

E-Mail Fund Raising: The CASE Survey Report

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Agenda

- Overview of Email Fundraising
- CASE Email Fundraising Survey
- Best Practices
- Some Examples
- 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)

Nielsen-Norman Survey

Jakob Nielsen (study of email newsletter usability):

- “E-newsletters that are informative, convenient, and timely are often preferred over other media.”
- “Email newsletters are so powerful that the best of them have a future” (despite spam and information overload).
- From a study participant: “Bottom line, I’d rather (get information) in an email newsletter than in regular mail.”

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

2nd Annual CASE Email Fundraising Survey

<http://www.case.org/Content/Miscellaneous/Display.cfm?CONTENTITEMID=4532>

Survey conducted in Fall 2004. 463 responses.

- 49% using email for fundraising. 42% plan to start (70% within a year).
- Of those using email, most frequent groups solicited:
 - Alumni: 47% (vs. 17% last year)
 - Everyone: 45% (also vs. 17% last year)
 - LYBUNTS: 29%
 - SYBUNTS, prior donors, nondonors: 26%

How Is Email Being Used?

- End-of-year cleanup: 31%
- On the same schedule as other appeals: 26%
- Second-round ask: 18%
- Other: 26%
 - Lead letter.
 - Holiday appeal.
 - Pledge fulfillment.
 - “Sorry we missed you” during phonathon.
 - Senior challenge.

How Is Email Being Used?

- 82% said this is an additional ask.
 - 4% do not send direct mail to email targets.
- Of those *planning* to use email:
 - 11% said it will be an end-of-year appeal.
 - 15% said it will be on same schedule as other appeals.
 - 11% said it will be a 2nd-round ask.
 - 59% haven't decided.

How Much Is Being Raised Via Email?

Amount	Count	Percentage
Less than \$1,000/year	34	19%
\$1,000 - \$9,999	62	35%
\$10,000 - \$24,999	34	19%
\$25,000 - \$49,999	19	11%
\$50,000 - \$99,999	12	7%
\$100,000 - \$249,999	9	5%
\$250,000 - \$500,000	6	3%
\$500,000 - \$999,999	0	0%
Over \$1 million/year	1	1%

Caveat: Many campuses do not track email appeals separately from other online gifts.

Best Practices: Get Permission

- Businesses generally use double opt-in.
- Higher education & nonprofits still tend to use opt-out.
- If you use opt-out, first email (and all subsequent) should offer it.
- 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/default.asp?hdnFilename=research_bp_privacypays.htm
- Bottom line: make sure your audience wants to hear from you by email.


Collect Email Addresses Constantly

- Ask for email addresses in all communications.



Subscriber Information (required)

First Name	<input type="text"/>
Last Name	<input type="text"/>
Email Address	<input type="text"/>

<i>Thank You</i> 
I AM INTERESTED IN KNOWING MORE ABOUT: <input type="checkbox"/> The Salvation Army services in my community. <input type="checkbox"/> Charitable Estate Planning Opportunities. <input type="checkbox"/> Making a gift to The Salvation Army in my Will. <input type="checkbox"/> A visit to a Salvation Army facility. For any of the above, please call or email me at: () _____ Email: _____
<input type="checkbox"/> I have enclosed a memorial or honorarium gift. Information is provided on the reverse side.

- Direct Mail
- During phonathons
- On surveys
- And on your website.

Give The People What They Want

Message
format

Content

Frequency
of contact



The screenshot shows the top portion of an email newsletter. At the top left, the text 'connect@UCLA' is displayed in yellow and white, with 'Bringing UCLA to You' underneath. To the right is a small image of a bear's head and a building. Below this is a blue horizontal bar with the text 'Archived Editions of the HTML E-mails'. The main content area has a dark blue background with white text. It starts with a paragraph: 'For upcoming events in a specific region, click on the most recent C@U e-mail for that region.' Below this are two columns of dates and lists of regional editions. The first column is for 'February 13, 2004' and the second for 'January 15, 2004'. Each date is followed by a list of regional editions, each with a blue underline.

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](#)
- [Orange County Edition](#)
- [San Fernando Valley Edition](#)
- [Greater Pasadena Edition](#)
- [Ventura County Edition](#)
- [San Diego County Edition](#)
- [South Bay Edition](#)
- [Bay Area Edition](#)
- [National Edition](#)
- [International Edition](#)
- [Greater California](#)

January 15, 2004

- [Los Angeles Edition](#)
- [Orange County Edition](#)
- [San Fernando Valley Edition](#)
- [Greater Pasadena Edition](#)
- [Ventura County Edition](#)
- [San Diego County Edition](#)
- [South Bay Edition](#)
- [Bay Area Edition](#)
- [National Edition](#)
- [International Edition](#)
- [Greater California](#)

[Contact Us](#) | [Unsubscribe](#) | [Request a Text-only Version](#)
[Privacy Policy](#)

Get Personal



Dear Gagan,

You will soon be receiving your official invitation to meet [Denise Trauth](#), the new president of [our alma mater](#). She is going to visit the Greater DC Chapter during our upcoming social on Saturday, March 27. Our alumni director, [Dorothy Evans](#), will also be making the trip up from San Marcos.

For this exciting alumni event, our [Texas State Alumni Association](#) is providing complimentary food and drinks from 4:30-7pm at [Las Tapas](#) in the Old Town Alexandria, VA. It is located at 710 King Street, so you can take the Yellow or Blue Line to the King Street Station. For driving directions, you may call the restaurant at 703-836-4000. **To attend, please call the Alumni Association at 1-888-798-2586 or [register online](#) by Wednesday, March 24.**

I am currently in a flurry of job interviews and expect to be relocating to another part of the country in the near future. **In preparation for this change, I am delighted to transition leadership of the Greater DC Chapter to [Jeff Nun '80](#).** He is a great person and a loyal graduate of Texas State University. Our founding chapter president, [Jan Veeder '75](#), and I have every confidence that Jeff will move the chapter forward in welcoming new alumni to the area, building a valuable networking environment, and connecting local alumni with current students for internship and career opportunities. **From this point forward, Jeff is the primary alumni contact in the DC area.** He may be reached via email at j.nun@att.net or phone at 703-504-6811.

While more than 500 alumni in the greater DC area will receive the invitation join us and meet President Trauth, it is always nice to receive a personal invitation as well. **If you would be willing to assist in making phone calls to local alumni, I am certain Jeff would appreciate you volunteering.** (Jeff, you can count on me to make calls, too.)

Measure Your Email

Campaign Detail: Performance Summary

summary	tracked urls	subscribers		
Show Content Formats	Totals	Rate	Change vs. Previous	Change vs. List
Attempts	2210		14 ↑	22 ↑
Bounces	3	0.001%	4.3% ↓	5.3% ↓
Deliveries	2197	99.4%	4.3% ↑	5.3% ↑
Unique Opens	2143	96.9%	38.4% ↑	1.3% ↑
Unique Clicks	2019	91.3%	4.9% ↑	4.4% ↑
Total Opens	2189			
Total Clicks	2175			

Track Results

Appeal	Net Sent	# of Donations	Total Donations	Response Rate	Avg Gift
Undergraduate AF Solicitation	11758	184	18,124	1.6%	98.50
Law AF Solicitation	8847	23	5,990	0.3%	260.43
Medical AF Solicitation	1998	2	200	0.1%	100.00
Class of 1999 AF Solicitation	1068	41	2,254	3.8%	54.98
Class of 1997 AF Solicitation	931	31	1,652	3.3%	53.29
Class of 1993 AF Solicitation	864	16	1,145	1.9%	71.56
Class of 1995 AF Solicitation	603	18	1,615	3.0%	89.72

Treat Email Like Any Publication

- Develop a publication/appeal schedule and stick to it.
- Mail regularly (so recipients remember that they subscribed) but not too often.
- Be prepared to deal with responses.
- Web and email are additional media, not separate campaigns.

Neither Rain nor Snow nor AOL

- Use a consistent and/or easily recognizable Sender name – preferably a real person.
- Don't personalize the Subject, but do mention your institution.
- Don't overdo HTML or graphics.
- Test appeals with spam filters (www.lyris.com/contentchecker/, <http://spamcheck.sitesell.com/>, www.spamassassin.org) & accounts on AOL, Earthlink, Yahoo, etc.
- Avoid spam “trigger words” www.businessknowhow.com/internet/spamwords.htm

Make it Easy

Make it easy to:

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

**Subscribing,
unsubscribing, and
dealing with bounces
should be automated!**

A contact form with the following fields: Name: [text input], E-mail: [text input], Phone: [text input], Subject: [dropdown menu with 'select...' option], and Message: [text area]. A red 'SEND' button is located below the message field. To the right of the form is a circular image of a woman smiling and talking on a phone, with the text 'Contact Us' below it.

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. -
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alumni@ucsc.edu

Think of the Reader

“People read books, scan web sites, and glance at email messages.”

– Brian Niles, TargetX

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

– Mark Twain

More from Jakob Nielsen

- **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.

Jakob Nielsen (cont.)

- Newsletters must be current and timely. However, people will continue to subscribe to newsletters that are periodically relevant.
- Most frequent advice: “Keep it brief.”
- Most frequent complaint: newsletters that arrived too frequently.

Test, Analyze, Fine Tune

- Sender (drives 65% of open rates)
- Subject line (drives 35% of open rates)
- Frequency
- Content
- Length
- Segmentation
- Format.

Sample Email Fundraising Campaigns

Duke University: Basketball Championship

www.erroyo.com/duke.html

Duke University: [A Day in the Life](#)

Pepperdine University: YOU

www.pepperdine.edu/alumni/one

Tulane University: Annual Fund, May '04

pdlb.eonstreams.com/erroyo/tulane/spring04.html

Miami University: Senior Challenge, Spring '04

pdlb.eonstreams.com/erroyo/miami/seniors.html

Georgetown: Set Apart

www.erroyo.com/Georgetown/Georgetown.html

Beyond the Annual Fund

Leave Your Legacy, Robert! - Message (HTML) - US-ASCII

File Edit View Insert Format Tools Actions Help

Reply Reply to All Forward Print Attachments Undo Redo Paste Help

You forwarded this message on 2/28/2005 11:10 AM. Click here to find all related messages.

From: The Trust for Public Land [darlene@tpl.org]

Sent: Tue 2/8/2005 3:01 AM

To: Robert Weiner

Cc:

Subject: Leave Your Legacy, Robert!



Dear Robert,

As a longtime supporter (and President) of the Trust for Public Land (TPL), I want to take this opportunity to tell you about a recent commitment I made to TPL.

I have always been inspired by donors who had the generous forethought to include TPL in their estate plans and I have seen firsthand the accomplishments made possible by these gifts. Generous bequests have enabled TPL to accomplish many wonderful things such as, creating entire parks where communities can reconnect with nature and their neighbors.

Recently, my wife and I updated our will and we made a family decision to include the Trust for Public Land. This was the perfect way for us to further our commitment to TPL and leave our own legacy of protected land for future generations to experience and enjoy.



Will Rogers, President

[Learn how to leave
A Legacy Gift](#)

Sample Vendors

- [Yahoo Groups](#), [Topica Lists](#) - free, plain text, ads.
- [Constant Contact](#) - \$75/month for $\leq 10,000$ msgs.
- [Groundspring](#) - \$19.95/month for $\leq 10,000$ msgs.
- [Sparklist](#) - \$89/month for up to 25,000 messages.
- [Topica Publisher](#) - \$49/mo. $\leq 2,500$ names & $\leq 50K$ msgs.
- [Vertical Response](#) - \$.015 to \$.0075 per 1,000 msgs.
- [Convio](#), [GetActive](#), [Kintera](#) - \$750 - \$2,500/month and up

Resources

Allison, Rachel: *Testing e-mail without testing your sanity:*

<http://www.malwarwick.com/newsletter/success0403.html#testing>

dotorgEssentials: *Best Practice for Email Campaigns:*

http://www.dotorgessentials.net/browse_issues.php?switch=1&dir=20040116

Fuel4Arts.com: *Tips on Email Promotions:*

www.fuel4arts.com/sauce/11_email_promotion/email_promos.htm

Fuel4Arts.com: *Email Promotions – How To Guide:*

www.fuel4arts.com/sauce/11_email_promotion/email_how.htm

Groundspring.org: *Online Fundraising Handbook* (chapter 3 discusses email newsletters): www.groundspring.org/learningcenter/handbook.cfm

NP Advisors: *Guidelines for Preparing E-mail Copy:*

www.npadvisors.com/NewContent/100244.asp

Pearson, Jerold: *@Stanford and Institutional Advancement:*

www.stanford.edu/~jpearson/archive.shtml

Stoner, Michael: *Creating Effective Email Campaigns:*

<http://www.mstonerblog.com/archives.php?id=A2004081>

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