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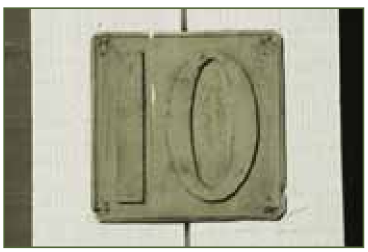
Annual Fund Inc. TOMORROW'S STRATEGIES TODAY

EVOLUTION

The newsletter for annual giving professionals *Volume 1, Issue 7*

SEPTEMBER, 2004

Top Ten Reasons to Support the Annual Fund



We have all seen the top ten lists on t-shirts, print materials, and on-line. Their usefulness is debatable; however, they do serve as a good means to market quick hitting bulleted factoids in an attention deficit world. These lists can be quite useful, particularly as filler for the dreaded white space that can be glaring during the design stages of annual giving marketing materials. What follows is a "Top Ten Reasons to Support the Annual Fund" template. Fill in your numbers and brag points and you will have a list to call your own. Sample lists can be found at www.annualfundinc.com.

The Top Ten

1) Tuition only covers about (# here) % of the actual cost of educating a (school name) student. The $ (# here) million that the Annual Fund provides each year is one of the few sources of income bridging the gap between what tuition provides and the total operating budget. Generous alumni support strengthens the (school name) experience for all students.

2) Over (# here) % of all students will receive some type of financial aid this year. The (school name) is responding to the continued need for assistance by families, and to make (school name) as competitive as possible in recruiting the most academically qualified students regardless of their financial circumstances.

3) To enable (school name) to retain and attract outstanding faculty who are the best within their chosen profession.

4) Alumni giving rates serve as the measure by which corporations and foundations rate alumni involvement. This is a major consideration for these groups when making major gifts to colleges and universities.

5) College guidebooks such as U.S. News and World Report, Barrons, and Fiske use alumni giving participation rates as the sole criterion to rate alumni satisfaction when completing overall institutional quality ratings. To move up (or maintain our place) in the rankings, and thus attract quality students, we must increase our alumni participation rate.

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Inside This Issue:

Alumni E-Mail Communications

Alex Beckett, Consultant

Success in alumni relations breeds success in annual giving and vice versa. Giving at the higher education level is based first and foremost on the relationship the institution has with the alumni. In these times of multiple appeals via direct mail, the telephone, and now email, the impact of contributors to the relationship cannot be overlooked. How we communicate with our alumni when we are not seeking financial support is as important as when we are seeking their support.

Five Non-technical Steps to Sending Better E-mail

There's no better way to get people to come to your site than to simply ask them at the moment when they will find it easiest to accept your invitation: when they are sitting in front of their computer reading their e-mail.

Sure, you can advertise in your alumni magazine, or you can put your URL in big letters on your convocation materials, and you can even tell them over the phone that the web site is an exciting place to visit with lots to offer, but the simple fact is that you are requiring people to remember, perhaps weeks later, that you have a web site that sounded vaguely interesting. Few people will do this for you.

But if you can capture people's imagination at the moment they are powered up, logged on and have itchy clicking fingers, you are on the verge of successfully getting them to do what you want. So don't blow it by sending a message that is vague, boring or unprofessional. It would take far too much space to address all the technical issues related to sending e-mail to your alumni, but here are five steps to help you send better messages tomorrow.

Don't scare your alumni. Give your newsletters a subject line that will pique users' interest but not alarm them. People scan their in-boxes very quickly and jump over the ones that confuse them or seem to be demanding something. Avoid words like "deadline," and stop yourself from using the imperative tense unless you can do so in a way that is clearly friendly. "Join us for lunch," sounds and reads much better than "Sign up now!" or "Register early!" A regularly scheduled newsletter should be labelled consistently (for in-box sorting) but with some indication of the issue (e.g. Acme U. Times, Spring, 2004).

> Think from the recipient's point of view.

Send your e-mail like a pro. Don't pull a list of e-mail addresses and fire off a message using your desktop e-mail software. Use protocols and tools that are up to the current standards of professionalism. Hopefully nobody needs reminding not to expose all of your subscribers' e-mail addresses in the "To" box of your desktop software, but it might be less obvious to some that all outbound e-mail should have clear and unambiguous methods of unsubscribing, a valid return address and if necessary, a brief description of why they are receiving a message. (E.g. "You are receiving this because you subscribed on our web site.) New e-mail verification standards are on their way, so you should make sure someone in your organization is keeping his or her eye on the evolving best practices of the e-mail marketing industry. Also, ALWAYS get your message copy edited by someone with experience.

Think before you write. Consider the purpose of sending the message and concentrate on that. There is no limit to the number of things you can talk about, but remember that the vast majority of people will give just a few seconds to each message. Do not hide your message in dense text like a flowery introductory paragraph. Put your key message at the top in plain language.

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EVOLUTION

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The Feedback Challenge

Becoming a bad supervisor is often learned on the job and reinforced through the staff's reaction to feedback, according to Paul Stepanovich, an associate professor of management at Southern Connecticut State University.

Stepanovich, who has studied workplace dynamics for many years, touched upon his research in an article published in the May edition of Total Quality Management & Business Excellence.

"It would be a fair statement to say that managers generally learn to reduce quality," Stepanovich said.

He said it is not intentional. He points out a mathematical concept known as "regression to the mean," that can be applied to performance. The theory indicates quality of work will vary within boundaries and gravitate toward their average. When the worker does a specific task well, the next task will likely not be as successful. Conversely, when a task is performed at a below average level, the next task will be performed better.

But bosses create problems when they intervene with an attempt to change job quality with praise and criticism.

Managers who see a job done well will praise the employee. But more than likely, the employee's next task will not be done as well. Over time, bosses (sometimes subconsciously) develop a sense that praise elicits a slackened performance, which tends to discourage the use of praise.

Perhaps worse, is when an employee is criticized after a lackluster performance? Without boss interference, it is likely that the employee's next task would be performed at a higher level. But when criticism is applied, it appears to the boss the upward change occurred because of his or her admonishment.

"Bosses gradually become less inclined to praise and more likely to punish and this has a devastating effect on employees," Stepanovich said.

Is it possible for a boss to improve the performance of his or her company?

Stepanovich says yes, but only if most of the attention is paid to system dynamics, so that the process is more efficient and lends itself to enhanced overall quality. (This is the overarching belief of AFI, that infrastructure systems are the foundation of success for an annual giving program and that consistency is driven more by infrastructure than anything else).

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Metro Toronto news services

Top Ten Reasons to Support the Annual Fund

continued from page 1

6) The rankings noted in #5 above, also serve to increase the value of a degree from (school name) and hence your degree.

7) Some of the areas that depend on support from annual gifts are: innovative academic programs, student scholarships, faculty teaching and research, campus technology, and much more.

8) Because annual giving makes a substantial impact. Consider, it would take an additional $(# here) million in the endowment, or an additional tuition charge of $(# here) per student, to support what Annual Fund gifts provide each year.

9) To reaffirm your commitment to (school name) and its mission.

10) Because one student, educated at (school name), can positively impact the lives of thousands.

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Annual Giving Brochures

In this time of declining budgets, the high per piece expense of producing an annual giving brochure can appear to be an investment that can be cut from the annual giving budget. Many brochures are pieces that are heavy in fluff and weight; the latter thus driving up your postal rates.

Rarely, if ever, should you send annual giving brochures to your entire prospect audience. There are, however, three opportunities where the use of an annual giving brochure is a wise investment.

As You Decide Follow-Up within the Telefund

Your calling center has to deal with the “Can you send me more information?” request on a nightly basis. What do you send them? Most send a form letter with general information. But, with so many call areas, it is impractical to have an information packet or brochure for each audience. The annual giving brochure is a great alternative. Yes, it’s generic in nature, but it can be personalized to fit the audience you are calling. For example, a prospect from the College of Engineering requests more information. Your student pledgeprocessor mails the form letter, a general annual giving brochure, and a personalized Engineering buck slip that is produced in-house. These buck slips are printed front and back noting brag points and annual fund priorities for the individual audience, and are placed within the global annual giving brochure. This method is very inexpensive and allows for a more thoughtful production piece that is personalized for the audience.

Major Gift Officers

We are constantly preaching the dual-ask culture, requesting that major gift officers request an annual gift as well as their major gift. The chance of this happening though, isn’t of the highest probability. The issue is that the annual gift is an afterthought request, while the major gift officer is on the way out the door, if at all. The annual giving brochure can serve first as a centerpiece around which to have a conversation about the need for annual fund contributions. Secondly, it can be used to create a win-win situation. Consider the donor that is asked to make a $25,000 gift by the major gift officer and has to say “no” at the time. The prospect feels bad about not being able to make a gift and the major gift officer feels bad about not closing the deal. The end result is a negative ending to what was likely a positive meeting. The annual giving brochure can be a good “save,” so that the experience ends on a positive note with an annual fund gift. An added benefit is that the annual giving office can note on the gift card within the brochure, a solicitation code unique to major gift officers by area. This code can then be noted in reports, thus identifying the team players.

New Alumni & New Donor Packets

Intended as an educational tool in these cases, the brochures serve as an opportunity to introduce and review annual giving methods, calendar, and recognition societies. An interesting phenomenon in the past has been when the brochures were included with our new donor packets as a part of a thank you message with no additional appeal, we actually generated additional gifts.

The Brochure

Less is more. Limit the fluff and focus on content. Items to highlight within a sample six-panel brochure include:

- Annual giving vision
- Importance of participation
- Impact of annual giving support
- Pictures of students
- Overall calendar (don’t be too specific by focusing on months of activity)
- Matching gift overview
- Securities giving overview
- Planned giving overview
- Contact information
- Gift card

Annual giving brochures can be a strategically wise investment. The focus lies more in how these brochures are used, rather than how beautiful the piece. Functionality and education are the end goals.

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Pizza, Pizza

The lifeblood of the majority of student call centers is the delicacy of pizza. A portion of our telefund budget typically goes towards this motivating treat and is used to reward, incent, and bribe. Unfortunately, the allocation of the telefund's budget that's earmarked for student wages continues to rise as these wages are forced to increase in order to compete with area employers. This, in turn, leads to cuts within the program expense areas that support the telefund operation and the first casualty is often the food budget.

Several years ago I was faced with the need to increase student wages in a flat budget year. We were able to accomplish our goal by thinking outside the box… the pizza box that is. Pizza was always a hit with our student callers within our 30-station call center. We typically had pizza at least once per week and placed our order with an establishment selected by our various student managers. The most eye-catching aspect of this ritual was that we always paid full price, unless someone was having a special deal of course. We decided to open our pizza business to a bidding process, therefore selecting an "official pizza" for the annual giving office. We were thrilled with the results.

The process was fairly straight forward, though it morphed into a better deal than we could have ever imagined.

Step One: Research and estimated how many pizzas would typically be ordered in a year. We included the pizzas traditionally utilized through our senior class volunteer effort as well. If you also have student alumni association responsibilities, you may want to take their numbers into account as well. The number of students employed through the telefund at any one time was also noted. We did this to stress the call center as a marketing venue, with our number of student callers hovering near one hundred.

> Access to your students is a commodity

Step Two: Select pizza establishments to invite into the bidding process. Allow your student managers, or callers, to select the potential pizza suppliers. They will appreciate the opportunity for input and are the individuals having to digest the end choice.

Step Three: Request the bids, offering the following in exchange for best price per pizza:

All pizza purchased during the specified time period for annual giving purposes will be through the pizza establishment selected.

The pizza establishment selected will be noted as official sponsor on select marketing materials and on the telefund web page (if applicable).

The telefund will distribute marketing materials provided by the pizza establishment to the student callers. This can include coupons and other promotions.

Normally, you can also negotiate the contribution of free pizza certificates that can be used throughout the calling year cycle as incentives for individual caller performance. In our first year of this approach we were able to save a great deal of money. We saved several dollars per pizza and received many "free pizza" coupons to award to our callers. An interesting thing happened that first year during the first bidding process. The pizza place that was located right next to our calling center would not budge off their normal prices and were therefore the highest bid and did not receive our business. Due to being a national chain and their proximity to the call center they took us for granted. Year two came around, and there was another opportunity to bid. The pizza establishment next door realized the previous year's miscalculation and was by far the best price. And… they provided a 30% discount for all our student callers outside of calling hours. This on top of the low cost per pizza made it a great deal. In the end, we accomplished two objectives:

We basically cut our food budget in half.

We now had an additional perk for working for the telefund thanks to the 24/7 discount for our callers.

The pizza strategy is a no-brainer and will help your budget. Also in the food area, we started planning our "food" nights far in advance in order to save additional money. A Sam's Club membership enabled us to buy food in bulk in accordance with our calendar. This translated into another 10% - 20% reduction in food costs. Enjoy your cheaper pizza.

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Peanut Butter & Jelly: Unique Script-Based Training

Paul Clark, Virginia Tech

(Part 2 of a 3 part series)

While Marshall McLuhan might have argued to the contrary, in this case the message is more important than the medium. For, truly, if the message is in Greek and you only speak Spanish, who cares what the medium is?

Peanut Butter & Jelly Script

Introduction

The introduction is your chance to set a pleasant tone for the rest of the call and to perform vital demographic updates where necessary. At this juncture, you will introduce yourself as well as the fund on behalf of which you are calling. Also, you should recognize the prospect as a major peanut butter and jelly sandwich eater, Jiffy Society member, or Welch's Grape Jelly Club member if appropriate. It is extremely important to update all demographic records, especially mailing address, and including e-mail and business information.

Hi, can I please speak to Mr. or Mrs. ____________? Hi ___________, my name is ________ and I'm a student calling from the University of Peanut Butter and Jelly. How are you doing this evening?

Fellow students and I are contacting hungry people across America to update their records and to talk about the many wonderful benefits of eating peanut butter and jelly sandwiches. First, in order to make sure all of our information is current and can be sent to the correct location, I would like to check your mailing address, is it still _________? I have your business information as _________. Is that still correct? I have your spouse listed as ___________ and working for ____________. Is that still correct? The Peanut Butter and Jelly Eater's Alumni Association would like to keep all alumni informed about happenings in the world of sandwiches by e-mailing a monthly "Netletter." If you would like to begin receiving the "Netletter" next month, I would be happy to update your email information now. Thank you for updating your records.

Be discreet in updating information that isn't listed, e.g. "We currently don't have any ______ (spousal, business, etc…) information, would you like to update that now?"

Transition

It is vital to achieve a smooth transition between phases of the call structure. This will allow for a smooth, flowing conversation and prevent unnecessary awkwardness. Always remember to use correct phrasing during your transitions. One example of an effective transition is, "Thank you for updating your records."

Rapport

Rapport is a very important factor in the success of the call. What is rapport? Rapport is used to make the prospect feel more comfortable talking with you on the phone. Most of the people you will speak with will be strangers to you when the conversation begins, but by the end of the call, they should feel a connection to you and the sandwich. Rapport is conversational, not survey-like. Don't just ask a list of questions, ask open-ended questions and let the conversation evolve from there.

Have you had a peanut butter and jelly sandwich recently? (If so, when?)

How many meals a day do you normally eat?

Do you eat out for lunch, or pack your own?

How much time do you normally spend preparing your meals?

How do you feel about bread? Do you prefer white or wheat?

Is nutrition important to you? (If so, do you practice any type of ritualistic diet?)

Any other relevant questions for the prospect.

You may find that information gathered during the introductory phase of the call can be used to fuel excellent rapport questions. Perhaps you are familiar with your potential eater's city or state, or perhaps you have some knowledge of their employer; these types of personal insights may be opportunities for achieving a comfortable rapport with your potential eater. The rapport phase of your call should last three to five minutes and you should ask at least three open-ended questions.

Remember that you are calling as a University of Peanut Butter and Jelly student, but also as a representative of the university. Make sure your language and topics of conversation are appropriate.

Transition

Once again, it is important to have a smooth transition into the explanation of the fund. Example: "I don't want to take up too much of your time tonight; I also wanted to share some information about peanut butter and jelly."

We are calling this afternoon/evening to inform hungry people about an opportunity for them to have a nutritious, tasty and affordable meal without spending a lot of time and money to do so.

Reason

The peanut butter and jelly sandwich is a traditional staple of American dining. However, you may not be aware of just how good this sandwich can be for your health. Peanut butter contains proteins, vitamins, minerals and carbohydrates, and peanuts are naturally cholesterol-free and low in saturated fat. Peanut butter has long been recognized as contributing to the lowering of both blood pressure and the risk of heart disease. Recent medical studies have shown that peanut butter can significantly reduce the risk of non-insulin dependent diabetes, and especially for women, the monounsaturated fats in peanut butter have been proven to protect against breast cancer and help prevent birth defects in children. In fact, two tablespoons of peanut butter has as much protein as an egg or a glass of milk.

Ask

Invite all prospects to eat an entire peanut butter and jelly sandwich. Make firm, but warm, asks; don't skip levels.

Knowing how beneficial to your health it can be, can we count on your support with a pledge to eat an entire peanut butter and jelly sandwich?

If yes: How would you like to dine this afternoon/evening – we offer white or wheat bread and whole or skim milk?

If no: Ok, that's certainly understandable. The reason we start off with an entire sandwich is to express just how great peanut butter and jelly is, and please keep in mind that we offer a variety of installment options that could allow you to eat a half, or even a third or fourth, of the sandwich over a 3-month period. As I said before, this is an informational call as well.

Make firm, but warm, asks; don't skip levels.

Reason
One of the leading misconceptions about peanut butter is that it's fattening. Like most foods, peanut butter contains some fat, but 80% of the fat in peanut butter is unsaturated fat, which may actually help lower cholesterol levels in your blood. Recent research at both Purdue and Harvard universities concluded that peanut butter can be successfully eaten during a weight loss diet, and that people who include peanut butter in their diet were more successful in losing weight. Now, here's something the folks in the fast food industry don't want you to know: a peanut butter and jelly sandwich on white bread contains a lower percentage of calories from fat, less saturated fat, less cholesterol, less sodium, and more fiber than a chicken filet sandwich, a hot dog, a slice of pepperoni pizza or a hamburger! Without a doubt, peanut butter is versatile, good tasting and nutritious, and for those reasons it's included in many medically endorsed weight loss and diabetic diets.

Ask
Invite all prospects to eat half of a peanut butter and jelly sandwich. Make firm, but warm, asks; don't skip levels.

With that in mind, can we count on your support with a pledge to eat half of a peanut butter and jelly sandwich?

If yes: How would you like to dine this afternoon/evening – we offer white or wheat bread and whole or skim milk?

If no: Ok, that's certainly understandable, and as I said earlier we do offer installment plans that allow you to eat portions of the sandwich over the course of 3 months.

Insert objection response if necessary. Build rapport; ask about matching gift company, etc.

Reason
If you're like many Americans, you don't have the time or the money to make every meal a gourmet event. Peanut butter and jelly sandwiches are inexpensive and easy to make, and their popularity is proof of that. Every second in the United States, someone buys a jar of peanut butter, and Americans eat an estimated 800 million pounds of peanut butter a year! In fact, by the time most kids graduate high school, they will have eaten about 1,500 peanut butter and jelly sandwiches! Americans alone eat 3 pounds of peanut butter per person every year; that's enough to coat the floor of the Grand Canyon! Peanut butter is also good for the environment. You might find peanut shells in kitty litter, wallboard, fireplace logs, paper, animal feed and sometimes as fuel for power plants. The purchase of peanut butter is a lasting investment, for it will last about 2 years if unopened and stored in a cool, dry area and three months on the pantry shelf if opened. All it takes is a couple slices of bread and a butter knife to start you on the road to dining success!

Ask
Invite all prospects to take a bite of a peanut butter and jelly sandwich. Make firm, but warm, asks; don't skip levels.

To help ensure this vital delicacy remains available for future generations, can we count on your support with a pledge to take a bite of a peanut butter and jelly sandwich?

If yes: How would you like to dine this afternoon/evening – we offer white or wheat bread and whole or skim milk?

If no: Thank you for you time. We hope you will consider eating a peanut butter and jelly sandwich in the future.

Thank You / Confirmation
Thank prospect.

Ask for matching sandwiches (ham and cheese, turkey, etc…).

Re-confirm amount/allocation of pledge. Seek confirmation if prospect has pledged to eat a very large sandwich, or more than one sandwich.

Tell them that they will receive a pledge baggie/brown bag in 5-10 days.

Thank prospect again.

Supervisor confirmation if necessary.

In addition, I have included some bonus information that can be of value to callers as they begin this hypothetical fund drive. This includes brag points to highlight specific accomplishments, a history of the purpose for which calls are made (in this case, peanut butter), objection responses to aid in training callers how to handle rejections of initial ask amounts, and two more collections of beneficial background data. These are meant to reflect the use of such materials in actual calling, teaching callers to integrate these types of resources into strengthening their rapport and knowledge of the fund.

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Look for Part III: Objection Responses in the October issue of Evolution!

Understand Thy Enemy?

While the title is admittedly tongue in cheek, the most important relationship the annual giving office has is with the information technology (IT) staff. Okay, prospects do come first; however, we cannot maintain a positive relationship with the prospect base without adequate IT support. Data is at the foundation of all we do. Without a strong IT infrastructure we are setting ourselves up for failure at its worst, or marginal success at its best. While it is debatable as to which relationship is key, there is little question that the IT relationship is the #1 internal relationship. A slight variation of the golden rule most definitely applies. Take care of those that take care of you.

It is important to remember that the IT area and annual giving are very much alike and will both prosper to a greater extent being “friend,” rather than “foe.” Consider our similarities:

- Both groups desire success
- Both are production shops
- Both have high volume work
- Both have processes that are data-dependant
- Both are only noticed when a problem arises

Lindsay Bauer of Colorado State University conducted a survey in advance of a users-group conference co-presentation on this topic with Mike Westfall of the University of Toronto. IT staffs and Annual Giving offices from several schools were asked a series of questions regarding the working relationship between the two development areas. One of the areas addressed was the question of how could annual giving improve the relationship. The top three responses were very telling:

- Enhance the ability to develop. and stick to. a reasonable schedule.
- Possess a better understanding of how everyone needs to use and manipulate information.
- Provide clear documentation of policies and procedures that are then followed.

Basically, what everyone desires is consistency of timing and effort. The word “annual” means annual… as in every year. We, within annual giving, can be guilty of knee-jerk decisions and projects. While there will always be some semblance of that phenomenon, we need to plan and develop infrastructure systems that make those last minute projects easier to handle. This issue played out in other results of the survey with IT staff, when asked, “If you could get annual giving to do or change one thing, what would it be?” Their responses:

- To be included in the planning process.
- To have their (IT) limitations better understood.
- To check data received from IT, prior to using it.
- To simplify and standardize.

The relationship between the annual giving office and the IT office has the potential to be very tenuous due to the deadline nature, the detail orientation, and the results based environment in which we all reside. Ultimately, the annual giving office goal should be simple: don’t be a headache. We have the power to make the relationship successful or an on-going challenge. Yes, there can be difficult IT staff members, but if we define the relationship (as we should), difficult IT staff members can be reined in a bit. The IT role should be that of service. As the customer, it is the annual giving office’s responsibility to:

- Be thoughtful and concise
- Think ahead and plan ahead
- Know what you want, how you want it, when you want it
- Explain why you want it

Making the Peace

There are several standard infrastructure areas that need to be developed in support of a better relationship with your IT staff.

Standard Definitions. How you define “giving,” is a question often posed. Do you include athletic giving, matching gifts, gifts to a fund, and much more? Be prepared to parse down to what you really want. IT staff can generally program to any criteria you want and they want literal definitions. No grey areas! This includes your segmentation strategies. They must remain consistent whether you utilize the traditional LYBUNT, SYBUNT schematic or the A, B, C schematic referenced in the March ‘04 issue of Evolution.

The Solicitation Calendar. Again, “annual” means annual. Develop global solicitation activities that occur the same month every year. Yes, exact dates will vary, but if the IT staff knows what to expect from a big picture perspective, they will be much more content. Distribute this calendar early and often. As you get closer to the effort for which data is needed, use the 3-2-1 approach to inquire as to progress of the data. Three months out make the written request for data. Two months out send an email follow up checking in on the original parameters of the request. One month out complete a “drop-by” to see how the data request is coming along. At one conference, an attendee remarked that they had this process in place; only the time increments were not months, but rather minutes!

Standard Solicitation/Tracking Coding. Does the system you utilize make sense? Is it timeless? Are you utilizing all the available data elements? This simple function is the basis of all your reporting capabilities. A well thought out coding system will make your IT staff’s job much easier.

Standard Reporting Templates. Get rid of your ad-hoc reporting habits. Create a few reports that give you all the information you need to keep leadership happy as well as analyze within the trenches. Less is more in terms of reports. Keep them simple by developing reports that go from the global to the specific. Think about what it is that you really need to monitor and what you really need to know.

Cut The Apron Strings When Possible. Who pulls your data and reports? Strive to create the ability to pull your own data and reports. If the above areas are addressed, the consistency created will allow for programming that allows the end user (you!) to pull and manipulate data and reports. This is desirable for two primary reasons. First, we know what our data should look like more so than the IT staff. Second, time is always an obstacle. By taking a “middleman” out of the process, we will hasten completion.

Keeping the Peace

The relationship between the IT staff and annual giving is like a marriage… an arranged marriage, yes, but still a marriage. As in marriage… you can’t change the other guy. The goal is to understand how they are structured and why.

As an organization, it is our collective responsibility to:

- Display the big picture for all to see, all the time
- Continue to affirm goals and objectives
- Understand that the other party has their own systems established
- Design mutually agreeable policies, processes, and procedures
- Identify each side’s diplomats
- Systematically examine where conflicts are likely to occur
- Build methods of communication that are neutral and devoid of personality

As an individual it is our collective responsibility to:

- Remember what is important to the other guy
- Pick battles worth fighting
- Force yourself into a hard self-examination of cause and effect
- Examine and adjust personal behavior to limit conflict
- Use humor whenever possible

In closing, the foundation of a solid relationship is communication. If, as an annual giving professional, you are able to establish methods of communication that handle processes, procedures, calendars, requests, and priorities, the relationship you have with your IT staff will flourish. A structured fundamental underpinning will “lift the debate,” according to Lindsay Bauer so that both parties are not consistently “counting favors.”

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(Editor s Note: A special thank you to Lindsay Bauer, Colorado State University, for her contributions/research on this topic.)

AFI E-Awards Announced

The votes are in and tabulated. The peer-selected winners of the AFI E-Awards can be viewed on the AFI website at www.annualfundinc.com. Annual giving peers selected from a stable of finalists in three categories: E-Solicitation, Annual Giving Web Pages, and On-line Giving form. Each winning submission will receive a $100 contribution compliments of AFI E-Awards sponsor, The Sales Factory. As an additional bonus, a voting peer was randomly selected to receive a $100 contribution for participating in the process. Winning selections are noted below with commentary regarding the possible attributes that lead to being voted the best of those selected. Be sure to submit your on-line samples to AFI to share with colleagues and for consideration in next year's awards.

Best E-Solicitation: Duke University

Finalists: Duke University, Georgetown University, Johns Hopkins University, Macalester College, Michigan State University, University of Michigan

While there were many worthy submissions, Duke University's was head and shoulders above the rest, garnering 44% of the overall peer vote. Key positive attributes:

1) It told a story of a "A day in the life…". Annual giving messages that are successful are able to stoke the warm and fuzzies within the prospect. The visuals made it easy for prospects to reflect back on their own experiences.

2) The music was uplifting and motivating. Many of the solicitations had instrumental music or fight song music. This type of piece is an engagement piece and should therefore be entertaining and motivational.

3) Students were utilized. We all know the adage that "People give to people," but we within annual giving are often quick to spotlight buildings and goals. Students should be a visible part of all visual materials.

Best Annual Giving Web Page: North Carolina State University

Finalists: Albright College, Duke University, North Carolina State University, Northwestern University,

Voting in this category was more spread out with NC State pulling away by garnering 30% of the overall peer vote. Key positive attributes:

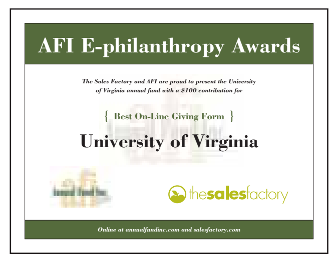
1) This Web page truly uses the medium to its fullest with a nod to the artistic. Most website design elements are carbon copies of print materials with words winning out over design, and straight lines over curved lines. This site was the most unique.

2) There is a presence of multi-media. While multi-media can overwhelm a site and turn people off. But when used the right way, multi-media can truly compliment a website.

3) Students were utilized. While not on the main page, they are noted throughout the site, as well as staff pictures, putting a face to the organization.

Best On-Line Giving Form: University of Virginia

Finalists: Cornell University, Southern Methodist University, Syracuse University, University of Virginia, University of Wisconsin



An excellent selection, the University of Virginia generated 37% of the overall peer vote. Key positive attributes:

1) Ease of use. Very friendly template in which to enter giving information. Clear map of what to do next throughout the giving process.

2) Information. A multitude of giving options including securities, matching gifts, and planned giving are noted for additional drill down information. Plus, there were pictures of students.

3) Variety of Method. The main giving page notes the various means to accept an annual fund gift clearly and simply and also allows the ability to sign up for EFT and pledge.

Be sure to check out the "E-Solicitations & Multi-Media" section of www.annualfundinc.com for the latest peer samples. Items are being added weekly.

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Alumni E-Mail Communications

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Give your alumni something to do. The best messages encourage people to do something, like visiting a site to gather or submit information, or see pictures, or give an opinion. It's always a good idea to suggest that people interact with you in some way. Most won't, but the message will have an entirely different feel if people can act upon it. One trick for getting in the right frame of mind for this is to think of your e-mail users instead of e-mail readers

Pay attention to what they're doing. Looking at the statistics of what people are actually clicking is the online equivalent of looking someone in the eye. You're paying your alumni the respect of actually caring about what interests them. If alumni are generally most interested in a certain kind of content, move that content up to the top of your message. Put up a fight if someone tells you they know better, and use your statistics as the counterargument.

Perhaps the best way to improve your messages is to be thinking more from the perspective of the person who is receiving your message than as the person who is actually sending it. Always test your e-mails by sending it to yourself first. Before you even check for that mail in your in-box, try to slip into the frame of mind of your alumni. Ask yourself if you would know who sent the message and what it's about from the subject line and sender information. Then see if your message really asks you to do something or if it really just beats around the bush. You will be amazed at what you discover. Better yet, do the same exercise with some people in the office who do not know what you are trying to accomplish, and ask them what they think your message is about. In e-communications, as in life, practice the golden rule and you will be successful.

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