

# This Way to the After-Party

## How to Steward Strategically, Post-Campaign

KATIE KUTNEY

ASSOCIATE DIRECTOR OF ADVANCEMENT

BERKSHIRE SCHOOL

# With thanks to

## **Derrick Shearer**

Director of Advancement Services

The Pingry School

## **Brad Poprik**

Mathematics Department Chair

The Pingry School

# A Case Study

July 20, 2014

Mr. Nathaniel Conrad  
Headmaster, The Pingry School

Dear Nat,

Thank you for your letter of July 15 informing me of successful academic year in general and the winners of the DeGryse prize in particular.

My Congratulations to the misses Herman and McManus for their impressive results in all aspects of their academic endeavours...particularly, in language studies. M. DeGryse would be proud of their accomplishments.

I am constantly amazed, and indeed pleased, to see how well Pingry is doing, in all aspects.

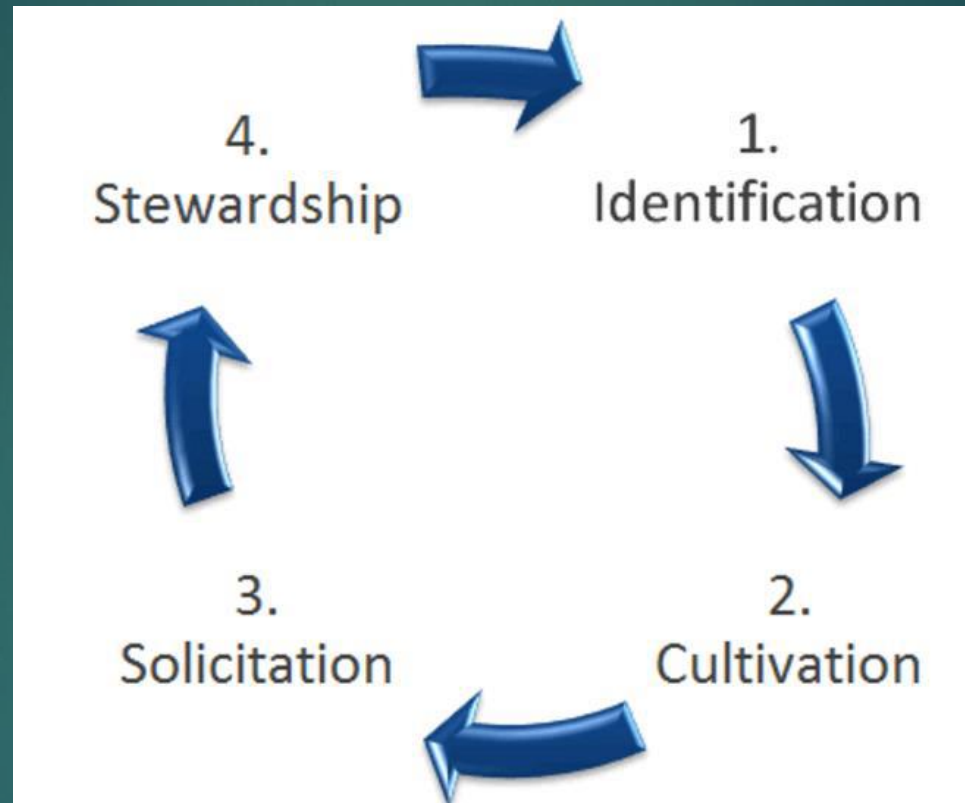
Thank you for you efforts.

Sincerely yours,



P.S. I enclose my check in the amount of \$1,000 to replenish the balance in the DeGryse prize fund.

# Traditional Cycle



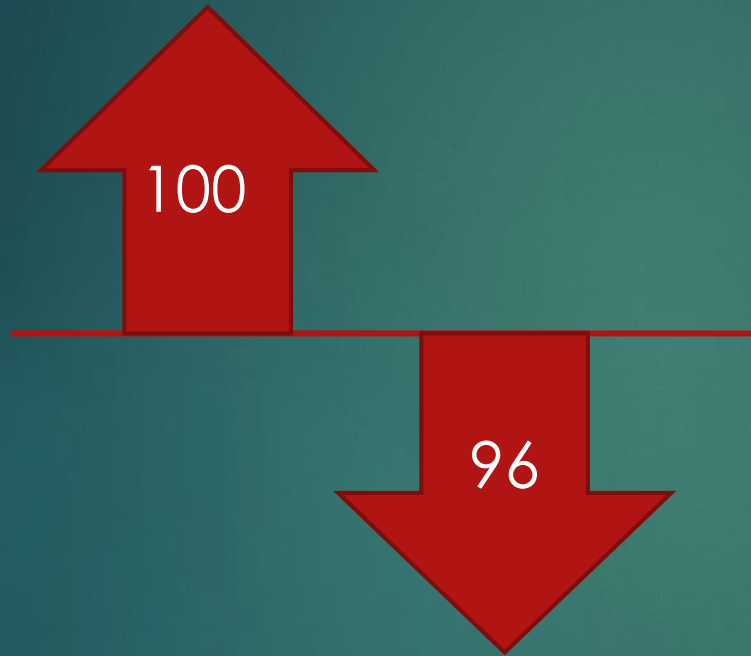
# New Model



# Biggest driver of post-campaign giving?

- A) Pre-campaign frequency
- B) Pre-campaign giving
- C) Campaign giving
- D) # Thank yous sent

# Our Challenge



“A 10% improvement in attrition can yield up to a 200% increase in projected value.”

--Dr. Adrian Sargeant,  
Indiana University



*“The Research Is Clear:  
Invest In Donor Retention...”*

*–Andrew Waitt, CEO, AFP*

- >> Where does investment begin?*
- >> What drives donor retention?*



# Bob's motivations:

- ▶ Positive past experiences in annual giving
- ▶ Connection fostered through prize report
- ▶ Opportunity presented by the campaign

*>> How can we extrapolate?*

# Key pivot point:



# Success of Pingry's FY95-FY00 Campaign:

**\$5M** over goal

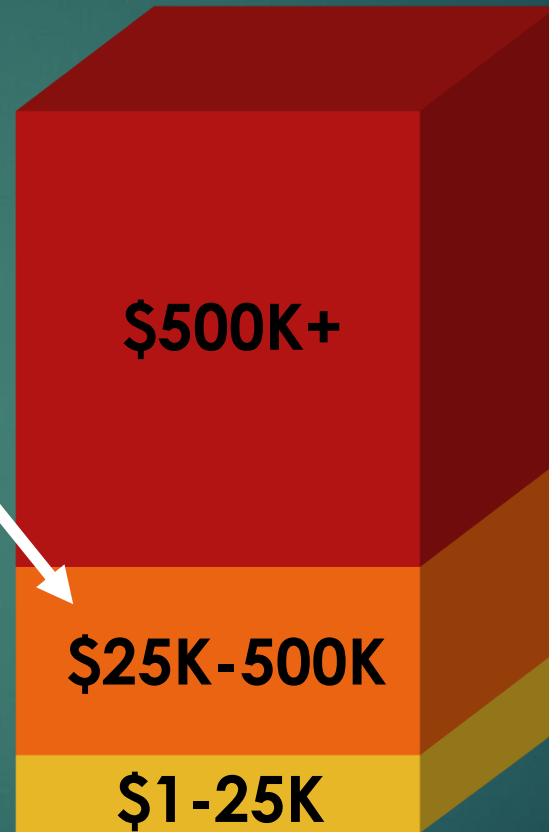
**dot.com boom**

**120%** annual fund yield

**24 of 50 NEW** top donors

# Missed Opportunity

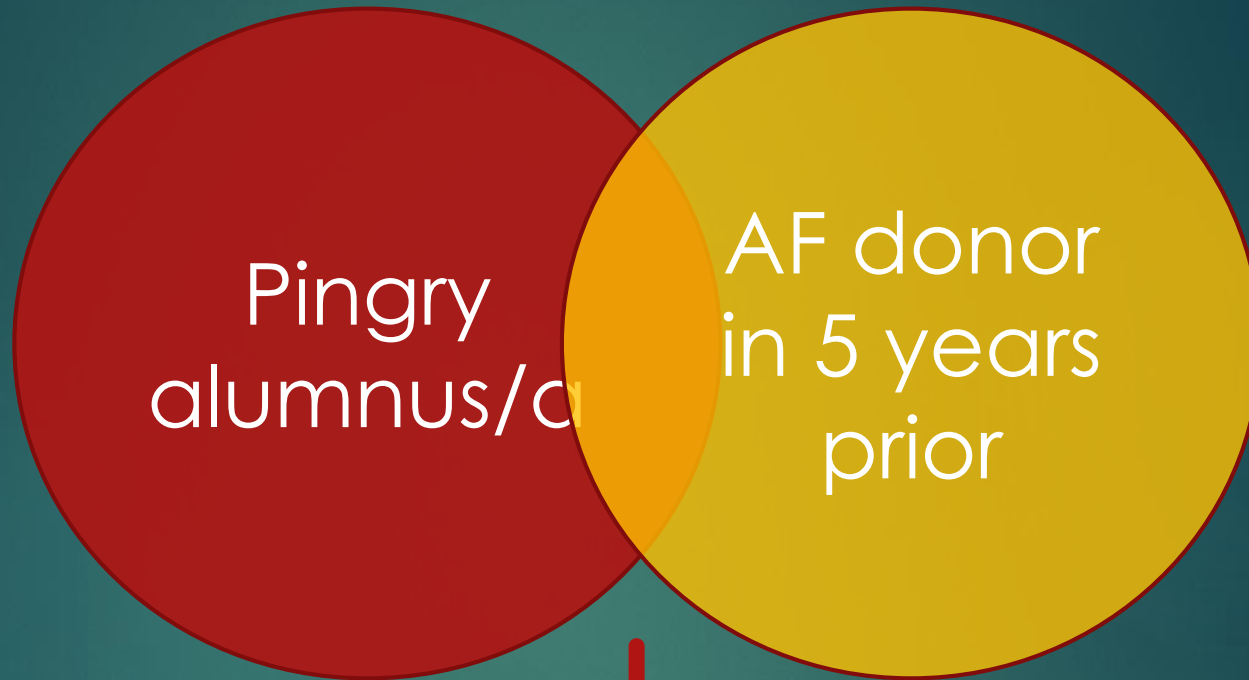
Gifts by  
Threshold



# How do we make it count?

- ▶ Who?
- ▶ What?
- ▶ How?
- ▶ Which?
- ▶ Why?

# Population



2,208 alumni donor HHs

# Worldview

## Identification Theory:

*“Charitable giving is a reciprocal relationship between donor and institution that benefits both parties with outward and internal rewards.”*

--Schervish & Ostrander, 1990

# Ultimate Goal

## Active Commitment:

*“a genuine passion for the future of the organization and [its] work...developed by enhancing trust, enhancing...two-way interactions, and by the development of shared values.”*

– Adrian Sargeant, 2013



# Pre-Campaign Satisfaction



# Post-Campaign Commitment

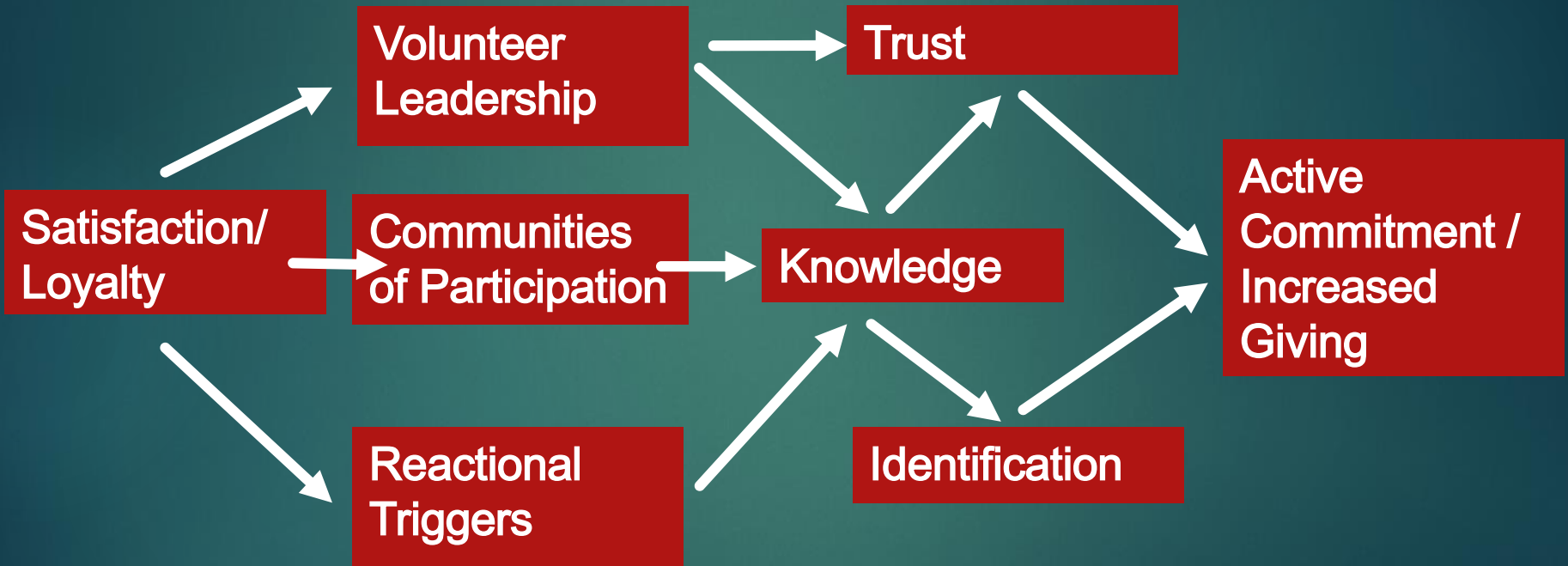


# Cause & Effect

PRE-CAMPAIGN  
FY91-FY95

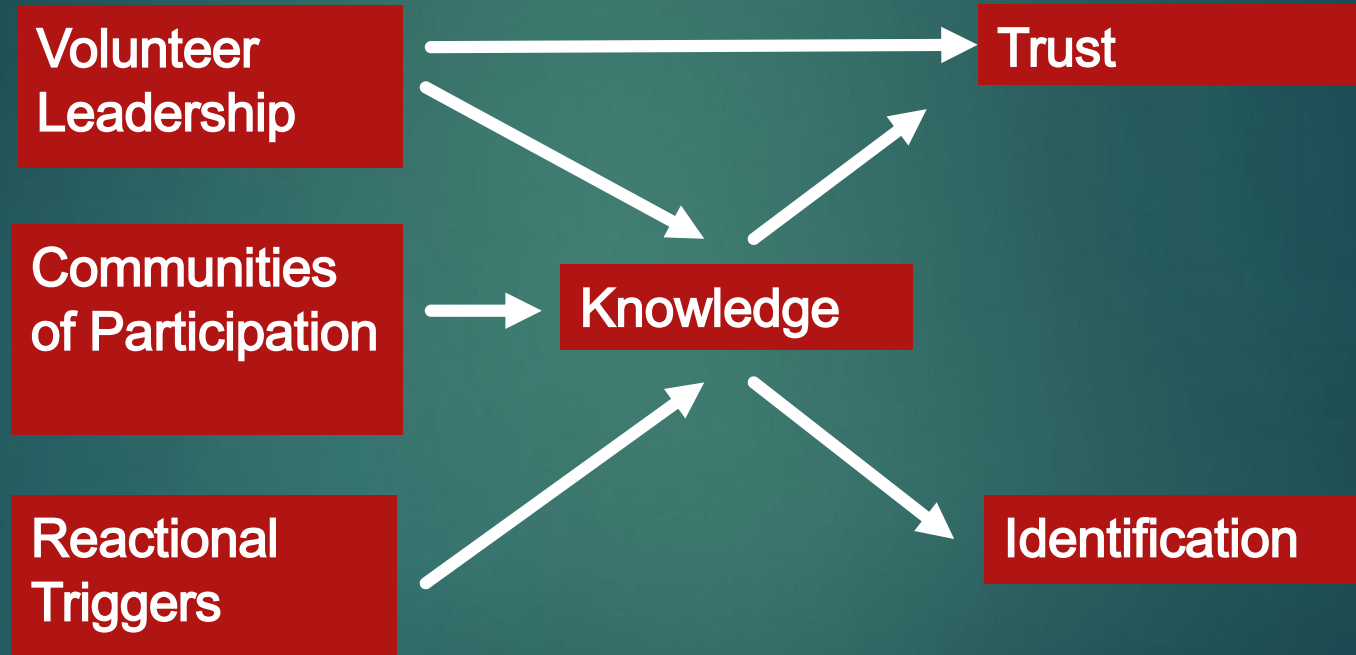
CAMPAIGN  
FY96-FY00

POST-CAMPAIGN  
FY01-FY05

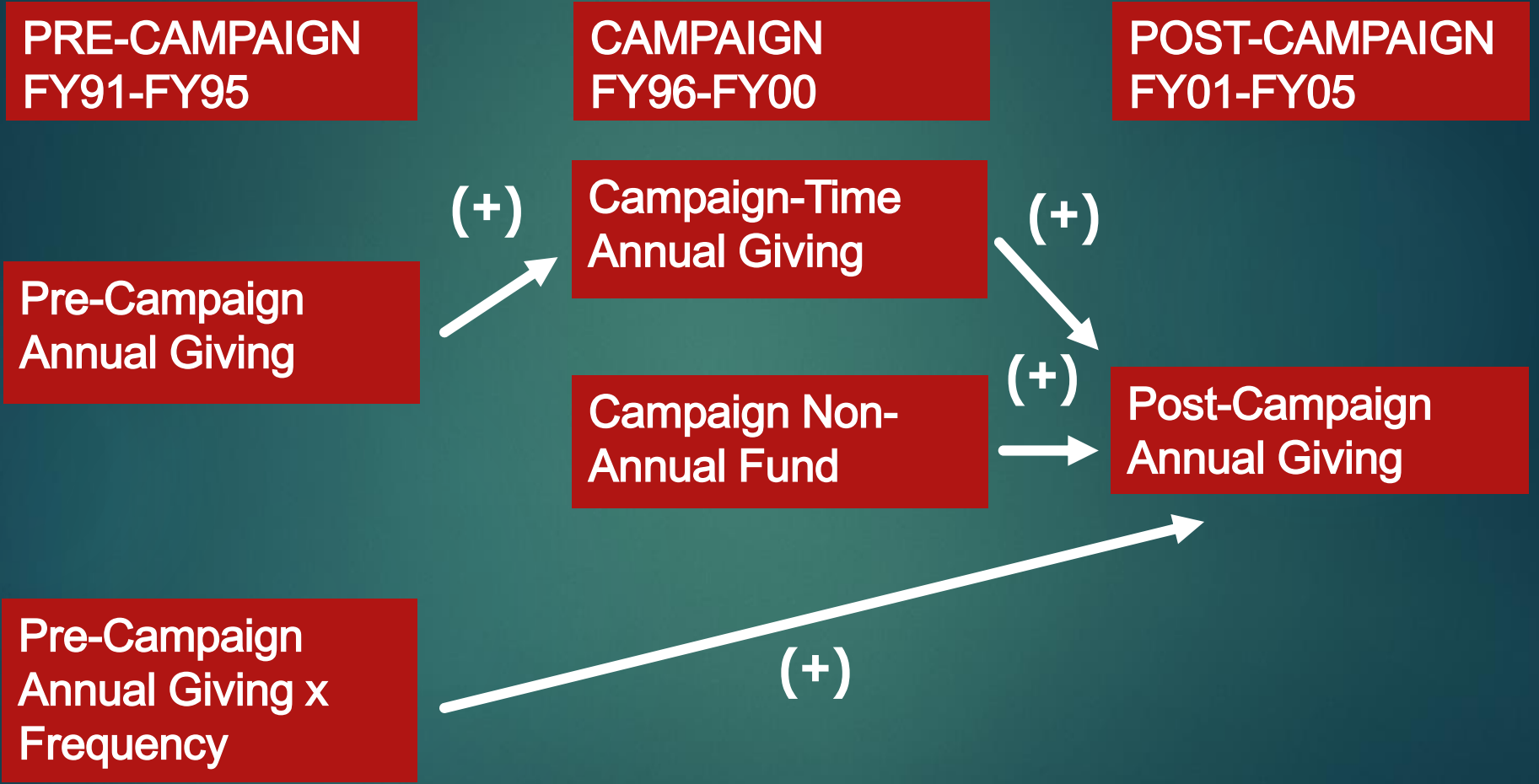


# Campaign-Time Influences

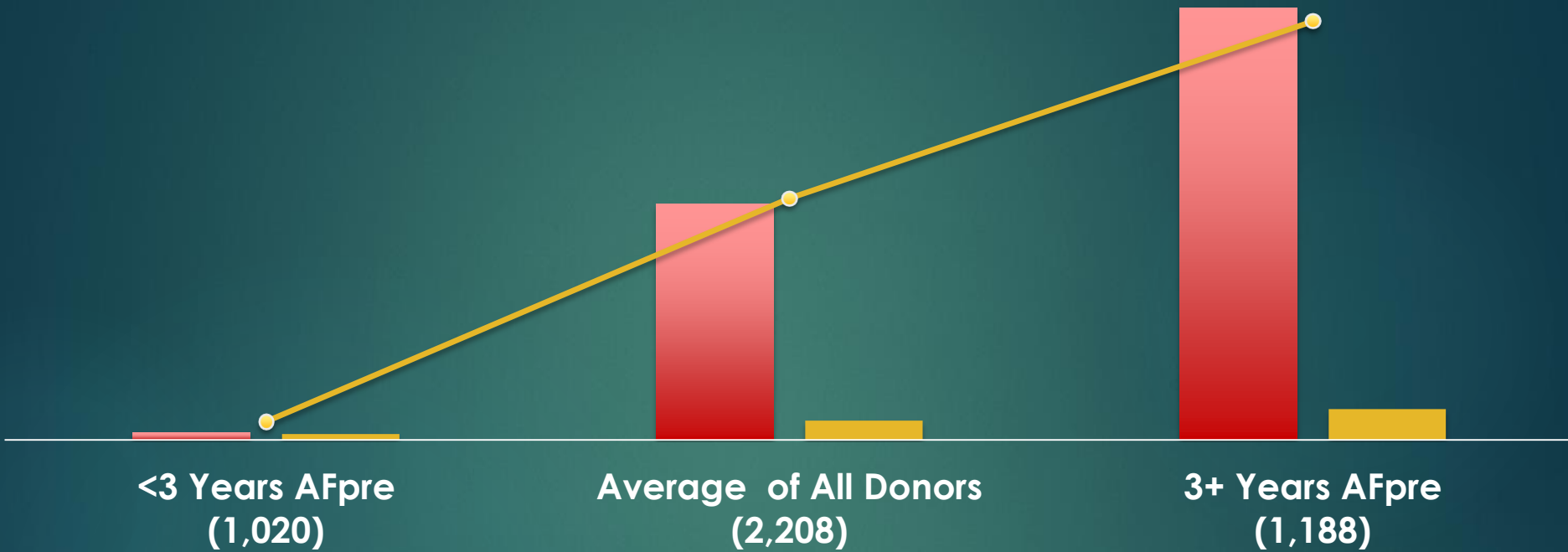
CAMPAIGN  
FY96-FY00



# Drivers of Commitment



# Loyalty Matters



# Participation Matters



# Donors who stretched...

**26x** more  
campaign

**5x** post-  
campaign

**5x** volunteer  
leadership

**1.2x**  
participation

**7x** more  
LTG





# Recommendations



- ▶ Reward Consistency
- ▶ Leverage Volunteers
- ▶ Reframe “Buckets” as “Communities of Participation”
- ▶ Pay Attention to Campaign Annual Giving
- ▶ Invest in “Stretch” Donors

# Now what?

1. Analyze
2. Monitor
3. Trigger
4. Measure

# 1. Analyze

Stretch Donors

AFpre x Freq

Campaign AF

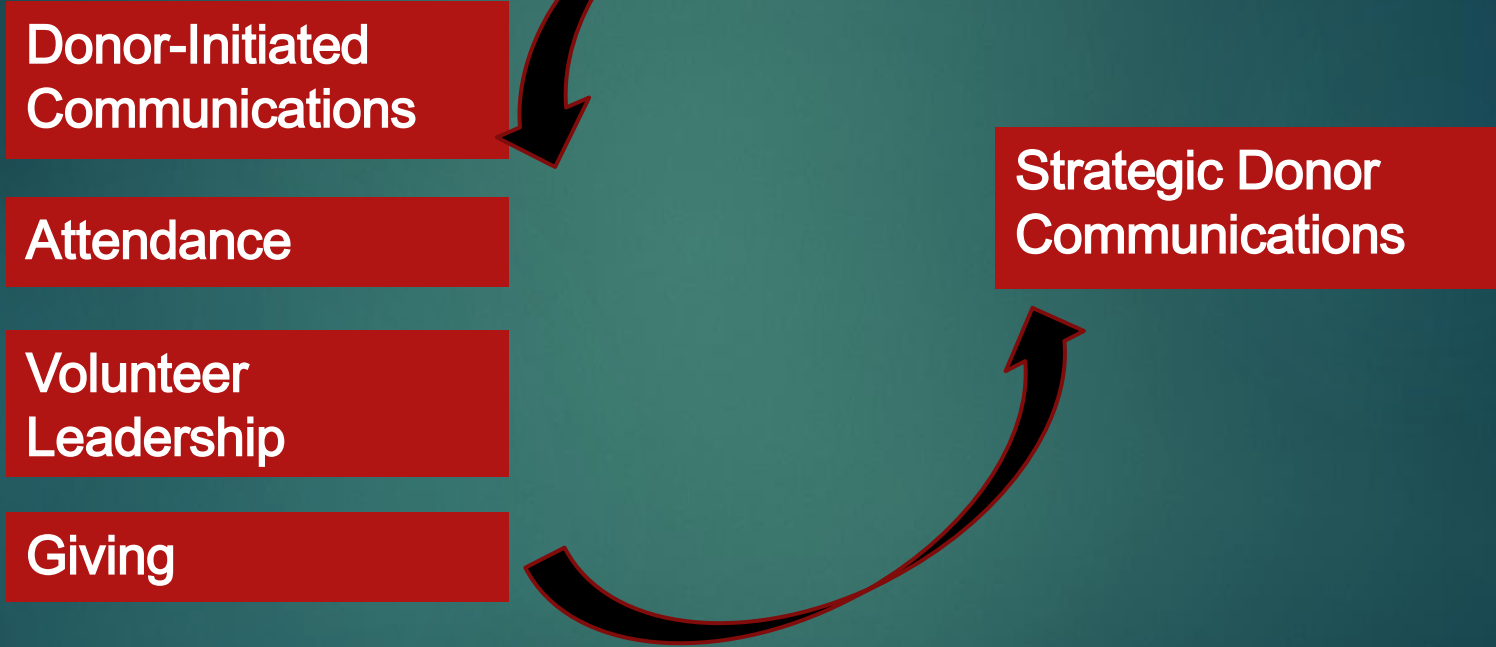
Non-AF Camp.

Affiliations

Participation



# 2. Monitor and 3. Trigger



# 4. Measure



Retention

Increased Giving

Engagement

# Thank You!

**Katie Kutney**

Associate Director of Advancement  
Berkshire School

[kkutney@berkshireschool.org](mailto:kkutney@berkshireschool.org)

(413) 229-1370