort*
5. Members of Alumni Association committees and groups should be asked to make contacts to non-donor classmates at least once a year as part of their work on their respective committees
6. The IWU Call Center should operate at best practices standards so contacts with non-donors have the best chance for success; for Fiscal Years 2013-15, this should be accomplished by outsourcing the center to Ruffalo Cody
7. Students should be used to convey Wesleyan Fund messaging via channels other than the phone; a personal appeal from a student is powerful when used strategically, and the Wesleyan Fund staff should employ students to hand-write letters, use messages via social media and/or send emails to specific segments of the alumni population asking for financial support
8. The direct mail program for the Wesleyan Fund should be operating at best practices standards to ensure the best possible return on mailings; with the

continuing assistance of Scott Huch '86, President of The Delta Group, this should be accomplished

- Improvements should come in the form of identification of new segments and/or areas of opportunity, better formatting for letters and reply devices, more appropriate frequency and timing of asks, better assessment techniques to evaluate ROI and industry best practices such as “renewal at birth”

Faculty/Staff

1. Payroll deduction forms should be easily accessible on the University Web site
2. No promotion of the Wesleyan Fund to faculty or staff is allowed at this point, per the president of the University; at such time as it is, a dedicated faculty/staff fundraising campaign should be undertaken; this would include as many face-to-face visits between IWU community members and Wesleyan Fund staff as possible; Advancement representatives should also address faculty and staff in meetings when possible and appropriate

How will the results be measured?

IWU should measure success in terms of the number of “never” donors acquired—and lapsed donors reacquired—in a given year. Donor participation rate will also be a good measure of success over time.

What will be considered a success?

Again, acquisition is a function of stewardship and engagement, so it may take a few years to fully appreciate how improvement in those areas affects the acquisition of new donors. Still, the Wesleyan Fund should strive for a 3% increase in new (acquired and reacquired) donors for each of the first five years of the plan and set new expectations at that time for increased annual growth for each of the last five years of the plan. Ultimately, IWU should strive to attain 28% alumni participation by 2022.

What if this does not work as planned?

An analysis of newly acquired donors should be done regularly, most likely monthly, to find out what methods are producing results and what times of the year and what occasions are the best times to acquire different types of donors. If, for example, it is discovered that student phone calls are acquiring more new donors than mailings, subsequent planning should take this into account. Similarly, recent graduates may need to receive additional focus in March and April, while Wesleyan Society members will require more resources and attention at calendar year-end and fiscal year-end. In fairness, acquisition will always be a challenge and strategies will have to change over time in an effort to try new tactics. The tactics for acquisition are perhaps the most fluid of the five main strategies.

RETAIN

What is the objective?

In a fundamental shift away from previous thinking by Wesleyan Fund staff, a current donor should receive more time, attention and resources—not less—than a non-donor. While it might seem logical, especially at a time when donors are scarce at IWU, to focus on acquisition, IWU must do better in retaining donors—in order to protect the investment that is made in difficult-to-acquire donors. The objective for the foreseeable future is to retain as many alumni donors to the Wesleyan Fund as possible, year after year, understanding that it is more costly and indeed much more difficult to bring on new donors than to retain those who are already giving. If a foundation of loyal donors can be established, the process of acquisition can simply add to that base each year instead of making up for the donors lost in the previous 12 months.

How will it be achieved?

Donor retention has much to do with one's understanding of, and pride in, his status as a donor. Donors need to know how and why they are needed, they need to know what exactly is expected of them and they need to understand the difference they have made once they follow through. Donors need to understand how their giving benefits the organization, and they must understand just what their contribution means to the organization. IWU must be able to provide answers to each of these questions in order to establish a solid foundation of donors who not only give but give regularly—and are excited about the next opportunity to give again.

Current students

1. Donors to the class gift campaign and the senior class gift should be recognized as alumni donors and
 - They should be listed in the Annual Report*
 - They should be eligible for membership in the Wesleyan Society*
 - They should receive a special acknowledgement letter that expresses the importance of student giving*
 - They should be invited to recognition events exclusive to student donors*
 - They should be invited to recognition events for which their giving would qualify them if they were alumni
 - Having students and alumni interact at a donor event would reinforce the stewardship critical to IWU's future success
2. Student donors, from first year students to seniors, should be encouraged to establish a multi-year pledge, as alumni are

Alumni

1. Multi-year pledges should be encouraged at every turn, via the call center, in direct mail, in personal visits and over email; this locks in the donor's support and

makes the giving process more convenient for the alumnus while saving the University time and money; however, it should be noted that the challenge is then to appropriately recognize and sufficiently communicate with the donor who would otherwise receive extra mailings asking for support; special communications must be set up for donors with multi-year pledges established

- Current donors need not be excluded from additional solicitations, but their status as donors should be acknowledged and praised as part of those subsequent asks
2. The Wesleyan Society must be promoted wherever possible; the request is for consecutive giving, which is perfectly consistent with Wesleyan Fund goals—the difference is that the Wesleyan Society is perhaps easier to brand, easier to understand and provides an opportunity to highlight donor benefits; the Wesleyan Society should be talked about at events, it should have a standing place in the IWU Magazine and it should be referenced whenever possible in Wesleyan Fund appeals
 - Benefits of Wesleyan Society membership include: feeling a part of something bigger than oneself, feeling special even at a more marginal giving level, being recognized as a peer of some of IWU’s most substantial donors and receiving an IWU calendar exclusive to members
 3. Assigned and unassigned “club billings,” or renewal requests, must be sent to habitual donors at the proper time without fail; Advancement must adhere to habitual donor’s schedules in order to maximize the opportunity to retain donors
 4. A voluntary Alumni Association annual dues mailing program could be developed to outline benefits of Alumni Association membership and to make the concept of an annual gift less foreign (this is how membership dues are collected for many organizations of which alumni may be a part)
 5. The Excel Grant program should be continued, and each and every time a student recipient is selected, Advancement staff must find a donor to connect to the student; this program has too much potential for good to not be given sufficient effort by gift officers
 6. The gift acknowledgement process must be enhanced; along with a tax letter, the donor should receive the latest IWU profile with admissions information and student data; surveys should be included from time to time; scholarship recipient profiles and personal student testimonials to donors should be used; donors should be asked for additional gifts; donors should be asked to refer a non-donor friend; donors should be encouraged to share the reasons why they give
 7. Retention events like the Benefactor Dinner and the Chicago Leadership Giving Dinner must continue to receive appropriate attention so that attendees feel appreciated and inspired
 8. Personal visits from Wesleyan Fund staff should be made to consistent donors whenever possible in order to retain and potentially upgrade those donors

How will the results be measured?

IWU should measure results in terms of percentage of previous year donors who are retained in a given year, as well as increases in IWU's participation rate.

What will be considered a success?

IWU should aspire to increase retention by 10% by the beginning of Fiscal Year 2018, and establish a goal based on performance for the remaining five years of the plan at that time. It should be expected that as the strategic plan is adopted and the Wesleyan Fund program is honed, retention should continue to increase over time. Still, it should be noted that 100% retention is not realistic, and IWU should ultimately benchmark against its peer and aspirant schools in terms of donor retention.

What if this does not work as planned?

Regardless of the impact of the tactics listed above, they align with best practice fundraising principals and should be adopted. If retention has not increased by the desired rate by Fiscal 2018, new strategies may be implemented, but it is doubtful that discarding those listed above will be advantageous.

UPGRADE

What is the objective?

A systematic process for moving donors from small, participatory gifts to larger, more significant gifts is necessary to ensure the future welfare of Illinois Wesleyan. Just as it will become increasingly difficult to keep the University moving forward with only 18% of the alumni population giving, it is equally unsustainable to receive gifts of the same amount from those donors year after year and expect to keep up with ever increasing fiscal demands. Over time, some alumni must be moved from participatory donors to major donors, and the Wesleyan Fund is the genesis of that pipeline of major donors.

How will it be achieved?

Simply put, donors must be asked to increase their giving over time. Thought must go into who is to be asked for how much and at what time, but, generally, all donors must be asked for an increase over time. And while there will be donors who will refuse every opportunity to upgrade, others will continue to progress and mature as donors—increasing their level of giving consistently and systematically. These are the future major givers who will solidify Illinois Wesleyan's financial position in the years to come.

Current students

1. Donors to the class gift campaign are currently asked for \$5 for each of their first three years on campus, then they are asked for the remainder to total their year of graduation in their senior year (\$5.12 to total \$20.12, \$5.13 to total \$20.13, etc.); this practice could be amended so that students are asked for a nominal but gradually increasing amount over the four years—still to total the year of graduation; for example, students could be asked for \$2, \$4 and \$6 in their first three years respectively, and they could be asked for the remaining \$8 and change as seniors; these small initial amounts may encourage greater participation in the class gift campaign at start, and it could be made clear that this process of upgrading over time is exactly what alumni donors do

Alumni

1. Alumni donors should be asked for upgrades to their giving when appropriate via the call center, direct mail, email and personal visits from staff; they should also be asked for second gifts within a given fiscal year because they are more likely to make a second gift than a non-donor is to make a first gift; this is one method of easing an alumni donor down the path to becoming a larger donor because one will often double his annual giving—or at least upgrade considerably—without even thinking about it
2. The Wesleyan Fund team should be more intentional of communicating the policy that annually funded scholarships can be established for \$2,500; it is possible that leadership level donors would have interest in this program but are unaware of this policy; some may be under the impression that they must endow to establish a scholarship; this scholarship promotion could again occur via phone, email, direct mail and in person—albeit with the proper target audience

3. Gift clubs and societies must carry with them some benefits to the donor; IWU must decide what each gift club means and just how members of each club are recognized; if the gift club directly above a donor's current status is more attractive in terms of recognition and prestige, upgrading the donor to that gift club is far easier
4. IWU must be more intentional about pursuing matching gift claims from alumni donors; matching gift forms should be included in acknowledgements when possible and matching gift information kept current in IWU's database; this is free money to both the donor and the school and should not be left on the table

How will the results be measured?

IWU should measure results in terms of both the percentage of previous year donors who give a greater total dollar amount in the subsequent year and total dollars raised from those donors who have upgraded in a given year. Moreover, the number of matching gift claims and dollars received via matching gifts should be examined each year.

What will be considered a success?

IWU should strive to have approximately one-third of renewing donors upgrade in a given year. Because not all donors will upgrade each year, this one-third rate should be sustainable over time, as different donors rise each year to upgrade gift levels that have been constant for some time.

What if this does not work as planned?

A review of performance in this area should be conducted at the conclusion of each fiscal year. While not all donors will be asked to upgrade each and every year, most should be—and if performance is off, it is possible the increased ask amounts should be adjusted. Typically, however, if donors are not increasing their gifts, it is an indication that upgrades are not being asked for often enough.

How This Strategic Plan Was Developed

This strategic plan was prepared under the direction of **Jeff Mavros '98**, Director of the Wesleyan Fund for Annual Giving. It represents the culmination of a series of meetings and intensive collaboration among key staff and alumni volunteers over three years, starting in 2009.

In connection with IWU's "Transforming Lives" capital campaign, a subcommittee of the campaign's communications committee began to examine IWU's annual fund participation rates.

Subsequently, **President Richard F. Wilson** appointed a "task force" of three alumni with professional expertise in the fields of fundraising, marketing, advertising, public relations, and higher education development:

- **Kathleen Larey Lewton '70**, IWU Trustee and Principal of Lewton, Seekins & Trester, a firm specializing in strategic marketing and public affairs;
- **Scott Huch '86**, President of The Delta Group, an advertising agency that uses direct mail for cause-related fundraising; and
- **Josh Butts '01**, Director of Development, Principal and Major Gifts, Harvard Medical School.

The bulk of this task force's work was done in late 2011 and early 2012.

In the course of the meetings and discussions that resulted in this strategic plan, the following individuals also participated at various times: **Sundeep Mullangi '98**, volunteer alumni chair of the Wesleyan Fund for Annual Giving; **Carlo Robustelli**, Assistant Director of the Wesleyan Fund; **Lora Wey '88**, former Director of the Wesleyan Fund; and **the members of the "Transforming Lives" Communications Committee**.

Appendices

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The Best Way to Start a Riot Is to Incite One: Creating a Culture of Stewardship at Illinois Wesleyan University

By Scott E. Huch '86

It is difficult to explain a culture of stewardship in a purely technical manner on paper because real, live human energy and passion is so critical to creating the virtuous cycle of enthusiasm among a group of people that is at the very core of this concept.

However, the basic elements can be explained, and it is also possible to describe what a thriving culture of stewardship at Illinois Wesleyan University would look like.

First, beware: There is no silver bullet, no pixie dust. No windfall ever comes.

Instead, doing the work necessary to create a culture of stewardship is like flossing teeth. There is almost no immediate benefit apparent. Only with consistent application, regularly, over a long period of time can the benefits of doing this be seen.

Conversely — and to extend the flossing analogy — the problems we see right now are the cumulative effect of what was **not** being done consistently over a long period of time, probably starting at least 40 years ago, roughly around the time that the previous volunteer alumni association was disbanded (in retrospect, a costly decision).

So, the change we seek will **not** happen overnight.

To start, a culture of stewardship has four critical characteristics:

1. It starts at the very top.
2. It involves as many people as possible, and **everyone** in a leadership position.
3. Discussion of it is encouraged, in order to get people talking about it widely.
4. Participants are publicly and frequently recognized and praised, in order to encourage them to stay involved, and to inspire others to get involved.

Also, it is a **continual** activity — not something that is only done once a year as a fundraising deadline looms — so the “stewardship angle” of every event and all communications involving alumni must always be considered.

Leadership

The importance of 100% participation cannot be overstated.

It is well known that major non-profit organizations — charities, symphonies, hospitals, and museums — not only require that every single member of the board of directors donate to the annual fund, but that each one does so in substantial amounts.

For example, the Alzheimer’s Association–National Capital Area Chapter, on whose board I serve in Washington, D.C., requires every director to donate \$5,000 and raise (or donate) an additional \$25,000 each year. For large arts institutions in large cities, it is not uncommon for each director to donate upwards of \$100,000 annually.

The reason for this is that prospective major donors frequently ask, “How many members of your board are giving, and how much?” For donors, leadership giving is an important criterion in determining whether to participate. It indicates a healthy charity that is serious about its mission — a sound “investment” for a donor. Because major gifts are highly intentional, it is understandable that a prospective donor would consider this factor as part of a process of due diligence before making a gift.

Annual fund donations, on the other hand, especially in amounts less than \$100, are usually more impulsive than intentional, at least when a donor first starts giving. (In a thriving culture of stewardship, it is possible to develop <\$100 annual fund donors who become quite intentional about their gifts over time.) Nonetheless, even for a purely impulsive donation, 100% leadership participation in the annual fund serves as an important justification in the donor’s mind for making a gift. If nothing else, it provides social proof that making a donation is a good thing to do because, after all, everyone else is doing it.

However, annual fund donors simply do not go through the same process of due diligence that would be common for a major donor. Instead, IWU must rely on being present with an ask at the right time when several factors converge simultaneously: the donor has a few moments to read IWU’s appeal; the donor has some disposable income to consider giving; and — with the proper nurturing by IWU’s Wesleyan Fund team — the donor has an inkling in the back of his mind that “it’s time” to give to IWU.

But because annual fund donors usually do not ask about leadership giving, ***it is necessary for IWU to tell them about it.*** In a thriving culture of stewardship, IWU would publicize widely that the following people are donors to the Wesleyan Fund:

- The President and every member of his cabinet
- Every staff member in the Office of Advancement
- Every staff member in the Office of Alumni Relations
- Every single member of the Board of Trustees
- Every single member of the Alumni Association Executive Board
- Every single Regional Alumni Chapter President and any board members
- Every single member of the Parent Board
- The President of the Student Senate and his cabinet
- The faculty chair of every single academic department

There would be feature articles about this in every issue of the *IWU Magazine*. It would be featured on IWU’s websites, both iwu.edu and titanpride.org (which should be

consolidated, by the way, in order to reintegrate alumni into the larger campus community — doing so would yield great benefits in creating a culture of stewardship because it would reinforce the important role of alumni as full-fledged members of IWU's "university community," rather than some type of outside auxiliary).

The 100% leadership participation fact would be cited, as appropriate, on printed materials and publications from numerous departments — not only on Wesleyan Fund materials, but other brochures and documents ranging from proposals to major donors, to the Homecoming brochure, to the Annual Report to Donors, to admissions materials. Every time a list is made of "The Ten Best Things About IWU," one of the items on that list would be "100% of IWU's leaders give back to the Wesleyan Fund." Communicating about this subject in this manner — across all departments — would be second nature.

At important events — Convocation, Commencement, the Benefactors Dinner, Homecoming, Class Reunions, Regional Alumni Connections, Alumni Council meetings, Board of Trustees meetings, Faculty Senate and Student Senate meetings — the 100% participation by these leadership groups would be announced, recognized, and praised, and IWU's overall alumni participation rate would be reported, even when it goes down from one year to the next — as a cause for concern — and especially when it goes up from the previous year — as a cause for celebration!

Lists of Wesleyan Fund donors —by name — especially IWU leaders who give to the Wesleyan Fund in the current year, would be posted in appropriate places around campus, where they would be seen by undergraduates, faculty and staff, prospective students and their parents, and visiting alumni and friends. The display case in Ames Library, the display case in the Minor Myers, jr. Welcome Center, a bulletin board in the student center, and ideally an "Alumni Hall of Fame" in the Alumni House — all of these places would be a perfect way to showcase, recognize, praise, and reinforce IWU's Wesleyan Fund donors — and to inspire others to do likewise.

Because increasing IWU's overall alumni participation rate starts with IWU's leaders, every person who is being considered for any leadership position, either professional or volunteer, when being advised of the requirements of the position, would be told in no uncertain terms that an annual donation to the Wesleyan Fund is a requirement, and it would be a deal-breaker if the candidate refused to agree to it. At a bare minimum, this would be an absolute requirement for inclusion in the Inner Circle of graduating seniors each year, and failing to make a Wesleyan Fund gift would terminate the Inner Circle membership. The same would be true of the Alumni Association Executive Board. We would be absolutely unabashed about enforcing this expectation.

Further, the leader of each constituent group would publicly and frequently declare his or her intention to seek 100% participation by all of the others in leadership positions subordinate to him. That leader would accept a commitment to personally solicit the donations from his or her leadership team, if necessary. If a leader fails (or refuses) to achieve 100% participation, a new leader should be sought for the position at the first opportunity. These are not "honorary" roles — each and every one exists

solely to support the mission of IWU in some way, and that must include financial support — even if it is only \$1 per year, because the symbolic value of 100% participation is so important.

Seriously, that's what a thriving culture of stewardship looks like. And it shows how far we have to go at IWU. At first, we'll have to make a dedicated effort to speak into existence some of IWU's "traditions" that are missing but badly needed. We'll have to start declaring what our traditions are, and living out those traditions, starting today. The best way to start a tradition is to just start it. It won't get any better on its own.

Communications and Messaging

I am absolutely convinced, from previous experience, that the single most important factor that determines the success of a culture of stewardship is whether or not you can get people talking about it. I am convinced that the more we share with one another our stories of why we give; and why it is important to each of us personally to give; and the rewards we've experienced as a result of giving — the more we will see not only increased giving, but increased *enthusiasm* for giving at IWU.

That is why it's so important to be firing on all cylinders when it comes to communications with alumni from various University sources, and the messages that we send. Communications and messaging around stewardship must be continual, consistent, and clear.

**The biggest mistake is doing nothing when
you can only do a little.**

— Paraphrasing Edmund Burke

Alumni who complain that "IWU is always talking about fundraising" should be approached respectfully, and politely engaged in a discussion of what they don't like about it and what everyone else *does* like about it, a conversation that should be viewed as a teachable moment, to persuade that alumnus to join in on the satisfaction and, frankly, the excitement of being one of the alumni who give back to IWU through the Wesleyan Fund. As IWU's participation rate grows, this objection will become easier and easier to counter.

There are only two reasonable objections to making a Wesleyan Fund gift, and fortunately both are rare (although the first one is probably used frequently as an excuse when it is not literally true):

1. "I don't have any money to give"; and
2. "I have decided that I don't like my *alma mater* anymore and want nothing further to do with IWU."

There is nothing that IWU can do about either one. And neither one is sufficient to make any adjustment at all to the Wesleyan Fund strategic plan, or to let up for one

instant in our drive toward the goal of 100% leadership participation and a greater overall alumni participation rate. The only action that should be taken in response is to remove such alumni from the solicitation base upon request.

Even more insidious is the attitude that we shouldn't ask alumni to give money to the Wesleyan Fund — or we shouldn't even *talk* about the Wesleyan Fund — because we're afraid that they'll be put off. Where does one even begin what that? You can't get any traction with a person who won't attend Homecoming or a Class Reunion or a Regional Connection because they're afraid that they'll be asked for money. ***To be blunt, you're damned if you do, and damned if you don't — so you may as well.*** Consider this problem in the obverse: If the assumption is true that people don't come to alumni events because they're afraid they'll be asked for money, then it must also be true that the people who ***do*** come to alumni events have absolutely no fear whatsoever of being asked. And you don't get what you don't ask for. ***So ask!***

IWU's Volunteer Alumni Association

Our Alumni Association must insist on the highest program quality, and we must constantly strive to build volunteer programs that delight, engage, and empower actual alumni, not intermediaries like the university IT department.

Most alumni feel nostalgia about their time at Illinois Wesleyan University.

Nostalgia is the emotion that lives at the intersection of happiness and loneliness.

Our Alumni Association must build and support programs that live at the intersection of nostalgia and the liberal arts in order to attract alumni and engage them in IWU's mission of educating undergraduates.

Right now, alumni volunteers do not really have the autonomy needed to do much more than what is presently being done. Examples include:

- Restrictions on the organization of Class Reunions and Class Gifts.
- The inability of Regional Alumni Chapters to build and maintain their own websites through either iwu.edu or titanpride.org (in fact, many regional chapters have worked around this problem by simply creating their own websites through GoDaddy and other ISPs, totally removing ***all*** control from the University over its brand image — and utterly defeating the purpose of the restrictions in the first place!).
- The inability of alumni to send e-mail from their @alumni.iwu.edu e-mail accounts, which only forward e-mail but do not otherwise have much value. Alumni volunteers should be able to send e-mail from an "iwu.edu" address to other alumni volunteers.

Volunteers can be viewed as either a burden or an asset. And while it is difficult, it is possible to build highly effective volunteer organizations. There are numerous examples — from political campaigns to Red Cross disaster recovery teams — that simply could not function without volunteers. These are the model to which IWU should look for a solution to the “problem” of what to do with volunteers.

In my experience, the answer starts with training. First, you decide what you need (and want) volunteers to do. Second, you write a “job description.” Third, you try to recruit people to help you who are willing to do the job you’ve described. Fourth, you train those people to do the job exactly the way you want it done. And finally, you manage your trained volunteers, and publicly praise and reward them constantly for everything they do right.

IWU’s Office of Alumni Relations is now working on a pilot program to train Regional Alumni Chapter volunteers, using Internet-based “webinars.” If successful, more training could be offered to more volunteers.

The next step for the Wesleyan Fund would be to better integrate with Alumni Relations and the Alumni Association Executive Board to develop programs for alumni volunteers that focus on the stewardship angle of alumni volunteer activity, with a specific focus on the Wesleyan Fund. One possible model is the “Leadership Circle” in the Chicago Regional Alumni Chapter, which is a vestige of a capital campaign in the 1990s, still functioning after roughly 15 years.

With respect to the “engage” element of the Wesleyan Fund strategic plan, the Office of Alumni Relations and the Alumni Association Executive Board are where the rubber hits the road. Alumni Association programs should all be designed to engage alumni, ultimately, with the Wesleyan Fund. This is simply good stewardship.

Homecoming & Class Reunions

Involvement of students is critical, and a focused effort to bring students back into the planning and execution of Homecoming — in a significant, if not to say leading role — is critical.

Both Homecoming and Class Reunions are simultaneously tools for stewardship and engagement, as well as “communications channels” for Wesleyan Fund messaging.

These events are not in the control of Wesleyan Fund staff, but they need access to these events, and they need these programs to be sound and strong, as a means of delivering Wesleyan Fund messaging, as well as being tools to enhance their efforts at stewardship and engagement.

Right now, a massive opportunity is being squandered.

In short, students no longer have much of an interest in — and no involvement in the planning of — Homecoming. This is another symbol of IWU's current problem and what must change in order to significantly increase alumni engagement and, with it, annual fund participation.

If students do not care about Homecoming while they are undergraduates, there is much less reason they should care about it as alumni.

If this goes on for too much longer, we may have problems ever getting it back on the rails. The things that I go back to Homecoming for are the things that were traditions when I was an undergraduate: Titan Games (well, really just the rope pull), the football game, and parties with friends. I miss the parade! Homecoming attendance numbers are up recently, but I fear it is partly bread and circuses — many alumni who attend are merely consuming programming (fireworks displays) rather than engaging with the university (sharing traditions).

However, as recently as 25 years ago, Homecoming was a student-led activity, with a fully-functioning Homecoming Committee that was appointed by the Student Senate. It was a very big deal. In fact, I was Parade Chairman in 1985 and seriously locked horns with Harry Lovell '59, then a member of the Advancement staff, over the parade route and starting time. In the end, the student got his way over the Advancement staff — that's how student-driven Homecoming once was!

Recently at home, I was looking for something else and pulled out a tattered, old manilla envelope with some mementoes from my college days inside. Three of the documents that I found were scanned and are included as an appendix to this white paper because they help to illustrate my point about the decline of Homecoming as an important event in the life of an IWU student.

1. Harry Lovell's very gracious note, conceding that I had been right about the parade. (The "Alumni-Gram" is a fantastic technique that should be revived and used again today. It would be a great way for alumni volunteer leaders to thank and engage participants in their programs, for example, Regional Alumni Chapter Presidents thanking their boards or Hospitality Committees after an event. It is so old-fashioned that its "retro" appearance would nearly guarantee that it jumps right to the top of a stack of mail, to be opened with great satisfaction by an alumnus. N.B.: It was printed on canary stock.)
2. A lovely note from Flo Armstrong '43, who was our Grand Marshal that year and who to this very day remains a highly engaged major donor to IWU. (Think of it! Students engaging with alumni major donors!)
3. A very kind letter from State Senator John Maitland — our committee sent letters to every elected official whose district included the IWU campus, inviting them to ride in the parade in open cars.

In addition to inviting all the local politicians, we invited high school marching bands and offered cash prizes, judged by faculty and students from the School of Music. We invited local car buffs to bring their convertibles to the parade for the dignitaries and Homecoming Queen candidates to ride in, and we offered prizes for the best cars, too. The Parade Committee had about 20 to 25 volunteers, and was only one part of the larger Homecoming Committee, which involved roughly 50 or more students. (And, yes, floats were kind of a problem then, too.)

But Homecoming was once a **very big deal** to undergraduates, not so long ago.

Every effort should be made to start moving in that direction again, and re-building what was lost. This has not met with much success recently, I realize, but I truly believe it is worth re-doubling our effort to bring students back into Homecoming, even if all we can achieve at first are incremental gains. Many other Alumni Association programs have met with great success in engaging alumni with undergraduates. The key to attracting students seems to be the career networking angle. There's no reason that wouldn't work with Homecoming, through a joint committee of alumni and students. With a sustained effort, it may be possible to get this back where it needs to be.

There is no finger of blame to be pointed — in fact, many parts of the current Homecoming experience are quite good. For example, there is no reason that the “Titanium” pep rally and its awesome fireworks display cannot become a tradition.

The main issue is focus. And many opportunities for stewardship and engagement are being missed because it is not a high priority. That needs to change. This also illustrates the need for better integration, in this case, between the Wesleyan Fund and Alumni Relations, and also with the Student Senate.

The discussion here leaves aside the question of Class Reunions, which are a very close cousin to Homecoming in terms of impact on stewardship and engagement. But I should note that there is tension between, “We're selling tickets to a nice dinner,” (consumption) and, “We're getting a group of people organized to do something that helps IWU,” (engagement). This subject is explored in greater detail in a separate white paper by Josh Butts '01 that is also an appendix to this Strategic Plan.

In short, Homecoming and Class Reunions may be the most important communications channel that IWU has available for the purpose of teaching traditions, fostering a culture of stewardship, and keeping alumni engaged as Wesleyan Fund donors — consistently, year after year — on a routine basis.

Evaluating the Results

Many of the things that will be measured in order to determine the effectiveness of the Wesleyan Fund strategic plan are quite specific and precise. We'll measure the participation rate to one-tenth of a percentage point. The average gift will be measured

right down to the very last penny. For most of these things, it's even possible to create projections to show the expected results. We'll also be able to determine with great accuracy how close we came to the projections, and adjust the projections if necessary.

But some of the discussion of what could be achieved with a dedicated and sustained effort to create a culture of stewardship at IWU brings to mind the sequel to the Arthur C. Clarke movie, "2001: A Space Odyssey," when the spirit of astronaut Dave Bowman appears to several characters and makes a strange promise: ***"Something wonderful is going to happen."*** It sounds hopeful ... but a little fuzzy.

I'm usually very skeptical when I'm asked to take part in an enterprise that I'm told is difficult to measure. It often means that someone is trying to avoid accountability, or sometimes it's used as an excuse for outright failure. Unfortunately, it is true that there is no perfect yardstick to measure the effectiveness of efforts to "create" a culture of stewardship.

The participation rate, of course, is one of the best gauges we have, but it could be artificially inflated by other means without building a culture of stewardship, though it probably could not be sustained and there would be limits to its growth. There will be other ways of measuring success, which are outlined in the strategic plan — none of them perfect. Nonetheless, it is correct to say that in the first year of the plan, success will be simply implementing the lion's share of the tactics outlined, because, as previously observed, IWU is basically starting from scratch when it comes to our "traditions" of stewardship. We're going to have to make a good bit of "tradition" up as we go along. In other words: we'll fake it 'til we make it.

This is not to suggest that there is any element of guile or flim-flammery at play here. To the contrary, IWU should approach this in a very straightforward manner, telling people exactly what we're doing and why, and — most important — asking them to get on board with us. But our success at that task can only be indirectly measured.

"Not everything that can be counted counts, and not everything that counts can be counted."

—William Bruce Cameron, 1963

However, if the Wesleyan Fund reaches its participation and other goals by 2022, we will know then that our efforts, starting today, to promote stewardship have been successful.

Conclusion

The Wesleyan Fund Strategic Plan for the next ten years, in my opinion, sets forth a substantial, logical, and credible path that is highly likely to achieve its stated goals because it starts and ends with an emphasis on stewardship. I wholeheartedly recommend that it be executed and fully supported in every possible way by the administration. I look forward, as an alumnus, to supporting it in whatever way I can.

Illinois Wesleyan University
Bloomington, Illinois 61701

ALUMNI - GRAM

"In recognition of good people doing great things"

To:

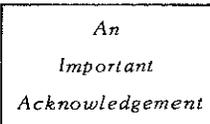
Scott Huch
Phi Gamma Delta



Illinois Wesleyan University



ALUMNI - GRAM



"In recognition of good people doing great things"

Dear Scott:

October 31, 1985

Hats off to a super parade chairman. The yellow brick road has never been lined with so many people.

Please accept my apology for my reluctance at changing the parade route and the parade time. It worked out great.

Harry

FLO ARMSTRONG
106 N BELLMONT
BLOOMINGTON IL 61701



Scott Huch
Phi Gamma Delta
1601 N. Franklin
Bloomington, Ill 61701

You do know how to put on a parade. You are to be
congratulated on the organizing and execution.
I was thrilled with my Birthday party and all
the thoughtful things you did for me. Thank you
for making my weekend one of my best

Flo Armstrong



ILLINOIS STATE SENATE
JOHN W. MAITLAND, JR.

525 NORTH EAST STREET
BLOOMINGTON, IL 61701

417 STATE CAPITOL
SPRINGFIELD, IL 62706

October 28, 1985

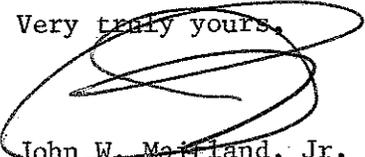
Mr. Scott E. Huch
1601 North Franklin Avenue
Bloomington, IL 61701

Dear Scott:

Just a note to tell you what a fine job you and your committee did Saturday at the Illinois Wesleyan parade. It was well planned and the plans were carried out quite well by all of you. I am very pleased to be involved with Illinois Wesleyan and seeing its students carry out their responsibilities as you did is what makes us all feel very good.

Keep up the good work.

Very truly yours,


John W. Maitland, Jr.
State Senator

JWM/lkw

The Case for Class Reunion Campaigns at Illinois Wesleyan University

By Josh Butts '01

Across the country, colleges spend a considerable amount of time and resources attempting to draw alumni back to campus to reconnect with their institution and with each other. At IWU, this attempt to reconnect is facilitated through Homecoming. At many institutions, it is accomplished through Reunion Weekend — a time when classes celebrating Reunion milestones gather to reminisce about their college experience, update classmates on the present, and share hopes for the future.

While IWU's Homecoming sponsors much of the same programming as a typical Reunion Weekend — Back to College Classes, campus tours, sporting events, artistic performances — one key element missing is the connection with classmates who share similar campus memories. People return to campus to see other people — not for the food, not for the fireworks, and usually not even for the football game. Through social interaction with their fellow classmates, alumni are reminded that the institution remains an integral part of who they are.

There are many ways to conduct a Reunion Weekend. The traditions celebrated and the events held are as varied as the institutions of higher learning themselves. Some are university-driven extravaganzas, while others take a more grassroots approach. Some are held in the summer, while others are held in the fall. But what they all have in common is their ability to bring people together who share a common bond — spending transformative years of their lives at the same institution, with the same people. Reunion is a chance to re-live college memories every five years and to remind alumni what an integral role the University has played in shaping their lives — from the direction of their career, to meeting their spouse, to finding a passion for a particular hobby or author or type of music.

No matter what shape a possible Reunion effort takes, a robust program takes careful planning. Posting dates on a Facebook page is not enough. It also takes time (perhaps a decade or more) to make Reunions a part of the campus culture. Classes that are 15+ years out might already be too far removed from IWU — and too accustomed to not returning — to make a successful attempt at a gathering. But for those classes that will soon celebrate their one-, five- and ten-year Reunions, it is the perfect time to ask them to return to campus.

A Reunion program should be highly volunteer-driven (although administrative support, when needed, is crucial). Ideally, classmates would be asked to start inviting other classmates back to campus a full year before the event. Indeed, class Reunions can be anticipated from the moment a class arrives on campus. During orientation, students should receive the message that the next four years will be so wonderfully engaging and transformative that they will hardly be able to *wait* to return to campus a year after graduation. A Reunion committee should be formed during senior year for graduating classes. This is a perfect opportunity to engage campus leaders — Inner Circle members, athletes, the stars of the theater and music programs, student council

leadership — as alumni before they even leave campus. A group of ten motivated individuals who will be responsible for bringing ten people back to campus in a year's time could create a hugely successful Class Reunion of 100 celebrants. This same type of volunteer effort could be used for classes celebrating their five- and ten-year Reunions. But the process **must** start early. An 18-month timeframe for planning (recruiting volunteers, planning Reunion activities, soliciting Reunion gifts) is ideal.

Happy and engaged alumni, of course, are most easily converted into happy and engaged donors. Reunion campaigns can build a robust pipeline of engaged alumni who feel good about the University and are knowledgeable about its aspirations and its needs. If done appropriately, Reunion attendees will be ripe for solicitations from the Wesleyan Fund and from major gift officers. In fact, in an ideal situation, the alumni office and the development office would work hand-in-hand to create a Reunion Giving component to coincide with the wonderful activity taking place over a Reunion Weekend.

The results of a successful Reunion effort are clear — engaged alumni who develop closer ties to their classmates and their university, paving the way for philanthropic support. If IWU is to create a true culture of stewardship among its alumni, we must provide ways for them to reconnect early and often. Class Reunions can best accomplish that goal.

Key Strategic Approach: Integration for Efficiency and Effectiveness

By Kathleen Larey Lewton '70

Silos — functions that are highly related, yet operate side-by-side and independently — have long been a part of corporations and organizations, including universities; and university advancement functions have not been immune to this phenomenon. The Council for the Advancement and Support of Education was for years organized into silos — fund-raising, external communications, alumni, publications, and periodicals — with totally separate educational tracks for each of these disciplines (even going so far into specialization as to separate periodicals from publications). The silo names and shapes have shifted — for example, marketing was finally added, but again as a separate “track,” and now there’s also a track called Advancement Services.

But whatever the nomenclature, the point is that the concept of integration has made little headway in the formalized world of institutional advancement. Ten years ago, a speaker in the external communications track at a district conference asked the audience, “Why are we in here talking to ourselves, when alumni and fund-raising staff who deliver as many messages as we do are off in some other room?” And the response was, “No, they are actually in **two** other rooms because they’re separate, too.”

In the larger world of marketing and reputational communications today, the word integration is not just a title, it’s a way of doing business. Mega-agencies have deliberately acquired advertising firms, PR agencies, direct communications firms, social media shops, and more — so that they can say to clients, “We can do it all for you with one integrated team.” Other clients prefer to hire a group of specialized vendor firms, **but** the client or a lead on one of the agency teams brings them all together under the *aegis* of one centralized communications plan, with each agency executing its specialty, as part of that integrated plan.

And smart corporations and institutions are mirroring that model, creating an integrated team *approach* within their own advancement structures.

The benefits are obvious:

1. All institutional audiences overlap — so that having separate messages and channels for any audience is impossible. The “eavesdropper” factor is more apparent in higher education than nearly any other sector. A prospective student’s parent is an alumnus; an alumna is a major gifts prospect; a media source has a neighbor whose child is going through college search; and on and on and on. When audiences overlap, messaging has to be consistent — tailored to the specific communicating department, but echoing the university’s core messages.

2. Creating this kind of message “echo chamber” is effective. If a prospective student’s parent sees messaging *via* admissions outreach, and then sees a media story about the University, and later hears some echo messages from a colleague who is an IWU alum, the overall impact of the messaging is multiplied in its effectiveness.
3. Finally, integrated communications is cost effective. Few universities have the resources, human or fiscal, to run side-by-side, separate communications campaigns for general external communications, alumni engagement, and fund-raising. Every vehicle, event or outreach effort must do triple duty, which requires a carefully planned and managed effort.
4. And given the major significance of fund-raising at a private liberal arts university, the core messaging that must be pervasive throughout all communications and outreach is that of advancement. Messages that support and/or echo fund-raising messaging and activities must be integrated throughout general university communications, media relations outreach, internal communications to faculty, staff and students (*i.e.*, future alumni), and all alumni affairs channels.

This doesn’t mean that overt fund-raising appeals need to be front and center throughout the magazine, website, e-newsletter and other channels — but that weaving both content and messages that are tangential to or complementary to the Annual Fund is an essential component of an effective annual giving program.

At IWU currently,

- Campaign and giving news is allocated specific space in the magazine, the University’s primary alumni communications channel, so it’s segregated rather than integrated with other news and information, giving readers the opportunity to simply skip the pages.
- On the website, it is in a specific section that requires a click on “alumni and friends” and then another click through to the Campaign section. There is no comparable “annual giving” page or information. And the information about giving is segregated to the alumni section — making it unlikely that students, parents and others will even be exposed to it. Finding information about giving takes 3 clicks (from the Titan Pride home page, to Get Involved page, to “Make a Gift” — and the only copy on the giving page is: *“Legacy Events, Campaigns, and Dues functionality is no longer available.”*)
- Alumni Affairs, the Alumni Association, and alumni volunteers involved adhere to a code of dis-integration. They maintain that they are “friend-

raisers,” and make it quite clear that their work is to be totally separate from anything to do with fund-raising. Even at universities where total integration has not yet taken hold, it’s unusual to see this degree of deliberate and firmly enforced separation. As an example, the alumni e-newsletter does not making fund-raising information a priority.

As noted in previous sections, at IWU currently, there is a very strongly entrenched silo approach, which occurs because the responsibility for these channels is also siloed — advancement does its own communications, as does alumni affairs, and then university communications handles other vehicles. The individuals involved all meet regularly to share information about what they are doing, but there is no apparent attempt to coordinate messaging for “echo” effect, for instance.

While it is unlikely that administrative structure will be changed to unite all communications channels under one function, that does not preclude a tighter coordination, with a particular emphasis on content and messaging that will support alumni donations and fund-raising. Some specific examples:

- Coverage of successful alumni, particularly those who are now giving back and can reference that in a subtle way (not as an appeal — “please give to the campaign” — but teaching by example).
- Coverage of students and faculty / programs that are supported by unrestricted gifts, with mention of how this support has made an impact.
- More comprehensive implementation of what is supposed to be the primary message of the University’s core messaging strategy (“Illinois Wesleyan’s successful graduates make a difference across the nation and around the world”) — so that it is woven throughout all vehicles.
- “Echo” words that have primary focus in annual fund materials, but are then deliberately placed throughout the alumni newsletter, magazine, website, *etc.*
- Alumni Affairs and Alumni Association events and communications should echo fund-raising themes, and play a more active role in promoting stewardship and recognition of donors. This is not to suggest that every alumni event focus predominantly on asking for gifts; but certainly something as simple as recognizing donors who are in attendance can send a message. It’s been suggested that some say they wouldn’t attend events if they were going to be asked to donate (not sure if this has been documented with any quantitative research), but subtle ways of recognizing donors and sharing information about exciting things on

campus being made possible by donors, should be done at every event, as echoes of more direct appeals from The Wesleyan Fund.

And at the heart of the messaging must be stewardship — caring about the University, taking care of the University, engaging and contributing. The University's need for funds and for alumni engagement must be top priority. It is not an "either / or" situation — there are universities that manage to embed alumni engagement and giving messages in magazines, newsletters and websites that are highly successful.

As noted, integrated communications can be accomplished within the existing IWU administrative structure (although a case can be made for a more centralized function), but true integration means more than having the appropriate departments share with each other what they are doing. It's not enough to say, "Our silo is doing A," and, "Our silo is doing B," in a report process. An integrated team approach means one integrated plan, mapped out over all key audiences, with coordination of channels, touch-points and, most of all, messages. The team agrees on core messages, with a focus on stewardship and alumni support, and each function then weaves those messages into the channels that they manage.

Without this kind of approach, IWU is operating at far less than optimal efficiency in terms of message delivery. And without consistent delivery, message uptake is severely compromised, as are desired outcomes.

Of equal importance, the Wesleyan Fund cannot achieve full effectiveness without having its messages consistently and comprehensively delivered and echoed every time and place an alum touches the University.

<http://www.fundraisinguccessmag.com/article/a-realistic-look-annual-fundraising-campaigns/1>

FundRaising Success

A Realistic Look at Annual Funds

By James P. Daniel

March 2012

Part One: A Brief History Annual Giving

Participation, always a sensitive issue with trustees, is in decline at many institutions — not for lack of trying but for difficulties in simply making contact. The CDC in Atlanta recently suggested that 20+ percent of households no longer have landlines — and the erosion in landlines is picking up speed.

Direct mail is super-saturated. Younger generations are not using e-mail except at work, etc., etc. Annual fundraising is getting more and more difficult.

And, who hasn't seen at least one story this week encouraging better use of social media in annual giving? Questions about social media are everywhere. Trustees are asking, "Why can't we raise the millions that Obama did using social media?" The short, albeit flippant, answer, of course, is, "We can — as soon as we figure out how to secure nightly coverage on cable news for the next 52 consecutive weeks."

Though that trustee's question may not be elegantly articulated, it is profoundly important and deserves a more serious answer. What is happening to the annual fund? As mass solicitation goes, so goes modern annual giving.

And, it is looking more and more precarious — and more quickly and more sharply so as time goes by.

There is an ancient history to this recent distress masked, ironically, by the fact that we've continued to raise more and more money through mass solicitation. If that sounds paradoxical, listen closely to two ways of recounting this history of annual giving.

A short history lesson

Until about 40 years ago, the "annual fund" was dominated by volunteer organizations that literally canvassed the community for annual support. Some did well — i.e., they met the budget needs and secured broad, though local, participation. There were "consulting" firms that helped organizations replicate these efforts through dinners and gatherings in other communities.

These canvassing efforts began to decline about 35 years ago, and they've rarely been really successful since, though many variations on "special events" continue to offer volunteer fundraising opportunities. One of the causes of the decline in volunteer canvassing was the introduction of an easier, better way to do annual giving — direct mail.

Direct mail made its debut in the late 1940s and ramped up slowly as the "better way." In the 1960s, the ZIP code provided new tools for targeting. But, the real explosion was caused by the computer in the 1970s with the advent and growth of the digital database.

Computers enabled direct mail to really take off. Canvassing became much easier and much broader. There were few geographical limits that could not easily be bridged. And volunteer efforts began quickly to shrink because the "return on investment" was simply not competitive.

Direct mail expanded the reach of the annual fund beyond the local community. And it raised the stakes, and the take. "Participation" became an art and a very big concern. Annual fund goals — and numbers of donors — skyrocketed with direct mail. A new "science" of direct marketing for philanthropy was born — how to write a letter, better BREs, live stamps, graphics, personalization, segmentation, teasers on the envelope, etc. It all got more and more elaborate and sophisticated.

Direct mail worked very well, and it grew quickly for a couple decades. In the 1980s direct mail quadrupled, then doubled again in the 1990s. The drivers for this growth were technology — we moved from the mimeograph to the offset press, then to the web press, then to high-speed computer printers and more recently

to color printers, etc.

Dynamic electronic databases replaced the static addressograph, making many new approaches possible. It took us from "Dear friend" to "Dear Sally and Joe." Automated stuffing, live stamping and NCOA were factors. Analytics and modeling took us even further, and we began to gather more and more seemingly "trivial" information to drive better targeting. Some nonprofits were able to support their entire operations from annual giving. The sky seemed like the limit as we bought, rented and exchanged lists, and got better with the analytics, segmenting and targeting.

Then, about a decade ago, direct mail started into a decline that has become a nosedive as we — and all our colleagues in the for-profit and political arenas — drove it to, and then beyond, the reader's saturation point. Witness the new vocabulary like "junk mail." Direct mail is still an important part of the mass solicitation business, but its role has changed dramatically.

But, through the later chapters of the direct-mail story, telemarketing was rising to meet and anticipate the challenge of that decline. Telemarketing moved in to compensate for "snail" mail. It too, at first, increased the dollars and the donors almost geometrically. The rate of growth was astonishing as alumni volunteers staffing the two-nighter at the local phone company's facility was replaced by students, then by paid students working several weeks, then all semester, etc. The process was so lucrative and so effective it simply kept growing. Soon telemarketing companies introduced new professional calling centers, and database-driven automated dialing equipment squeezed out the inefficiencies of touch-tone (which had replaced the rotary dial of the earliest days of telemarketing) and drove the contacts to thousands per hour.

We added the same statistical modeling and analytics that had redefined direct mail to further streamline telemarketing. Then, the digital database and other equipment brought robo-calling and a host of other technological refinements that seemed to hold the promise of stretching our "touch" nearly to infinity.

But almost as quickly (think about how the pace of these changes continues to accelerate) caller ID, screening and cell phones with unpublished numbers (and the decline of the landline) began to point toward the approaching decline of the phonathon. The story of telemarketing is all too familiar to all of us and hardly merits a reprise here. Telemarketing also continues to be critically important and continues to be the source of the vast majority of major gifts most institutions receive. But, participation is in decline for most. The ratio of "attempts" to "contacts" continues to decay, the numbers of prospects who are unreachable continues to grow, etc. The future looks long but not especially inviting.

This history, these progressing chapters — volunteers, direct mail, telemarketing — overlap each other and have long declining tails. But, though all continue to be used, their rises and declines are largely sequential and the history is pretty clear, if we pause to think it through. Mass solicitation is under a great deal of stress today.

The paradox: More is ALSO less

We, along with our trustee friend quoted earlier, are searching now for another new approach, the next technological chapter that will again vault annual giving to new heights. We're turning our attention toward social media. (We almost skipped completely over e-mail, though it had some currency and is still used for ancillary purposes. But its impact was not especially notable — certainly not yet comparable to any of the big three: mail, telemarketing or volunteers.)

Social media seems now to be the next chapter of technological advance. Our hope is that it will, once again, take mass solicitation to a bigger, better, broader, more personal, more effective, cheaper and more lucrative place.

And, after all, doesn't Obama's presidential campaign fundraising phenomenon of 2008 strongly suggest the potential for this?

Maybe. The responses to several natural disasters suggests also that there is potential in social media and online giving. But, before we jump to conclusions, consider another theme that winds its way, largely unseen, through a second telling of the history we just reviewed. This theme relates to the paradox we noticed back at the beginning of our discussion. We tend to miss it because we've focused on the radial growth in participation and dollar results and on what looks like the success story here.

Over time, the universe of mass solicitation — though it was exploding in real geographic terms, in terms of numbers of donors and prospects, and in terms of dollars — is distilling itself into a smaller and smaller space: the psychological real estate the charity owns in the donor's mind.

Decades ago, when we used volunteer groups to canvass, life was paced such that we could capture a week or more from our volunteers. They, in turn, were typically able to capture up to an hour from our donors as they made their personal solicitation calls. We "owned" a large chunk of psychological real estate in our constituent's mind.

As our technology advanced and our efficiency increased, and as we began to get much more from much less, our need for real time and for our donors' attention span for this stuff shrank — continuously. We went from being able to capture a half hour of our donors' time through the volunteers' visits to 10 to 15 minutes through direct mail, to three to five minutes through the phonathon. And we are now struggling to capture a few seconds of time and attention from our constituents via flash video to inspire someone to click "reply" and key in a credit card number. The psychological real estate we capture through the new media is shrinking — rapidly.

Have we asked ourselves: Can we ask? Is this psychological real estate important? How is it important? Does it have a half-life like uranium that reaches into infinity? Or is there a zero-point rapidly approaching where, for mass solicitations from organizations responding, not to natural disaster (which can capture continuous exposure on cable news), but to simple annual support, it will literally disappear? Should we worry that eventually the psychological real estate might become too small for established charities seeking baseline support?

Perhaps social media will become a new panacea. Certainly, we should do what we can to create this. But we probably need to spend some time asking ourselves what this history really means. Look again at the Obama fundraising phenomenon. Does it fit with this analysis? Was social media the tool that the Obama staff used to capture the psychological real estate? Or was it simply the tool the campaign used to harvest the results from the real estate that was captured by the news media — continuous front-page stories, cable news coverage, stump speeches broadcast, exceptional events, talking heads, continuously obsessing, etc.?

Social media was effective because it leveraged the attention already purchased in other ways. How will a charity do this advance work that the national election coverage was able to do for Obama? How will it do it in a way that is convertible and effective for the "harvest" tools? The recent tsunami, Haiti and Katrina phenomena pose similar questions — could the organizations that responded to those events have accomplished what they did without the massive support of the traditional media?

Is the glass half-full or half-empty?

The glass really does seem to be half-empty when we look at this second telling of the history of mass solicitation. But maybe there are some pointers toward a new road. For example, over this same history of several decades the profession has also come to appreciate a different truth through the maturation of another fundraising science, the campaign. This truth? It's that the annual fund is for many organizations no longer about real money. The major- and planned-giving programs are those that focus on real money.

Pareto's Principle that 80 percent of our outcomes result from 20 percent of our effort (80 percent of the funds from 20 percent of the donors) continues to skew northward, and we now realize that more than 80 percent (much more) of the money comes from fewer than 20 percent (many fewer) of the donors. The truth: Though we thought about it as a fundraising program — and many of us still do, especially our trustee friends — we are now beginning to understand in new ways that annual giving is really more about engagement than about fundraising. It's more about loyalty, teaching and involvement.

Of course, for many organizations that count on the annual fund to balance the budget, this will seem like heresy. But for the majority of larger, sophisticated fundraising shops, this is a much less controversial proposition. The annual fund is a donorbase-management program, not a fundraising program. Part of the difficulty in thinking about this issue is one of perspective. There was a time when what we now know as "major gifts," numbers with six, seven and eight figures, were not on the horizon. Most giving for most institutions was essentially "small gifts" as we look in our rearview mirrors today. However, though the annual fund still

accounts for the vast majority of donors, it rarely accounts for the lion's share of the gifts, the money.

Our long romance with mass-marketing technology distracted us from this lesson. We actually were making real money from the annual fund, and it looked like a bonanza with seemingly infinite potential. If we really took the lessons from this insight that annual giving is not really so much about the money as about the engagement — if we try to leverage it — we might find an insight that again positions the glass to appear to be half-full.

There is a striking coincidence between a couple trends that show through this history. Volunteer-based fundraising was (ROI) inefficient relative to money and participation breadth. But it was quite effective at capturing a huge share of psychological real estate in the constituent's time/attention continuum — it was very, very engagement-effective and efficient.

As we professional fundraisers became more bottom-line focused, aspiring to raise larger, faster, easier money from a broader and broader base, we bought, one might say, this bottom-line efficiency and dollar growth and paid for it with the currency of that old psychological real estate. This is not, of course, a black or white situation, but there is no escaping that this gray area has progressively become darker and darker over the years. When we run out of this currency (psychological real estate), can we still have the efficiency and the bottom line?

Here's a takeaway, also part of the history sketched above: Even in the old days, though we may not have realized it, our efforts were not so much about money but rather about donorbase management. We did not care as much that people gave sacrificially; we cared that they participated. The issue was to build a broad base and donor loyalty — we focused on building a supporting constituency. Episodically — once every 20 years or so — we "harvested" that base, that loyalty, with a major campaign. In the interim, the money we raised was as much a sign that we had a base as it was real money. Next issue, let's explore the pragmatic implications of this insight. Good donorbase management is still possible, of course, and we can still make it pay.

The Troubled Future of Mass Solicitation

Part Two: An Intriguing Future for Donorbase Management

Last issue we traced a troubling history of a young industry — mass solicitation of philanthropic support. It seems that technology has been a mixed blessing covering a wider and wider territory more and more thinly. We recounted the successive rise and decline of volunteer-based solicitation, direct mail and telemarketing. No one in annual giving, especially those in smaller, more regional institutions, is comfortable with the direction this history seems to be going.

But just as some organizations continue to use volunteers for community campaigns, all will probably continue to use both direct mail and telemarketing into the foreseeable future. Many are experimenting with social media and other internet- and technology-based mass-solicitation tools. We examined some fundamentals that seem to abbreviate the potential of these tools for most smaller organizations. But, this story is far from finished. Technology is a continual swirl of novelty and insight.

Until the next great mass-solicitation emerges — and everyone is working continually to produce this new marvel — there are some measures that suggest themselves to the prudent annual-fund director. Let's look at some pragmatic annual-fund management strategies for the way forward:

1. Manage your annual-fund program for loyalty rather than for money. If you succeed at the loyalty, you'll raise the money. If you manage for money and succeed at it, you're not assured to also capture the loyalty. Institutional leadership must be educated on this matter.

The annual fund cannot succeed as a gap-filler. It's not about the cash, and it can't just continue to raise more and more money.

Rather, the annual fund is the pump mechanism on the famous major-gift "pipeline." It is the intake system and one of the important tools for managing the hydraulics of the pipeline. To focus on the cash increases the risk for driving the management attention away from loyalty. The cash is only the sign — albeit a critical sign — that loyalty is building.

2. Focus first on LYBNTs (Last Year But Not This Year). Start with them on day 1 of your fundraising new year and stay on each of them until that person renews. In the end, we all know that it is much more successful and inexpensive to retain than to acquire. So build a program around the goal of securing maximum growth from minimal acquisition. (Sounds paradoxical, but it's a very interesting problem to contemplate.)

Set a retention goal, and track it progressively. It's not enough to know that you're building toward 73 percent retention over time — you need to know that you retained 73 percent of those LYBNTs you contacted this week, next week and so on.

Set retention goals, and work on them throughout the year. This positions the program to manage finite resources for the most important results. Many programs make a decision to limit the number of "attempts," and they set this number for the entire pool. Essentially this amounts to a decision that LYBNTs are no more valuable than recalcitrant nondonors. Conserve resources for investment in your most important prospects.

To manage retention you need to understand loyalty. Asking for an increase every year is insensitive and unresponsive to loyalty. Spend some time differentiating the message. This is more than varying the ask amount or the salutation.

New donors don't have loyalty. They gave spontaneously. (Most annual giving is simply transactional.) You need to help new donors interpret and internalize what they did. For this you need a new-donor program. And this should start with the acknowledgment of that first gift and be reiterated in the next solicitation. Pushing them to increase before they understand what their decision to give really means risks sending the message that their new gift was just not quite good enough. Weigh the risks — when you push you can push them up or out. We know which is better, but do we know which is more likely?

Newly increased gifts deserve a new-level program. Many of the same ideas apply. A new level of giving may require interpretation, and you may need to allow the donor to get used to it.

3. Recognize that there will be some attrition. People die, their circumstances change, they find new causes, etc. Build a plan to focus on compensating for it. Better programs experience retention rates in the high 70 percent range. That means even the best experience attrition of 20+ percent. Instead of looking simply at acquisition, look first and more precisely at reacquisition. SYBNTs (Some Year But Not This) are generally closer than never-givers. And, some SYBNTs are closer than other SYBNTs.

Find those SYBNTs with the best combination of high recency and high frequency. Focus on them like you focus on LYBNTs. Set goals for each segment of this group, design targeted strategies for the group and work to achieve the goals. A statistician can build a grid based on your donor records that segments your SYBNTs strategically. Use recency as one axis and frequency as the second in the grid. The upper left cell will contain those who have the longest giving record and the shortest lapse. The lower right cell will contain those who gave only once many years ago. Work from the upper left first toward the lower right. Identify how many you need to reacquire to compensate for LYBNT attrition, and target accordingly. Think about real numbers for these goals. "More" and "as many as possible" are not helpful unless you have infinite resources to invest in the effort. The key here is to budget finite resources to achieve specific goals — strategies are not strategies if they are vague.

4. Understand the average size of gift not as a question of money. Rather, it is a question of loyalty and engagement. Not everyone can or will increase his or her giving every year. In fact, if someone just made a significant increase last year, you risk sending him a message of ingratitude by asking for another this year. The donor might not hear you are grateful for that increase, but that you consider it to have been too small. In a typical annual fund, about a third of returning donors increase annually — loosely translated that means it takes about three years to grow into a giving level psychologically. Until the donor gets comfortable with this new giving level, you run a risk of pushing her out, rather than up, when you push. Build your segments and target your messages accordingly.

5. Recognize that you must also replenish your donorbase with new constituents. Your loyal constituents are human — i.e., they are mortal and at the mercy of the elements of change. Figure out whom you most need

to acquire and whom you have the best chance of acquiring. For higher education this is often the graduates of the last decade group. Build specific strategies for these younger people. Here is where social media might be most helpful. But persuading your new grads to join your online community — in addition to [Facebook](#), [LinkedIn](#) and others they may already be using — might be more challenging than we realize. This is a video-oriented crowd but not necessarily an e-mail-active crowd.

6. And build your real case. This is not about money. Nor is it about what the donor can do for the institution. It's about the value that the institution contributes to the community. All giving is, or wants to be, about making the world a better place.

Talk about outcomes — not simply the outcomes from the gift, but the institutional outcomes. Be specific; be quantitative. If you can, tell a story. If you tell a story, tell a short one.

Remember how much time and attention your program can capture — it's very, very small — and work accordingly. Try to "brand" the annual fund. This means that you find a very brief, pithy, memorable mental image. Stick with it; let it evolve very slowly such that the continuity is sustained. (See the [Reed College](#) example of the "[Lemming Society](#).")

You can produce a splashy new image each year in the acquisition program, but ask yourself how well you think this will serve your loyalty focus. If it serves that focus well, do it. If it undermines that focus, go back to the drawing board.

The amount of time and attention you are able to secure from your constituents is what makes the difference in the kind of donors they will become for your organization. Manage your annual fund for loyalty and attention. The annual-giving program is not as much a fundraising program as it is a donorbase-management program. Think about it and manage it from this perspective.

Implications for alumni (constituent) relations

There are implications here also for how we think about alumni or constituent relations. Another story line in the ancient history we reviewed at the opening is about the relationship between alumni relations and fundraising. In the old days, the days of volunteer canvassing, alumni relations and annual giving were one. They grew apart in parallel with the rise of mass marketing in annual giving.

Was there a causal connection between these two phenomena — the divorce from fundraising and the rise of technology? Maybe. But the important thing is that they grew apart, far apart. Not long ago it was common to hear an alumni-relations professional eschew fundraising fairly vigorously. One version of the argument held that, "We're about planting the seeds; development is about harvesting." Or "We set the table; we don't dine." Implied was the argument that fundraising was somehow antithetical to getting people's attention and that, if you insert fundraising into the equation, people won't listen to your case building.

Certainly, if every event and every magazine article was about asking for money, that argument makes some sense. But is it really that simple? Alumni relations is about engagement. At nearly every institution of higher learning, a simple overview will demonstrate that the vast majority of engaged alumni never attend an event. The principle means of engagement is the annual gift. Maybe a large number also engage through the magazine, website or the online community, but is that engagement as active and meaningful as the check they write? That's hard to measure.

The problem, it seems, is that when the alumni-relations professional staff walks away from fundraising, it tends to lead the alumni board also in that direction. How many alumni boards tend carefully to the actual work of fundraising? Most feel, like their support staff, that if they push the fundraising agenda, their events, clubs, communications and activities will suffer. Somehow these things don't fit together comfortably.

When the alumni leadership walks away from fundraising it delivers a very important, though very subtle, message to those it leads — "There is something untoward about the fundraising dimension of your relationship with your alma mater." "Fundraising is not fun; it's not rewarding; it's obligatory and painful."

If the annual fund is about loyalty and engagement; the alumni-relations program loses a great opportunity for success by looking away. A better strategy would be to endorse the annual fund, to make it a real point of pride. Does this mean that the alumni relations professionals must become "fundraisers," must do some

"asking"? Not at all. A simple effort to script every event and every communication with a message of pride about how well the alumni do in supporting the institution is very powerful.

A simple line like, "Many of you who join us here today are annual-fund participants. Thank you. It's hard to overstate the impact that you are having for the young people who follow you at alma mater. And, even more important, it's hard to overstate the importance of populating our world with more people who make the same kind of contributions to our society that you are making. Alumni, let's give ourselves and our institution a real hand," could be so very, very powerful. No asking. No discomfort on anyone's part. Some very meaningful reinforcement about the alumni experience and, oh by the way, a positive interpretation of giving.

To take it up a notch, give all donors special name tags and recognize them with a special round of applause. No one needs to ask at this event. No one needs to chastise those who don't give. No one needs to disparage the lack of participation. No one needs to declare that, "we all ought to be doing this," or that, "we owe this to our college," or that anyone should or could think more about the matter of support.

All that is needed is to declare the value of giving, to affirm the act of giving and to affirm those who do give for giving. The goal is to make a point of pride out of institutional support — a pride that all can share — whether or not they themselves are donors. It's not that nongiving is a fault; it's that giving is a strength and a privilege. Unless the alumni board signs on to this approach, it's hard to avoid tacitly, subtly suggesting the opposite. To suggest the opposite is to lose the connection to the biggest, most effective, most visible, most inspiring act of engagement the institution has to offer.

In the end, annual giving is about loyalty. It's about engagement. And the work that advancement departments do in annual giving is really about the hydraulics of the pipeline of major giving. It's always been this way. The pressures and stresses of recent trends in the business of mass marketing help us see this more clearly.

The issue is: How do we do the work of annual giving in ways that drives our attention away from the bottom line to this more important purpose? Most institutions discover that when they begin to view the money not as the end but as the gauge, as the measure, of a higher value — loyalty — they begin to raise more money. This is the happy paradox.

Is there a larger role for social media here? Is there a future for mass solicitation? Can we sustain the annual-giving program? Most assuredly. But let's think more deeply about these issues than we've thought in the past. These new times will require a new creativity, and they can bring us a new success. The golden age of philanthropy is not past — unless we allow it to be so. Fundraising is quite essentially the business of optimism, and optimism (not necessity) is the mother of invention. *FS*

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<http://www.fundraisinguccessmag.com/article/building-culture-philanthropy/1>

FundRaising Success

9 Ways to Build a Culture of Philanthropy at Your Organization

9 ways to ensure your program isn't operating in constant nickel-and-dime crisis mode.

By Pamela Grow

February 2012

Are you the sole person responsible for fundraising in your organization? Running a one-person development department can feel like you're spinning 10 glass plates in the air. You're the grant proposal writer, database administrator, director of individual gifts, webmaster, event planner, social-media director and more! And every day it seems as if "they" — the trendsetters — are dangling more bright, shiny objects in front of your face.

When this topic recently came into scrutiny in a [LinkedIn](#) discussion, I found one respondent's answers so telling that I asked for permission to reprint. [Frank Donaldson](#), president at the [Institute of School & Parish Development](#) in the New Orleans area, offered his thoughts on why development staff turnover is so great within Catholic institutions.

1. The leadership of the Catholic institution (pastor, principal, board, pastoral council) does not really understand development.
2. Everything is measured by the amount of immediate money that "must" be raised.
3. There is no written strategic plan in place with measurable, reasonable outcomes.
4. No training is provided for new development directors and continued professional growth.
5. The development director is hired, and the people who have been involved in the past seem to wash their hands of the responsibilities and take the attitude, "I'm glad that's out of my court."
6. The entire effort is simply one fundraiser after another fundraiser, and the "nickel-and-dime" mentality never ceases. Total burnout.
7. Too many "guarded kingdoms" to overcome. Therefore there's a lack of acceptance of the new development director's vitality, energy and creativity.
8. Not enough team building on all fronts, and this is really all about people engagement.

I think Donaldson absolutely nailed it — and I don't believe that these eight reasons are limited to Catholic institutions.

The good news?

You can avoid many of these pitfalls by heading them off at the gate. How? Start by creating a culture of philanthropy within your organization.

Fundraising is ultimately about building relationships. A culture of philanthropy is merely that — an attitude that embraces relationship building. Once everyone realizes that fundraising is, in many respects, everybody's job, your organization is on the path to sustainable funding. Shift your focus from money to building lasting relationships, and the money will follow.

How do you know that your organization has embraced a culture of philanthropy?

Everyone understands the need to raise money and is willing to do what it takes to support the effort, regardless of his or her role in the organization.

Everyone represents the organization — and everyone helps identify potential new friends.

Everyone can articulate a case for giving and how a gift will be used.

All of your internal processes are donor-centric.

You welcome donor visits to your offices and program sites.

Everyone takes turns welcoming at the front desk and phoning donors.

Your executive director sees him/herself as the face of the agency.

The executive director is 100 percent committed and personally involved in fundraising.

Your organization's clients and donors are viewed as experts in how the organization carries out its mission and are regularly invited to share their stories.

100 percent of your board members contribute financially.

What are some signs that your organization hasn't embraced a culture of philanthropy?

Your fundraising is constantly in nickel-and-dime crisis mode.

Your development staff is paying for its own training and books.

The responsibility for fundraising is assumed by one or a few people (usually the development director or your executive director).

You rely on activities such as special events or direct-mail campaigns, rather than focusing on a comprehensive strategy embracing multiple streams of income.

When major gifts or bequests do occur, they're surprises. There's no one in charge of making asks, and staff is rarely, if ever, out of the office meeting donors face to face.

You've never surveyed your donors.

You know that when the founder leaves next month she's taking half of the donors with her.

Where does your organization stand? Remember, as the development director (or executive director), you are primarily responsible for building a culture of philanthropy. Don't ask for permission to lead. Take the reins, and be prepared to lead your organization's staff, board and, yes, even your executive director.

What are some ways you can begin to lead?

1. Ask a program staff member his or her advice on an appeal letter. People love it when you ask their advice, and it's a lesson in the importance of story gathering. Please note that I didn't advise you to necessarily take their advice.
2. When you receive special "thank-yous" from clients, copy them and send them on to board members.
3. Keep a desk drawer full of cards — birthday, anniversary or "just because" — to send to your board members.
4. Schedule thank-a-thons, where your board members pen thank-you notes to donors. Make it a fun experience by scheduling 20 to 30 minutes within the course of a board meeting, serving refreshments.
5. Spend one-on-one time with board members getting to know them individually.
6. At every staff and board meeting, share your latest "story," whether it's about one of your agency's clients, a donor or even a recent visitor to your organization. Encourage staff members to share their stories as well.
7. Shadow a member of your program staff for several hours or even a day.
8. Think outside of the proverbial box. Recently I attended a United Way branding workshop on behalf of a client. Among the participants, I was delighted to see that one organization had sent program staff in lieu of marketing or development staff. I spent some time chatting with the program staffers, and it was clearly an eye-opening experience for them in terms of how they could better share their own work with their development department.
9. This tip came via my friend Andrea Kihlstedt, principal of nonprofit consulting firm The Kihlstedt Group. Create a habit of celebrating every little success. When you reach 100 percent board participation, celebrate it — perhaps with a pizza party at your next board meeting or by breaking out a bottle of champagne! Has a board member brought in three new donors? Send a thank-you gift or present a token of your gratitude publicly at your next board meeting. Celebrate what you want to see more of!

Building a culture of philanthropy absolutely will not happen overnight. It takes patience, consistency and commitment. But the rewards are well worth it. *FS*

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Big Fundraising Ideas for Small Development Offices

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FundRaising Success

Do You Need a Post-recession Turnaround?

Here are some things that won't get you there — and some that might.

By Jeff Brooks

May 2012

It's been a tough few years for a lot of nonprofits. But with life returning to the economy and many fundraisers reporting improved numbers, maybe now is the time for your turnaround.

But know that there are some things you might be tempted to try that simply don't have the potential to create that big, positive change you need to get back in the game like you used to be.

A new brand won't turn you around

You may already have heard from brand gurus who tell you that a shiny, modern, new-and-improved brand is your golden ticket to a turnaround and a perpetually bright future. It's an exciting prospect: Throw out that old look you've grown so tired of! Replace your logo with something you'd be proud to show your pals! Get a whole new Visual Identity System that was developed by brand gurus who wear the coolest eyewear you've ever seen! Maybe even change your organization's name to something that sends shivers up and down your spine! A whole new generation of richer, cooler, smarter donors will flock to your cause when they see your new brand. It's a no-brainer!

Problem is, it won't do the trick.

If you are very, very lucky, the result of your new brand will be neutral. If you're like most nonprofits that do this, the new brand will unleash a revenue hit that's somewhere between painful and catastrophic, and lasts for years.

I know my predictions sound dire, but I've watched it happen too many times to harbor any illusions. It goes this way for two reasons:

1. Brand is not where the action is in fundraising. That is, brand — as defined by a set of logos, colors, fonts, slogans and other communications techniques — just doesn't make that much of a difference.

Fundraising is about motivating people to take specific actions. The font you use to do that just doesn't have the horsepower to move the needle — unless it's unreadable, in which case it can move the needle a long way in the wrong direction. Which brings us to the darker and more painful side of nonprofit rebranding:

2. Brand gurus hate your donors. They hate how old, unsophisticated and middle-class they are. They hate the literal, straightforward, untinged with irony, wordplay or cleverness messaging that actually moves your donors to action. The Visual Identity System capable of reaching your donors would be an embarrassment in the brand gurus' portfolios.

So they brand for themselves: cool, modern, clever stuff that will look great in their portfolios. Maybe even win an award. And you, having a lot more in common with the gurus than with the donors, say, "Wow!" It's the coolest thing ever. You can hardly believe the ugly crap you used to do before the new brand!

But your donors? Those corny, old folks just don't get it. They can't tell who you are anymore. They're not making any emotional connection with the new look and feel. Often, they literally can't read the spindly, modern sans-serif fonts printed over dark backgrounds that the new brand requires.

Revenue crashes.

Instead of a new brand, get a better offer

By better, I mean a donor-centric call to action that's:

Specific.

Simple.

A great deal for your donors.

Emotional.

Urgent.

Get it right, and it's an expression of your cause that helps donors see how critical they are to your mission. Giving becomes a thrill, packed with psychic rewards and connected with a story they can tell about you and about themselves.

A great fundraising offer is the heart of successful fundraising. When it comes to brand, your offer is what matters. It can help turn things around in a hurry.

Amazing ad campaigns won't turn you around

The brand gurus' cousins, the ad agency people, have something they hope you'll buy: an ad campaign.

And they know how to sell it. They create a clever, beautiful message that makes your heart sing, that captures your aspirations and tickles your aesthetic sense.

The amazing ad campaign is a lot like the new brand — well-targeted to please you and to bulk out the portfolios of its creators ... but simply unable to get any traction in the world of real, live donors.

That's because "awareness," "aided recognition," "noted scores," "impacts" and other ways of measuring airy nothingness are not meaningful goals for hardworking nonprofits.

Think of it this way: Would you rather make 100 people slightly more "aware" of you — or would you rather move 10 (or even five) people to actually take action and write you checks?

Instead of an ad campaign, take control of your data

I realize there's hardly anything less sexy than data. But data is where it's at.

You should be able to ask a question like, "How many donors do we have in the three West Coast states who've given between \$25 and \$100 with cumulative giving under \$250 during the last 18 months?" And to that question get an accurate, meaningful answer — more or less instantly.

If you aren't there, you are not in turnaround territory. Great data capability can help you:

Target the right donors at the right times with the right messages.

Invest the right amount in cultivating each donor.

Spot trouble before it gets out of control or opportunities before they pass.

Avoid those boneheaded errors that annoy the heck out of donors.

Being on top of your data won't win you any awards. It won't even make you interesting at parties. But it can help transform your fundraising and bring about the turnaround you need.

Here are a few more popular moves that will not help:

Hiring a new marketing director from the commercial world who's unencumbered with fundraising knowledge.

Nicer headquarters.

A social-media campaign.

A smartphone app, QR codes or mobile giving.

None of these things are going to do it for you. Instead, try things like these:

A website that's easy to navigate and has a robust and simple online-giving back end.

A detailed fundraising plan, so you know what you're saying to whom, when and in what media a year in advance.

A fanatical focus on serving donors.

Making sure things like your state registrations, IRS filings and postal permits are always accurate and up to date.

Prompt, error-free caging of donor gifts, with fast and accurate receipting.

See the pattern? If you need a turnaround, the glamorous things aren't for you. You'll be lucky if the glamour moves don't end up destroying you. Your turnaround will come from a focus on the basics. Yes, that's boring. But the boring stuff is what makes the difference. *FS*

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FundRaising Success

Direct Response That Breaks Through: Capturing Attention (at Least for a Minute)

By Pamela Barden

June 7, 2012

In fewer than six months, we'll know who will be the president of the United States for the next four years, the latest Olympic gold medalists will be staring at us from cereal boxes, the World Series will be over, and Valentine's Day merchandise will be on the shelves while "Silver Bells" plays over the loud speaker.

Let's face it — getting the attention of our donors is never easy, and big events that capture everyone's attention don't help. As fundraisers, we're constantly fighting against the clutter that fills mailboxes, inboxes and pretty much every other place our donors turn.

For larger nonprofits, testing to find the design, teaser or subject line, copy, offer, premium, and so much else that best capture attention is standard operating procedure. But for the smaller nonprofit, budgets often won't stretch that far, and your only chance to break through to donors has to be your best effort. "Undivided attention" seems like an impossible dream these days, but these reminders can help you break in to busy lives and get donors to stop and at least consider if what you're saying in your direct-response mail, e-mail and other efforts is worth listening to.

Put it in the context of 'me'

Too many fundraising messages are about abstract problems that affect someone else. The great messages that get read (at least by me) find a way to take that problem and make it meaningful to me. Our job is to find the part of the problem that is going to resonate best with donors. For example, I recently read that hunger among older Americans is skewed toward women, and those hardest hit aren't that much older than I am. That puts a face on the problem — and it looks a lot like mine. Knowing the demographics of your donor file, and then finding a way to bring the need home to that target audience, helps your offer stand out from the others.

Show me what part of the problem I can solve

There are huge needs that deserve support, but it's critical in direct response to tell the donor what he or she can do about it. Let's face it: Most of us know that on our own, we can't solve world hunger, global warming, animal cruelty or your budget crisis that requires millions of dollars. Frankly, we're just trying to figure out what that funny noise is when we start the car. Be sure you serve up the problem at a manageable — and believable — level. Tailoring the ask amount to the donor's last, largest or average gift is fairly common, but if you can't do this, breaking down the problem to a level a donor can relate to gives assurance that what he or she does matters.

Tell me a good story, but don't only have a happy ending

It's important to show your donors that you — with their help — are making a lasting difference. A story helps your supporter visualize the value of the work you do. But avoid "and they all lived happily ever after." When you tell a great story of success, be sure to broaden it out and remind donors that this is a wonderful example of the good things their support makes possible, but that there are many more still waiting for this same "happy ending." It's easy to be excited about the good things we've done (and we deserve to be), but keep in mind that donors only know what you tell them. They may not realize (or take the time to remember) that there is still more to accomplish — and with their help, you will make that happen, too — unless you show them the need.

I won't make a prediction on the election or who gets the gold medal in rowing, or even suggest that the Cubs will finally win a World Series. But nonprofits — large or small — that continually ask, "How can I break through?" have the best opportunity to bring home the gold in terms of fundraising success.

Pamela Barden is the creative juice and the copywriting machine behind PJBarden Inc. Pamela also serves on the FundRaising Success Editorial Advisory Board. You can follow Pamela on Twitter @pjbarden.

Illinois Wesleyan University Alumni Association

Strategic Plan

Updated April 17 & 18, 2009

Mission:

The mission of the Illinois Wesleyan University Alumni Association is to strengthen the relationship between alumni and the University, to enhance the relationships among alumni, and to develop the culture of stewardship of alumni toward Illinois Wesleyan University.

GOAL #1

Enhance the sense of empowerment and ownership of the University among alumni by providing broadened and meaningful opportunities for volunteer involvement.

Objectives:

- A. Utilize the Executive Board of the Alumni Association to provide leadership in promoting alumni involvement with a wide range of volunteer opportunities based upon various areas of affinity with IWU (programs categorized as of April 2009):

“Achieved” and/or In Progress	Developing and Growing	Forming or Renewing	Undeveloped Ideas
Regional Chapters	Pride Alumni Community	Minority Alumni Network	School of Nursing
Parent Board		Greek Alumni Network	Fine Arts Alumni
Council for IWU Women		Young Alumni Council	Athletic Programs
Class Newsletters		Reunions & Homecoming	Academic Affinity (Bio, History, etc.)
Alumni Admissions Network		Physical Presence on Campus	

Implementation Strategies:

- Committee Chairs will recruit volunteers for their area of responsibility.
- Potential volunteers from the “University Community” include:
 - Alumni

- Students
- Parents
- Faculty
- Staff / Administrators / Trustees
- All Executive Board members will serve on a committee.
- Implement a regularly scheduled communication plan with volunteers (conference calls, newsletters, e-mail updates, *IWU Magazine* articles, web pages on www.TitanPride.org, etc.).
- Two on-campus meetings per year (one is a workshop).
- 90% attendance at one of two meetings
- Committees draft charters annually for Board ratification, to serve as “agreement” between committees and Board for goal-setting and accountability purposes (see “Committee Charter” template).
- Committee chairs report twice yearly to Board (see “Committee Report” template).
- Board sponsors annual workshop on campus, organized by the committees, to train existing and prospective volunteers or members.
- Executive Board reviews and re-categorizes all Alumni Association programs at least once every three years (last update: April 2009).
- A selection and nomination process will be identified and implemented for new members and volunteers.

B. Establish an IWU Alumni House (Welcome Center) to enhance the physical presence of alumni on campus and to foster a greater sense of identity, ownership, and belonging.

Implementation Strategies:

- Establish and maintain an Alumni Library / Resource Room (*e.g.*, archives, memorabilia, digital and regular pictures, alumni yearbooks).
- Sponsor and promote alumni participation in campus programs, with an emphasis on opportunities for interaction with current students.
- Create a wall display in the Phonothon Room.
- Promote use of the Eckley Lounge for alumni activities and visual display.
- Coordinate implementation with Office of Alumni Relations.

Addendum A: Auxiliary Group Charter Template

Addendum B: Auxiliary Group Report to Executive Board Template

GOAL #2

Increase alumni participation in alumni activities

Objectives:

A. Regions

- Increase number of attendees from year to year
- Regional Boards and Alumni Office will prepare and maintain an Annual Regional Plan
- Plan and execute events as identified in the Annual Regional Plan

Strategies

- Identify and establish Regional Boards as part of the Annual Regional Plan
- Encourage more area/neighborhood alumni groups
- Annual Regional Plan will add at least one area/neighborhood group each year
- Annual Regional Plan will use strategies to appeal to all alumni groups
- Establish measurements for all Regional Boards to track growth

B. Homecoming

- Continue to increase alumni attendance at Homecoming by over the average attendance of each previous five year period
- Continue to increase attendance at Alumni Luncheon over the average attendance of each previous five year period

Strategies

- Recruit large committees that represent broad constituencies for each class
- Encourage more communication with class
- Continue to develop affinity groups to bring alumni back to campus at Homecoming
- Provide suggestions to Alumni Office of affinity groups to invite to Homecoming
- Assist Alumni Office in contacting affinity groups to invite them to consider coordinating activities at Homecoming

C. Increase alumni attendance at reunions each year

Strategies

- Recruit Large committees that represent broad constituencies for each class.
 - Greek affiliation
 - Schools (Liberal Arts, Nursing, Theater, Music, Art, Sciences, etc.)
 - Minorities
 - Athletics
 - Other Constituencies as identified by class leadership
- Encourage more communications with class
 - Class Web Page
 - Direct Mail from Affinity Group(s)
 - Twitter, Facebook, MySpace, YahooGroups, etc.
 - Methods Currently In Use:

Direct Mail from Committee (3)

IWU Magazine ads (2)
Class Newsletters (2)
Class emails
E-Connection
Homecoming Brochure
Alumni Web Page
Committee Calls
Committee Postcards

- Maintain attendance at Alumni Luncheon of 700+ people
 - Set up tables by Affinity Group, Department, and/or School
 - Invite students to lunch with Alumni by Affinity Group, Department, and/or School
 - Set up some tables by Class for those with no preference for Affinity Group, Department, and/or School

Addendum C: Discussion Points for Region Participation

Addendum D: Discussion Points for Growth of Homecoming Attendance

GOAL #3

Build a culture of stewardship and involvement within the student body that encourages a lifelong relationship with the University, facilitated, in part by providing opportunity for ongoing relationship between students and alumni.

Objectives

- A. Create an auxiliary group of the Executive Board that has as its focus Traditions, Transitions, and Stewardship
 - Membership would include alumni/staff/students/faculty and staff
- B. Create vehicles including publications and programs that transmit tradition and engage alumni and students in telling their own stories and the stories of Illinois Wesleyan University.
- C. Design programs for first year and senior students that provide interface with alumni and students.
- D. Encourage existing auxiliary groups to continue to nurture alumni and student relationships.

- E. Integrate the story of alumni and the history of IWU into the institution's architecture and virtual displays and designs.
- F. Provide programs and publications that enlighten inspire and encourage student, staff, and alumni to be good stewards of IWU (example: Tuition Free Day)

Addendum E: Building a Culture of Stewardship and Involvement within the Student Body that Encourages Lifelong Relationship with the University

GOAL #4

Assist and coordinate fundraising efforts with the Illinois Wesleyan Development Office

Objectives

- A. Evaluate and report trends of the Wesleyan Fund to the Alumni Board

Strategies

- Work with the development office to monitor and to determine the effectiveness of each alumni event by measuring attendance, participation, and donation rates
- Monitor our results as it compares to peer institutions
- Report to the alumni board on a regular basis
- Obtain 100% alumni board participation in giving
- Develop new strategies to increase attendance, participation rates and donations

GOAL #5

Assist the university in recruiting and retaining students providing geographic and ethnic diversity to campus

Objectives:

- A. Work with Admissions Office to further develop Alumni Admissions Network.
- B. Engage Minority Alumni Network in minority recruiting efforts.

ADDENDUM A

Auxiliary Group Charter Template

Charter Overview

This Charter presents details related to the functioning of the _____ Committee, which is an auxiliary of the Illinois Wesleyan University Alumni Association. It discusses details regarding the operation of this auxiliary group and represents an agreement between the auxiliary group members and the Executive Board of the IWU Alumni Association. This document shall be binding for a period of one year from the date it is ratified by the Executive Committee and signed by the Auxiliary Group Chair.

Relevant Strategic Plan Goals for the Auxiliary Group

▶ _____

▶ _____

▶ _____

Auxiliary Group Leadership and Membership

- ▶ Committee Chair: _____ Committee Vice-Chair: _____
- ▶ Committee Secretary: _____
- ▶ Committee Members: _____
- ▶ Executive Board Member: _____
- ▶ Membership Criteria / Qualifications: _____

Auxiliary Group Activities and Operations

- ▶ Leadership Committee (or Auxiliary Group) Meeting Frequency & Venue: _____ / _____
- ▶ Attendance Requirements: 100% expected

Standing Agenda for Meetings

- ▶ Review minutes from previous meeting and the status of open action items
- ▶ Discuss status report presented by Auxiliary Group Chair and/or Executive Board member
 - ▶ Review progress toward achievement of Strategic Plan goals
 - ▶ Wrap up & report to Executive Board

ADDENDUM B – Auxiliary Group Report to Executive Board Template, Version 1

ILLINOIS WESLEYAN UNIVERSITY ALUMNI ASSOCIATION TEMPLATE FOR AUXILIARY GROUP REPORT TO EXECUTIVE BOARD			
AUXILIARY GROUP:			
DATE & TIME:			
ATTENDEES:			
Name	In-Person (P) / Call-In (C)	Name	In-Person (P) / Call-In (C)
_____ (Committee Chair)	P	_____ (Staff Leadership)	P
_____ (Committee Vice Chair)	P	_____ (Staff Support)	P
_____ (Committee Member)	P	_____ (Executive Board Member)	P
_____ (Committee Member)	C	_____ (Committee Member)	C
AGENDA:			
<ol style="list-style-type: none"> 1. Review of Minutes from Workshop held on _____ 2. Finalize Auxiliary Group Charter 3. Overview & Discussion of Strategic Plan revisions 4. Detailed Discussion of Tactical Actions for Auxiliary Group 			
DISCUSSION ITEMS:			
<ol style="list-style-type: none"> 1. Review of Minutes from Workshop held on _____ <ol style="list-style-type: none"> a. Provided a brief re-cap of points discussed last time b. Last meeting focused upon Actions 2 and 5 <ol style="list-style-type: none"> i. Today's meeting must look critically at Actions 1, 3, and 4 and at all actions as a whole 2. Finalize Committee Charter <ol style="list-style-type: none"> a. Added _____ to the list of Auxiliary Group members as Staff Support <ol style="list-style-type: none"> i. He/she will focus primarily on the communications-related actions 3. Overview & Discussion of Strategic Plan Revisions <ol style="list-style-type: none"> a. _____ provided high-level debrief of all Strategic Plan revisions b. Auxiliary Group members suggested changes for the summary text to make it more results oriented 4. Detailed Discussion of Tactical Actions <ol style="list-style-type: none"> a. Made a broad range of updates to the Tactical Action Plans based upon conversations b. Replaced the Responsible Staff member for Actions #1, 2, and 4 with _____ c. Revised the heading for "Auxiliary Group Ways to Contribute" with "Auxiliary Group Member-Specific Ways to Contribute" (to reflect only unique actions for which the members would be responsible versus the "Overall Board and Board Member Ways to Contribute" which would also include Committee members by default) 			
ACTION ITEMS:			
Assigned To:	Item:	Due Date:	

Addendum C

Goal #2 - Discussion Points for Region Participation

- We have accomplished our goal to increase the number of attendees by 10% over 2003.
- We probably cannot achieve a 10% annual increase indefinitely.
- To increase publicity for events we urge regional clubs to add Twitter, Facebook, YahooGroups, and LinkedInGroups to the examples listed under “Strategies.”
- A goal in the planning and execution of events is to increase the number of events in the C and D Regions.
- Do we wish to rename the Regions to clarify we classify them by the number of annual University sponsored events?
- The University sets budgets according to the classifications and established the classifications according to the alumni base.
- A goal is to create more regional clubs.
- How do we identify the potential for new regional clubs?
- How do we strengthen existing clubs?
- How can we evaluate how the regional clubs are performing? How do we measure their effectiveness?
- It is important to recruit a large, involved, committed committee.
- A goal is to create a summary of what the successful clubs are doing – best practices - and distribute this information to all the regional clubs by monthly e-mail.
- How do we measure the effectiveness of our goals to increase attendance and the number of events?
- We create two goals: (i) a total, or aggregate goal for the alumni regional clubs; and (ii) a goal for each regional club.
- We propose to ask each regional club to set its own goal and report to the alumni board annually, at the spring or fall meeting, on its progress. The idea is to make each club accountable.

Addendum D

Goal #2 - Discussion Points for Growth of Homecoming Attendance

- Item C 1 should read “Increase large homecoming planning committees that represent . . .”
- Under C 2, we are doing all of these activities except the class web page. We do, however, have a class notes page. Our class newsletters are improving. Co-choir mails letters to each alum.
- Ann has asked a graphic design class to develop the promotional material for Homecoming.
- We reached our goal of maintaining attendance at the alumni luncheon at 700+ in 2007, but not 2008.
- We recommend we set up affinity tables by school and department at the luncheon.
- We recommend we invite students to lunch with affinity groups.
- We recommend we have other tables set up for alumni who wish to lunch by class or other arrangement.
- We recommend we show nostalgic video or slides.
- We plan to “pump up” the luncheon this year by asking a theater alum to act as MC.
- We have engaged faculty in the recruitment of alums to return for reunions by emphasizing affinity groups at Homecoming.
- Affinity groups are a better draw than class affiliation. In 2009 we’ll have co-choir, theater, and art affinity groups.
- We do not plan to have identical affinity groups each year. Some will change.
- We discussed affinity groups by major and school. How do we fit these in and include students? What are the best times and places that do not conflict with other events? Before or after the game? On the quad Saturday morning, Friday afternoon, or early Friday evening?
- A suggestion: begin with one tent for the business school to be staffed during the Saturday morning activities.

Addendum E

Building a Culture of Stewardship and Involvement Within the Student Body that Encourages Lifelong Relationship with the University

**Illinois Wesleyan University
April 2009**

Committee: Josh Butts, Marsha Guenzler-Stevens, Justine Robinson, Larry Stimpert (Alumni Members); Kathy Cavins, Kevin Clark, Ann Harding, Jeff Mavros, Trevor Sierra, Lora Wey, (Staff Members); Carissa Nemmers (Senior Class President), Matt Hastings (Vice President of Senate) (Student Members)

Inspiration: Larry Stimpert (all the way from Korea) shared the information of his research with colleagues at Colorado College of other institutions (Carleton, Centre College, Davidson, and Grinnell) and their alumni/student interface and ways to enhance students' relationships with their alma mater.

Jeff Mavros shared the long list of ideas he had been holding for years – waiting for the right moment (See appendix A and B)

Plan of Attack: March 18 Conference Call and April 8 Conference Call with Special New Members

Possibilities:

Broad Stroke –

- Find a way to link seniors prior to graduation and recently graduated seniors with alumni
- Continue to find ways to link alumni with existing affinity groups for organic interaction (e.g. fraternity/sorority, sports teams, ILANA students, music students, people who survived Organic Chemistry)
- Orientation has a new theme called "Turning Titans." Jeff Mavros and Kevin Clark are the players on this. We need to have an interface with alumni and new students during orientation.

- We need to strip away the “negative connotations of being an alumnus” or “becoming old.” We need to “jazz the transition”
- How do we tell the “stories” of alumni in more public and prominent ways – to inspire and inform.
- Create every opportunity for students to interface with alumni – including in notes and in person.
- Help students visualize the impact of alumni giving to their own educations.
- Showcase the talents and knowledge and great personalities of alumni so students want to be “just like them.”
- Enhance our publications so they do a better job of “telling the story of alumni.” Help current students to understand the traditions of IWU and the long line of alumni who have made the institution special.
- Create this sense of “book ends” where we interface with first year students and seniors and reinforce traditions by repeating them.

Short Term –

- New Idea: Senate Alumni coming together for reunion at Homecoming (Matt)
- New Idea: Alumni Soccer Game for past players (Carissa)
- Continue to Grow Council for IWU Women and the interface with students (Marsha)
- New Idea: Invite the 50 year class to lead the way in the graduation procession
- New Idea: Invite the Outstanding Young Alumnus to speak at Orientation
- New Idea: Introduce the idea of Commencement and the leap to Alumni Life by doing an orientation “Strawberries and Scones” picnic with alumni and new students – suggesting “We will return to this same thing, four years from now.”
- New idea: Invite table hosts to the Senior Dinner that are Alumni. Must be fabulous conversationalists and be primed to talk about Life after College and the beauty of transition (We might try this out in December of 2009 before launching in May of 2010)
- New Idea: What if we told the story of the “Alumni Award” as a scholarship link to the “Stories of Alumni” by creating a publication that tells the stories of alumni who benefitted from the scholarships and now give back (Jeff has a great illustration of this). It would tell of the alumnus then and now and why he/she is compelled to give. We would hope to “touch the heart” in the way the Parents Council Brochure does. We would send this out to new students as they are awarded these awards via Financial Aid.

- New Idea: Extend the students writing notes to alumni of thanksgiving to a group broader than the Titan Talkers. (Jeff)
- New Idea: Enhance the Financial Literacy program that the Career Center does and the Career Center Guide to include an expanded section on philanthropy and giving to IWU (Kevin) and (Lora) will coach John Theotard.
- New Idea: Every Alumni Executive Board Member will agree to mentor one IWU current student.
- New Idea: Because the story of the Parent's Council and their giving is so rich - don't lose it and send it to young alumni and "never givers" so they might give to something.
- New idea: Enhance the holiday card sent by the Wilson's. It is still beloved, but it needs to tell more of the story and not be a lost opportunity (Larry's example was of the President of Columbia University). (Ann will talk to Dick.)
- New Idea: We could create the "bookend event" for first year students by doing as Centre College does and give first year students a medallion as a gift from alumni that they later give to someone their senior year that has made a difference in their life. Or - give a first year student a \$2 bill signed by a long line of alumni as a "traveling token" and then the person signs the bill as a senior and passes it on to another younger student. (Our students liked the \$2 bill better than the medallion).

Long Term -

- New Idea: Invite alumni to participate in the graduation procession (e.g. Smith College does that each year). Planting the seed: Students liked the idea as long as it didn't detract from the undergraduate graduates
- New Idea: Link in some way with the Honors Convocation by inviting an alumnus to speak (This is prior to Senior Week).
- New Idea: Alumni Executive Board would prepare personalized graduation cards for seniors (this was tried by the Council for IWU Women last year).
- New Idea: Senior Week is being enhanced (thanks to Kevin and his colleagues in Student Affairs). They will have a Festival of Talent during that week similar to orientation. What if we featured alumni talent as well as students?
- New Idea: What if we did workshops during senior week that would feature alumni and would showcase life skills (we are doing something

like that already with John Theotard – and our request that he enhance his already great presentation to include financial literacy).

- New Idea: What if we did a single day prior to the return of seniors to their last semester of college that would have elements of fun (perhaps even a cocktail party) and would include sessions on life planning beyond college and an opportunity to network and a potential exchange between mentors and seniors where the mentors were members of the Alumni Executive Board (Kevin could help us on this).
- New Idea: Do a convocation (as other institutions do) that marks when the tuition revenue runs out and the generosity of others kicks in to support the college OR do a Booth that suggests it is “Tuition Freedom Day” where students are invited to write a note of thanks to an alumnus who gives and for doing so they would get a free cup of coffee.
- New Idea: Transform the Eckley Lounge to an Alumni Hall by telling the story of distinguished alumni with “static” and “non-static” displays including flat screen TVs running video profiles
- New Idea: Create “take away” personal profiles of alumni in the form of bookmarks that might be used in referring students to the resources of the community. Example: At the University of Pennsylvania they do a Deck of Cards with the faces of alumni and their stories on them. These are given to orientation students. Example: What if we did book marks that might include a picture of the person and his/her favorite book, favorite IWU memory, something about their history, stories of their current life, resources they find helpful (e.g. an LGBT alumnus might talk about resources for coming out to parents and resources that might be helpful and then link to Pride). We could do these bookmarks for ALANA alumni, women, young alumni, etc.
- New Idea: Create a deck of cards that would tell the history and tradition of IWU...as seen through the eyes of alumni (haunting, traditions, buildings, symbols, ceremonies)
- New Idea: How might we tell the story of IWU as a piece of history and do this at public occasions? Perhaps we could do this interplay between first year students and alumni at Homecoming in a fun convocation on the history of IWU. Example: Marsha does a speech every fall for convocation at the University of Maryland that highlights the role of students throughout the institution’s history that have made a difference – Ann is sharing a copy widely!
- New Idea: What if we did more “archival pictures” in the alumni publications and/or on line that would be a “contest” to get folks to

name people and/or events in the pictures. Pictures would represent a wide variety of eras and would garner the "winner" an IWU prize

Examples of Ways We ARE Already Doing it:

- **MAN doing a first year ALANA student send off (in the old days it was at Ansell Johnson's place)**
- **The Council of IWU Women and the Summit**
- **The Greek Alumni Network and the current chapter presidents**
- **Pride and the Homecoming Interface** (This might be enhanced if there was a staff link to this group that would provide the bridge to students as the Council of IWU Women enjoys. Kevin suggested that he and the folks in Multicultural Affairs might be this bridge)

Appendix A -- Jeff Mavros Dream of Culture Change at IWU

Culture Change at IWU

LITTLE OR NO ADDITIONAL TIME, COST, MANPOWER

1. Stories, traditions included in tours to prospective students
2. Admission Officers mention alumni involvement and support during on-campus interviews/presentations
3. Letter to contracted students from Ed Rust
4. Letter included in acceptance/financial aid packet that explains where Alumni Scholarships and Grants come from (how they're made possible)
5. President Wilson to incorporate message of alumni support in speech during Fall Festival
6. Traditions Tour during Fall Festival—finish with pep band playing alma mater and cheer song (and students learning words)
7. Briefly (15minutes) discuss alumni support and financial aid to students at Fall Festival—introduce new tradition of Class Scholarship (\$5 each year), which will replace current Senior Gift campaign (\$20.06, \$20.07, etc)
8. Reinstitute Student Orientation Leaders during Fall Festival
9. Hang banner in Shirk Center with words to cheer song
10. Hang alumni banner in Hansen along with student banners; include senior and alumni banners in Senior Dinner and Commencement
11. Have freshmen sign their class banner during Orientation
12. Display Silver Bowls in Hansen Student Center with other alum paraphernalia
13. Slides for Hansen kiosk and before movies (IWU trivia before Titan Film Series); ask Kevin Clark to pose trivia questions prior to events

14. Use Pipeline (Web Poll) for highlighting alums, updates on giving
15. Argus "ad" with facts/alumni profile each week
16. Commencement: more ritualistic; alum to welcome students to Alumni Association; involve alums in procession or ask alums to serve drinks and scones at end
17. Pass out the "Alumni Across the Nation" map to seniors at the senior dinner or at cap and gown pickup

SOME ADDITIONAL TIME, COST, MANPOWER

1. Combine SAC and Ambassadors
2. Move-in day: gift for each student from Alumni Association; ask alums to assist Ambassadors with moving students in
3. Invite alums back to campus as much as possible: classroom speakers/guest lecturers; involve them in student organizations such as Habitat for Humanity
4. Have alumni call prospective students during recruitment process
5. Take class picture at Commencement (only of donors?); hang each class picture one after the other in Hansen
6. Alumni Brunch prior to Commencement
7. Create an area that highlights alums and/or traditions (Nell Eckley Lounge)
8. Alumni Association begin to sponsor on-campus events
9. Have seniors visit the President's house (groups of 30; dessert, talk with Dick about favorite memories and things they would change)
10. Create a "pen pal" system so that every freshman who wants one has an alum pen pal with whom they can write/email
11. Special dinners for each class
 - a. First-years: something ceremonial but fun in Shirk Center; have upperclassman mentors sit with students
 - b. Sophomores: tables of advisors/advisees (quad, Main Lounge)
 - c. Juniors: President's house/backyard
 - d. Seniors: similar to how it is now, but find ways to make it more "special"

SIGNIFICANT TIME, COST, MANPOWER

1. Get Development staff into classrooms for guest lectures on what we do
2. Get faculty to make their own advancement-related remarks to their classes
3. May Term course: About IWU
4. Build an Alumni House
5. Replace yearbook with something
6. Invite seniors to off-campus event hosted by alumni
7. Hold send-off parties for incoming students at alums' houses
8. University-wide Happy Hour/Social Hour; last Friday of every month in spring at 4pm (Tommy's/Welcome Center/Alumni House)
9. Picnic after First-Year Convocation; first-year students, parents, faculty

CULTURE CHANGE AT IWU (extra ideas)

LITTLE OR NO ADDITIONAL TIME, COST, MANPOWER

- 1.) Place an alumnus picture and profile on one of the first pages of the IWU planner.
- 2.) Pass out the "Alumni Across the Nation" map to seniors at the senior dinner or at cap and gown pickup.
- 3.) Give students a breakdown (perhaps an Excel spread sheet or Word table) of where the university's money goes such that students will see the big picture of development.

SOME ADDITIONAL TIME, COST, MANPOWER

- 1.) Develop a mini calendar with an alumnus picture/profile for each month to be passed out with student planners at the start of the year.
- 2.) Pair an alumnus with an incoming freshman. The alumnus will act as a mentor to the freshman throughout his or her four years at IWU.
- 3.) Have students receiving alumni aid handwrite a thank-you letter or a "what's going on at IWU" or his/her own personal information/story to an alumnus.
- 4.) Create a survey with incentives (i.e. Best Buy gift certificate, Tommy's/IWU Bookstore gift certificate, etc.) gauging students' knowledge/interest in alumnae relations/development work/etc.
- 5.) Create a tiny poster to be placed in plastic holders on Tommy's/SAGA tables with an alumni story/quote/fun fact/etc.

SIGNIFICANT TIME, COST, MANPOWER

- 1.) Continue to have alumnae and students join together for special weekend programs, such as the women's conference held recently.

Appendix B – Jeff Mavros Culture Change at IWU Timeline

Student Philanthropy/Culture Change

Note: some of these ideas are possible with little or no cost and/or manpower; others represent some additional cost/personnel; still others may require a significant investment of resources.

A few ideas are already in practice on campus.

I. PRIOR TO ENROLLMENT

1. Examples of alumni/class gifts, historical sites, traditions included in Admissions tours
2. After tours, Admissions counselors stress importance of alumni generosity
3. Include letter in acceptance/financial aid packet that explains Alumni Grants and Scholarships and where they come from (highlights donors)
4. Alumni speakers incorporate themes of loyalty, community, responsibility in presentations at Open Houses, Scholars Days
5. Letter to contracted students from Ed Rust or George Vinyard, etc.
6. Alumni phone calls to admitted students
7. Alumni hold send-off parties at their homes for incoming IWU students from their areas (regional boards could host)

II. NEW STUDENT ORIENTATION

1. First year students sign class banner
2. Present PowerPoint to students about history of IWU
3. Introduce examples of accomplished alumni (in history PowerPoint?)
4. Introduce traditions and concept of philanthropy (Marty Smith?)
5. Ask Brian Udovich to create a short video for #2-4 above?
6. Hold an IWU trivia game night with prizes
7. Give out playing cards to all first year students with IWU facts on back
8. Have pep band play cheer song (or play over sound system) and football team teach it (after Traditions Tour?)
9. Alum at First Year Convocation speaks about loyalty, community, responsibility
10. Make sure alumni are part of first year reading program
11. Incorporate themes of philanthropy and charity in first year reading program
12. Admissions identifies potential leaders in first year class for Advancement

III. FALL SEMESTER

1. IWU's Birthday – celebrate the first ever day of classes (Oct. 28)
2. "Bowling Day" – place green bows on anything gifted by alumni
3. Have first year class sing Cheer Song at first football game (wear class shirts)
4. Football alumni should make tunnel for team to run through at Homecoming
5. Bring back Homecoming parade, do tailgate before game, get big concert for Saturday night of Homecoming

IV. SPRING SEMESTER

1. Seniors back a night early for Life After College consultant & 21 Club reception (off campus, hosted by McLean County alumni chapter?)
2. "Day Tuition Runs Out" – Feb/March; signs on quad; coupons for any thank you written by a student to an alum

3. Get Wayne Messmer to record National Anthem and announcements for each of our baseball and softball players for each season
4. Seniors get cookbook with favorite recipes from faculty and staff
5. Have favorite/elected faculty member address students at Senior Dinner?
6. Bring in alumni speakers for series of senior class events: house hunting, managing debt/financial planning, wedding planning, etc. (ask seniors what they want to learn about)

V. SENIOR GIFT

1. Larger donors (\$50? \$100?) get name on Alumni Walk?
2. Donors get to honor three people, certificate sent to each and names in Commencement bulletin
3. Donors get to videotape a short thank you for video to play prior to Commencement ceremony
4. Competition between us and Augie for participation?
5. Donors get special pin/tassel for Commencement ceremony
6. Dick matches/challenges seniors?
7. Bookmark with giving site given to seniors
8. Senior Gift Committee invited to special event at President's home?

VI. COMMENCEMENT

1. Hand out "Alumni Across the Nation" map to seniors at cap & gown pick-up
2. Hold Alumni Brunch prior to Commencement
3. Have alumni serve scones after ceremony

VII. OTHERS

1. Display silver bowls and other alumni paraphernalia on campus (use Nell Eckley Lounge to feature Alumni Award Winners and Alumni of Distinction)
2. Hang Alumni banner in Hansen next to class banners
3. Argus column/ad every week for Advancement-related news and topics
4. Slides for Hansen kiosk, table tents for cafeteria and Tommy's, price tags around campus
5. Use MyIWU to highlight notable alumni, Advancement stories
6. Hang banner in Shirk Performance Gym with words to Cheer Song
7. Ask all IWU fans attending basketball games (or other IWU sporting events) to wear green to the games
8. Get alumni back on campus whenever appropriate/possible
9. Alumni Association sponsor on-campus events, become more visible
10. Offer course about IWU/higher education (May Term?)
11. Do electronic yearbook or something to replace Wesleyana
12. Every six weeks hold a University-wide social hour at 4pm on Friday afternoon where campus community can congregate (nothing formal, maybe even no agenda); simply get students, faculty, and staff together to build community