

### Minute to Win It





- Amy Massimo
   Director, Donor Relations
   Hackensack Meridian Health
   Foundation
- Shelley Drozd
  Donor Relations Writer
  Lehigh University
- Lisa Honan
   AVP for Advancement Operations
   University of New Haven
- Barbara Mlawer
   Director, Stewardship
   NYU Langone Health
- Casey Sharkey
   Director, Donor Relations and
   Principal Gift Stewardship
   Lehigh University

# Gratitude Books: NO Dusting Required





Amy Massimo
Director, Donor Relations
Hackensack Meridian *Health* Foundation

### The 5 Ws (and an H)



#### Who:

- Select Donor
- O Legacy gift?
- Designation easily articulated into thanks
- Someone who has been recognized before?

#### What:

**Gratitude Book. NO dusting Required** 

#### When/Where:

**Special Event** 

#### Why:

Memorable Unique Personal Meaningful

#### The 5 Ws (and an H)



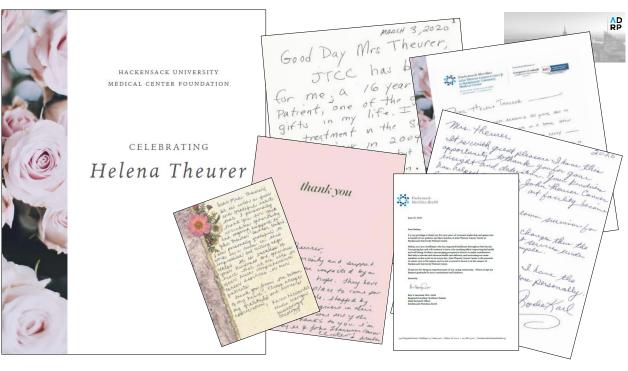
#### How:

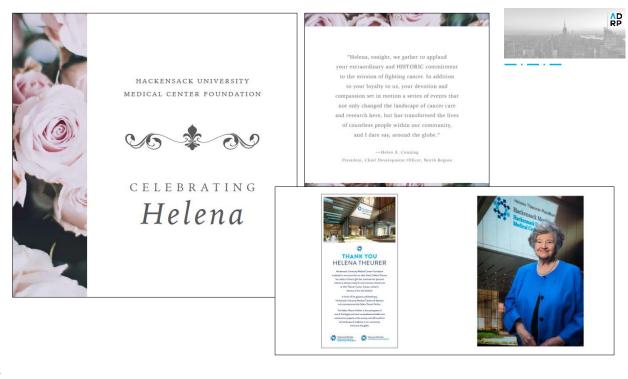
- Partner with your gift officer/relationship manager. They will be your champion!
- This takes longer to do than you think
- Solicit letters from multiple areas: physicians, leadership, patients, team members
- Avoid creating templates
- Designers can create personal letterheads!
- Make it personal
- Presentation counts











# Gratitude Books: NO Dusting Required





Questions

Now, That's Saying Something: Designing Impact Reports for Maximum Effect





Shelley Drozd
Donor Relations Writer
Lehigh University
Development and Alumni
Relations



# Smart creative starts with the fundamentals of good journalism.

- WHO are you producing the report for?
- WHAT resources exist within your organization?
- WHEN is your deadline?
- WHERE can you find trustworthy information?
- WHY produce an impact report?
- HOW to execute for maximum surprise and delight?





#### Why produce an impact report?

- a) To deliver a stewardship update
- b) To commemorate a milestone
- c) To show appreciation/express gratitude
- d) To demonstrate donor impact
- e) All of the above





### Who are you producing the report for?

- Alumni donors in the principal/major gifts space
- Typically gives to multiple philanthropic passions
- Audience of one = highly personalized reporting





#### When is your deadline?

- Determines project scope and format (print or digital)
- Hard deadline (e.g., planned donor visit)
- Soft deadline (e.g., anniversary year celebration)





### What resources exist within your organization?

- Gift officers/frontline fundraisers
- Subject matter experts
- Creatives:
  - Writers
  - Graphic designers
  - Photographers
  - Proofreaders
- Project managers





#### Where can you find trustworthy data?\*

- Registrar for degrees conferred, graduation years
- Career center for placement statistics
- Office administrators for college-, department-, or organizational-specific data
- Communications/public relations departments
- Librarians
- Athletics organizations

\*in higher ed





#### How to execute for maximum surprise and delight?

- Schedule an intake meeting with project stakeholders
- Lengthen lead times/expect the unexpected
- Identify interviewees, research resources
  - o Repurpose where possible
- Design and launch data collection devices:
  - Survey instrument
  - Photographic assets



#### What makes a great photo?



- High-resolution minimum 300 dpi at 100%
- On iPhone: Settings>Camera>Formats> High Efficiency
- Phones seek bright light; place in front of subject
- Zoom with legs, not fingers
- JPGs less prone to data loss, preserves quality
- PNGs are smaller files, less file density, pixel quality
- Why not rip images from the web?
  - Most are trademarked
  - Poor quality for print projects





#### How to execute for maximum surprise and delight?

- Build a detailed outline/circulate for review
- Think visually, write tightly
  - Chunk up the copy
  - Use photos, captions, pull quotes, and graphics to convey info at a glance
- Proofread approved copy before submitting for layout
- Review proofs promptly/send to printer
- Manage review cycles to meet deadline







donors made a record \$275,500 in challenge and matching gifts

lehighgivingday.com | 3



#### **Next steps:**

- 1. Exhale.
- 2. Decompress.
- 3. Take a victory lap for a job well done.
- 4. Conduct a post-mort and document it for posterity. It'll make the next project an easier go.





# Thank you for your time and kind attention.

I wish you all the success you can stand!



Now, That's Saying Something: Designing Impact Reports for Maximum Effect





Questions? sed308@lehigh.edu

### Build the case to build your team!

Using Research and Donor Input to Expand Your Donor Relations Program





Lisa Honan
Associate Vice President,
Advancement Operations
University of New Haven



### Step 1 - Set the Stage

- 1. Identify the problems those within your control and those NOT within your control.
- 2. Think about the goals but not too deeply yet...
- 3. Think about the value you want to deliver not to your donors, but to your organization



### Step 2 - Internal Research and Evaluation

Assess your effective programs and activities
What is less effective – who would miss them?
Do you KNOW what's positively impacting your donors?
What could be improved, streamlined, or jettisoned to make you more effective?
Job descriptions – are responsibilities grouped correctly?
Do you have the right people?



### Step 2 continued – External research

- 1. Review national donor research reports
  - Penelope Burke
  - Donor Relations Guru
  - Giving USA
  - Educational Advisory Board (EAB) membership organization
- 2. Peer benchmarking /ADRP /Conference conversations
- 3. And if you dare do a survey of your donors...

BUT BEWARE – you may have to listen to them...



### Step 3 – Start Brainstorming

- 1. Take the opportunity to engage your team members and other partners
- 2. Talk about BIG IDEAS grounded in metrics and qualitative feedback
- 3. Balance standard program basics with new, creative tactics
- 4. Strategic plan with 3-year projection including:
  - Ending unproductive practices
  - Enhancing current activities
  - Implementing new programs
  - Ballpark operating budget
  - Does this mean revised team job descriptions? New Positions? Get the budget number included early



### Step 4 – Make the Case for Support

- 1. Create a bulleted synopsis of changes and improvements for your management.
- 2. Include ballpark resources necessary to accomplish, and <u>timeline</u>
- 3. Speak to things you know are important to leadership and discussed regularly within the division
  - Giving societies
  - Acknowledgements
  - Individual Stewardship
- 4. Create job descriptions so you're ready prioritize them
- 5. Drive approvals up the chain. Fundraisers are your allies!



### Step 5 – Implementation

- 1. You can't eat an elephant in one bite! Start with two-pronged approach
  - a) At least one systematic changes that cover a wide range of people
  - b) One or two individual touches that affect the top people and get immediate feedback.
- 2. Unite with a few strategic partners
- 3. Document everything you do. Let your progress be seen!
- 4. And if you can prove it, link your work to gifts.

## Build the Case to Build Your Team





Questions?

How donors helped NYU Grossman School of Medicine become the first tuition-free medical school in the US

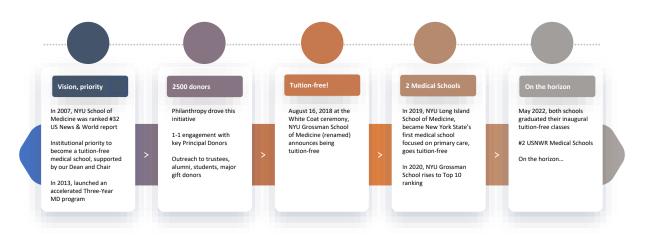




Barbara C. Mlawer
Director, Stewardship
NYU Langone Health



# The road to tuition-free 2007 to current



We started small by targeting key principal donors with highly personalized donor books

# "His students" A point of pride for the donor



Control and Contro

"I'M GOIN ADVANTA THEM TH

"THE MONEY THEY'RE GIVING IS ONLY TO US AS INDIVIDUALS, BUT IT HAS THE POTENTIAL TO AFFECT SO MANY OTHER PEOPLE."

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### Handwritten notes of thanks





#### **Matthew Kingery**

Phoenix, Arizona

#### What are your experiences so far

How waking up every morning knowing that fill be learning something that day that will help me to become a better provider of care, and that iff be sharing the experience with classificates that have become like family

#### Why does your chosen field need you?

Because I will be a great doctor I'm always searching for opportunities to learn and improve myself, and I am confident that I will remain committed to my practice and my patients over many years.

Mr. and Mrs. Silverstein,

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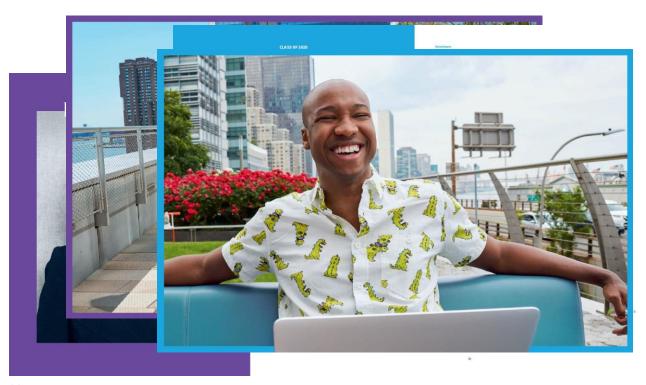
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It was an absolute phasure to meet you!

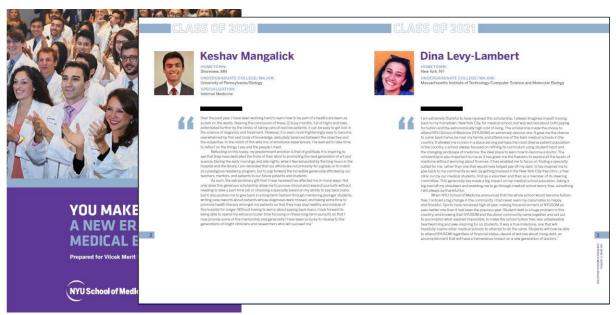
Matt Kingery



And in 2019, after the announcement, we developed a stewardship book for all scholarship donors



# Annually, we produce reports for all our scholarship donors



#### All the pieces gave us reusable assets





"I will take every opportunity to pay it forward. This gift multiples far beyond one individual. It's a gift to community, to patients, to medicine." – E.T. '19

"I will be a better doctor because I will be a better person. I am able to maintain my humanity because I'm not under financially crippling loans." – G.C. '20

"I know that throughout my career I will give back to students from a similar background as mine who need someone to make their dreams possible – just as people who invested in my education have made mine possible." – E.DL. '19



**THANK YOU** 

**Questions?** 



Celebrating Scholarships: A Digital Experience





Casey Sharkey

Director, Donor Relations and Principal Gift Stewardship Lehigh University





https://lehighscholarship.org/

### **Content Collection & Zoom Meetings**



- Surveys shared with donors and students seeking their input, advice, photos, etc.
  - · 92 students responded to content survey
  - 13 donors responded to content survey
- Offered Zoom meetings to PG/Trustee, and assigned donors with gifts on the pipeline – 95 households
  - 35 total requests
  - 24 completed



Dear Ms. Sharkey,

One of Lehigh's most meaningful traditions is the annual Scholarship Celebration, which gives you the opportunity to meet the students that your scholarship supports and hear firsthand how your generosity is impacting their lives. While we are still unable to gather in person, we would like to invite you to pass on your Lehigh wisdom and pride to today's scholarship students through a digital experience.

Through the <u>survey link</u> below, please answer a few brief questions about your Lehigh days and submit a photo. These will become part of a special online presentation that will be unveiled in May. We hope you'll take a few minutes to contribute and help today's students understand the power and potential of a Lehigh education.

Take the Survey

Thank you for your generosity to Lehigh students and your unwavering support of scholarships and financial aid.

### **Audience and Deployment**

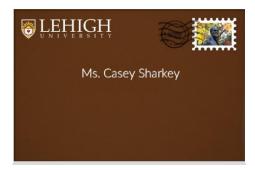
**Segment 1** – All donors, alumni, and friends who are coded to endowed funds at \$100k and donors with current use scholarships

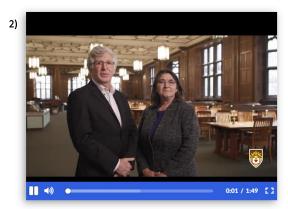
1) Now live! Visit the Celebrating Scholarships Website

We hope you enjoy this special video message from James '85 and Sharon Maida '17P '19P, introducing you to our new Celebrating Scholarships website!

We invite you to then visit the new website to hear from the exceptional Lehigh students whose lives are forever changed by your generosity.

WATCH YOUR VIDEO!





Take me to the Celebrating Scholarships website

Though we were unable to gather in person this year, I hope you've had a chance to enjoy this <u>special digital experience</u> and to hear how your generosity has had an impact on Lehigh's exceptional students.

Scholarship support is a key priority of <u>GO: The Campaign for Lehigh</u>, and I'm very thankful for your commitment.

With gratitude, Joseph E. Buck

## **Audience and Deployment**

Segment 2 – All donors to scholarship and financial aid designations





Thank you for giving to scholarships and financial aid at Lehigh. Not only are scholarships and financial aid the top priority of GO: The Campaign for Lehigh, the challenges of the past year have revealed just how critical your support is and how very much it means to our students and to our entire community.

We're excited to share the <u>Celebrating Scholarships</u> website, a new digital experience celebrating our exceptional students and the generous donors, like you, who rallied, as never before, to make their Lehigh stories possible.

Because of you, Lehigh students continue to GO toward the future. Thank you for all you make possible, today and tomorrow.

**Visit Celebrating Scholarships** 

CHANGE STARTS WITH ACTION. LET'S GO.







https://lehighscholarship.org/

#### Metrics

#### May 5 - 18, 2021 (initial launch - Segment 1)



- Average session duration was just over 2 minutes with an average of just under 3 pages per session.
- Engagement numbers for those who reached the site via a ThankView invitation were exponentially higher.
- Top Content (initial launch)
  - Homepage: 46.6% pageviews; 39% unique pageviews
  - Student Voices: 7.8% pageviews; 8.3% unique pageviews
  - A Legacy of Gratitude (Flamini): 6% pageviews; 7% unique pageviews
  - Virtual Connections: 4.7% pageviews; 5.4% unique pageviews
  - Just for Fun: 4.38% pageviews; 4.68% unique pageviews

#### May 19-June 10, 2021 (public launch - Segment 2 and social)

- 40% of total traffic to the site was driven by social media traffic
- People who visited the site from the general imods email spent more time and browsed more pages per session than any other audience with an average duration of nearly 7 minutes
- Top Content (public launch)
  - Homepage: 31.3% pageviews; 21.9% unique pageviews
  - A Legacy of Gratitude (Flamini): 14.9% pageviews; 17.9% unique pageviews
  - Kiara's Story: 5.8% pageviews; 6% unique pageviews
  - <u>Student Voices</u>: 4.4% pageviews; 3% unique pageviews
  - Andy's Story: 4.2% pageviews; 3.7% unique pageviews

Link to full analytics report

#### Successes & Lessons Learned

- Repurposing materials/videos for wider use
- First time sharing impact with wider audience
- Heavy collaboration with donor relations and marketing and communications teams
- Zoom meetings were well received; donors preferred quality time and interaction with their students
- Intentional focus on both donor/student experience
- · Video is most viewed content
- Too much content; might've benefited from a more targeted approach. Could've resulted in better ROI
- Pre-launch engagement was low
- Needed more time for a project of this magnitude



# Celebrating Scholarships: A Digital Experience





Questions

