

CASE Submission, Fundraising Improvement

UC Davis Annual and Special Gifts Program

FY20 Unit-Specific Direct Mail and Email series (July-December)

## **SUMMARY OF ENTRY**

### **Current count: 248**

As the centralized Annual and Special Gift Program (ASGP) for UC Davis, we produce all annual giving solicitations for our main campus schools, colleges and other units, and for UC Davis Health academic units. To raise money for these 35-plus “unit partners,” our fall solicitation calendar focuses on unit-specific messages and those for our Annual and Parents Funds. This submission will outline the segmentation, marketing strategy and staff resource-based approach we used to increase the amount of money we brought in during our busy fall season in FY20 by 16.7 percent.

Last year the ASGP communications team added an in-house Digital Media Specialist who designs all our email solicitations. While we had an excellent working relationship with an outside vendor, being able to design and manage our email solicitations in house allowed us to expand our program to include Giving Tuesday in our solicitation calendar. It also enables us to be more nimble with strategy, variable data and design while managing a tight budget.

In FY20 we developed 70 pieces of direct mail and 98 emails between July and the end of December, comparable to the previous year. Using this strategic approach, we saw a 16.7 percent increase in funds raised during Q1 and Q2 between FY19 and FY20. We also saw a 7 percent increase in donors. Both of these numbers show exceptional growth in a program that has been growing in leaps and bounds over several years, due in large part to the strategy we use.

## **METHODOLOGY AND STRATEGY**

### Strategy

We refer to our approach to annual giving as the “follow the money” strategy. Essentially, once a donor gives, we will continue to ask them to support the program they gave to. For example, if a College of Engineering alum gives to Student Affairs, that donor will then be in Student Affairs’ donor pool going forward instead of the College of Engineering’s. It doesn’t matter that they attended that college if their affinity is to something else on campus.

This strategic approach necessitates a detailed hierarchy of unit partners’ alumni and friends that gets modified slightly each fiscal year. The unit partners with the smallest number of donors are higher in the hierarchy than the larger units so they have a chance to increase their donor base. Our Advancement Services division, which manages our database of record and assists with data pulls, also manages the hierarchy.

The multi-channel approach we implement in the donor market requires our direct mail and email solicitations to drop within about a week of each other so they work together in the market. Robust crowdfunding and telephone outreach that focus primarily on non-donor audiences round out our program. We also do some texting, but that program is in its infancy at present.

## Methodology

Public Service Messaging: At UC Davis we don't have a communal ethos fostered by attending sports events, so we focus our messaging instead on the university's mission to contribute to the public good.

Units choose their stories: Because our unit partners, both academic and veterinary clinic, know their own donor audiences and their Dean's financial goals, we ask them to choose the stories we tell on their behalf each year. They all fill out and submit comprehensive messaging forms each May for the following fiscal year's tactics.

Keep messages short and design nimble: The two direct mail formats we use get refined each year and give us an opportunity to express the creativity of the person we profile as well as our innovative design approach.

The alumni-specific format focuses on professionally photographed images and accommodates a 150-word impact story. It comes in a single-folded heavy paper stock that looks special when it comes out of the envelope, almost like a brochure or a card. We substitute a pullquote, often an actual quote from the person we are profiling, for the P.S.

We also have an 8.5" x 11" direct mail format, primarily used by our veterinary clinic partners, that accommodates stories of up to 330 words. Only these longer pieces include a traditional P.S.

Exterior envelopes use one-color graphics to make them stand out in the mail, but also maintain our budget. Taglines rotate depending on the drop or message inside.

Our email blasts are designed to mirror the design and messaging of our 150-word direct mail materials. They are also approximately 150 to 250 words. Employee and student audiences receive email solicitations only.

In addition to the three decisions noted above, our solicitation schedule includes the following four tactics:

- Comprehensive Q1/Q2 solicitations with a unit-specific focus: In September FY20 we sent out over 16 direct mail pieces followed around one week later by email 15 solicitations for the same unit partners. Our Annual Fund and Parents Fund programs are included in this approach.

At the end of November we perform an expanded version of the same approach, sending out over 27 direct mail pieces on behalf of unit partners, the Annual Fund and Parents Fund. We follow that up in December with three unit-specific email drops (totaling 69 email solicitations). Drops one and two contain unique stories; drop three is a repeat of the one that had the best click-through rate, modified to include a "time is running out" message. Donors are removed from solicitation audiences immediately after they give in order to prevent donor fatigue.

- Veterinary friends audiences: We send out more than 10 direct mail pieces for our various veterinary clinic programs like the Center for Companion Animal Health, the Center for Equine Health and our San Diego clinic in the fall as well. Each solicitation tells a specific story of an animal that was helped by the work of our veterinarian teams.

- Leveraging program-related events: We structure some of our solicitation schedule around events related to the unit or the marketplace. For example, solicitations for a summer program go out right after the program has completed in July. For athletics, our first solicitations drop in advance of the fall sports seasons when wins and losses have yet to be determined. Solicitations supporting our School of Veterinary Medicine’s wildfire emergency response program drop amid what has sadly become an annual fire season in California, when the program is most active.
- Selective use of Giving Tuesday emails: We don’t promote academic messaging for Giving Tuesday because our message generally can’t compete with the number of nonprofit and crisis-related giving opportunities in the market that day.

Instead we choose to only promote select programs that will complete in the market, such as the UC Davis Arboretum and Public Garden and the wildfire emergency response programs affiliated with our School of Veterinary Medicine. Both programs have a “nonprofit” feel to them that aligns with the nature of Giving Tuesday and have friend audiences who are extremely passionate about the work being conducted by both groups.

## **RESOURCES**

### ASGP Project Team:

Senior Director of Development Michelle Poesy oversees the entire ASGP program. Andrea Elliott, director of marketing and communications, manages the solicitation and crowdfunding program and ASGP communications team.

Content: Senior Writer, Joan Fischer and External Relations and Communications Specialist, Chelsea Clouser.

Email design and development: Digital Media Strategist, Kilby Graham.

Data: Data and Analytics Manager, Joseph Belford

Graphic design/Production: Snr Graphic Designer, Sam Sellers. Production work, Graphic Designers, Sherry Macias and Jill Walker.

UC Davis Photographers: Karin Higgins and Gregory M Urquiaga.

Printer: Pacific Standard Print, Phil DeGaa

### Budget

Direct Mail:

Print and postage Direct Mail budget for Q1/Q2 is \$303,965.68 for 198,967 pieces. Per piece total for print and postage is 65 cents. It costs us 19 cents in print costs to raise \$1.

Contracting: Graphic Designers: Sherry Macias costs \$5,250 each year. Jill Walker cost \$7,443.62.

Email:

Email budget for Q1/Q2 is \$5,000. Previous to contracting with iModules and hiring an internal Digital Media Strategist, we paid an average of \$50,000 during the same timeframe for a well-respected industry vendor.

**TOTAL COST: \$321,659.30**

**OUTCOMES**

In FY20 we developed a comparable number of solicitations between July and the end of December (i.e., 70 pieces of direct mail and 98 emails). Using this strategic approach, we saw a 16.7 percent increase in the amount of money we brought in overall during Q1 and Q2 between FY19 and FY20. We also saw a 7 percent increase in donors.

Fiscal Year Dollars	Q1/Q2 Email	Q1/Q2 Direct Mail	Q1/Q2 combined total
FY19	\$552,163	\$1,584,665	\$2,136,828
FY20	\$776,143	\$1,718,910	\$2,495,053
Dollar increase	\$223,980	\$134,245	\$358,225
Percentage increase	40.5%	8.47%	16.7%

Fiscal Year Donors	Q1/Q2 Email	Q1/Q2 Direct Mail	Q1/Q2 combined total
FY19	2,406	7,886	10,292
FY20	3,580	7,435	11,015
Donor increase	1,174	-451	723
Percentage increase	48.7%	-5.71%	7%

**WHAT MAKES OUR SUBMISSION DISTINCTIVE? (max word count 500)**

**Current word count: 448**

Many universities choose a broader approach to their annual giving messages rather than take on unit-specific pieces. The broad approach is tried and true. It works for many, but not all, which is why we wanted to showcase our strategy as a lucrative alternative.

Universities all over the country have a sports-based communal student and alumni ethos on which their marketing and annual giving shops can hang their messaging. For the most part, UC Davis doesn't have that kind of culture. We don't have an iconic gate or clock tower that alumni think of when they remember their time on campus.

We do have nationally- and globally-ranked programs that are perfect for the single-minded and academically inclined students UC Davis attracts. By taking a unit-specific approach to our solicitations we can more easily play into that sense of identity our alumni relate to. We can also showcase how a donor's gift will make a specific difference to the area of campus they support. That approach is becoming more meaningful to donors, especially young alumni and students, as the market tends toward donors wanting to know exactly how their gift will make an impact and how their money is being spent. It is also meaningful to our employee and veterinary friends' audiences as well.

We also find this approach helps dilute the perception that UC Davis is reaching out to our audience repeatedly. Because our fall materials come from the units and the spring materials have broader university messaging, primarily focused on UC Davis Give Day in April, our audiences don't feel as though they are constantly being approached for money by one source.

This approach is admittedly much more complicated than using broad university messaging. It requires detailed long-term planning, exceptional project management and a strong customer service approach to working with our unit partners. The work has to be effective and high-quality as well, in order to maintain good relationships and achieve success. This kind of program must also have strong leadership support, and we are lucky to have that.

Finally, the ASGP team produces a tremendous amount of high-quality work with a small team of people. We have one full-time Senior Writer who is supported by two other communications team members. A UC Davis graphic designer produces our new templates each year, but an outside graphic designer produces all our pieces. Typically speaking we have fewer than seven ASGP team members doing the heavy lifting on our projects at any time, though campus photographers and a handful of others pop in to make important contributions at different times of the year. We are a small but mighty group, and we have developed a very successful program.