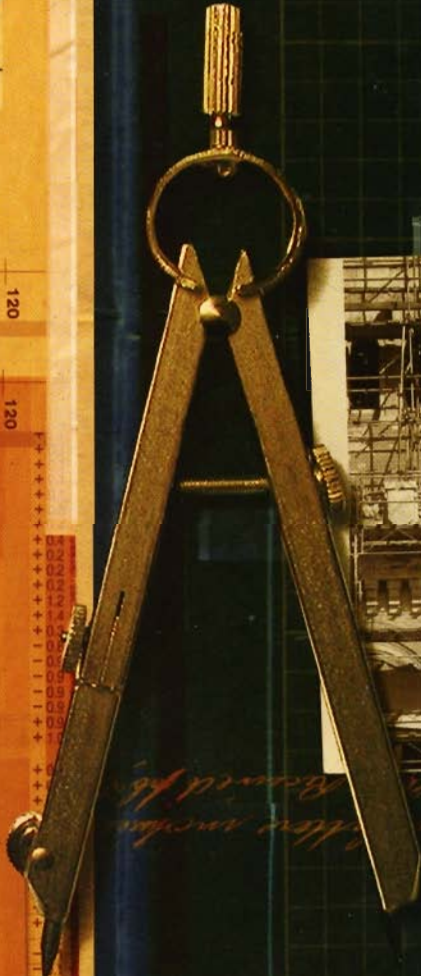


# CURRENTS

COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION



## BEST-LAID PLANS

Alumni Association Marketing

## COVER: ALUMNI RELATIONS

**16 A MEASURED RESPONSE** Marketing plans are now a part of alumni relations  
• By MAURA KING SCULLY

**22 ROOM FOR IMPROVEMENT** Golden Gate University has made the alumni experience better for everyone involved  
• By LENORE JUNKER



MAY/JUN 2006

# CURRENTS

VOLUME XXXII NUMBER 5



## FEATURES

### COMMUNICATIONS

**28 WEB USABILITY** A process and a goal • By JOHN FRITZ

**35 WEB SIGHT** A new vision for online content • By CHRISTINE BABICK

### DEVELOPMENT

**41 NO LEAF UNTURNED** The advancement team at UW-Superior worked with research consultants to reconnect with alumni and discover hidden donors • By MARY K. REINDERS, GARY J. HUBBELL, and JILL R. SCHOER

**47 GIFTS ARE IN THE DETAILS** Advancement research looks at data more closely to cultivate greener campaigns • By SHELBY RADCLIFFE MCCLINTOCK and JENNIFER SHIMP-BOWERMAN

## DEPARTMENTS

- 4 AD INDEX**
- 6 ADVANCE WORK**
- 51 IN CASE** Your professional association at work
- 57 CAMPUS BUYERS GUIDE**

## COLUMNS

### MANAGER'S PORTFOLIO

**11 ATTRACT SUCCESS** Step away from your to-do list and try another approach to reach your goals • By MARSHALL BROWN

### CAREER PATH

**13 YOUR NEXT CAMPAIGN: YOU** Development professionals have already learned many of the skills necessary to find the perfect new job • By MATTHEW A. HUGG

### CLOSING REMARKS

**64 ACCESS ROADS** The growing stratification in higher education should worry all Americans • By STANLEY O. IKENBERRY



COVER ILLUSTRATION by CLIFFORD ALEJANDRO for CASE



A benefit of working with external consultants is that they often provide a perspective that internal staff can't.

Yet questions remained. If we didn't find the answers, we felt we would be merely skimming the surface. Our advancement team members needed to know

- how alumni felt about us
- what alumni thought about the value of their education
- what motivated them to give
- the most effective ways to communicate with them
- who had the capacity to give and who merited the most attention.

With rising fund-raising goals, we decided to invest in research despite the tight budget. Initially we didn't know whether this investment would pay a good return. However, once we began working with a development research consulting team, we believed targeted data gathering and the strategic application of key findings would pay off in stronger alumni relationships and fund-raising performance.

#### WHAT WE ALREADY KNEW

We recognized the merits of customizing donor appeals. We believed that in-depth knowledge of our donors' attitudes, interests, and perceptions would help us create specialized outreach and fund-raising appeals that met the needs of unique constituencies. We knew we'd have to use donor feedback to direct our activities.

We were familiar with individual-level research approaches—wealth screening, attitudinal surveys, data mining—but we thought of them as unconnected. The research consultants helped us think of our advancement effort as a small business. To grow it, we would have to go deeper to uncover valuable market intelligence. Ultimately, primary and secondary data collection led us to understand our donors' giving capacity better and truly know the motivations and attitudes influencing their propensity to give. We wanted a customized, personalized approach because we now had

information and involvement-hungry donors. With the pertinent information in hand, we began to feel as if our small advancement team could meet the chancellor's expectations.

#### AN INTEGRATED APPROACH

A benefit of working with external consultants is that they often provide a perspective that internal staff can't—in our case, how to deal with limited resources when we'd been thinking simply "to do more with less." The researchers helped us think differently about gathering information and using it to formulate action. We began to regard donor research as a continuous activity rather than a one-time event; new data would help explain and expand on previous data. To increase the depth and value of the information we obtained, we had to tailor, time, and unify research methods according to our needs.

We set out to expand our donor knowledge base and test hypotheses for garnering additional detail. Our advancement staff and the researchers together identified the needs and desired outcomes from data gathering. We were ready to begin.

We sent a confidential survey to a representative random sample of alumni and asked, What do you think of UW-Superior? and other questions. We got a 20 percent response rate, which we believed indicated a desire to re-engage with the university and other alumni. We analyzed the feedback to test trends and valid differences among various groups, based on key variables such as graduation date, major, and involvement in extracurricular activities as undergraduates.

The survey also asked alumni their preferred type and frequency of communications, which we all know can affect giving behavior. We used the data immediately to plan ways to engage alumni more meaningfully in university life.

Next we wanted to ascertain the charitable gift capacity of our alumni, so we initiated

a wealth-screening process that also explored the viability of our fund-raising goals. Our approach focused on individual-level analyses of the wealth holdings of selected supporters, along with their giving patterns during the past five years. To estimate the gift capacity of alumni donors and their commitment to the institution, we relied on publicly available wealth indicators and predictive fund-raising models in current use.

The wealth screening enabled us to develop a demographic profile of major gift prospects and plan strategies for attracting donors with similar capacity.

#### BACK TO THE DATABASE

The wealth screening was a mixed blessing: It uncovered a large number of major gift prospects, yet we had few field staff to pursue them. We needed a creative approach to achieve fund-raising potential. Thus we returned to the wealth-screening database for more mining. Taking a closer look at gift ratings, and syncing them with segmented survey results, helped us prioritize leading prospects. The additional mining and segmentation led to finely tuned outreach strategies designed to address the unique characteristics of various prospect groups.

Prioritizing the list was a good start, but we needed more information about individual prospects within priority groups. To get that information, we conducted nonconfidential, qualitative telephone interviews. This time the questions were to test respondents' receptivity to university and advancement outreach initiatives. We expected the feedback to provide a shortcut for tailoring visits to prospects' interests, attitudes, and needs.

To foster trust and increase participation, we issued respondents consent forms explaining the purpose of the phone interviews and use of data. We personally selected and trained UW-Superior students majoring in research-related fields to conduct the interviews and capture data for

## TARGETED COMMUNICATIONS PLAN

Timing	Message Sent	Distribution Medium	Internal Requirements	Results
August 2005	<ul style="list-style-type: none"> <li>• Glad I went to UWS</li> <li>• Valuable education</li> <li>• Still stay connected</li> <li>• Check us out now</li> </ul>	<ul style="list-style-type: none"> <li>• Snail mail, personalized</li> </ul>	<ul style="list-style-type: none"> <li>• Update Web site</li> <li>• Enlist a letter signer</li> <li>• List/letter merge</li> <li>• Mail production</li> </ul>	<ul style="list-style-type: none"> <li>• Letters signed by volunteer leaders created ownership in process with volunteers.</li> </ul>
September 2005	<ul style="list-style-type: none"> <li>• Get involved</li> <li>• Here's how</li> <li>• I need you to do this....</li> </ul>	<ul style="list-style-type: none"> <li>• Snail mail, personalized</li> </ul>	<ul style="list-style-type: none"> <li>• Chancellor-signed</li> <li>• List/letter merge</li> <li>• Mail production</li> </ul>	<ul style="list-style-type: none"> <li>• Five e-mail responses to the chancellor indicated willingness to get involved.</li> </ul>
October 2005	<ul style="list-style-type: none"> <li>• Strong UWS, strong student numbers</li> <li>• Enrollment and campaign signs are good</li> </ul>	<ul style="list-style-type: none"> <li>• Snail mail, not personalized</li> </ul>	<ul style="list-style-type: none"> <li>• Provost-signed</li> <li>• Update the numbers</li> <li>• Mail production</li> </ul>	<ul style="list-style-type: none"> <li>• Received several specific responses and questions about nontraditional students.</li> </ul>
November 2005	<ul style="list-style-type: none"> <li>• Holiday card</li> <li>• Donor thanks</li> </ul>	<ul style="list-style-type: none"> <li>• Snail mail, personalized</li> </ul>	<ul style="list-style-type: none"> <li>• Card (designed)</li> <li>• Signed</li> <li>• List/letter merge</li> <li>• Mail production</li> </ul>	<ul style="list-style-type: none"> <li>• Received many e-mails, notes, and phone calls thanking sender for card.</li> </ul>
December 2005	<ul style="list-style-type: none"> <li>• Solicitation</li> <li>• \$1,000/yr. for 5 years</li> <li>• Mini-case attached</li> </ul>	<ul style="list-style-type: none"> <li>• Snail mail, personalized</li> </ul>	<ul style="list-style-type: none"> <li>• 3 signatures needed</li> <li>• List/letter merge</li> <li>• Mail production</li> <li>• Include mini-case</li> </ul>	<ul style="list-style-type: none"> <li>• 9% response rate</li> <li>• Average gift \$290</li> </ul>
January 2006	<ul style="list-style-type: none"> <li>• Information about gift before media announcement</li> </ul>	<ul style="list-style-type: none"> <li>• Letter announcing recent major gift</li> </ul>	<ul style="list-style-type: none"> <li>• Signed letter</li> <li>• Mail production</li> </ul>	<ul style="list-style-type: none"> <li>• Received responses excited about giving.</li> <li>• Respondents liked being treated as insiders.</li> </ul>

analysis. Not only did that save money, but also alumni were glad to hear from students and catch up on university news. Instilling trust through full disclosure and personalizing the interviews prompted a high response rate and deepened the data. This approach also helped dispel alumni's previous perception of sparse contact.

### OUTCOMES AND RETURNS

Each element of this research process proved beneficial, but the combination produced results that were more meaningful, in-depth, and strategic. Now our tactics are informed by research—more targeted, more efficient.

The attitudinal research was crucial in determining alumni attitudes about UW-Superior. Historically, alumni giving was low. Over the years the university eliminated student activities such as sororities, fraternities, and football. We heard occasional grumbling but thought of it as merely anecdotal.

Research helped us understand alumni attitudes and perceptions and how and why they interact with their alma mater. We discovered their disengagement resulted from lack of communication with the university over the years. Despite that, surveys showed our alumni felt positive about their alma mater, were willing to contribute, and wanted a deeper connection. The first step for successful outreach was for the university to show interest and open the door.

We also discovered a dichotomy in attitudes about the university. Older alumni (1970s and earlier) felt connected through their affiliations as students. Younger alumni (1980s and later) were more career focused and not as involved with the university when they were students. Consequently, we segmented direct mail according to age and targeted messages to different alumni groups based on the sentiments they had expressed in the surveys.

The attitudinal research helped us target and segment our communication efforts overall, from direct-mail appeals to Web site design and content. For example, alumni wanted updates on other alumni. So during phone interviews, students collected alumni news, and we included it in the alumni paper and on the university Web site. In the past we'd used direct mail primarily for annual solicitation. Now we established a segmented communications effort of monthly, customized relationship-building contacts. The findings also helped us plan an appropriate mix of on-campus and national alumni events.

Our past major-gift fund raising had been hit and miss. A small number of loyal donors increased their giving (\$1,000 to \$5,000). For campaign planning, we needed to know whether we had a sufficient number of donors with the capacity and commitment to contribute larger gifts.

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Wealth screening identified more than 300 donors with the ability and propensity to give \$25,000 or more over a five-year period and nearly 2,000 additional donors with the ability to give \$5,000 to \$10,000. So the question wasn't whether we had enough capable donors; our real challenge was having more major gift prospects than we could manage effectively. With only one full-time advancement member in the field, it would be impossible to qualify all solid prospects through personal contact. So in the phone interviews, students asked questions that a major gift officer would ask donors during a first visit. We gathered vital information, and donors enjoyed talking with students—a research and cultivation strategy in one.

The interview data helped us qualify donor leads and gauge alumni response to future outreach attempts. Thus we were able to customize cultivation, communication, and relationship-building more effectively. Using the research, we created a 12-month targeted communications plan for priority prospect segments—donors with the greatest connection to the university and capacity to give large gifts, which we defined as \$5,000 or more. This plan has increased campaign awareness, nurtured interest in the university, and helped us attain commitments from those donor segments. (See chart, page 43.)

A key benefit of the research we did was an opportunity for interactive communication with alumni. In an era of technology-driven, impersonal mass communication, our communications programs are becoming more personalized and interactive. A recent example is our winter direct-mail appeal. Campaign volunteer and foundation leaders wrote more than 800 personal notes to mail with form letters to donors. Many recipients contacted volunteers to express thanks for the personal touch. This direct-mail project significantly outperformed past efforts. As of January 2006, our fall 2005 appeal had raised \$105,677. Mailed to 4,151 people and targeted through research, the appeal had a 9 percent response, with an average gift of

\$290. In contrast, the previous year's mailing, distributed to more than 33,000 people, raised just \$7,836, with a 0.4 percent response and an average gift of \$56. We're convinced the difference in success was the targeted, personal appeal based on integrated research and segmentation strategy.

Prioritizing and qualifying our prospects enabled us to focus our field work on alumni with the greatest giving capacity and strongest connections to the university. This enhanced cultivation, moving donors more quickly to gift readiness. In only 18 months, we secured commitments of nearly \$10 million toward our \$17.5 million campaign goal—impressive when you consider that it doubled our foundation assets. At a time when we couldn't afford to add field staff, we used research to leverage our resources.

By far the greatest outcome is a stronger bond between the alumni and the university. Research was the first step in re-engaging disconnected alumni. Nothing is better than face-to-face contact, but thoughtful use of research leveraged a limited staff effectively and qualified prospects meriting personal attention.

We found the quantifiable answer to our initial question about the return on research investment. Since 2001 we've experienced unprecedented attendance at our alumni events, a 145 percent growth in contributions (from \$490,000 to \$1.2 million), and a 140 percent increase in alumni giving (from 5 to 12 percent).

The foundation and alumni boards are now national, reflecting the alumni constituency. Fund raising is at an all-time high. The advancement team has grown by five. “We've come a long way in eight years,” Schoer says proudly. □

Mary K. Reinders is a senior research analyst at Growth Design Corporation in Milwaukee. Gary J. Hubbell is president of Gary Hubbell Consulting in Milwaukee. Jill R. Schoer, assistant chancellor of university advancement at University of Wisconsin-Superior, contributed as a coauthor to this article.