

Alumni Challenges: Transforming the \$50 donation to a Sustaining Giver. The Answer is Peer-to-Peer + Analytics.

WHETHER YOU'RE A SMALL SCHOOL OR LARGE SCHOOL, YOU ARE ALWAYS FIGHTING THE GOOD FIGHT OF DONOR FATIGUE. GIVING IS NOT JUST FOR YOUR FAMILIES, BUT ALSO TAPPING INTO YOUR ALUMNI BASE. SOCIAL FUNDRAISING + ANALYTICS IS THE ANSWER!

Lovisa Lane, Blackbaud

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bbcon[®] 2019



Lovisa Lane

STRATEGIC PEER-TO-PEER FUNDRAISING
ADVISOR



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SOLUTIONS ENGINEER, PRINCIPAL –
FUNDRAISING/ANALYTICS COMPETENCY –
HIGHER EDUCATION

Let's grow the world of
giving so that no good
cause goes unfunded!



Agenda



- Overall K–12 Giving Trends
- New Alumni
- Older more established Alumni
- The power of Giving Days
- Getting the right message, to the right person, in the right way with Peer-to-Peer Insights and Analytics
- Predictive Modeling and three models and scores for successful P2P fundraising
- Our Nine Peer-to-Peer Personas




Overall K–12 Giving Trends

K-12 Giving Trends

2018 OVERALL GIVING TRENDS BY SECTOR

Sector	YOY % Change
K-12 Education	-0.1 % 
All Sectors	 1.5 %

2018 ONLINE GIVING TRENDS BY SECTOR

Sector	YOY % Change
K-12 Education	-2.1 % 
All Sectors	 1.2 %

Q2 2019 vs Q2 2018

-0.3%

LAST 12 MONTHS

-0.4%

How Fundraising Performed in the K–12 Education Sector in 2018

PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING





One size does not fit all! Segmentation is a key!

On the one hand many alumni are either getting prepared to start accumulating student loan debt or still paying off their student loan. They'll want to focus on this first before paying someone else's.

On the other hand, you have many successful, older alumni who you definitely should be reaching out to for support.



New Alumni



Did you know that roughly only 2
out of 10 new alumni donors give
again the following year?





Meet Matt!

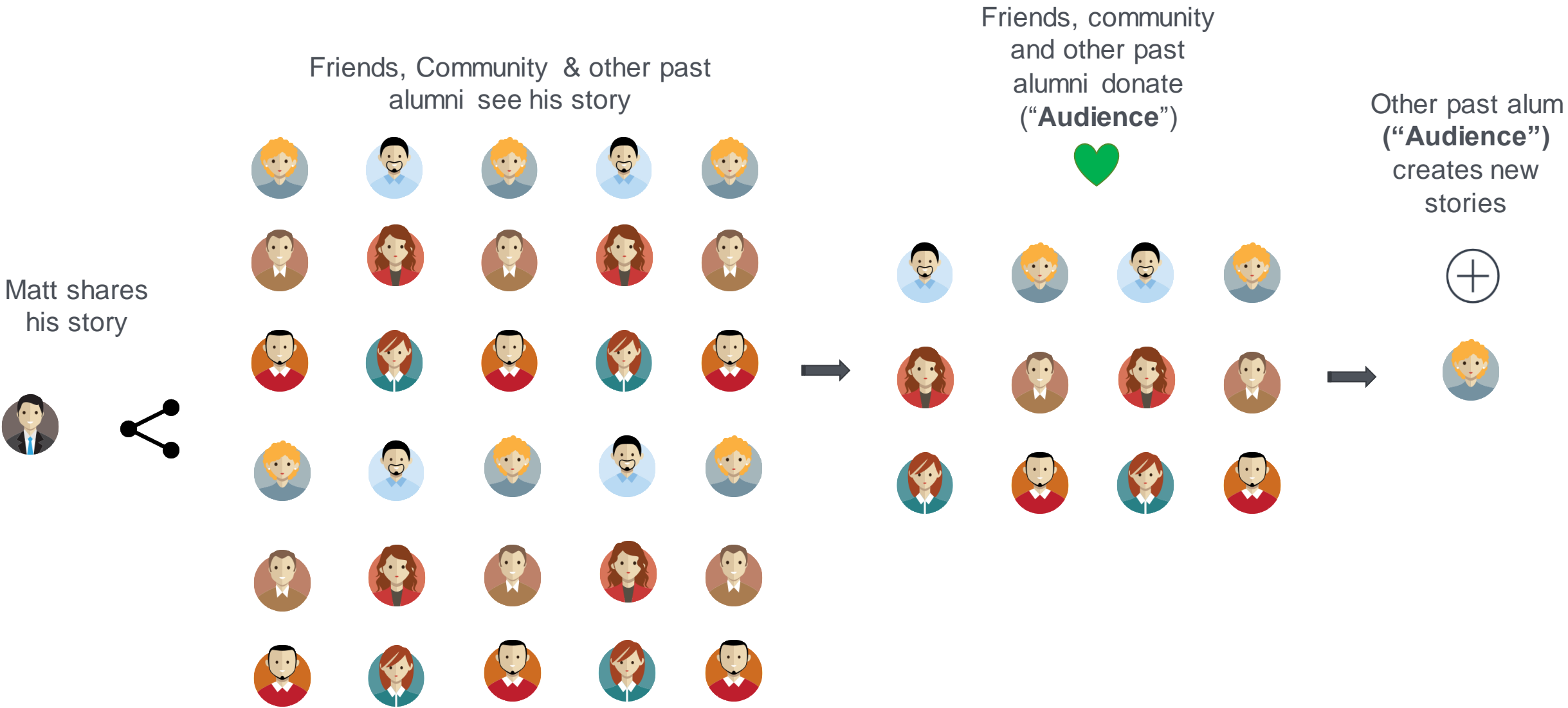
The earlier the better.

Don't underestimate your new alumni. They may not have much to give now, but they are tomorrow's most valuable donors. Start early and adjust your strategy over time.

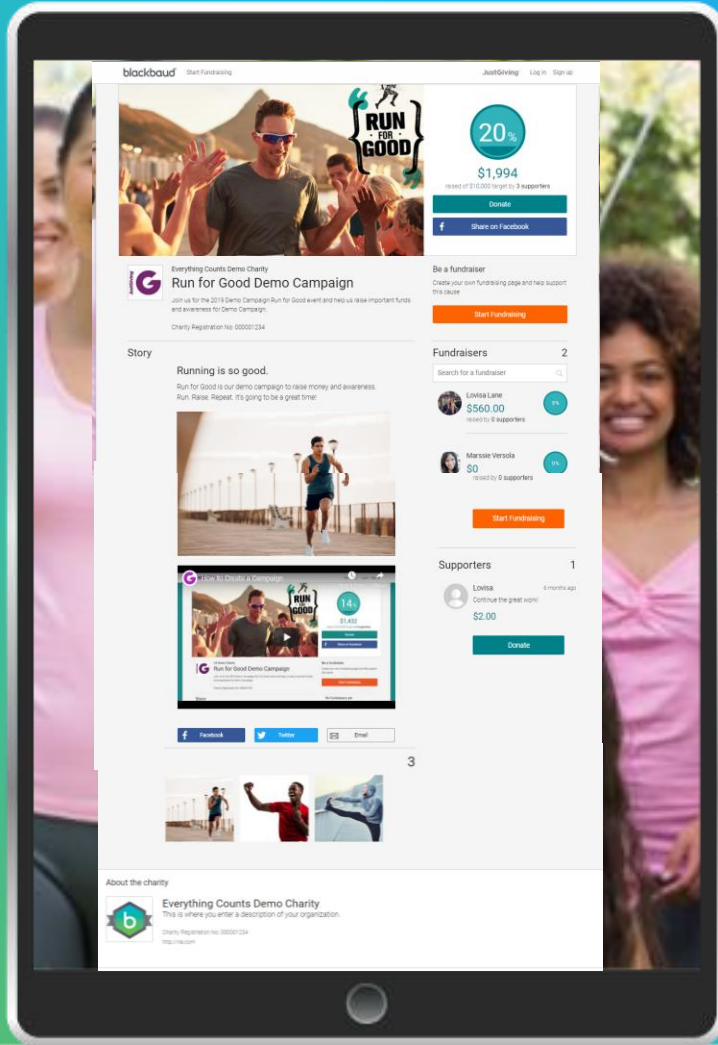
Another way to engage new alumni like Matt is to ask them to fundraise for your school.



New ways to engage, raise more money and acquire supporters



Benefits



- Crowdfunding is the **fastest growing form of online giving**, which is the fastest growing form of individual giving, and is increasing ~35% year on year
- **Each \$** you raise from crowdfunding is worth an estimated **\$2.84 in additional income**
- **1 in 4 people** will donate if a friend asks them, **1 in 63 people** will respond to a solicitation from a nonprofit organization
- **56% of Gen Z / Millennials** have participated in a crowdfunding campaign in the last 12 months. 87% of organizations struggle to attract and engage younger givers

Implement P2P Fundraising for New Alumni

Traditional donation strategies may not be effective for new alumni. Perhaps they're unwilling to donate so soon, or they don't yet have the means. Peer-to-peer fundraising empowers them to get involved, give back and make a difference.

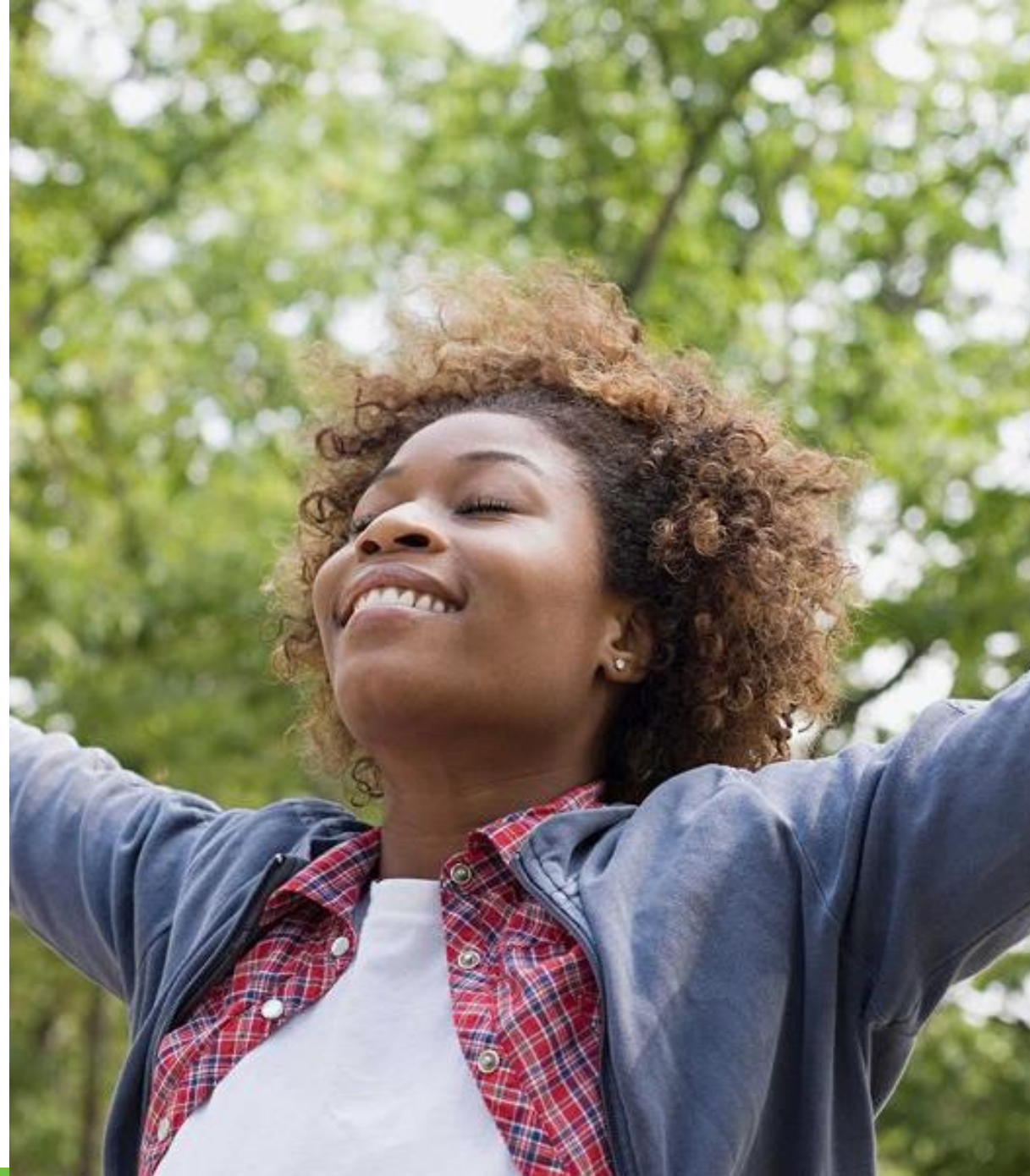
Skills:

- Tech savvy
- Online social network gurus

Ripple effect:

- Friends and family
- Other alumni for whom you don't have up-to-date contact information

Friends asking friends yield a larger impact than a stranger calling for donations.





Implement P2P Fundraising for New Alumni

Make it personal

- Ask them to fundraise for specific projects related to their old department or athletics group

Give them a tangible goal

- Update the old sports equipment, help send a class on a class trip

Offer easy giving functionality

- Offer simple start fundraising buttons and donation buttons in email communications, on social media, flexible donation options

Link it to Social Media

- Create Facebook and LinkedIn groups to engage alumni
- Use hashtags to create a sharing momentum and to continue to build an alumni identity

Develop a high donor value relationship that will last a lifetime

Think long term. Smaller, more reasonable donation asks now will help cultivate your relationship, and it will pay off with larger donations in the future.

Be sure to stay in contact to develop a lasting alumni identity.





A healthy relationship needs give and take.

Your alumni association can engage potential donors through events of value, like networking and reunion events.

GOAL: Don't be the institution who only calls to ask for cash. Be the partner and resource making your alumni proud to be a part of it!

Older more established Alumni





A great fundraising strategy provides
giving options for your entire
community!



Appeal to Their Interests

Focus on academic and extracurricular interest to make your appeals personal.

Lean on the strong connections alumni might have with a club or team. Send alumni event invitations and communications specific to their interests.

Alumni Interest Segmentation

- Academic Department • Athletic Groups • Campus Associations • Volunteer Organizations

Develop fundraising competitions around

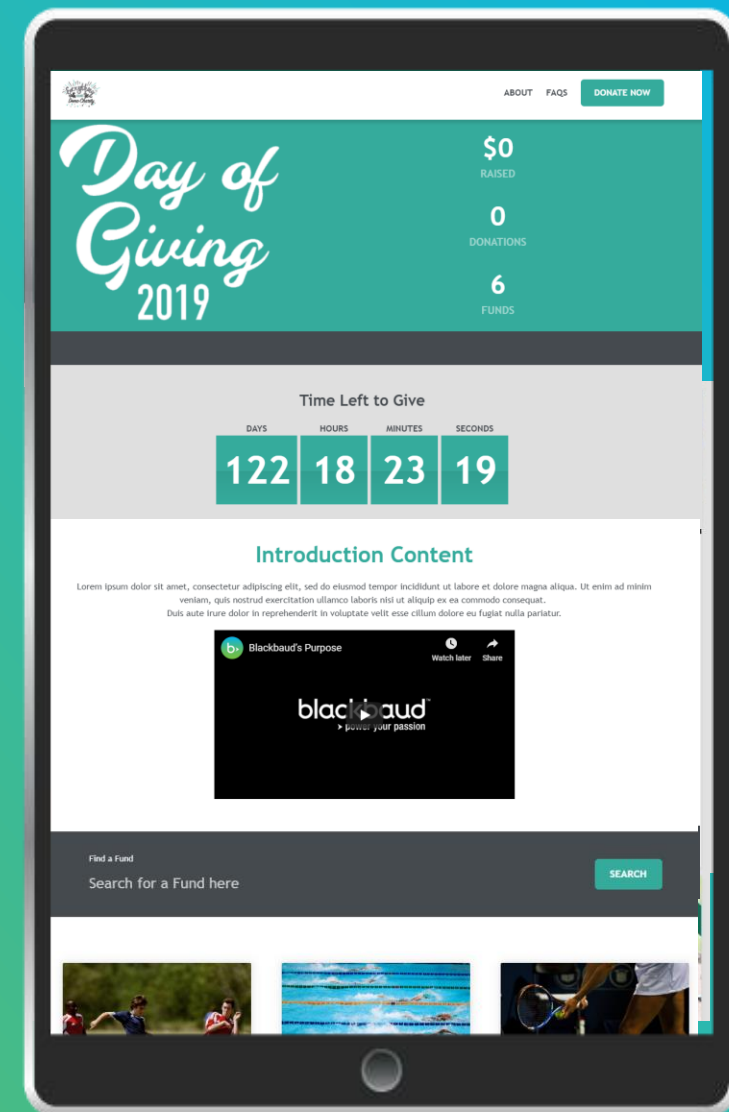
- Different segmentations • Specific projects

to invoke the personal connection and contribution to a group effort related to something they enjoyed as students.





The power of Giving Days



SCARLET & GIVE BACK DAY

TAKE FIVE

\$1,001,753

Raised thus far

1,967

Goal 1,846 Gifts

Thank You!

Max Ju

Scarlet & Give Back Day – Take Five is a resounding success!

Thanks to you, we've raised over \$1,000,000 to ensure that future generations of students will have access to the opportunities and experiences that make a Grinnell education special.

You took full advantage of the \$2-for-\$1 match provided by an alum anonymous donor, reaching the maximum \$500,000. All matching funds will be directed to the Humanities and Social Studies Center.



Pioneer Fund

Your gift to the Pioneer Fund provides unrestricted funds to the operating budget, making a direct and significant impact by helping make a Grinnell education affordable for students today, tomorrow, and for years to come.

Donations 716 Target 900

80%

Donate Now



Financial Aid

Your support of Financial Aid allows students from all walks of life to embark upon an unforgettable Grinnell journey, paving the way for new generations of intellectual seekers and proactive citizens. Your gift helps to ensure that a Grinnell education is accessible for every qualified student, regardless of ability to pay.

Donations 452 Target 500

90%

Donate Now



Center for Careers, Life, and Service

A gift to the Center for Careers, Life, and Service helps ensure that students graduate fully prepared to thrive after Grinnell and to lead lives of distinctive and enduring purpose guided by their personal and professional commitments.

Donations 101 Target 100

100%

Donate Now



Institute for Global Engagement

Your gift to the Institute for Global Engagement empowers students to engage the world the Grinnell way – bravely, humbly, compassionately, and creatively. By expanding students' access to a wide range of global experiences preparing them not only to thrive in a world that's more connected than ever, but to shape it.

Donations 81 Target 75

108%

Donate Now



Reunion 2019 - Class of 1969 Martin Luther King Jr. Scholarship

Rev. Dr. Martin Luther King, Jr. has special significance for our Grinnell class. We remember our good fortune of hearing Dr. King speak on campus on Oct. 29, 1967, and we remember that he urged us to "Remain awake through a revolution." We also remember the heart-breaking news of his assassination less than six months later. Our class has chosen to honor Dr. King at our 50th Reunion with an endowed scholarship to honor his legacy.

Raised \$8,146 Target \$10,000

81% funded

View Project



Reunion 2019 - Daniel Samson Folmer '05 Endowed Scholarship Fund

As many of you know, we lost our classmate Daniel Folmer this past year. Daniel loved Grinnell, was committed to education, and spent his career in college admissions, facilitating access to it for others. We are honoring Daniel's memory by creating the Daniel Samson Folmer '05 Scholarship Fund to benefit students who demonstrate high financial need, are first generation college students, are from Chicago, and in great need.

Raised \$6,905 Target \$15,000

46%

View Project



Reunion 2019 - Class of 1979 Endowed Scholarship

The class of 1979 is establishing an endowed scholarship that will allow future generations of students to benefit from "The Grinnell Experience" that shaped our lives. Two anonymous donors have offered a dollar for dollar match up to \$15,000 for gifts directed to the Class of 1979 Endowed Scholarship, bringing the fund nearly halfway to the \$30,000 needed to endow a scholarship. Please take the time to contribute.

Raised \$5,050 Target \$25,000

20%

View Project



Reunion 2019 - Class of 1994 Endowed Scholarship

In honor of our 25-year Reunion and recognizing the role Grinnell played in shaping who we are today, the class of 1994 has determined to raise funds to endow the Class of 1994 Endowed Scholarship Fund. The scholarship will provide financial support to one or more students in perpetuity. As we continue contributing to the fund, the size of the scholarships and the number of students helped will grow.

Raised \$8,185 Target \$14,000

58%

View Project

CLASS OF 2019

Class of 2019

Class of 2019 – win the Chipotle Student Giving Challenge. The more of us that give increases our chance to enjoy Chipotle burritos right here on campus! The class with the highest giving participation percentage will be the winner of the Chipotle Student Giving Challenge. Plus, 50% received.

CLASS OF 2020

Class of 2020

Class of 2020 – win the Chipotle Student Giving Challenge. The more of us that give increases our chance to enjoy Chipotle burritos right here on campus! The class with the highest giving participation percentage will be the winner of the Chipotle Student Giving Challenge. Make your gift.

CLASS OF 2021

Class of 2021

Class of 2021 – we have the chance to define our Chipotle Student Giving victory from Scarlet & Give Back Day 2018. Show your Grinnell pride by making a gift during this year's Scarlet & Give Back Day and once again, enjoy Chipotle burritos! The class with the highest giving participation percentage will be the winner of the Chipotle Student Giving Challenge. Make your gift.

CLASS OF 2022

Class of 2022

Calling all First Years! Who knows Chipotle? Let's begin our class legacy by making a gift to Grinnell in support of Scarlet & Give Back Day. Not only is giving a great way to show our Grinnell pride, we also have the opportunity to win Chipotle burritos – delivered to campus. The class with the highest giving participation percentage will be the winner of the Chipotle Student Giving Challenge. Make your gift.

Giving Days are great tools to reactivate donors

Grinnell College

High Point University Giving Day

POINT UNIVERSITY

Social Media ToolkitFAQEvent ScheduleFaculty & Staff CampaignSenior Giving

Give Now

one day, one university.
#DayforHPU
high point university

\$1,485,482
Amount Raised

1,685
Gifts

MARCH 27, 2019

ou!

Carson SperingMelissa MartinsShea ClearyRyeong ChoiAllstate Foundation/John M. Shepherd

Current Challenge

Double Your Impact with a gift to Support the Siegfried Leadership Fellows Program.
The Siegfried Family will generously match your gift dollar for dollar up to the first \$200,000.

Donate NowRead more about this program

Point University will celebrate its third annual #DayforHPU on Wednesday, March 27, 2019. As a member of the global HPU Family, we encourage you to join us in celebrating all that makes HPU extraordinary.

Make An Impact When You:

Give to Student Scholarships and Programs
When you make a gift to the HPU Fund for Extraordinary Education, you support the \$40 million in annual scholarship support awarded to today's HPU students. You may also support your academic or athletic program of choice with your #DayforHPU gift. Visit engage.highpoint.edu/dayforhpu to make your participatory gift.

Wear Purple and Share Your HPU Story
Put on your favorite HPU gear and tell the world why you are proud to be part of the HPU Family. Share your stories with a photo on social media to inspire others using #DayforHPU.

Attend A Chapter Event
Visit engage.highpoint.edu/DayforHPU-events and register to attend a regional chapter event. If you're interested in hosting a gathering in a different area, contact us at engage@highpoint.edu.


HIGH POINT UNIVERSITY

Social Media ToolkitFAQEvent ScheduleFaculty & Staff CampaignSenior Giving

Give Now

Support High Point University

Support the university project of your choice by clicking DONATE NOW under each option listed below.




HPU Fund for Extraordinary Education

The HPU Fund for Extraordinary Education supports the \$40 million in scholarship assistance awarded to High Point University students each year.

Raised \$1,318,364Target \$1,190,000

111% funded

Donate Now




School of Art & Design

The School of Art & Design offers students the opportunity to cultivate and advance their creative and critical skills. Make your gift and support scholarship assistance for students majoring in Interior Design, Visual Merchandising Design and Studio Art, amongst others.

Raised \$2,864Target \$2,000

99% funded

Donate Now




Congdon School of Health Sciences

High Point University's Congdon School of Health Sciences supports an array of undergraduate and graduate programs, including Exercise Science. Make your gift to support scholarship assistance for future healthcare professionals.

Raised \$1,909Target \$2,000

99% funded

Donate Now




David R. Hayworth College of Arts & Sciences

The David R. Hayworth College of Arts and Sciences offers students a broad range of disciplines for exploration in the liberal arts as well as pre-professional programs. Make your gift and support scholarship assistance for students majoring in areas such as Human Relations, Dance, and Non-Profit Leadership and Management.

Raised \$1,347Target \$2,500

94% funded

Donate Now




Phillips School of Business

The Earl N. Phillips School of Business seeks to prepare future business leaders for success. Make your gift and support scholarship assistance for students majoring in areas such as Accounting, Marketing and Entrepreneurship.

Raised \$5,551Target \$5,750

97% funded

Donate Now




Wilson School of Pharmacy

The Wilson School of Pharmacy helps students possess the skills and knowledge to practice pharmacy at the highest level possible. Make your gift and support scholarship assistance for future healthcare professionals.

Raised \$718Target \$2,000

36% funded

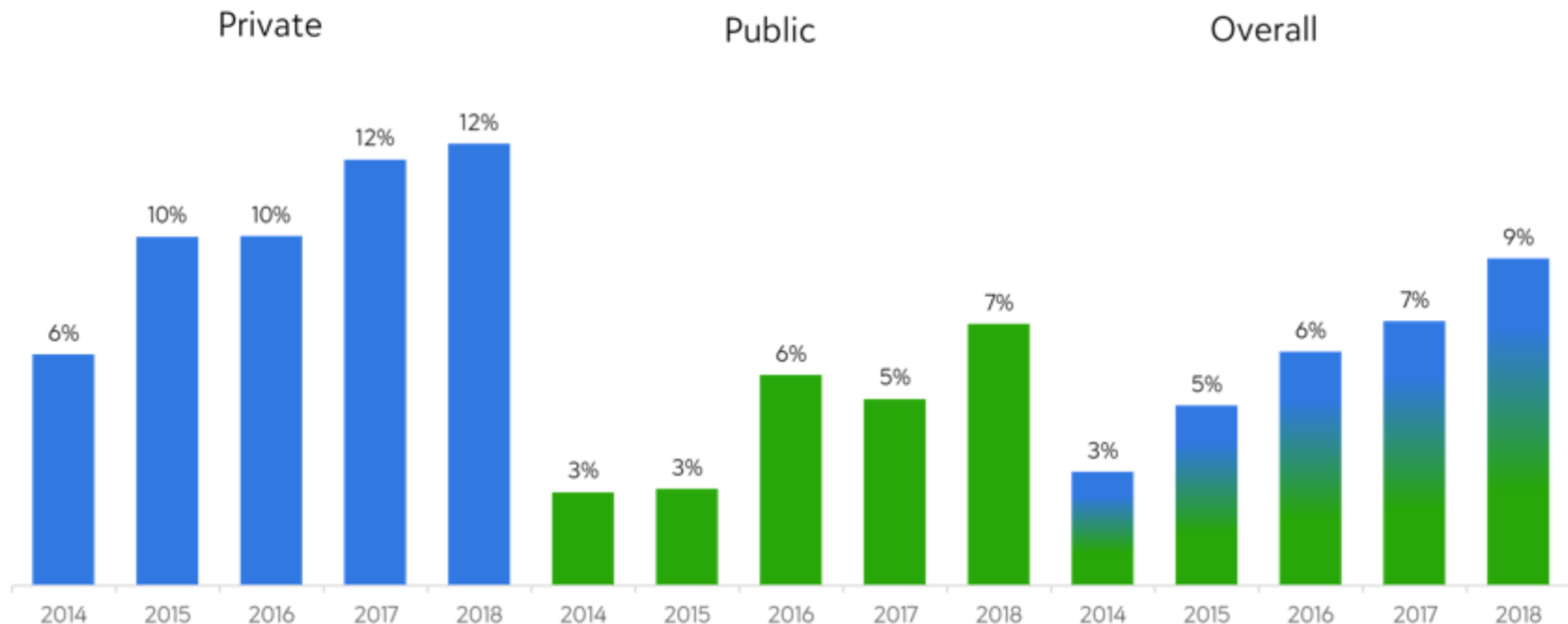
Donate Now



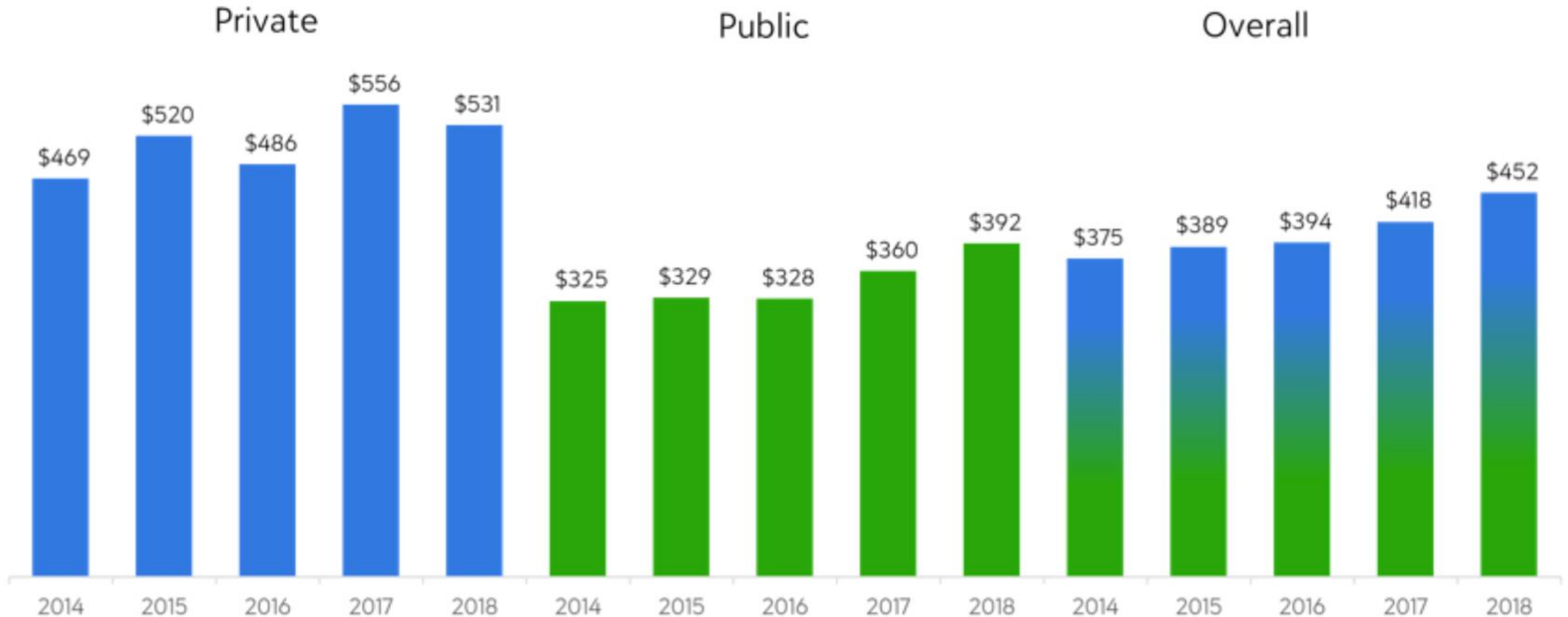
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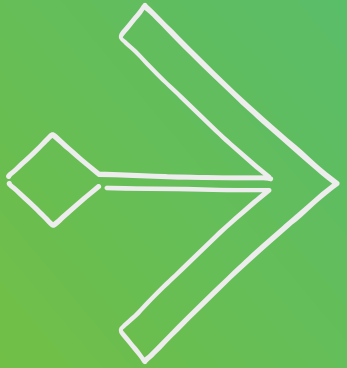
#bbcon

% of Donors making any gift to a Giving Day



Revenue per Reactivated Donor (all years lapsed)





‘Peer to Peer Insights + Analytics’



ALL fundraising organizations
should offer their supporters
Peer-to-Peer fundraising
in some way.

Peer-to-Peer Fundraising Spectrum



Organization Driven

Individual Driven



Traditional Peer-to-Peer
Runs
Walks
Biking Events



Endurance
Fundraising



Giving Days
Virtual Events



DIY
Memorials
Tributes
Third-Party Events



Livestreaming
Project-based
Fundraising



Charitable
Crowdfunding



Major
Donors

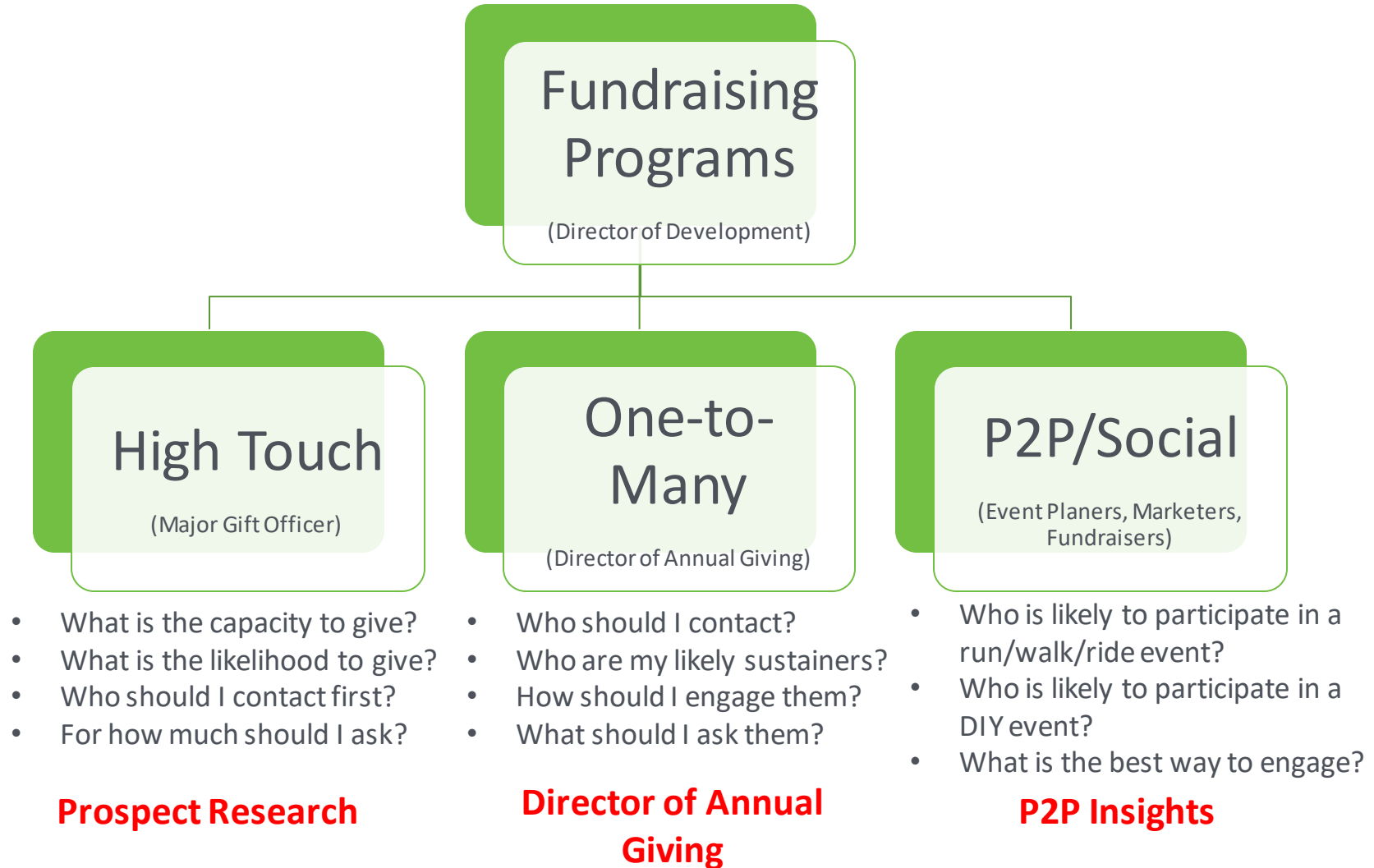
Mid-Level
Donors

Entry-Level
Donors

Expand your pyramid

- P2P fundraising attracts new people into your entry-level donor pool and drives new entry-level revenue streams
- Their first loyalty is to your supporter / the fundraiser, not your organization.
- P2P donors need to be acknowledged & warmed up to your organization

Where does P2P fundraising fit in?



P2P Insights and Analytics, specifically Predictive Modeling, helps schools answer the following questions:

Who do I target?

One of the key questions that our schools try to answer is: who should they focus on?

- Many of our schools simply target everybody – known participants and donors, registrants, volunteers, non donor populations, etc.

The profile of P2P fundraisers who participate in crowd fundraising or an organization driven event are different and our schools need to understand who to target for each. Simply targeting everyone for everything is inefficient and likely increases their marketing costs while raising less money.

How do I engage with her/him?

Once you understand who to target and how to market to them, how do you engage them?

- What motivates him/her?
- What is the message?

After doing the hard work of identifying who to target for what program, messaging becomes critical.

We interact with predictive models every day:



► Product
recommendations



► Advertisements



► Fraud alerts

We interact with predictive models every day:



Outcome:

Increased sales



Outcome:

More clicks = more
ad revenue



Outcome:

Reduce risk

Predictive Modeling

Descriptive Statistics



- Where have we been?
- What's happened?
- How has it happened?



Predictive Modeling

- Where might we be able to go?
- What might happen?
- Who might do something?

Predictive Modeling

Descriptive Statistics



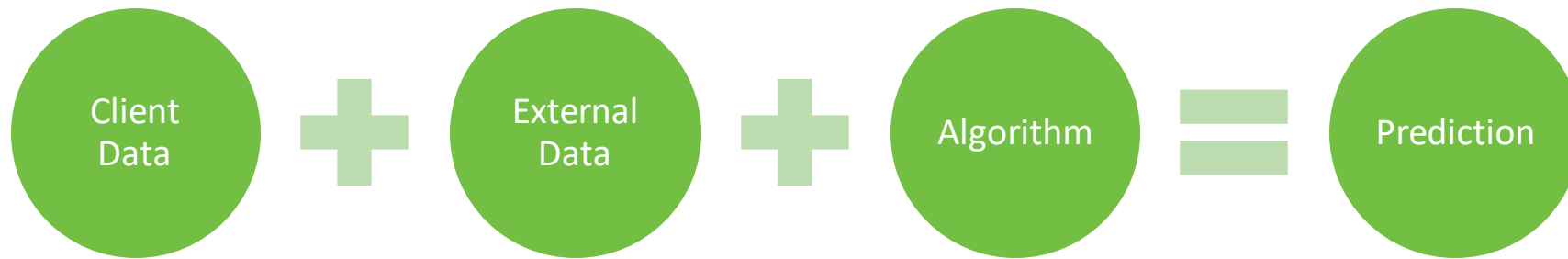
- How many \$10K+ donors did you have last year?
- What percentage of donors upgraded, downgraded or lapsed?



Predictive Modeling

- Who is most likely to give to my organization in the future?
- Who is likely to give \$10K+ to my organization?

Predictive Modeling made simple:



How can fundraisers use predictive modeling?

Predict future
behavior of
constituents to
identify your best
and
most impactful P2P
prospects



Outcome:

Increase engagement
and fundraising
revenue

Who do I target?



Likelihood to participate in an Event

Predict individuals who are likely to participate in an organization-driven P2P event



Likelihood to participate in P2P and Crowd Fundraising

Predict individuals who are likely to participate in an individual-driven P2P event

&

Sustainer Score

Uncover who is most likely to become a sustained donor.

How do I engage with her/him?



Personas

A cluster segmentation of demographic, wealth, philanthropic and P2P information.

Peer-to-Peer Personas



OVER ACHIEVERS



Profile

Educated, wealthy, and extremely healthy, Over Achievers are only slightly more philanthropic than average. They are motivated to do good and to be the best in everything they carefully decide to do.

Campaign Preferences

More likely to participate in cycle events and DIY, and somewhat likely to participate in walks.

Team Participation

Tend to be members of the largest teams.

Revenue and Fundraising

Over Achievers are exceptional fundraisers. Financially secure, they tend to make sizable personal gifts and receive more and larger donations from their network of family and friends. They are also more likely than average to donate to other P2P participants.

Communication Strategies

This group is interested in learning how they are contributing to the greater good and welcome consistent messaging across channels. Competition, challenges, leaderboards, and recognition fuel their fire. They enjoy earning prizes, particularly those that show off their affinity to the campaign or organization. They should be approached with opportunities to share their experiences publicly, to join the committee, or to step up in other ways. They will deliver in spades. Having a high-risk aptitude, they also tend to be good targets for dare or obstacle events.



DO GOODERS



Profile

Do Gooders are very philanthropic and tend to give more themselves than a traditional wealth screening would suggest. Combined with their ability to raise funds makes them quite valuable to organizations.

Campaign Preferences

More likely to participate in cycle, DIY, and walks.

Team Participation

More likely than Over Achievers and Go Getters to be on a team or be a team captain, but the teams are smaller.

Revenue and Fundraising

Do Gooders are strong fundraisers but tend to raise about half that of Over Achievers. They are likely to participate in multiple P2P campaigns and have a tendency to both pay the fee and fundraise on top of that.

Communication Strategies

Challenge Do Gooders to set a lofty goal. They are conscientious and self-motivated and will work hard to reach it. They generally don't act on a whim, so multiple touchpoints are needed to engage and drive action. This group is also more active on social media than average, so be sure to provide resources to spread the word on social media.



GO GETTERS

Profile

Upwardly mobile, healthy, and educated, Go Getters are about average in terms of philanthropy, but their drive to compete can motivate them to fundraise.



Campaign Preferences

More likely to participate in cycle events and DIY.

Team Participation

Least likely to be a team captain, but tend to be on larger teams.

Revenue and Fundraising

Although less likely to participate in multiple campaigns, Go Getters tend to raise about the same as Do Gooders. When they fundraise, the average gift they receive is high, though they are also fairly likely to be fee-only participants.

Communication Strategies

Motivated by rewards and recognition, target Go Getters to publicly share their stories, both in real life and digitally. They are tech savvy and like to be ahead of the curve, so invite them to use innovative fundraising tools such as mobile apps. Their risk tolerance and interest in a healthy lifestyle make Go Getters good targets for dare, obstacle, and endurance events.



CAUSE ENTHUSIASTS

Profile

Cause Enthusiasts get excited about making a difference. This is the most inherently philanthropic persona, though they tend to skew below average in terms of wealth and education.

Campaign Preferences

More likely to participate in runs and walks, and somewhat likely to participate in DIY and cycling events.

Team Participation

Most likely to be a team captain and be on a team, though their teams tend to be smaller.

Revenue and Fundraising

Cause Enthusiasts donate much more than their wealth profile suggests, and they have the highest revenue as a percentage of income. You can count on them to make personal donations to their own P2P campaigns as well as make donations to other P2P participants. They are also most likely to participate in multiple P2P campaigns.

Communication Strategies

They're extremely passionate about the mission of your organization and want to hear about your history and current successes, but might need a little confidence boosting when it comes to being a captain, speaking publicly, joining the committee, etc. They engage on social media more than any other persona but are not very tech savvy. Provide them with plug-and-play resources to share with their networks, as well as personal attention and instruction related to online fundraising.



GENEROUS JOES



Profile

Generous Joes raise about the same as Average Joes, but they are more philanthropic. They are also less healthy, wealthy, and educated than their fundraising counterparts.

Campaign Preferences

Likely to participate in runs, walks, and DIY.

Team Participation

Likely to be a team captain or the member of a team.

Revenue and Fundraising

Generous Joes are average fundraisers, but funds raised tend to be their own rather than from their network of friends and family.

Communication Strategies

They are more engaged than average on social media, so provide them with resources to spread the word with their networks. They aren't very advanced with technology, so they will appreciate step-by-step instructions when it comes to online fundraising. Generous Joes gain confidence when they can follow someone else's lead. Share testimonials from other participants, and they'll be encouraged to join and take action.



AVERAGE JOES

Profile

Average Joes embody what their name suggests, but they can be one of the largest persona segments and can be responsible for a large percentage of P2P revenue.



Campaign Preferences

No distinct preferences.

Team Participation

Mix of team captains, team members, and individuals.

Revenue and Fundraising

Average Joes are middle of the pack in terms of dollars raised, but they tend to donate less to their own fundraising efforts and collect more from friends and family.

Communication Strategies

Average Joes don't stand out from the crowd. A mix of message types and tactics is appropriate to help engage.



THRILL SEEKERS



Profile

One of the least philanthropic segments, Thrill Seekers are more interested in appearances than they are in your mission and they have the lowest revenue as a percentage of their income. They keep up on the latest trends and have all the latest tech. This group is very active on social media, though they post more than they engage.

Revenue and Fundraising

Thrill Seekers are below average in terms of P2P revenue. They are not likely to make a personal donation and are most likely to only pay a fee and not fundraise.

Communication Strategies

Capitalize on their fear of missing out and offer them the opportunity to be involved in something new and exciting, along with the tools to share their participation with friends. Thrill Seekers embrace risk and are excellent targets for dare and obstacle events. They are impulsive and aren't motivated by meeting goals but could rally a group to participate in a trendy campaign.

Least likely to do a walk event.

Least likely to be on a team.



CARING CONTRIBUTORS

Profile

Caring Contributors are often the least educated and least wealthy of the personas. They are most likely to have children and have high levels of daily stress.

Campaign Preferences

Least likely to do a cycling event.

Team Participation

Somewhat likely to be a team captain or be on a team.

Revenue and Fundraising

Caring Contributors generate about as much revenue as Casual Contributors but can be slightly more invested in the cause. Because of this, they are inclined to personally donate what they can both to their own efforts and to their fellow participants.

Communication Strategies

Protective of their spending, Caring Contributors respond positively to registration fee discounts. They are not concerned about the health aspects of participating but are interested in any family-friendly activities related to the campaign. These constituents have busy lives, so make engaging and participating as easy and low-commitment as possible.





CASUAL CONTRIBUTORS



Profile

Casual Contributors are often the least philanthropic of the personas. They are also the least conscientious and most impulsive segment.

Campaign Preferences

Least likely to participate in a DIY campaign.

Team Participation

Tend to be members of larger teams.

Revenue and Fundraising

Casual Contributors often generate the least amount of revenue of any P2P segment and are likely to pay a fee only and not fundraise.

Communication Strategies

Consistent messaging is more important than segmented communication, as these participants aren't particularly enthusiastic. Casual Contributors also lead busy lives, so make participation and engagement as easy as possible to win them over.

LEARN MORE

To learn more about what was included in this agenda, visit:

2018 Charitable Giving Report:

<https://institute.blackbaud.com/asset/2018-charitable-giving-report/>

2018 Charitable Giving Report: K–12 Education Spotlight:

[<https://institute.blackbaud.com/asset/2018-charitable-giving-report-k-12-education-spotlight/>](https://institute.blackbaud.com/asset/2018-charitable-giving-report-k-12-education-spotlight/)

LET'S CONNECT



[linkedin.com/in/ alex-orr-
8674985](https://www.linkedin.com/in/alex-orr-8674985)



[linkedin.com/in/lovisalane](https://www.linkedin.com/in/lovisalane)

INSPIRED?
WIRED?
FIRED UP?

Tell us in a session survey
on the mobile app, and
you'll be entered to win a
complimentary pass to
bbcon 2020 in Seattle, WA!

THANK-YOU!

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