

Category: Advancement Services: Donor Relations & Stewardship

Title: FY20 UC Davis Annual and Special Gift Program's Annual Stewardship Campaign

Provide a concise summary of your entry (250 words maximum) currently 241 words

In recent years, the UC Davis Annual and Special Gifts Program has developed a comprehensive annual giving stewardship program that has increased overall annual donor retention rates to 54.8 percent in FY19, a range well in keeping with national averages.

Today, as the centralized annual giving program for UC Davis, we produce all of the annual giving solicitations for over 17 unit-partners' alumni, including units on main campus and at UC Davis Health. Our extensive and personalized methodology for both solicitations and stewardship includes unit-specific messaging, as well as unique audiences that include employees, giving society members, and first-time donors. We consistently steward all of the donors that give through our appeals based on where they fall in the aforementioned audiences. Similarly, because we use a multi-channel approach to our solicitations, we mirror that approach in our stewardship program as well, drawing on video, email and printed materials to thank our donors.

This submission describes our multi-faceted donor stewardship campaign that has resulted in our maintaining a high donor retention rate ranging from 52 percent to 54.8 percent from FY17-FY19. Of similar interest is the impact our stewardship program has on UC Davis overall giving. Donors who received our stewardship materials in FY20 retained at 51.9 percent, whereas those who did not retained at 45.2 percent. The national average for donor retention rate for public universities is 50.6 percent according to DonorCentrics, so we are pleased to be maintaining numbers within and above this zone of success.

Objective/Goal: Stewarding all annual giving donors in a personal, timely manner that leads to concrete results like increased donor retention rates across all audiences. Because we use a unit-specific and audience-specific approach to our solicitations, we do that in our stewardship program as well, so donors receive unique stories about how their gifts are making an impact at UC Davis. This creates a grassroots and personal feeling to the program, which is in keeping with what our donors expect from the university.

Methodology and Strategy: How did you accomplish your goals? Provide a list of no more than 10 key activities and/or decisions that were central to your success.

Our stewardship campaign uses a multi-channel approach to promote long term and increased engagement with our donors. While the messaging of each stewardship piece varies by medium, each time we conduct outreach to donors we do so with the purpose of effectively communicating how their gift has benefited their area of giving but in a way that is personal and specific to the donor's interests.

We also intentionally schedule our stewardship pieces to be sent out in advance of a donor being solicited again. We have a 90 day block on re-soliciting donors for an annual second or even third ask, which gives us a good window of time to submit meaningful stewardship materials in advance of asking our donors for additional support.

Direct Mail

First Time Donor pamphlet: This pamphlet celebrates a donor's first gift by featuring a variety of UC Davis and UC Davis Health students and faculty members that have benefitted from philanthropy. We update this pamphlet each year with new student and faculty profiles and send it to new donors each quarter.

Annual Fund Impact Mailer: In partnership with the Donor Relations team, we create a postcard for donors that have given to UC Davis' Annual Fund during the previous fiscal year. Because gifts to an unrestricted fund are generally less common, sending an Annual Fund-specific stewardship piece is crucial to retaining its donors. The Impact Mailer is updated each year to demonstrate the amount raised per fiscal year, donor type percentages, as well as profiles of the Chancellor's Fellows, UC Davis faculty members that have received fellowships funded by the UC Davis Annual Fund.

End of Fiscal Year Donor Gift: Also in early fall, the ASGP team partners with the Donor Relations team to coordinate the design, messaging, and purchase of small branded gifts to thank all donors that have given through ASGP's solicitations during the previous fiscal year. The items are always branded appropriately for general and employee donors to provide an additional personal touch.

Milestone Mailers: Also in the fall, ASGP coordinates with Donor Relations to send personalized cards to donors who have given to UC Davis for 5, 10, 15, 20, 25, 30, 35, 40, 45, and 50 years, cumulatively. Donors who have given 45 and 50 years receive a hand-signed card from Chancellor Gary May while donors who have given 5-40 years will receive a card with Vice Chancellor of Development and Alumni Relations, Shaun Keister's digital signature.

Video

Telephone Outreach Program (TOP) Thank You Video: In partnership with the student callers at the TOP Center, ASGP scripts and produces a brief thank you video that we send to all donors who have given through the phone at the end of each week. Having a video that showcases the student callers gives our donors a glimpse at who they are talking with on the phone and shows them in person who their gifts benefit. These videos are disseminated through email.

ASGP Unit Stewardship Videos: ASGP partners with our Donor Relations and Marketing and Communications teams annually to script and produce 17 unit-specific videos that feature a student, faculty member, or employee from a college or school that has benefitted from philanthropy. On a quarterly basis, videos are distributed via the ThankView program and are accompanied by a personalized salutation, subject line, and unit-specific message.

General Give Day Stewardship Video: In the Spring, the ASGP team organizes UC Davis' Give Day, a 29-hour online fundraising drive to support initiatives at UC Davis Health, our veterinary hospitals and on the UC Davis campus. UC Davis' Give Day is a valuable fundraising event due to its ability to attract high numbers of new, lapsed, and recent graduate donors while also raising upwards of \$2.5 million dollars as of 2020. To show our appreciation of and to retain these donors, the ASGP team scripts and produces a general Give Day video thanking donors for investing in student support, research, and other important campus programs and initiatives.

Email

We send emails to all donors that give during specific fundraising campaigns that are managed by the ASGP team. This includes the Crowdfund UC Davis campaign:

- Crowdfund UC Davis: Each year, we have two Crowdfund UC Davis cohorts--one in October and another in February. While each crowdfunding project team is responsible for all project-specific outreach, we supplement their communications with a general stewardship email thanking all donors for making a difference within the UC Davis and UC Davis Health communities.

Events

Davis Chancellor's Club Insider's Tours: Twice a year, the ASGP team partners with Donor Relations to plan an event in appreciation of the Davis Chancellor's Club (DCC), a group of donors that give \$1,000 or more each year to any area on campus. These events, typically called DCC Insider's Tours, are generally half-day events that feature a speaker series with Davis Chancellor's Fellows as well as a tour of interesting areas on campus or businesses owned by UC Davis alumni. In FY19 the event included a tour of two Napa Valley wineries affiliated with UC Davis alumni, as well as Oakville Station, the viticulture and enology research hub for the university. The Insider's Tours are heavily anticipated by our DCC members and are a great way to ensure that they remain both interested in and connected to UC Davis.

Employee Giving Philanthropy Spotlight Tours (4 per yr): These tours steward employee donors by giving them unique opportunities to learn more about special programs on campus that are funded by donor support. Previous Spotlight Tours have featured the UC Davis Student Farm, Botanical Conservatory, and The Pantry. Similar to the DCC Insider's Tours, these tours are a great way to foster a sense of connection to the valuable programs and resources at UC Davis and UC Davis Health.

Employee Giving Month Ice Cream Social: The Employee Giving Ice Cream Social occurs at the end of the fiscal year and is an opportunity for employee donors to enjoy free ice cream while Chancellor Gary May thanks staff personally for their generosity as both employees and donors.

Resources: Describe and detail how your resources were used (budget and staff)

Participating Staff:

ASGP Project Team: Sr. Director of Development for ASGP, Michelle Poesy and Director of Marketing & Communications for ASGP, Andrea Elliott

Content: Senior Writer, Joan Fischer, Communications & External Relations Specialist, Chelsea Clouser, Donor Relations, Recognition and Stewardship Manager, Mayra Roman, and (former) Donor Relations Communications Manager, Julie Sullivan

Email design and development: Digital Media Strategist, Kilby Graham

Videography: Video Producer, Muamer Celik, and Videographer, Pat Kuske

Graphic Design: Snr Graphic Designer, Samuel Sellers and Snr Graphic Designer Jill Walker

Event Planning: Donor Relations Outreach and Engagement Program Manager, Lonnie Muntz

Data: Data and Analytics Manager, Joseph Belford

Printer: Pacific Standard Print

Fiscal Year 2019 - 2020 Stewardship Production Budget by Project:

Project Name	Distribution	Vendor costs
First Time Donor Pamphlet	3,332	\$5,597.76
Annual Fund Impact Mailer	4,000	\$3,453
EoFY Annual Fund Donor Gift	8,742	\$16,103.50
Milestone Mailer	2,397	\$5,517.63
Telephone Outreach Program Stewardship Video	1,065	Produced in house
ASGP Stewardship Video Series (17 videos)	15,960	\$4,999
General Give Day Stewardship Video	2,586	Produced in house
Crowdfund UC Davis Stewardship Email	356	Produced in house
Davis Chancellor's Club Insider's Tours (2)	Approximately 200 attendees for both events	\$12,000
Employee Giving Ice Cream Social	Approximately 250 attendees	\$2,500
Employee Giving	Approximately	\$1,000

Philanthropy Spotlight Tours (4)	200 attendees total	
TOTALS	39,288	\$51,170.89

Impact / Results:

Our method of consistent and personalized stewardship efforts has contributed to steadily increasing donor retention rates that remain well above the average rates for similar institutions. According to DonorCentrics, the industry average for fiscal year 2019-2020 median donor retention is 50.6 percent, while ours is 54.8 percent. The number of our alumni, employees, and first-time donors have been consistently growing over the years.

UC Davis ASGP Donor Retention Rates					
Channel	Criteria	Measure	FY17-18	FY18-19	FY 19-20
ASGP Acquired	Alumni	Counts	7,675	7,067	7,455
ASGP Acquired	Employee	Counts	876	1,088	1,276
ASGP Acquired	First Time	Counts	3629	3827	2609
ASGP Acquired	First Time	Renewal Rate	21.6%	26.1%	28%
ASGP Acquired	Overall	Renewal Rate	53.7%	52.7%	54.8%

What makes your entry distinctive?

UC Davis is a unique school in that its students, alumni, faculty, and donors generally have a greater affinity for a specific school, college, or program than they do for the general university brand. Our UC Davis' Annual and Special Gifts Program (ASGP) taps into donors' connection to and/or appreciation of a specific program by creating unit-specific stewardship messaging and events. This approach mirrors the successful unit-specific donor solicitation program we also implement, so donors are being thanked by the unit they gave to. Similarly, if they give as an employee or student, they are acknowledged as such when they are stewarded.

While there are significant pay-offs to unit-specific stewardship, our budget requires that we be efficient and frugal in our stewardship efforts. For that reason, many of the events and videos

we produce to thank our donors are developed by the hard work of employees. We also draw on multiple teams to complete this comprehensive program, including the UC Davis Development and Alumni Relations (DEVAR) Marketing Communications and Donor Relations' teams as well as annual giving. The impact the program has on our donors, overall, is very positive and the program successfully keeps them engaged with the university over the long-term.