AFI
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EVOLUTION

The newsletter for annual giving professionals Volume 1, Issue 8

OCTOBER, 2004

Managing Professional Development (Part 1 of 2)

www.supportingadvancement.com

Professional development is essential to career progression. There are a variety of methods for managing professional development, and it is important from both a professional and budgetary perspective to ensure that efforts and expenditures are effective.

Our environment is becoming increasingly more complex. Today's professionals face the challenge of needing to manage with knowledge of multiple disciplines and systems and the ever-changing interrelationships between them. Life long learning is very important. Professional development keeps you abreast of changes in your field, and helps you to provide state of the art services to your institution and its constituents.

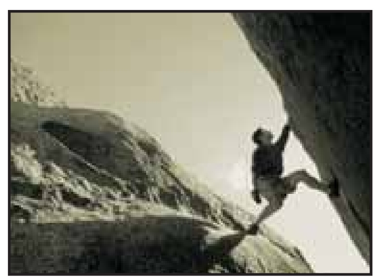
Professional Development and Career Planning

There should be a sound and well-understood business process for managing professional development.

- Professional development should be directly related to an individual's career path.
- Professional development activities should have a discernable benefit to the institution.
- Both the individual and the organization need to share in the planning and accountability for professional development.
- There should be an emphasis on skill acquisition rather than a specific conference or conference location. Too often, professional development is managed as a perk rather than the skill acquisition and enhancement exercise it should be.
- Skills acquisition should be integral to the organization's strategic and operational planning cycle rather than an ad-hoc selection of activities.
- Professional development should be an integral part of the budget planning and negotiation process.
- There should be a formal appraisal and review process for all requested activities to ensure that they fit with overall organizational plans.
- Consider the need to represent the organization to its peer groups at specific conferences.
- Who are the people with the most need for professional development activities?

Continued on page 6

Inside This Issue:



The Name Game: Giving Societies

Here is a great exercise to complete with members of your development team. Ask your staff to take out a piece of paper and then request that, from memory, they write down all your institution's giving society names and qualifying amounts. Chances are that there will be some difficulty. The larger question, however, is if the societies/levels have no meaning for your staff, how can they have significance to your alumni?

"...choose names that have some type of historical significance."

Perhaps the biggest issue with many giving societies/levels lies simply in their naming. These societies/levels are a marketing tool and should be better leveraged to reflect the tradition and history of the institution. What do the following common names of societies/levels say about an institution?

- Century (based upon dollar amount, sending clear message on what is valued)
- Gold (good for Olympics, not giving)
- Silver (same, plus sends message that money rules)
- Bronze (same and third place at that)
- Dean's Club (too generic, and club implies benefits)
- President's Circle (too generic, 1,000's of presidents)
- School Color (too generic, too athletic)

Rather then select names that could apply to any one of hundreds of schools, or that send a mixed message, choose names that have some type of historical significance to the institution. There is currently an institution going through the creation process of an enhanced recognition society infrastructure. This is requiring the introduction of new recognition societies and levels. The novelty of the approach lies in the naming mechanics of the new structure.

There are clearly two distinct types of recognition societies: annual giving and cumulative lifetime giving. As addressed in previous issues, there should only be two annual giving societies, consecutive and leadership. These two annual giving societies are going to be named after traditional iconic symbols of the institution, not people. The consecutive year society will be named after an institution symbol, while the leadership annual giving will be named after the year of the institution's founding. Also, to qualify for this society, a donor must make an annual gift of at least the year of founding or more.

The cumulative lifetime giving societies will be named after influential president's who have transformed the institution in the past, much like major gifts transform the institution today. By going this route, the institution is able to continually retell the significant stories of the institution. Combined, these giving societies become tradition-marketing tools that increase awareness, and provide added substance to the overall program.

An important distinction that should be made is in the use of the word "society." Many institutions still utilize the term "club," in describing their recognition levels. Club implies benefits, which we all know are dwindling, if any are truly left anymore. Society is a far cleaner term. With decreasing budgets, how do we recognize/steward folks within our societies? In next month's issue we will look at programming options to effectively and efficiently steward these groups of loyal supporters.

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The newsletter for annual giving professionals

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EVOLUTION is published ten (10) times per year.

Annual Subscription Rates
$149 US / $179 Non-US
Please make checks payable to AFI (USD)

How to Motivate Callers

Creating the Right Physical Atmosphere (Part I of 5)

by Alison E. Novicki

One of the most flattering professional compliments I ever received was while I was working as the program manager for the annual fund phone center at a large public university. I was chatting with a colleague whose office was located on the fifth floor of the building with the rest of the development division the phone center was located on the third floor, as if we were the black sheep of the herd. She told me that she liked coming down to the third floor "just to hang out" in the phone center because "it seemed like such a happy place." She shared that there was always music and we were always laughing about something. Wow.

It was beyond my job description to motivate full time members of the development staff outside the phone center, but I appreciated the recognition. It made me realize that my staff and I had created the ideal environment!

So in addition to the many other traditional and not-so-traditional ways to motivate callers that I'll cover later in this series, here are some suggestions for how you can alter the physical atmosphere of your phone center to begin creating the ideal environment for motivating callers.

Caller station set-up

Every phone room has its limitations in terms of size and the arrangement of the room; and whether or not you are automated makes a big difference. There are also many smaller programs that do not even have a room designated for calling, which will be addressed at the end of Part One. However, if you are fortunate enough to have a "phone room" where all of your callers work together, try incorporating some of these ideas into your station set up:

1. Joke with your calling staff that "I have the ears of an elephant and the eyes of a hawk." You are basically letting them know that if they try to do or say something stupid, you will find out. As the manager, it is your responsibility to make sure that your staff is on their toes! If the expectation is that you may be listening or watching, that is an instant motivator for them not to slack off.

Stand in the middle of your phone room: can you see all or most of the happy faces of your callers? If not, then try rearranging the room in a way that there are more callers that you can keep an eye on than those you can't. If you cannot move any stations, can you identify the stations that are commonly used as "hiding spots?" Make a new rule: unless you have a full shift and you need to use the hiding spots, simply post a sign or a sticky note at those stations asking your callers to sit elsewhere.

It is possible that you may experience some degree of whining if you have never tried this before, especially from your veteran callers who have an established spot. In this case, I suggest making a deal with the caller that will please both of you. Have them sit in your designated spot for, say, the first hour of the shift. If their production is satisfactory, then let them move back to their special spot. In my experience, most callers who I made this deal with ended up staying put after the agreed period of time because it was too much of a hassle to move.

2. Do you have any motivational signs posted at each station? Make some of your own signs, or get some from your alumni relations or athletics folks to post. Simple "Go (Name of School here)!" are quick and easy and they look festive!

Signs are also a great way to drive home the importance of a specific piece of the call. For example, if you're trying to motivate callers to increase the departmental credit card gift revenue (Who isn't trying to do this?), talk to your gift-processing department and get the name of your school's contact person for the bank that facilitates your credit card processing. Ask for some signs or stickers that display the Visa, MasterCard, Discover, and American Express logos – they are usually happy to oblige! Also try typing your credit card ask into a document, blowing it up to the size of an entire sheet of paper, and posting one at each station.

continued on page 4

How to Motivate Callers

continued from page 4

3. If you are automated, do you have hardcopies of reference materials at each station for things that are not electronic? (i.e.. Phonebook(s), the latest magazine or alumni publications, etc.) Knowledge is power and your callers should have as much information at their fingertips as possible. It can be frustrating and embarrassing for callers to have to put a constituent on hold to find information. If the information is right there, then they can continue the discussion while looking.

The Wall of Honor, caller stats, and expectations

Recognizing a job well done is important in any work environment, especially when "well done" is directly tied to quantitative results. In the tele-fundraising environment, there are lots of ways to recognize exceptional callers. Below are some examples of how you can motivate your callers by using posters to identify exceptional callers and reminding your calling staff of both individual and departmental goals:

1. Designate a wall in the phone room to post callers' names when they reach certain productivity milestones. I mean an entire wall. As large of an area as possible. If you do not already have such a wall, it might be fun to have your callers come up with the names of each milestone level. Or you can come up with a bunch of names and have the callers vote on which one should be matched to each level. The more you get them involved in the process, the more invested they will be in reaching those milestones.

And make a big deal out of it when a caller gets on the Wall of Honor or moves up to a new level!

Do you send a caller evaluation form along with pledge cards to your donors who have pledged over the phone? Another way that you can openly recognize callers for a job well done is to find somewhere to post the forms that donors send back with especially glowing remarks about the caller with whom they spoke. I suggest using a poster board to tape the evaluation forms to, giving the poster board a creative title like "What our donors have to say about (name of your phone center)'s callers . . ."

To further motivate callers, you can make a contest out of this by posting a chart that lists all of the callers' names, and placing a star next to the caller's names for each positive evaluation form that a donor returns.

Another tip: if you use evaluation forms, be sure to address issues that may surface as a result of less-than-average evaluations that donors return. However, don't always assume that the donor's opinion is completely true and accurate. If your highest ranked, most productive caller gets one negative evaluation form returned among a sea of beamingly positive evaluations, don't overreact. Share it with the caller, but present it as, "I want to make you aware that I received this, but given your talent and all of the positive feedback we've received, I want to let you know that it does not affect how I feel about you as a productive member of this team."

2. Callers should know where they stand in terms of how much money they have raised, and how they compare to other callers. I am a big proponent of posting caller statistics somewhere in the phone room where any caller can walk up and look at them. For example, you can list year-to-date stats such as total raised, pledge rate, and credit card percentage. You can list the callers alphabetically, or you can rank them in some way.

Some managers may shy away from doing this for fear that it might embarrass the callers that aren't doing as well as others. Remember, it's not there to embarrass, it's there to motivate. If that's how you present it to your callers, they'll take your lead.

3. Assuming that your callers already know what their production expectations are, why not post them in the phone room? It will act as a constant reminder of what is expected of them and will give them some goals to pursue. As an alternative to posting just the minimum expectations, try posting a few ranges so that there is motivation to perform beyond the minimum expectations. Give theranges names, like: good, better, and best.

continued on page 5

How to Motivate Callers

continued from page 4

For example, if the minimum credit card percentage you expect is 35%, then your ranges might look something like this:

35% - 37% > 1 Good
38% - 40% > 1 Better
41% + > 1 Best

In addition to posting expectations and goals for individual callers, you should find somewhere to post your fiscal year revenue goal, as well as how far along your phone center is toward reaching your goal. If possible, make this sign visible to people outside of your phone room, perhaps on the door or above the door that leads into your phone center.

Scrapbook, photo album, and an art gallery

If you've been around phone centers long enough, you know that it can be like a second family for you and the callers. It's like the callers are all the "kids" and the supervisors/managers are the parents. Besides some other key parental duties – such as helping to mend a broken heart, feeding them, and trying to perk them up after a bad day at school – it is your job to let them know that you appreciate them for their other talents and interests outside of work.

1. Create a phone center scrapbook and invite your callers to add to it on a regular basis. You should also try to regularly scan the school newspaper or website for articles about your callers or photos of your callers. A scrapbook is also a good place to put all of those pictures you've taken during shifts or at parties for the callers. (What? You don't take pictures at your phone center? You never have parties? Well I suggest that you start doing both because that's another motivational tool!)

Put the scrapbook somewhere in your phone room where everyone has access to it and be sure to point out the new additions!

2. Although we would all like to think that between calls or during a particularly slow lull during the shift, callers are contemplating the various ways that they can make the next call better, but that's probably true only about 3% of the time. Otherwise, they're keeping themselves occupied by chatting with other callers or creating elaborate doodles on scrap paper. I say save the doodles!

What began as an innocent plan to display some of the more creative and elaborate doodles I found on pieces of scrap paper quickly became a contest to see who could get their artwork on the coveted phone room mini-refrigerator art gallery.

Displaying doodle artwork is certainly not meant to solve morale problems, and it will not necessarily motivate your callers to do well on the phones, but it will add to the enjoyable atmosphere and make coming to work a little more fun after a hard day.

Music, coffee, water, snacks, etc.

Think about some of the peripheral elements that you can add – like filtered water – that will make your callers feel better about coming to work.

1. It was a great day when my phone center received its very own filtered water dispenser. The division we were part of had one, but it was in a different part of the floor, which made it inaccessible for the callers. The enthusiasm for the water dispenser eventually wore off, but judging from the amount of water we went through, it became a phone center necessity! The callers really appreciated having it there, even though it was just a small "luxury."

2. Another phone room staple is a constant free supply of coffee and tea. These kids are busy and they often come to work when they're tired. The caffeine will only help their production! Encourage – or require – them to bring a travel mug with a top to work to minimize spills.

3. Phone room snacks were a late addition during my time as a program manager. It was an impulse buy one day when I was at a warehouse store. There were these massive jugs of pretzels and animal cookies for super cheap, so I bought them and brought them to the phone room. The idea of having food around all the time was a little scary, since one of our rules was that eating or chewing anything while on the phones was not permitted. So I offered the pretzels and cookies as a pre-shift snack or a break snack. (Occasionally, I allowed it as an "oh-my-gosh-I-haven't-eaten-all-day" snack for callers who genuinely and obviously needed some kind of nourishment!)

As long as you're clear about where and when the snacks should be consumed, then this could be a good addition to your phone room, too!

4. If you don't play music during your calling shifts, then you're missing out on what could potentially be one of the greatest atmospheric enhancements to your phone room.

- Music stimulates. It increases the energy in the room!
- Good background noise for when there's a lull in conversations.
- The callers get excited about bringing in their own music.
- You can use it as a reward for good production. For example, the caller with the highest pledge rate gets to be the DJ during the next shift he/she works.

The bottom line is that you want the physical environment in your phone room to strike a healthy balance between professional and fun. If it's all professional and no fun, then the motivation just to come to work begins to disappear. If it's all fun and not professional, then the motivation to be a productive member of the team will dwindle.

In closing, I would like to offer a suggestion to managers and supervisors out there who aren't fortunate enough to have a phone room: Get one. Devote as much time and energy as you can to finding a space for your program. If it is just not possible, try your best to incorporate some of these suggestions into your program. Otherwise, look for the next few parts of this series on motivating callers for some ideas that anyone – with or without a phone room – can make use of.

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Managing Professional Development

continued from page 1

- What are an individual's professional strengths, and what needs to be improved? How will staff be moved up in the organization and how will their skill development be inventoried and related to career progression?
- How does professional development enhance an individual's future leadership role?
- How will professional development lead to performance improvements for individuals and program areas?

There should also be formal policies for items such as whether session attendance is mandatory, when an employee can arrive at a conference, how conference attendance relates to travel policies, whether it is acceptable for multiple staff to attend the same conference, if professional development activities are subject to an employee's probationary period, etc.

> "Activities should have a discernable benefit to the institution."

Managers should have a professional development plan in place for their staff and should be responsible for helping them select opportunities. All staff should have professional development as part of their annual performance and accountability plan and any new staff should have this information and expectations clearly outlined as part of their orientation.

The first step is to determine where the organization lacks or requires additional skills and to seek out those opportunities that contribute to the enhancement of these skills. The next step is to evaluate the costs and provide the necessary budget.

Planning and Budgeting

The organization should have a clear and complete understanding of the expense of these activities and how to manage them effectively. All peripheral costs, in addition to the conference fees, should be included in the budget as this will give a more accurate overall picture of the total budget for these activities, and will also help provide year over year comparisons.

- Conference fees
- Airfare and other transportation costs
- Hotel and lodging
- Meals, per diem
- Miscellaneous costs
- Peripheral activities, if allowed

The budget should then be developed and each budgeted item should include narrative as to why the specific activities are required.

Budgeting Models

Formula Dependent on Staff Level

- Good for setting defined levels for specific groups of staff. i.e. Professional staff allocated $2,500/yr, support staff $500.
- Doesn't always allow for exceptions. For example, what happens when a course for a support staff member costs $900?
- Formula approach makes planning for activities easier because each staff member is allowed a certain amount. Also, it is easier to administer.
- There is a loss in central management control as amounts are allocated to individual budgets.
- There is a need to decide if rollover applies. For example, can staff combine the amounts for two years in order to attend a national conference if the formula allocation for one year is not enough?

Central Pool

- This scenario allows for much greater control by senior management.
- It is sometimes difficult to translate specific goals to specific levels of staff because of lack of formula. i.e. What amounts should be planned for clerical or support staff?
- Staffs that are under-represented in the budget process may not receive adequate amounts.
- May create perception of unfair allocation of funds especially for staff that have a better lobbying advantage in terms of budget. The staff that feels they don't have any lobbying ability may also feel uncomfortable asking for professional development even though they need some additional skill acquisition.
- Doesn't allow individual managers to manage their own professional development budget.

Mix of Individual Formula and Central Pool

- This is the best of both worlds.
- It allows for central control and allocation from central pool for exceptions plus a degree of program area budgetary control by appropriate managers.

Budgetary Controls

No matter the funding model, there are a number of vital budgetary policy decisions that need to be in place.

- Flying in the day of the conference vs. a day or two before should be governed by whether there will be a significant

continued next page

continued from previous page

enough saving to offset the additional accommodation and per diem costs. By the same token, if a flight is long, you don't want to have exhausted staff attending a conference where they're supposed to be learning. You also have to consider flight and travel delays and make sure staff can get to the conference on time.

- Flying out the day the conference ends vs. the next morning. Often a grey area in terms of institutional policies. Leaving the next day allows for additional networking opportunities and visits to your peer institutions.
- Taking advantage of advance registration. Are all staff members required to do this, or are valuable discounts lost because of last minute planning? The same applies to booking flights far enough in advance to get the lower fare.
- The cost of flying vs. driving and parking costs. Policies on traveling as a group.
- Car rental. Most conference activities take place at the conference hotel so car rentals are typically not necessary.
- Are peripheral activities included, or is the employee required to pay for these on their own? For example, a tour of the city may be part of the conference and considered valuable for networking activities.
- Spousal or family member costs if attending. Are there additional accommodation costs that should be covered by the employee? Are there conferences where the attendance of a spouse is beneficial?
- International vs. national vs. regional vs. local conferences.
- Conference hotel vs. a nearby hotel that may be less expensive.
- Are conference included meals deducted from the per diem meal allowance?
- If travel or the conference takes place on weekend or holiday, does the attendee receive equivalent time off?
- Which conferences would normally be considered mandatory and how are these included in the regular budget cycle?
- Is there a professional development allowance for contract or short-term employees?

Whenever you set budgetary controls you need to balance their rigidity with the recognition that most employees will engage in responsible behavior. You need to have a certain degree of flexibility. Don't implement policies that are too restrictive.

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(Editors Note: Look for part two in next month s issue of Evolution.)

The Gift Card Template

Our primary goal, as annual giving professionals, is to enhance habits within our alumni base. This requires us to be consistent in our own habits. Gift card formatting is an important consideration within your direct mail program. While the gift card is the “working” piece of a direct mail package (as opposed to the “marketing” piece of letterhead/letter), its formatting can do far more than serve as a tool to complete the transaction.

Consistency

The rule of thumb here is to keep it simple. Review past gift cards within your office. How consistent are they in format? The format should be the exact same for the majority of your gift cards. The design elements around the format, however, can change depending upon the requirements of the effort. Your alumni will become accustomed to seeing your format items in the same locations each time they are solicited.

Size

Size matters for many reasons. Too big, as in a full 8.5” X 11”, and there will invariably be too much white space that is wasted and excess paper within the package. And, a full-page gift card competes with a full-page appeal. The ideal size is one-third of a full 8.5” X 11”. It fits easily into a #9 return envelope and makes the direct mail package more compact. Costs will be one-third less by printing 3-up.

Front Side

Referred to as the “working” side, this is the side of the card that focuses on the transaction. The card should be split into three columns. The first column contains name, address, ID number, and give designation options. The second column contains gift amount options and method of payment options. The third column contains the option to update contact information and request additional giving information for planned giving, EFT and such.

Personalization

Unfortunately many gift cards are one size fits all, even though technology is available for better personalization with simple mail merge programs. The prospect’s name, address and ID number should be printed on the gift card. Also print the giving options that would most likely appeal to your prospect along with choice boxes to check. Personalize the ask amount based upon previous giving history (see related story in May 2004 issue). Personalizing to this degree, makes it simple for the donor to check off a couple of boxes and then send it back, rather than having to take the time to fill out a gift card.

Back Side

Referred to as the “education” side, this is the side of the card that focuses on philanthropy education. Nothing to check off or fill in, there are just opportunities to learn more about ways to enhance giving to the institution. Like the front, this side is broken into three columns.

continued on page 9

Peanut Butter & Jelly:
Unique Script-Based Training (Part 3 of 3)

Paul Clark, Virginia Tech

PBJ Objection Responses

I m allergic to peanut butter!

"I understand allergic reactions can be difficult to endure. Researchers are working on methods to stop the proteins in peanuts that cause these allergic reactions, and human trials have also begun on a peanut allergy vaccine to mitigate the severity of the reaction. Most childhood food allergies are outgrown and the U.S. peanut industry helps to fund university research that has already identified the proteins responsible for the allergic reaction. Researchers are now attempting to eliminate these proteins from peanuts altogether. Now may be the time for you to test whether or not your allergy should prevent you from partaking in this American tradition. Let me tell you more about…"

I don t like the taste.

"Are you sure? Have you tried peanut butter lately? You may not be aware of the fact that there are several different varieties of peanut butter on the market today, manufactured by a host of competing companies. In fact, there's even a crunchy kind! The millions of Americans who purchase peanut butter daily have proven that peanut butter is loved and treasured as a lunchtime treat! Let me tell you a little more about…"

It sticks to your mouth/it is hard to swallow.

"I understand we all want to be able to swallow and talk normally. However, liquids have proven to be an excellent way to reduce the difficulty in chewing and digesting peanut butter, especially milk. Milk is an excellent source of calcium, which is essential in the creation and preservation of bones and bone structure. Liquids are also beneficial in hydration, and have been proven to relieve thirst. Let me tell you a little more about…"

Peanut butter can be used in cruel ways on animals!

"Through the efforts of a number of societies dedicated to the ethical treatment of animals, this barbaric practice has almost become extinct on movie and television sets around the world. The increasing use of advanced computer-generated effects has also contributed to the downfall of this horrific practice. Soon, the work of a few compassionate individuals will guarantee that talking animals seen on screens around the world, both large and small, will not be visions of torture. Let me tell you a little more about…"

I ve already eaten

"Congratulations! While we certainly don't want to take your support away from other deserving entrees, we would ask that you consider peanut butter and jelly for your next meal. Let me tell you a little more about…"

Bread is bad for you

"I understand staying fit is a concern for the majority of Americans. However, there are breads that aren't a detriment to a healthy diet. Have you tried wheat? Wheat bread can provide a tasty and nourishing alternative to white bread without white bread's negative aspects. High in fiber and low in fat and cholesterol, wheat bread can allow you to enjoy the wonderful world of peanut butter and jelly without worrying about your figure! Let me tell you a little more about…"

PB&J Sandwiches are childish :

"Although peanut butter is considered to be a kids' food, adults actually eat more peanut butter than kids do each year. In fact, peanut butter and jelly sandwiches have been proven to rekindle sentimental feelings and memories in many adults, harkening back to a time less hectic and troublesome. I would suggest that peanut butter and jelly might be the duo you need to reawaken your inner child! Let me tell you a little more about…"

continued on page 9

> "Empathy first, objection response second"

Peanut Butter & Jelly: Unique Script-Based Training

continued from page 8

I m afraid of peanut butter."
“I’m sorry to hear that. Many people suffer from arachibutyrophobia (pronounced I-RA-KID-BU-TI-RO-PHO-BI-A), and this crippling condition tears at the fabric of society. The University of Peanut Butter and Jelly is working hard to rid the world of this plague, and through the efforts of courageous citizens everywhere, a breakthrough is guaranteed to happen any day. Let me tell you a little more about…”

Other Peanut Butter Facts
Someone buys a jar of peanut butter every second. We eat an estimated 800 million pounds of peanut butter a year. By the time most kids graduate high school, they will have eaten about 1,500 peanut butter sandwiches.

Did you know a 12-ounce jar of peanut butter contains about 500 peanuts?
Peanut butter is good for you! It contains protein, vitamins, minerals and carbohydrates. Two tablespoons of peanut butter has as much protein as an egg or a glass of milk. A peanut butter and jelly sandwich eaten with some fruit and a glass of milk is a very nutritious meal. And, peanut butter is found in about 75% of American homes.

Peanuts are not actually nuts at all! They are legumes like beans, peas and lentils.
Americans eat 3 pounds of peanut butter per person every year. That's about 700 million pounds, or enough to coat the floor of the Grand Canyon!

Peanuts may be a favorite food, but we've found many uses for their shells too! You might find peanut shells in kitty litter, wallboard, fireplace logs, paper, animal feed and sometimes as fuel for power plants!

Two peanut farmers have been elected President of the United States: Thomas Jefferson and Jimmy Carter.

peanuts will make 30,000 peanut butter sandwiches.
March is National Peanut Month, a time to celebrate one of America's favorite foods! Roasted in the shell for a ballpark snack, ground into peanut butter or tossed in a salad or stir-fry, peanuts find their way into everything from breakfast to dessert. National Peanut Month had its beginnings as National Peanut Week in 1941. It was expanded to a month-long celebration in 1974.

Month - a great time to recognize the nutritional value of peanuts. One serving of peanuts is a good source of protein, Vitamin E, Niacin, Folate, Phosphorus and Magnesium. Peanuts are naturally cholesterol-free and low in saturated fat.
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(Editor s Note: To download the remainder of the marketing materials in support of the University of Peanut Butter and Jelly, go to www.annualfundinc.com.)

The Gift Card Template

continued from page 7

The first column contains information about the direct mail solicitation. This is useful if the gift card is separated from the letter, as it is a summary of the case for supporting the respective effort. The second column provides a planned giving and gifts of securities overview with contact information. The final column includes matching gift information and development office contact information.

By applying the strategies above you will make the direct mail transaction easier and quicker for the donor to make, provide education on other giving opportunities and establish consistency and greater efficiency. A final mass mailing piece of advice: when working with a mail house, print the prospect information on gift cards PRIOR to cutting the gift cards for stuffing and mailing. I learned this lesson the hard way! Several samples of this approach can be found on-line at www.annualfundinc.com.
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“Your program should encourage habits.”

If You Build It… (Part I of 5)

The memorable line "If you build it, they will come," from the movie Field of Dreams is very fitting for consideration in your alumni on-line strategy. Instinctively, we within development think of on-line giving as the primary use of on-line resources. An on-line giving form is often the first page for many development operations. While a worthwhile addition, this is putting the end prior to the means. Your on-line strategy is much more than merely providing the opportunity to make a gift on-line. It is about providing value to the relationship.

This article is the first of a five part series that focuses on the key areas to address in the development of an on-line strategy that will enhance the relationship your alumni have with your institution.

Why is your alumni site so important to your development efforts? The answer is simple… value. For many alumni, simply stating a case for support within your annual giving letters and phone calls is sufficient to secure engagement. However, in order to increase participation and the average gift of current donors, you must increase the value of the relationship. If your alumni view the institution as a resource rather than just an annual solicitor, they will be stronger partners. Of course, the challenge is how to maintain a relationship with this "off" campus group. The answer, as you have probably already surmised, lies in use of on-line strategies.

We must provide alumni (and friends) with highly practical services and content to take advantage of the Internet's inherently efficient electronic communication and transactional features. This should also have the dual goals of helping alumni to be increasingly fulfilled in their relationship with the university and by extension, help the university gather relevant information and contributions from these alumni.

This is not a new concept, to be sure. However, the answer is not the formally in vogue proliferation of "alumni communities." These have been hit and miss in their success and dependent upon the degree of community experienced by the graduate. Community is but one dynamic of successful alumni engagement. Other resource areas of focus include information, services, tools and involvement.

On-Line Strategy Key Foci:

Tools (this month's focus)
Information
Services
Community
Involvement

Tools

As much as we would like to think that alumni are driven to our sites to review upcoming events or make a gift, the truth is that they are looking for information. The majority of the tools noted below allow the institution to serve as a conduit for communication. This too can be of great value.

The most popular alumni tool is that of an on-line directory. Providing the ability for alumni to locate lost friends is a great value-added benefit. There are numerous vendors available that can facilitate use of a directory, and many institutions create their own in-house. And there are some that do it the old-fashioned way by providing an on-line form that can be submitted and responded to, via an alumni office staff member. Here are some advanced options to consider for your password protected on-line directory:

- Allow a photo option to accompany the record
- Note alumni that are missing/lost with ability for other alumni to submit an "I think they may be in…"
- Provide "I am looking for you," feature to those that wish to have their information hidden
- Provide a check off field for each directory item so your alumni can choose whether the item can be shown or not
- Limit number of look-ups per week noting how many look-ups remain, this will combat mass "prospecting" by alumni for business purposes

Note deceased alumni

Job postings are another valuable tool to add to your site. This is a great opportunity to work with your on campus career services office in the promotion of posting ability. The career services area is normally in consistent contact with corporate recruiters and the ability to post on the alumni website can be viewed as a benefit for the companies as well as your alumni.

Business card and "Yellow Pages" options are the last of the alumni-centered tools to consider. While it's important to incorporate a statement protecting the institution from liability, this option can prove popular to those that wish to advertise their services to fellow graduates by service and geographic region. There is also the potential for revenue generation for this service, though it is recommended that if a fee is charged, it should be nominal or tiered for varied degrees of design and font type.

The final tool is one that assists your alumni, however it will also benefit the institution. The tool is a matching gift look-up directory. This tool allows your alumni to enter the name of their employer on your web site. Upon hitting enter, the company's matching gift criteria (if it has a matching gift program) will be detailed. Two companies offer this service, HEP (www.hepdevelopment.com) and CASE (www.case.org). Both are good services and offer the ability to modify the directory to include your institution's template.

Next month's focus will be on the types of information to consider adding to your alumni site.

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Puzzle Question of the Month

This new monthly feature is meant to serve three primary purposes:

1. Provide a fun opportunity to think outside the box

2. Be used as a means to engage your student callers or staff

3. Prepare you for this type of question in future interviews

While the first two are self-explanatory, the third is a growing phenomenon thanks in large part to companies like Microsoft. The questions below, and others like it in the coming months, are meant to explore reasoning skills as much as coming up with the correct answer. Employers want to get a better understanding of the thought process behind the correct answer. Estimates are that approximately 10% of employers use this type of question within their interviewing process.

We will start with two relatively easy questions this month and move to one per month in future issues. Answers can be found on-line at www.annualfundinc.com, though I would not recommend letting your students or staff know the location. Good luck and have fun!

Question #1: Why are manhole covers round?

Question #2: A coin is placed in an empty wine bottle and corked. How would you retrieve the coin without breaking the bottle or pulling the cork?

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