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REVAMPING THE ANNUAL FUND

Boosting alumni participation
requires a tailored design

BY DENA LEVITZ

Educational institutions famously undervalue the annual fund, perceiving it merely as a means to unrestricted funds, according to Lori Yersh, senior advisor to the vice president of advancement and external relations at Concordia University in Canada and an annual giving expert who has consulted at more than 120 educational and health care institutions in the U.S., Canada, and Europe.

However, Yersh says that recently a growing number of institutions are recognizing how valuable the annual fund is to the organization's long-term health.

"They're starting to understand that it's about building the pipeline," Yersh says. "The data shows that those who make annual gifts can emerge to become major gift donors if they have the capacity."

To gain footing in annual giving, she says, institutions need to assess their programs and constituents, as well as consider trends in the field. For one, many donors have come to expect choice, Yersh advises. In a highly competitive philanthropic market, allowing donors to decide where their money goes could make a significant difference in participation.

In addition, using the myriad outreach channels available today will pay dividends, says Adrian Salmon, vice president of Grenzebach Glier and Associates Europe. For example, according to Grenzebach Glier data, when some institutions couple direct mail and email, they've improved the performance of each by 25 to 30 percent. For optimal renewal rates, institutions need to make five to seven solicitation touches per year through a combination of mail, email, and phone appeals. And the outreach channels don't end there. The only bad channel is one used alone, Salmon says.

Focusing on broad participation, encouraging restricted giving, and using multiple communication channels are key tactics to consider. Here's how four institutions revamped annual giving and achieved results.

DENA LEVITZ is a Dublin-based journalist whose work has appeared in *The Washington Post*, *CityLab*, and *Narratively*.

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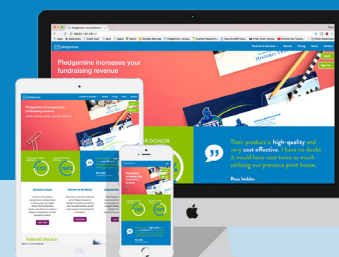
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