



Strategic Growth: Using Research and Donor Input to Expand Your Program

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The Syracuse Expansion Method

Set the Stage

Research and Evaluation

Strategic Planning

Making the Case for Support

Implementation: Where are we now?



Wave Your Hands In the Air!



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Set the Stage

- Serious staff attrition – Donor Relations and Advancement division
- Reduced resources – staffing, operational \$, software/IT support
- Stale and scaled down programs
- Lack of consistency in unit-driven donor relations efforts
- 3 years since end of last campaign
- At least 5 years since program was evaluated and improved



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Research and Evaluation

This isn't working! We need to significantly enhance our program. How do we do this?

Internal Assessment

Evaluate each program

1. Is this program cost effective?
2. Does this program have a positive impact on our constituents?
3. Does this program meet industry best practices?
4. Should we keep this program?
5. Can we improve this program?



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Research and Evaluation

This isn't working! We need to significantly enhance our program. How do we do this?

Internal Assessment

Evaluate staffing structure

- Donor Relations team job descriptions
 - Is this the right grouping of responsibilities?
 - What is missing?
- Unit based donor relations support



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Research and Evaluation

This isn't working! We need to significantly enhance our program. How do we do this?

Internal Assessment

BIG Ideas!

- What have we always wanted to do?
- How can we better support the units?
- Have we experienced great donor relations from other organizations that we can replicate?



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Research and Evaluation

This isn't working! We need to significantly enhance our program. How do we do this?

External Assessment

- Review national donor and sector reports
 - Bank of America
 - Penelope Burke
 - Donor Relations Guru
 - Giving USA
 - Educational Advisory Board (EAB) – membership organization
- Peer benchmarking
 - Music to your leaders' ears
- Conferences



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Research and Evaluation

This isn't working! We need to significantly enhance our program. How do we do this?

Donor Assessment

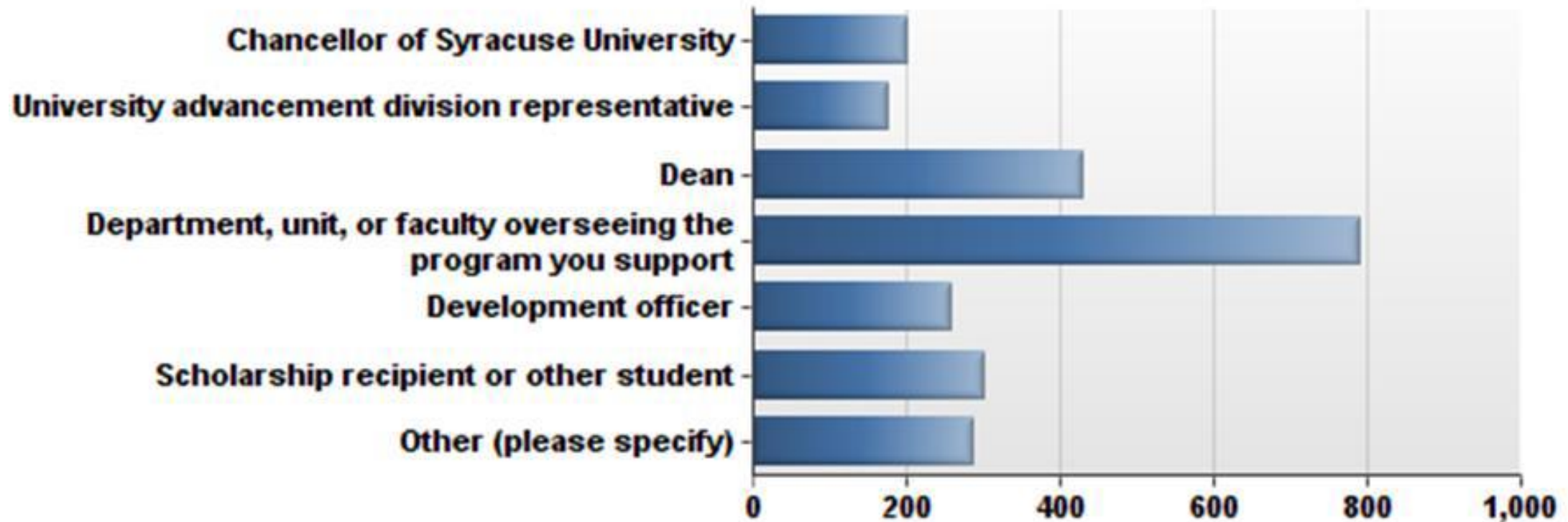
- Electronic donor survey
 - All donors from current and previous FY with email addresses
 - 1,790 surveys completed
 - Questions gathered info on many topics
- Donor focus groups
 - Choose major markets with deep donor pool
 - Moderate conversation to receive directed feedback relative to the issues



Basic Results from Donor Research

Acknowledgements

Who would you like to acknowledge your gifts? Check all that apply.

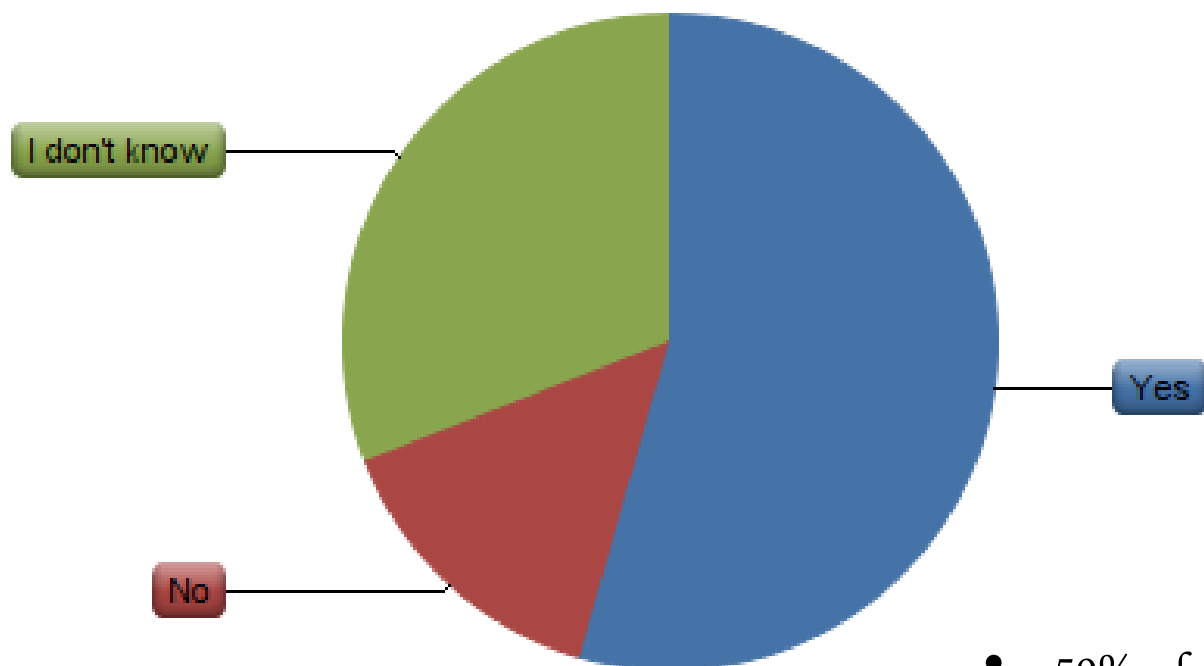


SU donors prefer the letter be tailored to where they give and explain the specific impact that gift will have on the unit.

We received very positive comments about handwritten notes from officers, faculty, and students.

Impact Reporting

In the last year, have you received any communications or updates on the impact of giving on Syracuse University?



What more personalized and tailored impact messages.

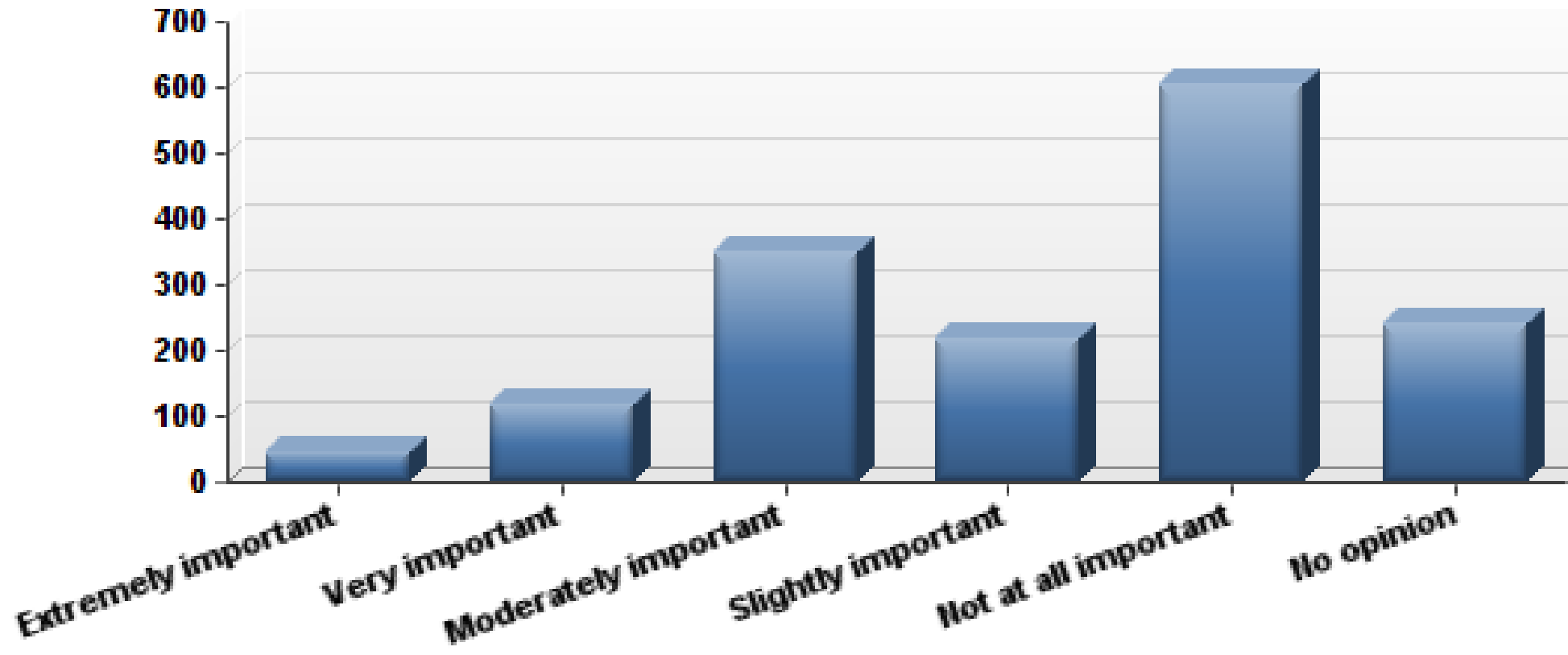
Use photos to convey impact!



- 50% of our donors would like more info on how we use their gifts.
- Donors most appreciate genuine updates/notes from those using their gift.

Giving Societies

How important are donor giving societies to you as a Syracuse donor?



Giving Societies and Donor Segments

Most of all, donors want to know that they are helping the University accomplish their goals. This can be done with or without a society.

Some donors believe giving societies can help influence others to give when they see the society impact/importance marketed well.

We need to show them that we KNOW who they are – special donor segments.

Benefits/Perks

Donors like regular personalized communications and access to events, concierge services, and athletics.

Only 30% of SU donors feel that token/tangible items are meaningful recognition for their giving. However, some qualitative feedback suggests they like receiving small, Syracuse branded items to show their school spirit.

Events

How likely are you to participate in the following types of Syracuse events?

Question	Extremely likely	Somewhat likely	Unlikely	I would not attend
Exclusive donor-only events held on campus	6.12%	23.05%	44.43%	26.40%
Exclusive donor-only events held in my area	17.35%	42.43%	26.19%	14.04%
General Syracuse University events held in my region	16.23%	47.47%	25.58%	10.71%
Exclusive donor events held in destination cities around the country	2.76%	14.77%	51.21%	31.25%
Single-session classes or lectures held on campus, on a variety of topics	4.64%	18.88%	44.09%	32.40%
Single-session classes or lectures held in my area, on a variety of topics	12.85%	46.03%	26.62%	14.49%
Meeting on campus with Syracuse students who benefit from my gifts	8.14%	21.33%	42.91%	27.62%

Services/Perks

VIP perks and concierge services are well received by many donors.



We received many comments communicating a desire for athletic ticket access.



Plaques and physical recognition for non-naming gifts is unnecessary.



Donors like listings/honor rolls in concept, but these aren't usually factors in making gifts.



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Research and Evaluation

Compiling and Presenting Results

- Divided information into major donor relations program categories
- Condensed information from all research sources
- Started reporting with division leadership team, then worked out to all staff
- Ensured information presented spoke to the future direction of the program
- Graphs/charts should be
 - Easy to understand and explain
 - Directly relative to the experience of major gift officers and/or the leadership that must approve your new direction



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Strategic Planning

Vetting Results

- Internal partners
- Major donors if important
- Volunteers if appropriate

Team Planning

- Opportunity to engage your team members and other partners
- BIG IDEAS grounded in metrics and qualitative feedback
- Balance standard program basics with new, creative tactics



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Strategic Planning

The Syracuse Plan

- Strategic plan with 3-year projection including:
 - Ending unproductive practices
 - Enhancing current activities
 - Implementing new programs
 - Ballpark operating budget
- 5-year staffing plan
 - Incorporated staffing plan into program improvement plan
 - Revamped existing team descriptions and added new positions



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Making the Case for Support

The Syracuse Plan

Strategic plan presentation to leadership

- Created bulleted synopsis of changes and improvements with target FY
- Included ballpark resources necessary to accomplish
- Spoke to things we knew were important to leadership and discussed regularly within the division
 - Giving societies
 - Acknowledgements
 - Individual Stewardship



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Making the Case for Support

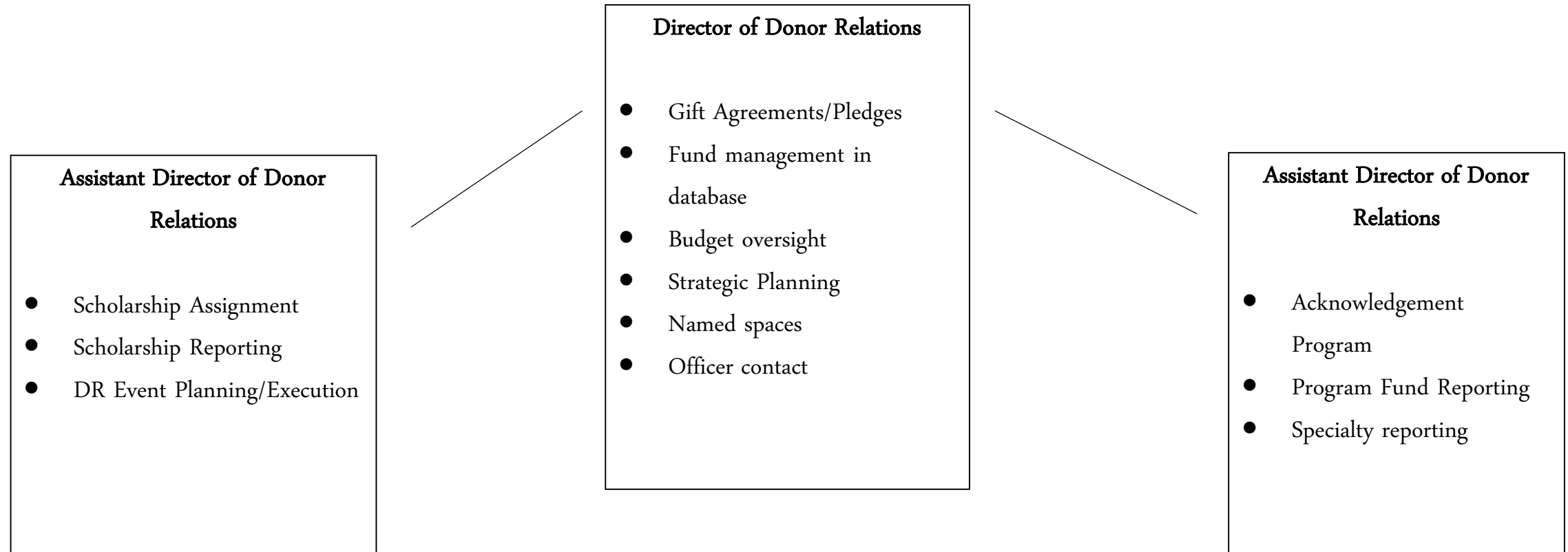
The Syracuse Plan

Strategic plan to leadership

- Staffing plan presented in organizational chart style with 5-year roll out depicting change over time
- Created job descriptions for new positions so could be easily approved and sent to HR
- Approval process: immediate supervisor, then her boss, then the head of division and other VPs
- We drove approvals – we didn't wait for someone to ask
- Fundraisers are your allies!

Donor Relations Team

FY2016 Structure



**Donor Relations Team
Proposed Structure
Round 1 Hiring – FY17**

2

**Associate Director
Major Donor Stewardship**

Round 1 Hire

- Ind stew plans w/ MGOs
 - Strategy
 - Planning
 - Execution
 - Tracking
- Group stewardship plans
- Draft gift agreements/pledges

Director of Donor Relations

- Gift Agreements/Pledges
- Fund management in database
- Budget oversight
- Strategic Planning
- Named spaces
- Officer contact

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**Assistant Director
Fund Reporting**

Round 1 Hire

- Annual Financial Endowment reports
- Program fund narratives
- Liaison for unit fund mng
- Fund compliance

**Assistant Director
Major Donor Stewardship**

Round 1 Hire

- Ind stew plans w/ MGOs
 - Planning
 - Execution
 - Tracking
- Group stewardship plans
- Assist Associate Dir with execution of tasks and reporting

3

**Assistant Director
Student Programs and Scholarships**

- Scholarship Assignment
- Scholarship Reporting
- Student communication
- Phil Council assistance
- Student programs

**Assistant Director
Donor Communications**

- Acknowledgements
- Donor Segments/Societies
- Specialty reporting and communication pieces
- Digital donor comms

**Administrative Support
(as necessary)**

- Budget reports
- Expense posting
- Supply orders

**Associate Director
Major Donor Stewardship**

Round 1 Hire

- Ind stew plans w/ MGOs
 - Strategy
 - Planning
 - Execution
 - tracking
- Draft gift agreements/pledges

**Donor Relations Team
Proposed Structure
Round 2 Hiring – FY18**

**Assistant Director
Fund Reporting**

Round 1 Hire

- Annual Financial Endowment reports
- Program fund narratives
- Liaison for unit fund mng
- Fund compliance

Director of Donor Relations

- Gift Agreements/Pledges
- Fund management in database
- Budget oversight
- Strategic Planning
- Named spaces
- Officer contact

Data Specialist/Administrative Asst.

Round 2 Hire

- Data extractions/cleaning
- Dept. reporting
- Manage mailings
- Activity tracking on system
- DR phone line
- Budget reports
- Expense posting
- Supply orders



**Assistant Director
Major Donor Stewardship**

Round 1 Hire

- Ind stew plans w/ MGOs
 - Planning
 - Execution
 - Tracking
- Group stewardship plans
- Assist Associate Dir with execution of tasks and reporting

**Assistant Director
Student Programs and Scholarships**

- Scholarship Assignment
- Scholarship Reporting
- Student communication
- Phil Council assistance
- Student programs

**Assistant Director
Acknowledgement and Correspondence**

Round 2 Hire

- Manage central acks
 - Write Sr. level letters
 - Expansion of program
- Assist units with ack programs
- Leadership correspondence
- Tracking in system



**Assistant Director
Donor Communications**

- Comm. matrix
- Donor Segments/Societies
- Specialty reporting and communication pieces
- Digital donor comms
- Event follow ups



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Implementation

Where are we now?

Program Elements

- Expanded fund reporting and communication from beneficiaries
- Began individual stewardship program – Infancy
- Rolling out new annual giving society
- Revamped acknowledgements and other donor communication pieces
- New policies and guidelines
- Partnerships including collaboration with leadership on key initiatives
- Database conversion – data cleanup and significant business process changes



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Implementation

Where are we now?

Operational Budget

- Presented plan for allocation of current budget in FY17 planning
- Secured additional \$100,000+ in budget resources this FY

Staffing

- Received HR approval on revised job descriptions for current team members
- Approval for 3 new team members FY17
 - Hired 2 and started process for 3rd before end of the FY
- Beginning push for FY18 hires



Questions?

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