

Advancement's Electronic Future

Using Technology to Solicit and Process Donations

CASE Conference Assembly

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Part One – Robert Weiner

- Overview of Email Fundraising
- CASE Email Fundraising Survey
- Some Examples
- Best Practices
- Resources
- Time for questions.

The Gilbert Email Manifesto

- E-mail is more important than a web site.
- Resources spent on e-mail strategies are more valuable than the same resources spent on the web.
- E-mail combines personal communication, immediacy, rapid response, and scale.
- People treat e-mail messages as To Do items.

[http://news.gilbert.org/features/featureReader\\$3608](http://news.gilbert.org/features/featureReader$3608)

Survey of @Stanford Recipients

Donors in FY2000:

49% of @Stanford recipients vs. 34% of nonrecipients.

Previously Lapsed Donors:

32% of recipients gave vs. 22% nonrecipients.

New Donors:

13% of recipients gave vs. 5% of nonrecipients.

Average Gift from Undergraduate Degree Holders:

\$2,732 for recipients vs. \$1,579 for nonrecipients.

CASE Email Fundraising Survey

www.case.org/Content/PressRelease/Display.cfm?CONTAINERID=51&CONTENTITEMID=3355

Surveys conducted over Summer and Fall of 2003.

- 57% using email for fundraising. 24% plan to start (most within a year).
- Of those using email, most frequent groups solicited: 1) alumni, 2) everyone, 3) LYBUNTS
- Most are using email as end-of-year cleanup. Some are using an email lead letter, followed by mail or telephone.

Survey Results (cont.)

- 93% said this is an additional ask.
- Of those *planning* to use email:
 - 17% said it will be an end-of-year appeal.
 - 35% said it will be on same schedule as other appeals.
 - 14% said it will be a 2nd-round ask.
- Most of said it's too soon to tell how the yield compares to other appeals. Still, 58% said it is more cost-effective than mail or phone.

Sample Email Fundraising Campaigns

Duke University: Basketball Championship

www.erroyo.com/duke.html

Pepperdine University: ONE Pepperdine

www.pepperdine.edu/alumni/one

Northwestern University: It All Adds Up

pdlb.eonstreams.com/erroyo/nw/NU_general.html

Tulane University: Athletics

www.erroyo.com/tulane/RollWave.html

American University: The Faces of American

pdlb.eonstreams.com/erroyo/au/mailler.html

Emory: The Annual Fund's impact on Alex Newell

pdlb.eonstreams.com/erroyo/emory/emory.html

Get Permission

- Businesses increasingly using double opt-in. Higher education & nonprofits tend to use opt-out.
- If you use opt-out, first email should be a welcome letter. Never start with an ask!
- Develop and post a privacy policy.
 - DMA Privacy Policy Generator www.the-dma.org/privacy/creating.shtml
 - Customer Respect Group privacy policy guidelines: www.customerrespect.com/offer/Cust_Respect/2042579145/EN/welcome.asp?N=4tp~DOBGCDIJG~EG3un~FNB~CH41pr~DOLP
- Bottom line: make sure your audience wants to hear from you by email.

Give People What They Want

- Message format
- Content
- Frequency of contact

connect@UCLA
Bringing UCLA to You

Archived Editions of the HTML E-mails

For upcoming events in a specific region, click on the most recent C@U e-mail for that region.

February 13, 2004

- [Los Angeles Edition](#)
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January 15 , 2004

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Make it Easy on Them

Make it easy to:

- Subscribe
- Learn more
- Give
- Unsubscribe
- Reach a human.



Name:

E-mail:

Phone:

Subject:

Message:

SEND



We invite your feedback. Email the editor at dschack@ucsc.edu.

To unsubscribe from the *eSlug Bulletin* mailing list, email us at alumni@ucsc.edu

The UCSC Alumni Association - 1156 High St. -
Santa Cruz, CA 95064 - (800) 933-SLUG -
alumni@ucsc.edu

Be relevant, informative, engaging, and brief

- “If I'd had more time I would have written a shorter letter.” – Mark Twain

2004 Jakob Nielsen Email Study

- **The good news:** most participants can distinguish between spam and legitimate email.
- **The bad news:** spam has made people less patient when reading email.
- Only 11% of participants read e-newsletters thoroughly. 57% skim them.
- Most frequent advice: “Keep it brief.”
- Most frequent complaint: newsletters that arrived too frequently.

<http://www.useit.com/alertbox/20040217.html>

Resources

Alder Consulting: Accepting Credit Cards Online On a Shoestring:
www.alderconsulting.com/creditcard.html

Allen, Nick: *13 tips for raising money online*:
www.malwarwick.com/newsletter/success0210.html

Fuel4Arts.com: *Email Promotions – How To Guide*:
www.fuel4arts.com/sauce/11_email_promotion/email_how.htm

Groundspring.org: *Online Fundraising Handbook*:
www.egrants.org/techniques/handbook.cfm

NP Advisors: *Guidelines for Preparing E-mail Copy*:
www.npadvisors.com/NewContent/100244.asp

Pearson, Jerold - CASE Currents: *@Stanford and Institutional Advancement*: www.stanford.edu/~jpearson/archive.shtml

Warwick, Hart, Allen: *Fundraising on the Internet*: www.malwarwick.com/internet.html

Weiner, Robert: *Email Campaigns – The Technical Side*:
charitychannel.com/article_87.shtml

Weiner, Robert: *Email Addresses - Collect The Whole Set*:
http://charitychannel.com/article_62.shtml

More resources are at: www.rlweiner.com/resources.html

Part Two – John Taylor

- Accepting Gifts Online
 - Doing it yourself vs. outsourcing
- Electronic Funds Transfers
- Recurring Giving Programs
- Accepting Stock Online
- Resources
- More questions.

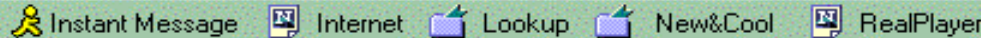
First Response

- A successful esolicitation is most successful if it results in a gift!
- You piqued the donor's interest electronically so accept the gift electronically!
- Two ways to accomplish this – “their” way or “your” way.

GiveToCharity 1998

Give to Charity. The secure on-line way to donate to a Charity or non-profit organization. - Netscape

File Edit View Go Communicator Help



Bookmarks Location:

What's Related



www.givetocharity.com

Storm Internet Services, Inc.

Translation to: [French](#) [German](#) [Italian](#) [Spanish](#) [Portugese](#)

The Secure way to Donate.

Mission Statement

[Add a Charity](#)

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www.givetocharity.com is an international Secure Online Donation service for nonprofit organizations. We make it **easy and secure** for you to donate on-line to your favorite charity. Charitable organizations can now solicit and **accept donations directly from their Website!**

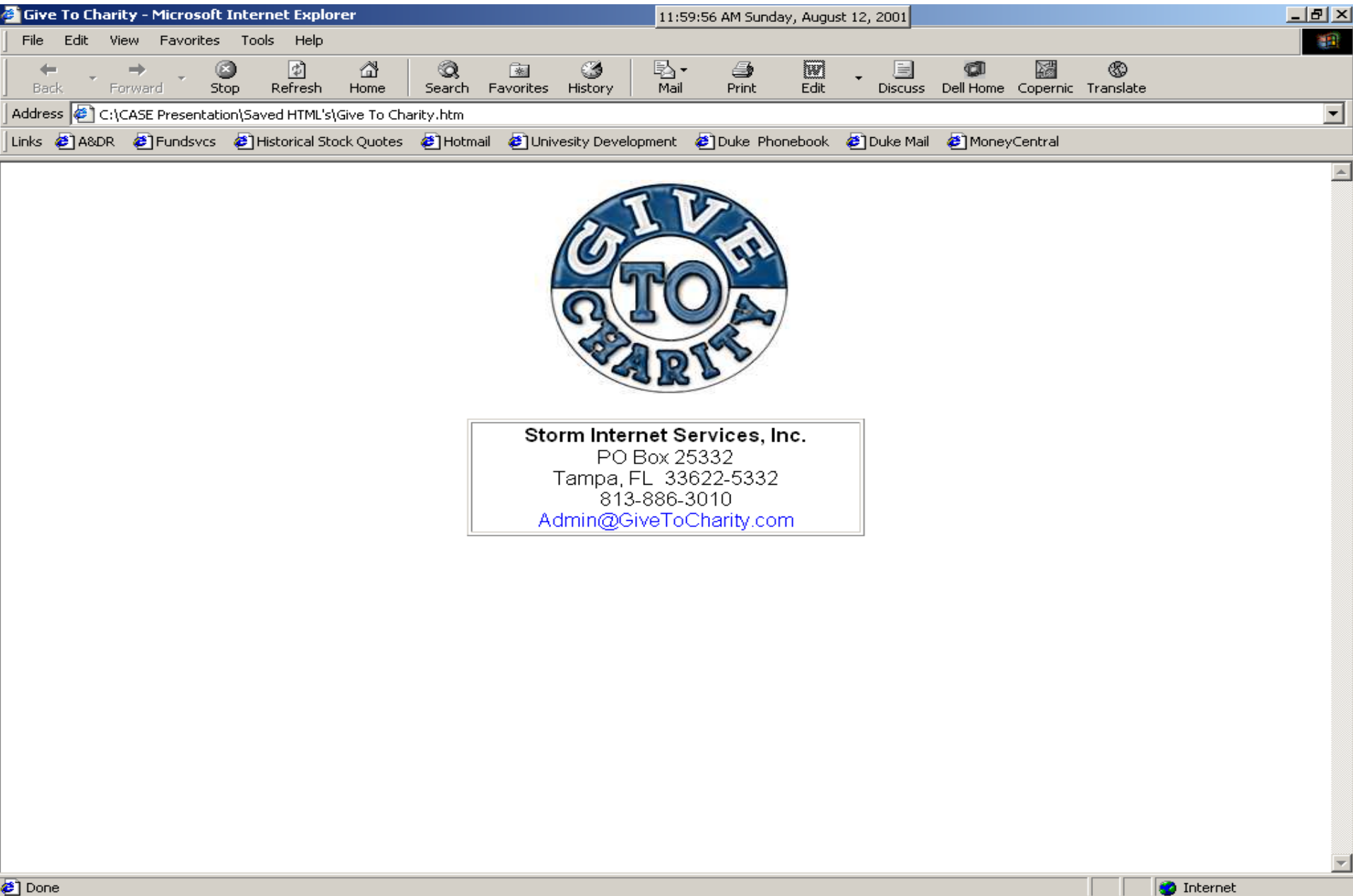
Important Security Notice:

Our On-line donation forms are provided on a Secure Server. All information provided will be encrypted by your browser and only our secure server will be able to read your information. **This means, your valuable credit card information is communicated SAFELY.**

Getting a message about expired certificates?

Connect: Host extreme-dm.com contacted. Waiting for reply...

GiveToCharity 2001



Doing Your Own Thing

- Not terribly expensive on the front end.
- Keeps the institutional look and feel.
- Keeps the donor on your site!
- Automated front-end is of little value with a manual back-end.

- See the handout *Online Donations – Sorting Out The Chaos*.

THE CAMPAIGN FOR DUKE

Make a Gift

The Campaign for Duke seeks to ensure that the University continues to excel in scholarship, teaching, and service to society.

Priorities include endowment and operating funds for essential University needs: financial aid for students, faculty, programs, research, the campus environment, and unrestricted purposes.

Visit the [Campaign for Duke](#) and the [Alumni & Development Records](#) web sites for more information.

For specific questions contact the Alumni & Development Records Office via e-mail at gifts2duke@duke.edu or via telephone at (919) 684-2338.

Make your gift to Duke online by completing sections ① through ④ on the form below.

Fields marked with asterisks (*) are required.

① Personal Information

First Name*:

Middle Name:

Last Name*:

Home Address 1*:

Home Address 2:

City*:

State:

Country:

Postal Code:

DUKE UNIVERSITY
DURHAM
NORTH CAROLINA
27708-0581

ALUMNI & DEVELOPMENT RECORDS
BOX 90581

TELEPHONE (919) 684-2338
FACSIMILE (919) 684-8527

Thank you for inquiring about our Electronic Funds Transfer charitable contribution program. By completing and electronically returning this form, you will be on your way to establishing an easier and less costly way of making your gift to Duke. This authorization to draft your account on or about the 10th of each month will remain in effect until we have received notification from you of its termination, and Duke has had reasonable opportunity to act on it. Your monthly bank statement will adequately describe this draft when it occurs.

You should anticipate the first draft approximately 30-45 days after we have received your authorization.

AUTHORIZATION AGREEMENT FOR PRE-AUTHORIZED DRAFTS

I/we hereby authorize Duke University to initiate debit entries to my/our bank account and financial institution indicated below on a monthly basis for the amount entered below.

FINANCIAL INSTITUTION:

BRANCH:

CITY:

STATE:

ZIP:

TRANSIT/ABA NO:

ACCOUNT NO:

AMOUNT TO DEBIT PER MONTH (\$)

PLEASE DESIGNATE MY GIFT FOR:

This authority to remain in full force and effect until Duke University has received

Recurring Gifts

- Applies to EFT and Credit Cards.
- “Guaranteed” Monthly Cash-Flow.
- Totally Automated with Software (PCACH & ICVerify).
- Automatic Annual Increases.
- Need Back-end Automation as well.
- See Blackbaud White Paper.

Automation & Electronics Facilitate Security Donations

- See John's White Paper
 - Identify historical stock donors and notify of procedural change.
 - Select single brokerage account.
 - Close all other brokerage accounts.
 - Develop an automated tracking system (more later).

Stock Transfer Options

- Publicly-traded versus Restricted/Closely Held.
 - ➡ US mail
 - ➡ Third party vendor
 - ➡ Hand delivery
 - ➡ DTC Is The Best (if feasible)
 - ➡ But you need to know about it in advance.

Start Here

Are you the donor or the broker?

- Donor indicates a required field if you are the donor.
 Broker indicates a required field if you are the broker.

Your email address:

Donor Information

Please enter information about the donor in the following fields:

- Check here if the donor has previously given gifts to Duke.

Donor's First Name:

Donor's Middle Name:

Donor's Last Name:

Home Address Line 1:

Home Address Line 2:

City:

State: if a United States address.

Other:

Country:

(Leave blank for "United States")

Postal Code: if a United States address.



E-Mail:

Home Phone #:



Broker Information

Please enter information about the broker who will make the transfer:

- I am **not** using a broker for this transaction.
- I am using a broker for this transaction.


Brokerage/Financial Institution Name:  

Broker/Contact Name:

Broker/Contact Phone #:  

About This Gift

Please tell us about the gift:

Expected date of transfer: 

- I am unsure of the exact stocks/securities that will be donated. However, I will follow-up with your office once the decision is made.
- I want to donate the following stocks/securities:

Stock / Security Name	# of Shares	and/or	\$ Approx. Value (USD)
<input type="text"/>	<input type="text"/>	and/or	\$ <input type="text"/> USD
<input type="text"/>	<input type="text"/>	and/or	\$ <input type="text"/> USD
<input type="text"/>	<input type="text"/>	and/or	\$ <input type="text"/> USD
<input type="text"/>	<input type="text"/>	and/or	\$ <input type="text"/> USD
<input type="text"/>	<input type="text"/>	and/or	\$ <input type="text"/> USD

My Company will match my gift. My Spouse's Company will match my gift

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media Recycle Bin Mail Print Send To Favorites

Address <http://www.stockgifts.duke.edu/> Links >>

mywaysearch Google PopSwatter Smiley Central Customize CASE Home Highlight

- My Company will match my gift. My Spouse's Company will match my gift

Designate my Gift to the following:

If more than one designation is specified, your gift will be divided equally unless other instructions are provided in the comment section below.

Gift Designations:

1.
2.
3.
4.

If you are unsure of where you'd like to designate your gift, below are a list of commonly used designations. Check all that apply.

Gift Designation Options

- Show options Hide options

Additional Comments Regarding Designations: (optional)

Submit This Form

Submit this form to send this information to Duke University's Alumni & Development Records office.



Duke University (A&DR): Gift of Securities Tracking System

Stock recorded?: y

Date gift recorded: 08-15-2000

Value date of stock: 08-10-2000

Total value of stock: \$ 1,025,909.23

Donor ID: 2606

Pledge ID:

Donor ID:

Pledge ID:

Donor(s) Last Name: Fitzpatrick

First Name: Michael

Address1: RESTRICTED USE RESTRICTED GIFT PROCEDURES

Address2: donor fin advisor: Mark Olohoff 1-650-373-1030 ext *814

City: New

State:

Zip:

Phone Number:

Fax Number:

Transfer Agent: cert in Duke's name

Contact:

Phone Number:

Fax Number:

Name of stock: JDS Uniphase

Number of shares: 8,547

Name of stock:

Number of shares:

Name of stock:

Number of shares:

Name of stock:

Number of shares:

Date Gift Records Notified: 08-14-2000

Expected total value:

Stock

Phone Number:

Fax Number:

Name of stock:	JDS Uniphase	Number of shares:	8,547
Name of stock:		Number of shares:	
Name of stock:		Number of shares:	
Name of stock:		Number of shares:	

Date Gift Records Notified: 08-14-2000 Expected total value:

Allocation:	749-0011	Portion of gift:
Allocation:		Portion of gift:
Allocation:		Portion of gift:
Allocation:		Portion of gift:
Allocation:		Portion of gift:

bwg distrubtion per Susan Ross stock was purchased by donor (he owns 5% of the company) in

More Resources

- Fundsvcs listserv:
 - hermes.case.org/cgi-bin/wa.exe?SUBED1=fundsvcs&A=1
- ePhilanthropy Foundation:
 - www.ephilanthropy.org/site/PageServer
- Internet resources for nonprofits:
 - www.uticapubliclibrary.org/non-profit/directory.html
- The Nonprofit Matrix – list of ASPs:
 - www.nonprofitmatrix.com/
- Resources for fundraising online:
 - www.nonprofits.org/npofaq/misc/990804olfr.html
- E-Donor Bill of Rights:
 - www.afpnet.org/tier3_cd.cfm?folder_id=898&content_item_id=1247