

Current Issues in Annual Giving

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Current issues in Annual Giving

- **Unrestricted vs. Restricted Giving**
- **5 Metrics to Track Program Growth**
- **Growing Alumni Participation**
- **Other Topic Requests...?**

Unrestricted vs. Restricted

What are the winning conditions for Unrestricted Giving Success?

- Messaging / Marketing Unrestricted Fund
- Internal stakeholder Buy-in
 - Who pays for raising the money?
 - How are funds allocated?
 - What's in it for me?
 - Is it Stakeholder WIN/WIN?
- Stewardship and Recognition



HEART &
STROKE
FOUNDATION

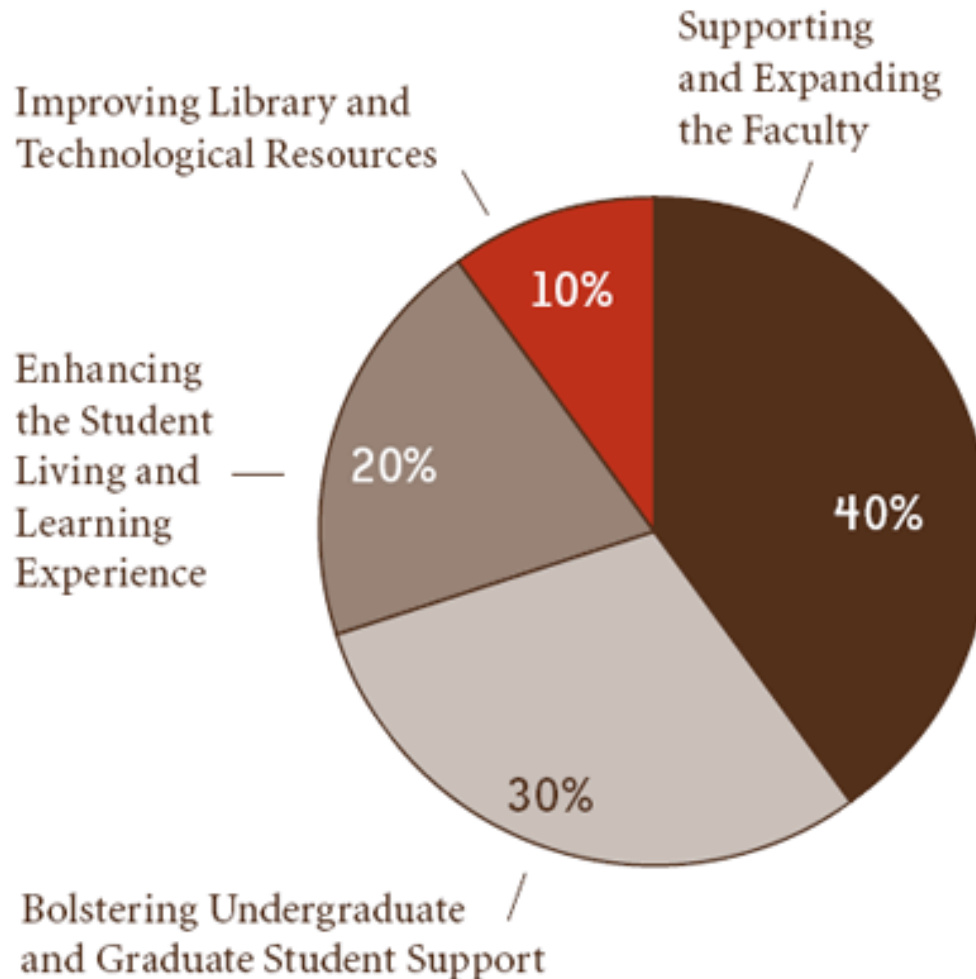
Finding answers. For life.

As a leading funder of heart and stroke research in Canada, hundreds of research teams depend on the Foundation to support their work year after year. This important work leads to earlier diagnoses, leading-edge treatments and world-class prevention strategies. Please help us continue to support this vital research.

THIS IS WHAT HAPPENS WHEN YOU PUT YOUR HEART INTO IT.

- Gifts to the **Brown Annual Fund** directly support the [Plan for Academic Enrichment](#). During the 2005-2006 academic year, alumni & alumnae, parents, and friends made gifts to support many projects, including:
 - **26 gifts of \$10 (\$260)**
allowed an academic journal subscription to be continued at the library.
 - **120 gifts of \$25 (\$3,000)**
provided an Undergraduate Teaching and Research Assistantship to conduct research into the generation of a functional human immune system in mice.
 - **146 gifts of \$50 (\$7,300)**
Purchased an online subscription to a collection of digital dissertations

Impact on the Plan for Academic Enrichment
By strategic area • 2005-2006
\$30.7 million contributed



The Queen's Annual Fund

Every gift to the Queen's Annual Fund adds to an exceptional community of the very best students, educators, researchers, and alumni who study, imagine, compose, advocate, lead and discover.

Together we make a difference.

- Unrestricted Fund Key Words
 - Flexibility
 - Greatest Needs
 - Respond to change
 - Relevant
 - Impact
 - Capitalize on opportunities ...
 - Provide seed money for new initiatives:

- **Pitfalls**

- Is the case donor centred / donor friendly?
- Limiting options brings out one more...
- What is in it for the Deans and other stakeholders

The “Restricted” Unrestricted Fund

- Allows donor’s to choose between a limited number of “flexible” allocation options
- Is easier to gain support of multiple stakeholders
- Enables us to brand one umbrella fund (QAF)
- How is it working out?

The case for unrestricted giving

- Unrestricted does not = Unaccountable
- Promote IMPACT of unrestricted Gifts
- Promote unrestricted giving at all levels
- Get Stakeholder endorsement
- Discussion

5 easy metrics you can track for your annual giving program.

5 metrics you should track to show program growth

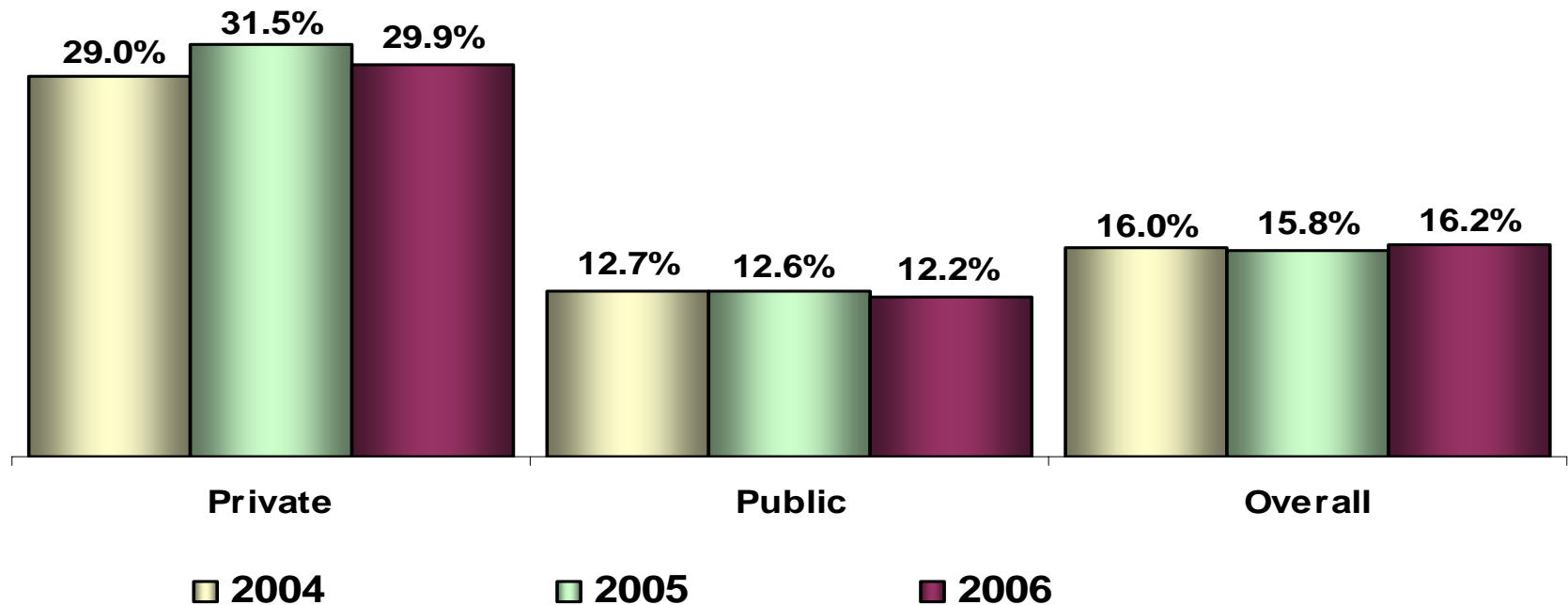
1. Alumni Participation Rate

We need to track this but be careful to not track in isolation and careful in benchmarking with others

More discussion on donor % later

FY06 Index of University Fundraising Performance – source Target Analysis Group

Median Donor Participation Rates



5 metrics you should track to show program growth

2. % change in # of donors

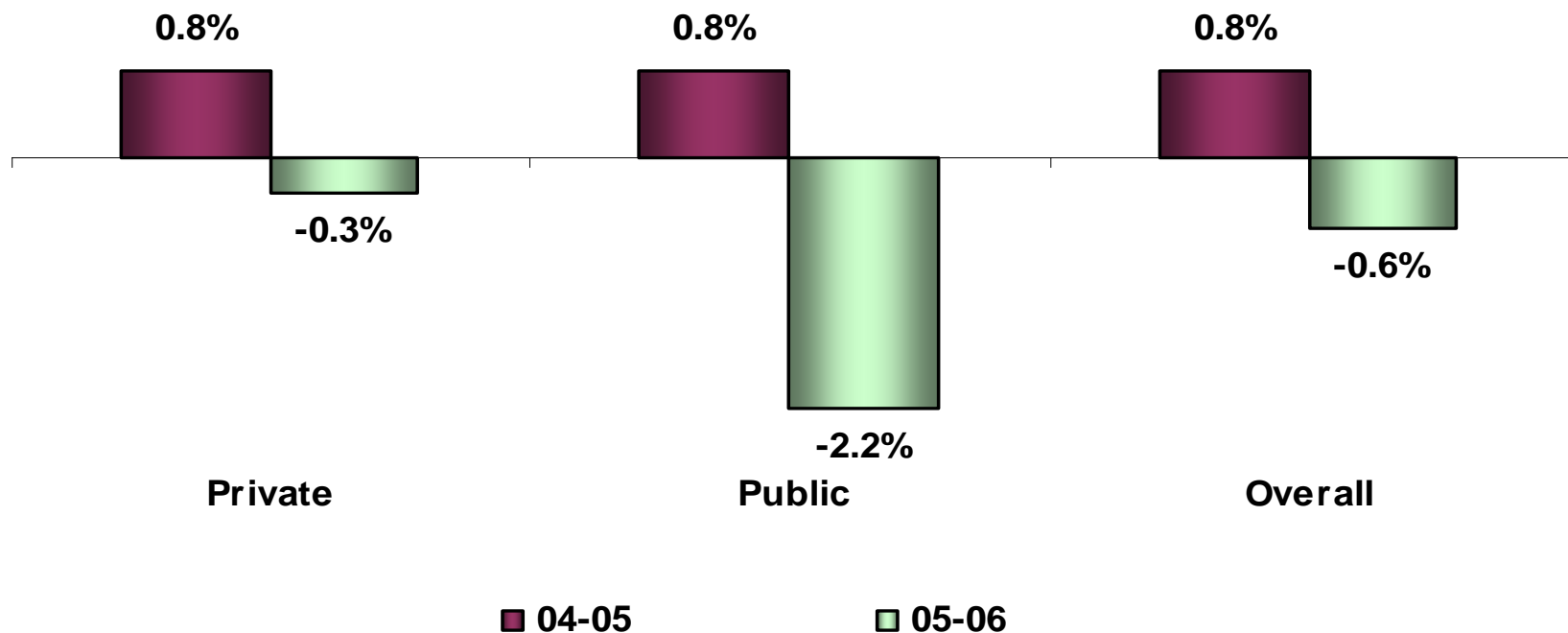
Donor Retention Rate

Donor Reactivation Rate

Donor Acquisition Rate

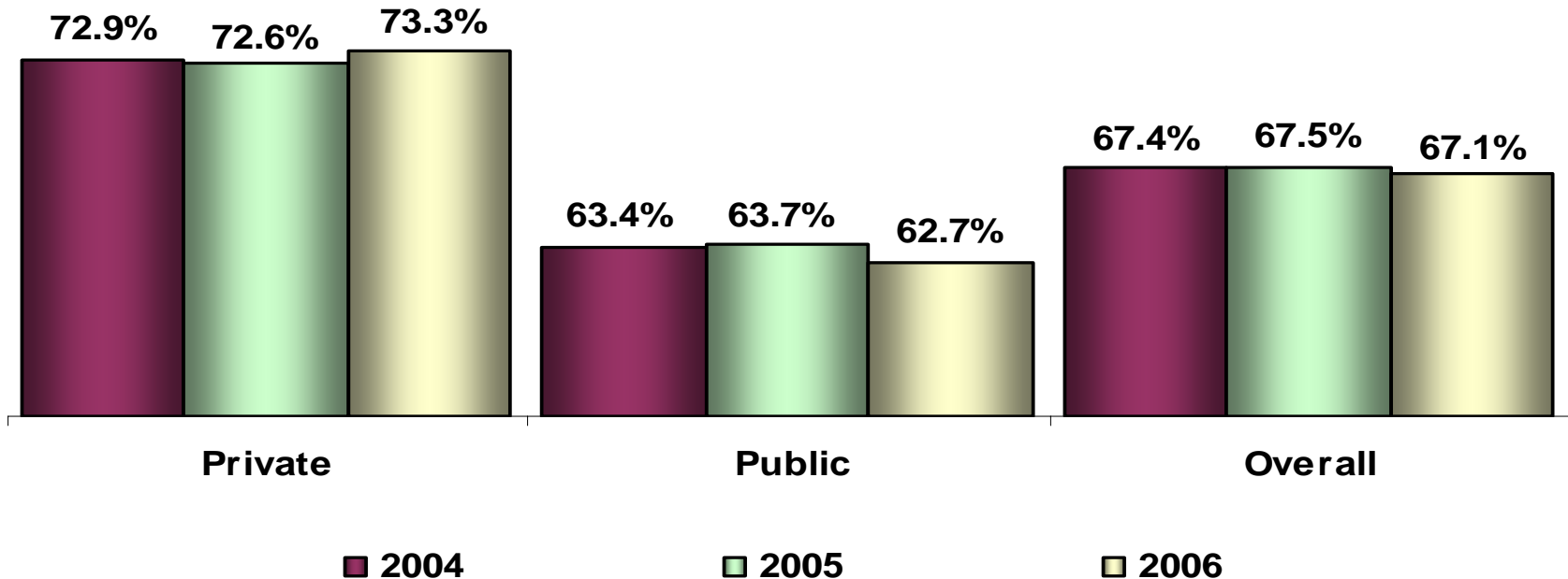
Donor Counts FY06 Index of University Fundraising Performance – TAG Data

Median Change in Donor Counts



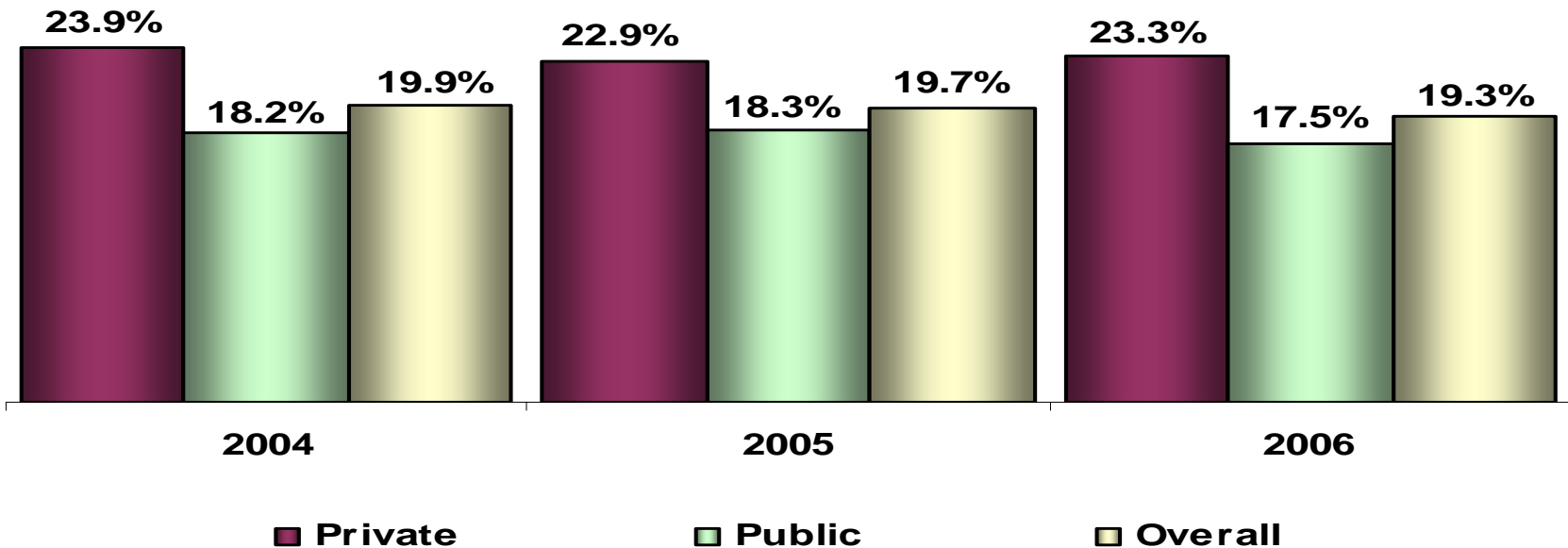
Donor Retention Rates - FY06 Index of University Fundraising Performance – TAG data

Median Donor Retention Rates



Lapsed Donor Reactivation Rates FY06 Index of University Fundraising Performance – TAG Data

Median Donor Reactivation Rates



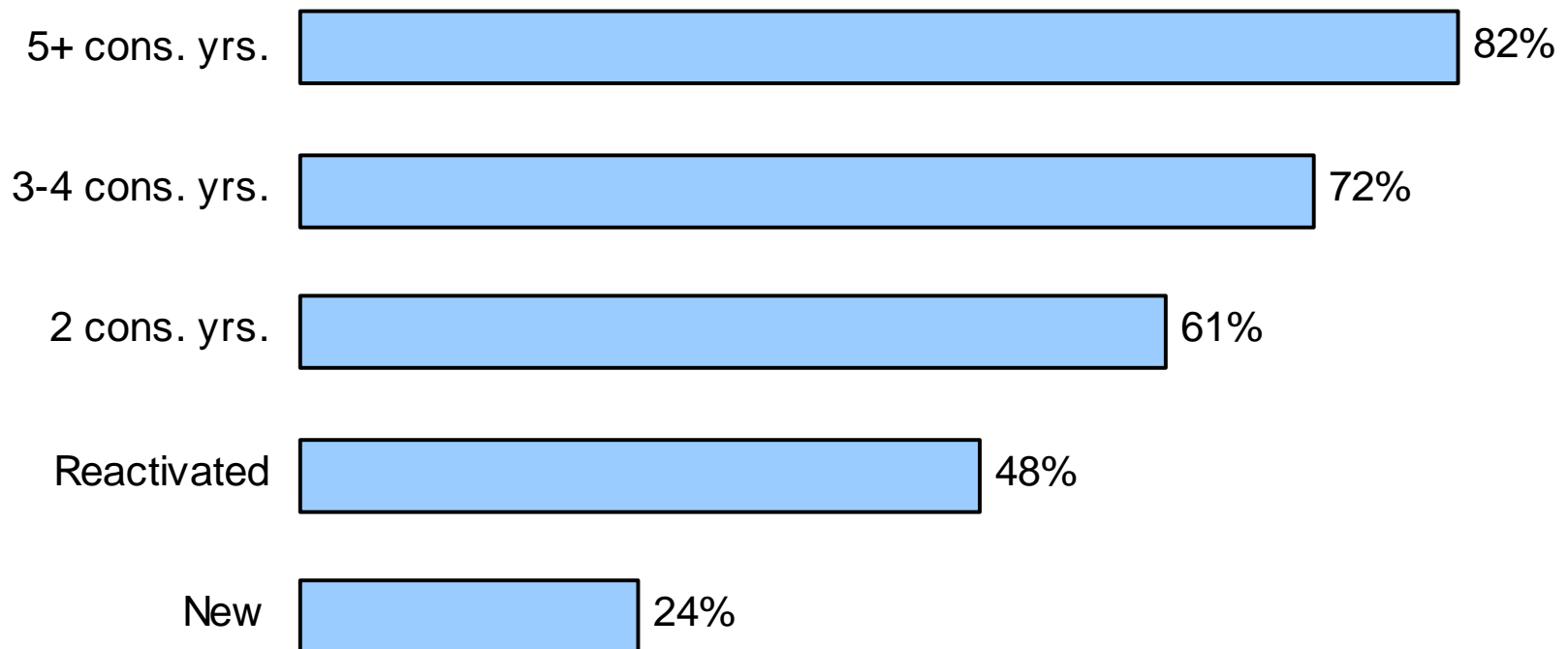
5 metrics you should track to show program growth

3. Donor Loyalty

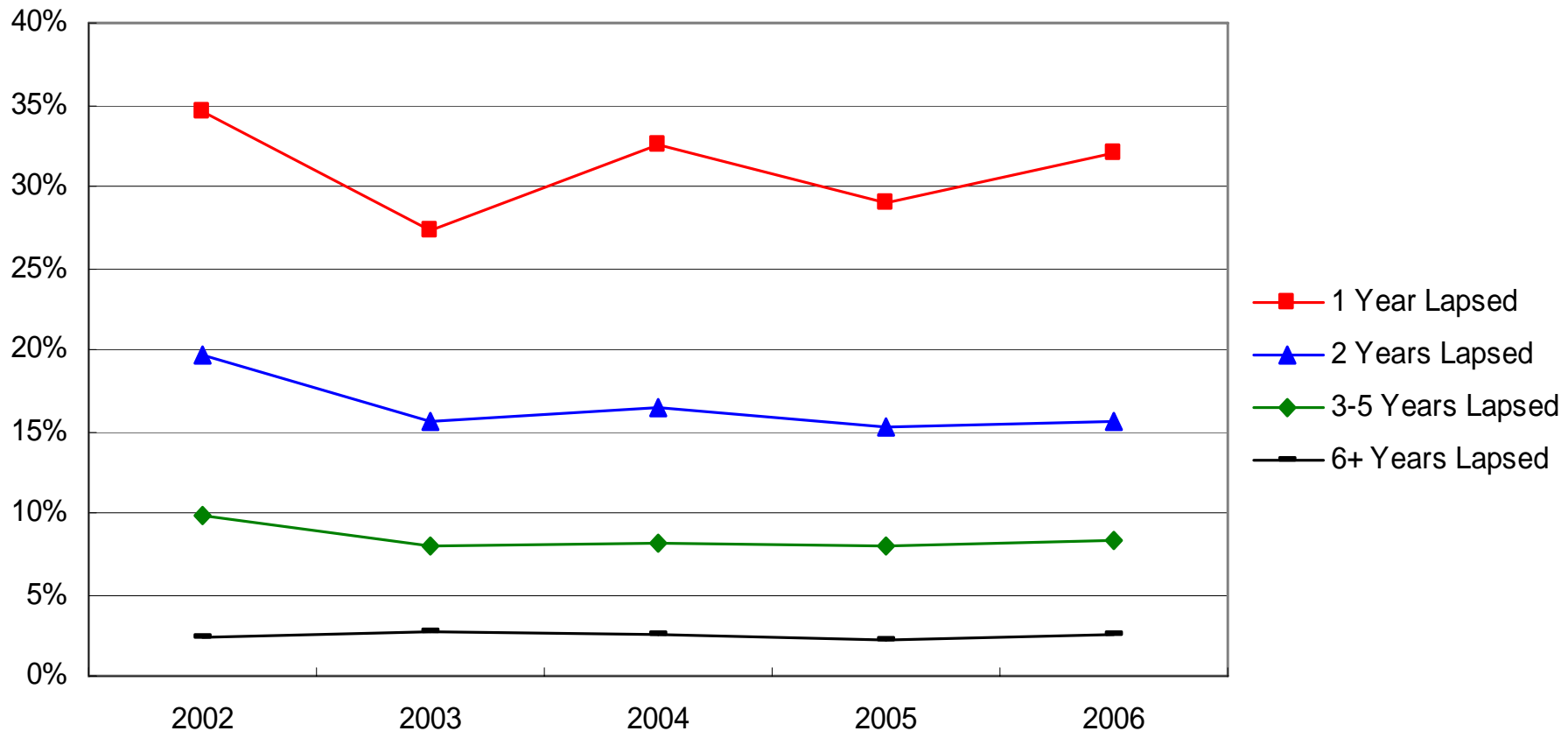
Consecutive year donors

Retention by Years of Consecutive Giving at Queen's

Queen's FY 06 Overall Retention Rates – 63%



• Queen's Reactivation Rates for FY 05 - 06



5 metrics you should track to show program growth

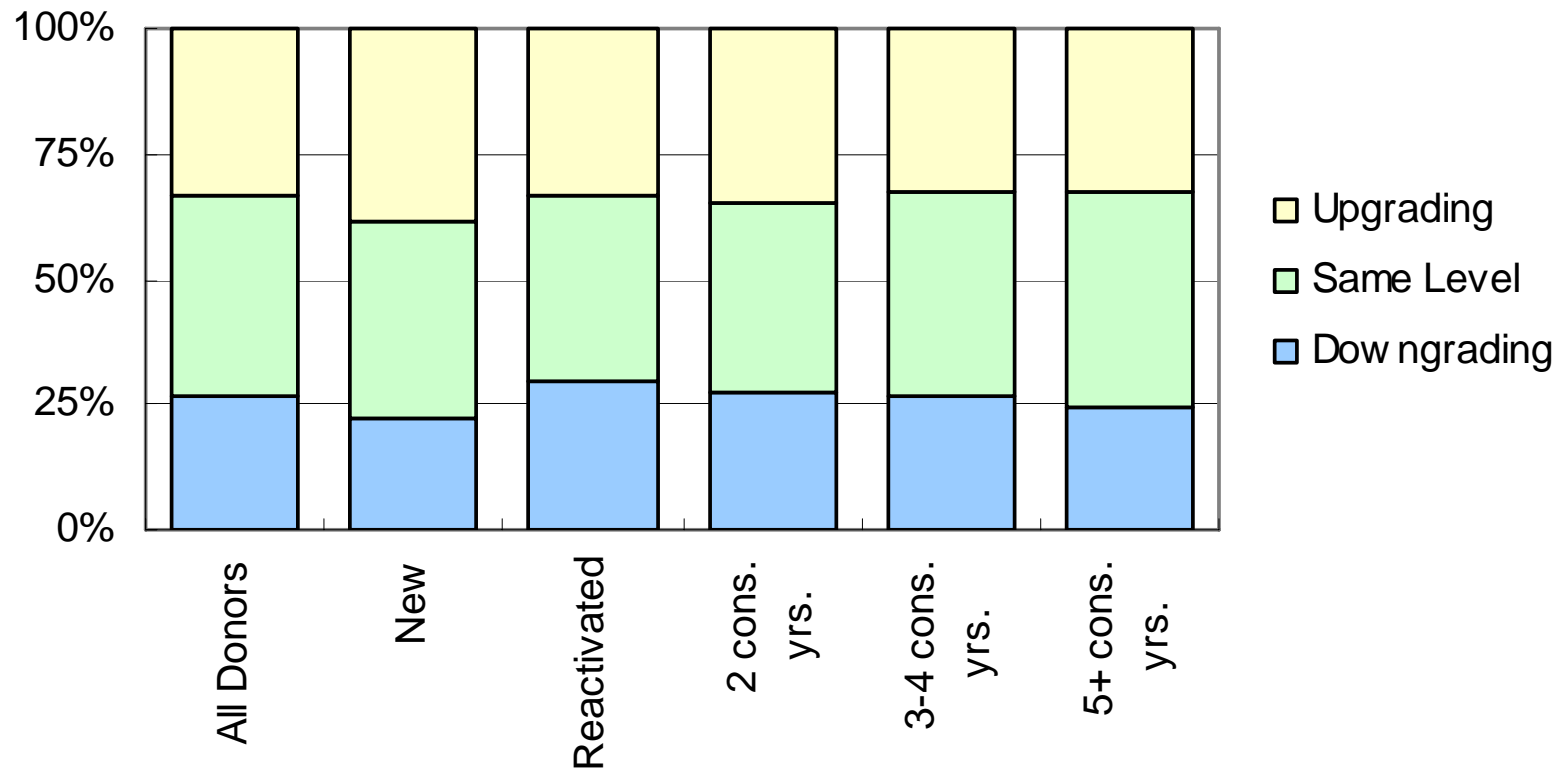
4. Average Gift – BE CAREFUL
Donor Up-grade - YES
Donor Down-grade -YES



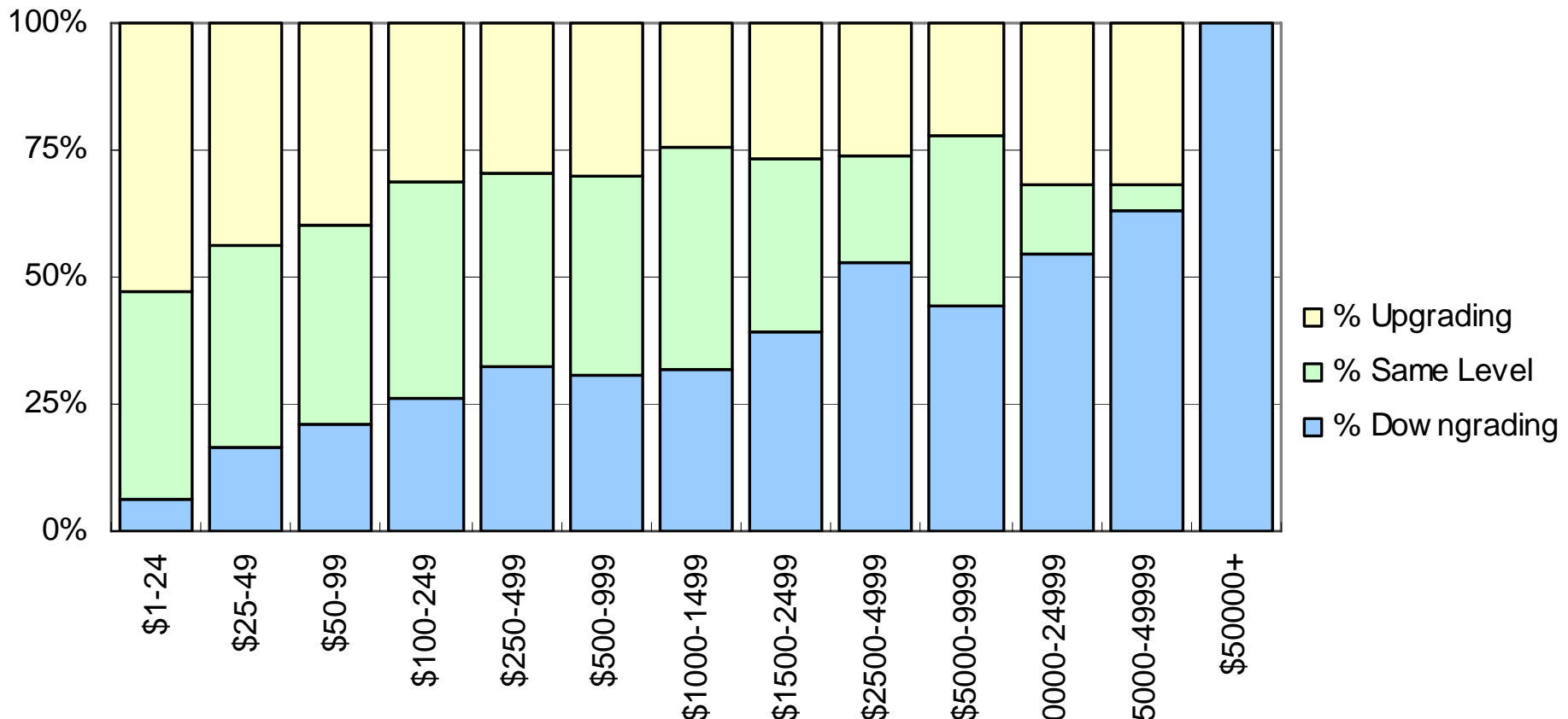
Average Gift by Donor Type

	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>
Total Donors	12,815	12,475	12,652	11,538	12,013
Total Revenue	\$5,110,594	\$4,929,261	\$5,340,933	\$5,309,744	\$5,606,588
Revenue per Donor	\$398.80	\$395.13	\$422.14	\$460.20	\$466.71
Retained Donors	7,863	7,427	7,579	7,310	7,158
Revenue per Retained Donor	\$463.05	\$462.47	\$515.23	\$536.32	\$556.68
Reactivated Donors	3,923	3,550	3,836	3,301	3,764
Revenue per Reactivated Donor	\$311.34	\$372.03	\$322.68	\$371.40	\$382.95
New Donors	1,029	1,498	1,237	927	1,091
Revenue per New Donor	\$241.24	\$116.02	\$160.24	\$176.09	\$165.36

Queen's FY 06 Upgrade/Downgrade by Loyalty



Upgrade/Downgrade by Prior Year Giving Level



5 metrics you should track to show program growth

5. Donor Attrition Profile

By Loyalty

By Giving Level

By Allocation

By Demographic profile

Alumni Donor Participation Rate

Alumni Donor Participation Rate

-



Factors Impacting Participation

- Donor Retention

- Loyalty
 - *Consecutive giving clubs*
- Size of the gift
- Stewardship

- Lapsed Reactivation

- Loyalty
- Years lapsed

- Acquisition

Affinity Asks – Class/SIGS etc.

Others

- Database Integrity
- Counting practices
- Benchmarking
 - Apples to Apples?
- Wall Street Journal March 2, 2007
 - Math Lessons: To Boost Donor Numbers Colleges Adopt New Tricks

Why do they care?



Queen's
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UNIVERSITY RANKINGS '06

MAGLEANS



29TH CANADIAN NATIONAL MAGAZINE
CANADA'S
MAGAZINE
OF THE
YEAR
199 PRIX DU MAGAZINE CANADIEN • 2005

NOV.
13th
2006



Alumni Support

Maclean's measures the percentage of grads making gifts to their alma mater over a five-year period

MEDICAL DOCTORAL

PER CENT

1	Toronto	25.9
2	Western	24.5
3	McGill	18.7
4	Sherbrooke	17.2
5	Queen's	16.2
6	Calgary	16.1
7	Dalhousie	16
8	Alberta	15.2
9	Montréal	14.6
10	Saskatchewan	14.5
11	Ottawa	14.4
12	Manitoba	14
*13	UBC	13.8
*13	McMaster	13.8
15	Laval	13.6

COMPREHENSIVE

1	Waterloo	18.9
2	Guelph	16.9
3	Windsor	16
*4	Simon Fraser	14.5
*4	Victoria	14.5
6	Concordia	14.3
7	Memorial	13.4
8	Carleton	12.6
9	New Brunswick	12.5

PRIMARYLY UNDERGRADUATE

1	St. Francis Xavier	37.4
2	Saint Mary's	26.9
3	Mount Allison	23.3
4	Winnipeg	21.2
5	Bishop's	20.8
6	Mount Saint Vincent	20.7
7	St. Thomas	18.6
8	Wilfrid Laurier	17.8
9	Trent	17.3
10	Cape Breton	15.5
11	UPEI	14.6
12	Lakehead	13.7
13	Acadia	13.3
14	Moncton	12.8
15	Brock	10.7
16	Nipissing	10.6
17	UNBC	9.3
18	Ryerson	8.5
19	Brandon	7.7
20	Lethbridge	4.8
21	Laurentian	4

See a box, Full description of the methodology, page 74.

Examine a scenario for University XYZ “The Real Hard Numbers”

Active Alumni Records in Year 1

Current Donors	12,000
Lapsed < 4 years	14,000
long lapsed 5+yrs	9,000
<u>Non Donors</u>	<u>50,000</u>
TOTAL	85,000

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Active Records	85,000	88,000	91,000	94,000	97,000	100,000
Ret. Donors (70%)		8,400	8,824	9,282	9,724	10,086
React. lapsed (20%)		2,800	2,960	3,050	3,100	3,250
React. LLaps (4.5%)		405	430	460	485	500
Donor Acq. (2%)		1,000	1,046	1,100	1,100	1,150
Alumni Donors	12,000	12,605	13,260	13,892	14,409	14,986
Participation Rate	14.1%	14.3%	14.6%	14.8%	14.9%	15.0%

Growing Alumni Participation

How to respond to questions from lead volunteers and Senior Administration?

Discussion