I JUST CALLED, TO SAY, I LOVE YOU INNOVATION IN THE PHONATHON

Jenny Cooke Smith, Senior Solutions Consultant, Target Analytics
Sara Harvey, Managing Director for Annual Giving, Marquette
Patrick McCarthy, Senior Advancement Officer, Annual Giving, Marquette

MARQUETTE UNIVERSITY | BE THE DIFFERENCE.

Session Objectives

- To create a network of colleagues dedicated to improving and sustaining telemarketing
- To learn more about the data behind telemarketing performance
- To introduce some innovations both at Marquette and at other institutions

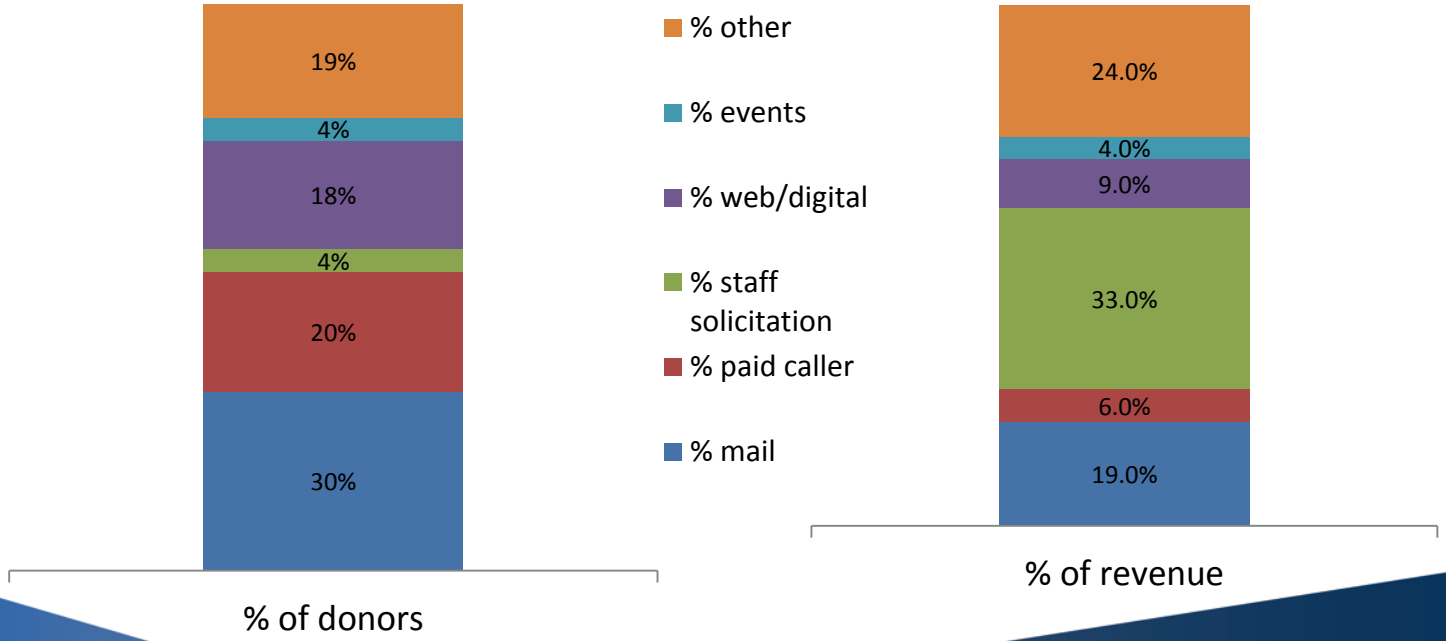
The State of Telemarketing

- Data from Target Analytics' donorCentrics™ benchmarking service
  - Actual transactional data (plus some self-reported for fun)
  - Cash, hard credit data from Alumni
  - $50K gift cap
  - Source data only as good as its coded

Unless otherwise noted, dated presented is from the following participants:

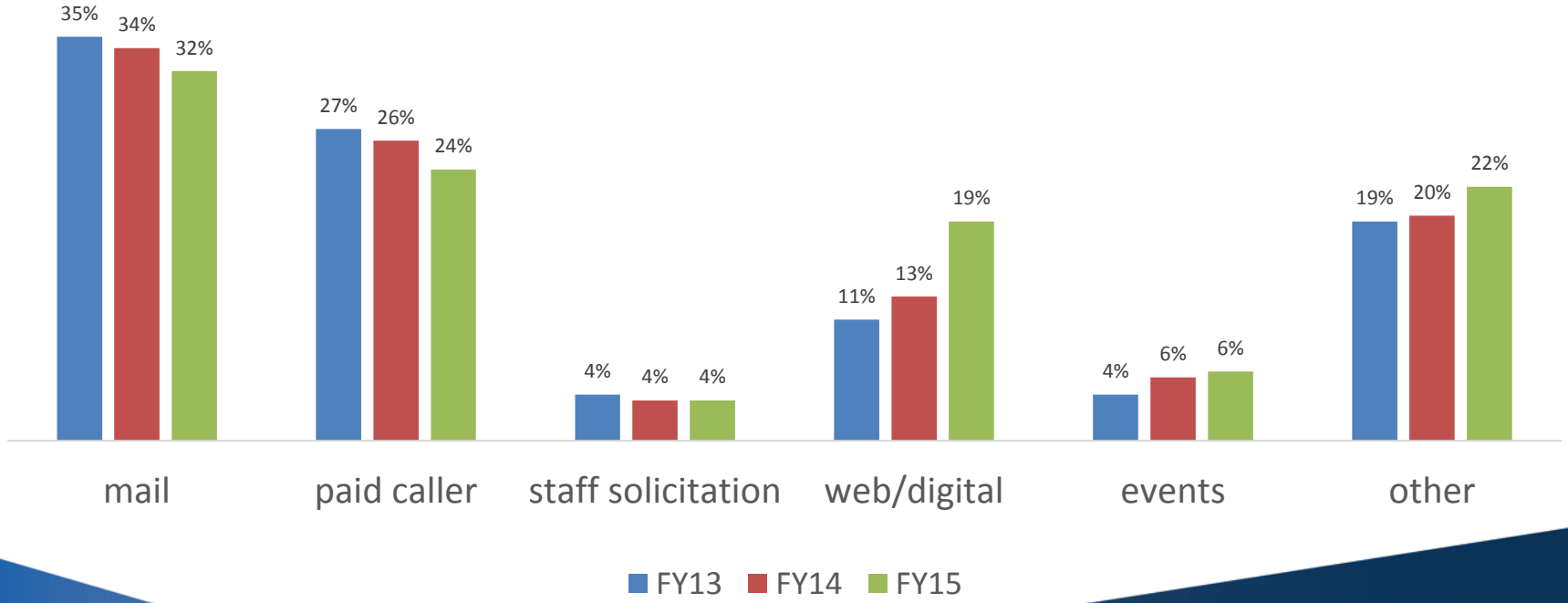
- Boston College
- Gonzaga University
- LaSalle University
- St. John’s University
- St. Joseph’s University
- St. Mary’s University
- St. Louis University
- Marquette University
- University of San Francisco
- University of Scranton

State of Telemarketing: % of donors and revenue by Source



Note - Medians will not always add to 100%

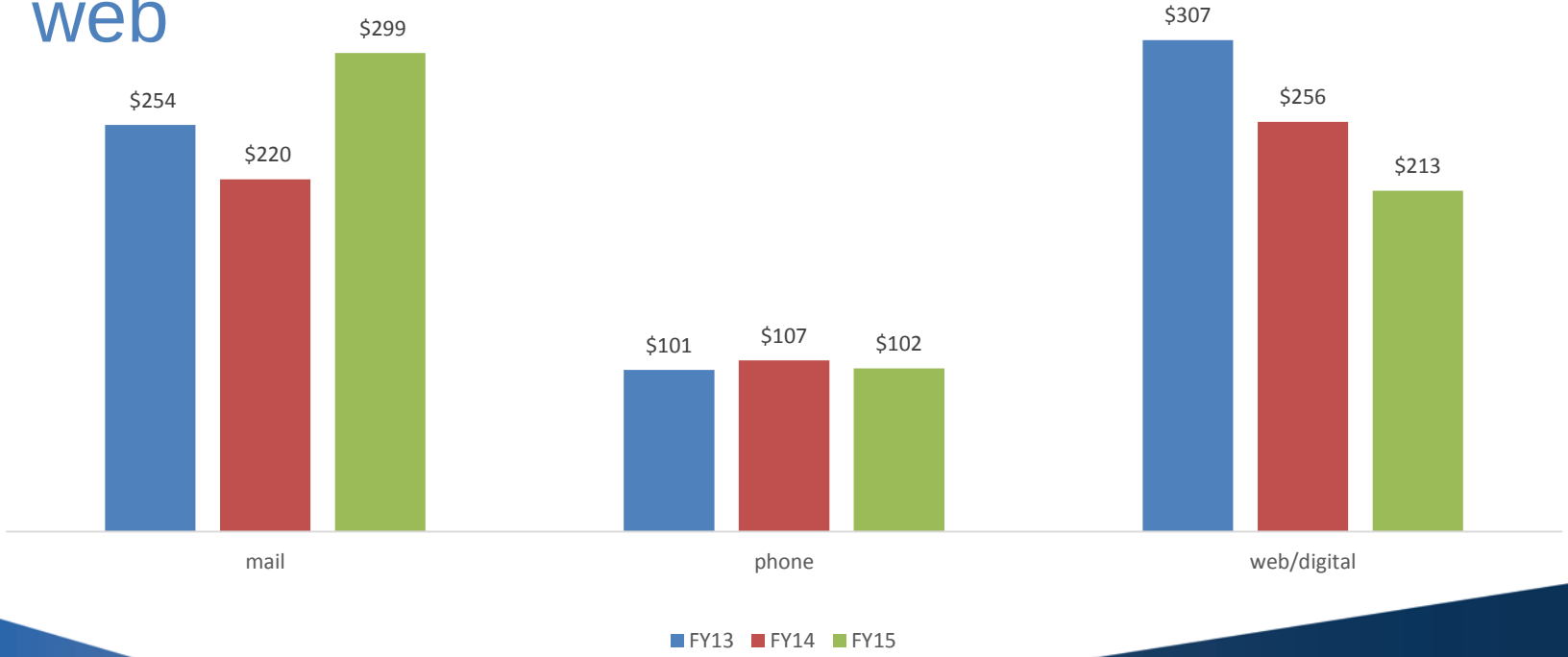
Trends: % of donors by Source



Note - Medians will not always add to 100%

MARQUETTE UNIVERSITY | BE THE DIFFERENCE.

Trends in revenue per donor by mail, phone, web



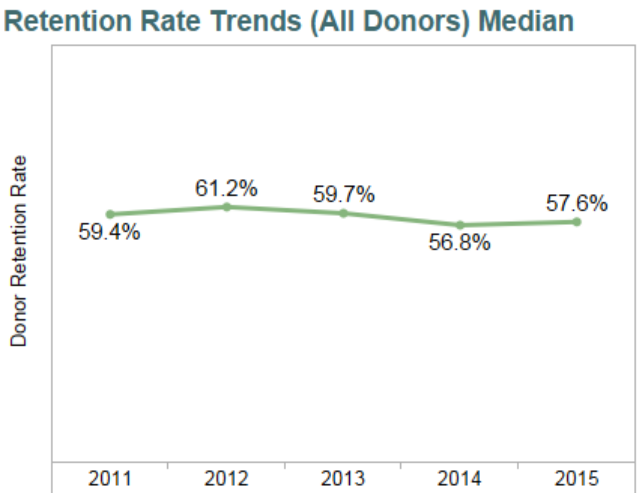
Acquisition

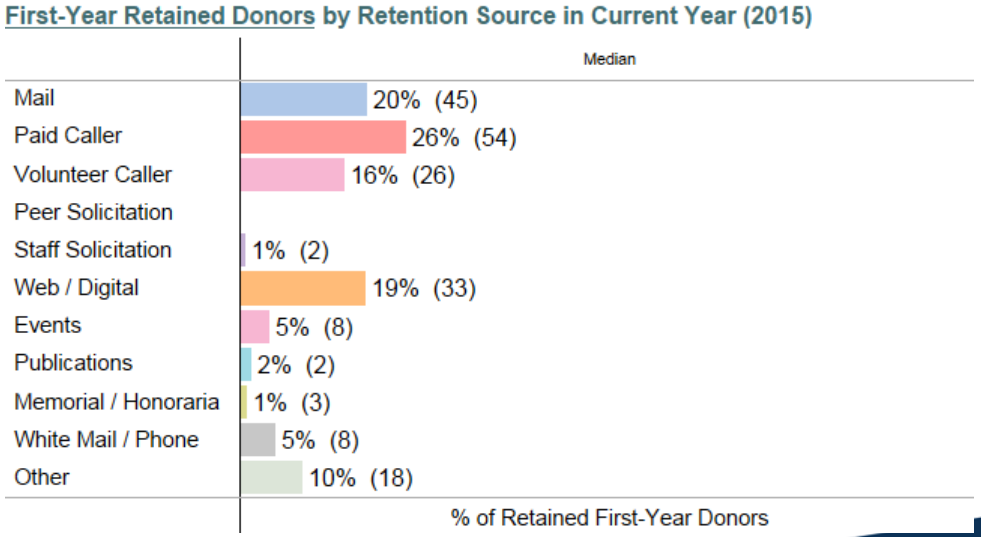
Distribution of New Donors by Origin Source (2015)

	Median					
	CY Donors	CY Revenue	CY Revenue per Donor	CY Gifts per Donor	% of CY Donors	% of CY Revenue
Mail	91	$15,962	$118	1.15	10%	11%
Paid Caller	230	$14,687	$67	1.06	22%	13%
Volunteer Caller	24	$977	$41	2.08	4%	3%
Peer Solicitation						
Staff Solicitation	7	$8,550	$2,006	1.05	1%	12%
Web / Digital	206	$15,623	$83	1.10	23%	18%
Events	55	$5,469	$100	1.10	8%	7%
Publications	3	$250	$100	1.00	0%	0%
Memorial / Honoraria	4	$863	$166	1.06	1%	1%
White Mail / Phone	62	$5,546	$266	1.11	6%	13%
Other	67	$6,954	$163	1.17	11%	9%

CY = the current year. Percentages add to 100% within each year for each university. Medians will not always add to 100%.

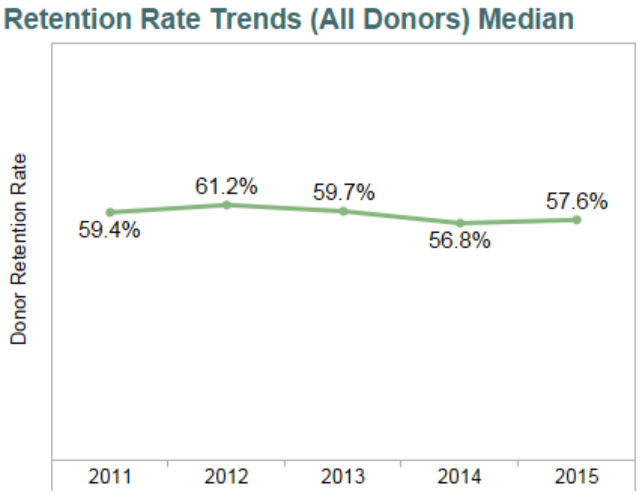
Distribution of Retained Donors by Source

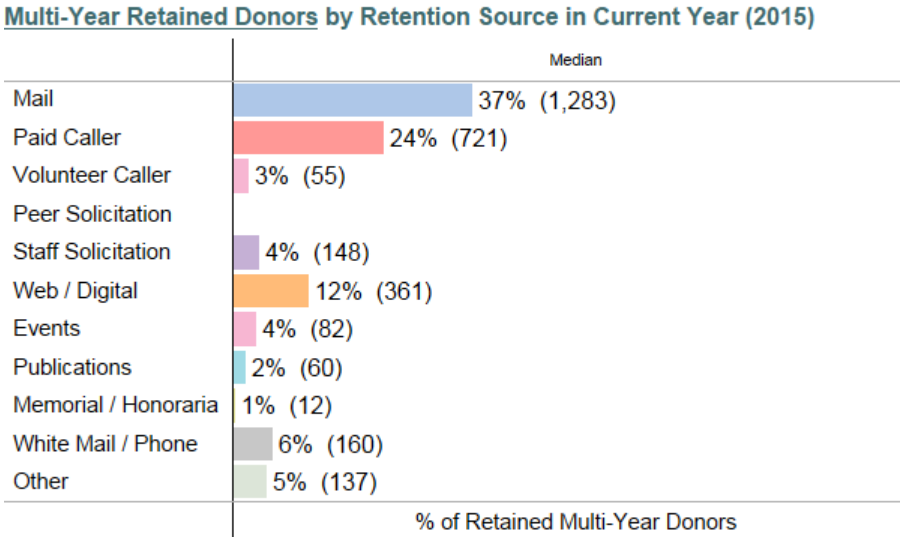




PY = the prior year of giving. CY = the current year. Includes only donors who were new in the prior year and who were retained in the current year. The number of donors appears in parentheses after the donor percentage. Medians will not always add up to 100%.

Distribution of Retained Donors by Source

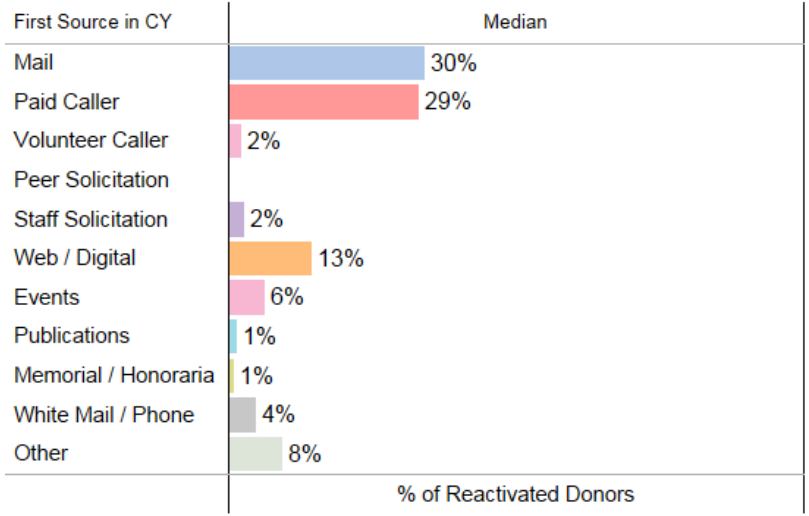




PY = the prior year of giving. CY = the current year. Includes only donors who were new in the prior year and who were retained in the current year. The number of donors appears in parentheses after the donor percentage. Medians will not always add up to 100%.

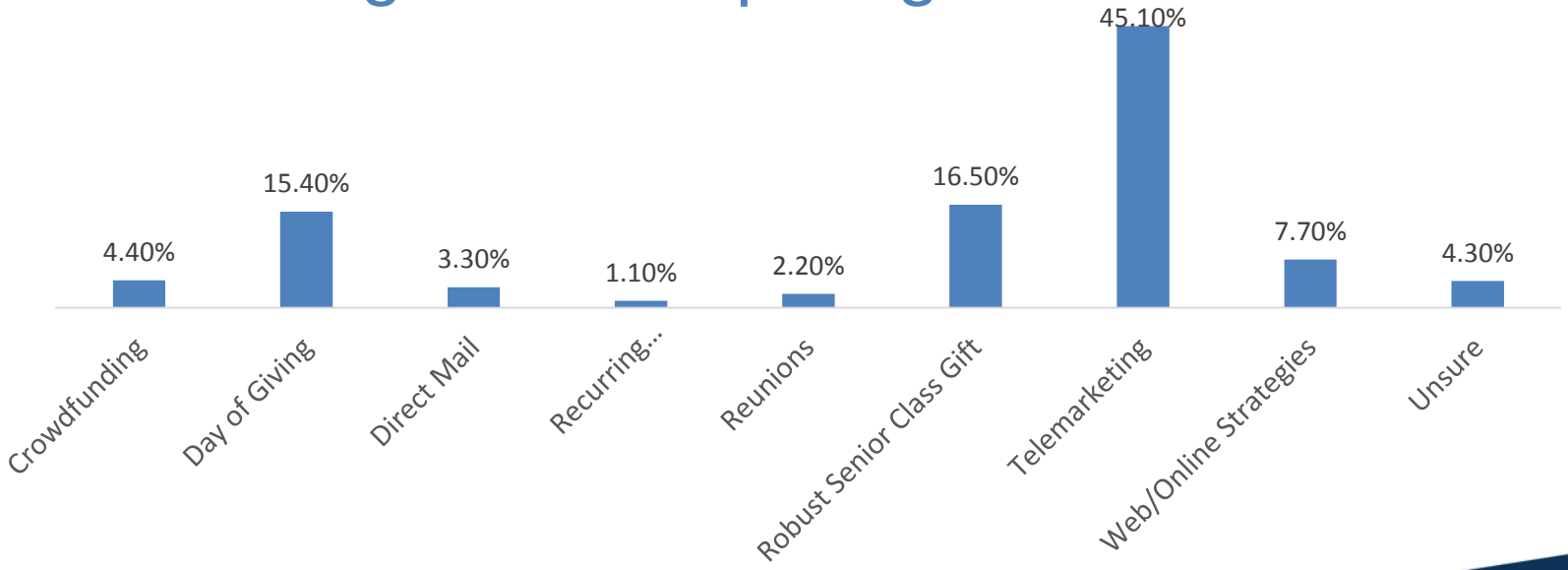
Reactivation by Source

Source of Reactivation Gift in the Current Year (2015)



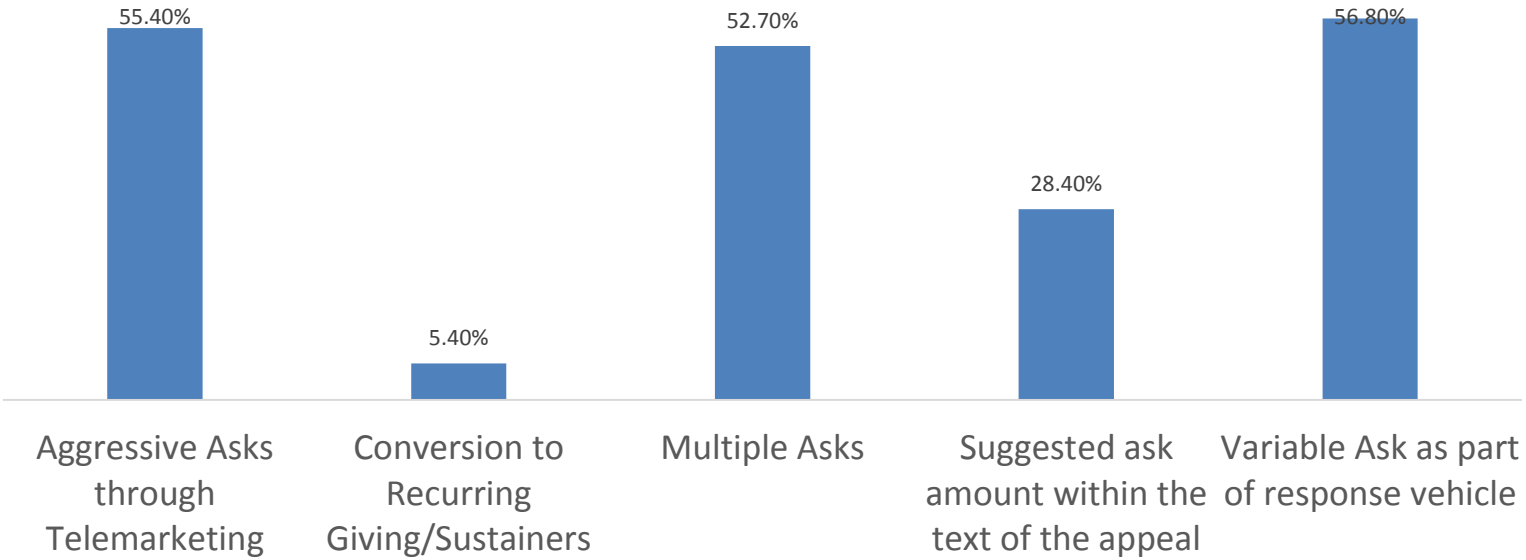
Distribution of all reactivation gifts.

Self Reported Data: What are your two most effective strategies for acquiring donors?



Source: Poll of 91 donorCentrics Customers in Spring 2016

Self Reported Data: What are your two best strategies for upgrading donors?



Source: Poll of 91 donorCentrics Customers in Spring 2016

Self Reported Data: Paid Caller System

	Responses
Do you use student callers, a telemarketing vendor, or both?	Student Callers – 5 Reponses Both – 4 Responses
How many days/nights of calling do you hold per year?	Range: 96-280 Median:186
What was your pledge rate last FY (pledges/contacts)?	Range 22-50% Median:25%
What was your fulfillment rate last FY (fulfilled pledges/pledges)?	Range: 63-81% Median: 69%
If you use an automated telemarketing system, which vendor do you use?	RNL - 7 Responses Campus Call – 1 Response
Do you manage your telemarketing program in-house, or is it managed by an outside vendor? If an outside vendor, which one do you use?	In House - 4 Responses RNL - 3 Responses Wilson Bennet - 1 Response Campus Call – 1 Response

Source: Self Reported answers from participating donorCentrics™ Faith-Based institutions

Marquette Telemarketing

- Automated, user of CampusCall software
- Utilize our own student callers and student managers
- One full time professional staff member, as well as substantial use of analytics staff member
- Call approximately 40 weeks each year
- Six shifts each week
- Up to 30 callers per shift

Summer 2015

- Really saw a drop in fulfillment revenue, while at the same time, saw an increase in credit card revenue
- Pledge fulfillment was as high as 81% (FY 2010) but had dropped to 64% in FY 2014 and FY 2015
- Some pools had less than 50% fulfillment (Non-Donors, Young Alumni, Long-Lapsed Donors)

Fall 2015

- Decided to move to only accepting credit card gifts for certain pools
  - Non-Donors, Long-Lapsed and Young Alumni – about 40% of our calling universe
- Adjusted training to continue to re-emphasize how to “close” with a credit card
- Results:
  - “Realized” dollars actually up slightly in Credit Card-only pools
  - Overall credit card giving up sharply, even in pools not designated as Credit Card-only

Spring 2016

- Still disappointed with a decline in fulfillment for the remaining pools
- Decided to accelerate fulfillment from next day, 30, 60, 90 to next day, 15, 30, 45, 60
- Accelerated Phonathon write offs from one year to ½ year
- Results
  - Fulfillment up about 11% overall to 75%
  - Continued increase in overall credit card rate – now 38% of gifts (24% in Spring FY 2014)
  - Time and money spent on fulfillment down sharply
  - Direct mail results up – write-offs move constituents back into mailings and e-solicitations faster
  - Giving rates in Credit Card-only pools continue to rise – well above expectations

Summer/Fall 2017

- Removing “repeat incomplete” records
- Training changes to emphasize smaller training classes with more personal attention
- Tracking individual caller success with credit card giving and other factors

Other Perspectives

SAINT LOUIS UNIVERSITY™

Using Phonathon calls to increase response rates to the recent graduate survey (were reimbursed for this work)

- Use Phonathon callers to set appointments for annual giving officers
- Outsource non-donor pools; moving those who make a gift back in-house

SJU

Other perspectives

OSU
Oregon State
UNIVERSITY

FY15 was Best year Ever for Phonathon:

- Switched from one 3-hour shift to two 2-hour shifts
- Called 4-6 and 7-9 (1-3 and 4-6 on Sunday)
- Students call straight through for 2 hours then get a 1 hour break.
- Saw an increase in contacts and increase in revenue.
- Runs Sunday through Thursday.

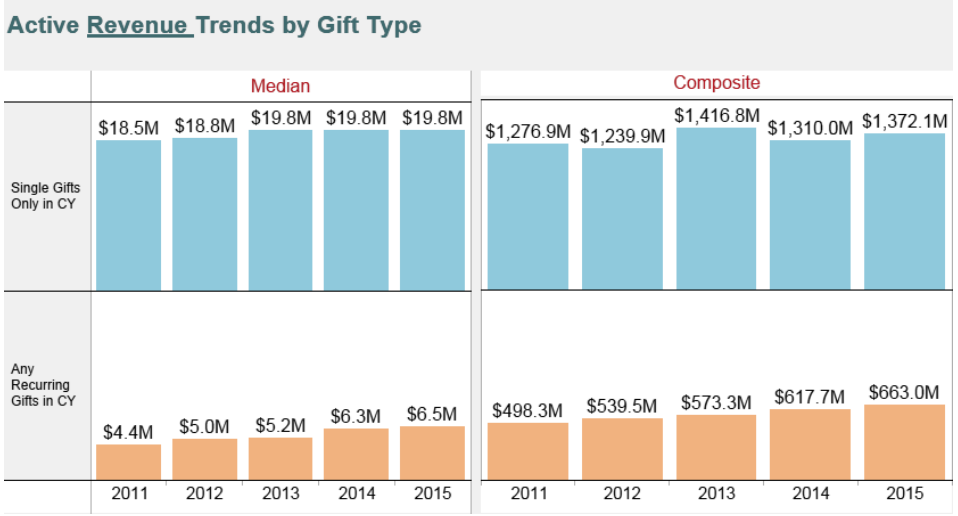
Using the Phone for Recurring Giving:

- 13% of all donors are sustainers (430)
- Focus primarily on acquisition on the phone
- Also upgrading from Advancement services (credit card expirations)
- Become a monthly donor “just like your public radio station”

HUMBOLDT
STATE UNIVERSITY

APPENDIX
TRENDS IN RECURRING GIVING

Trends in Recurring Giving
(data from Outside Higher Education)

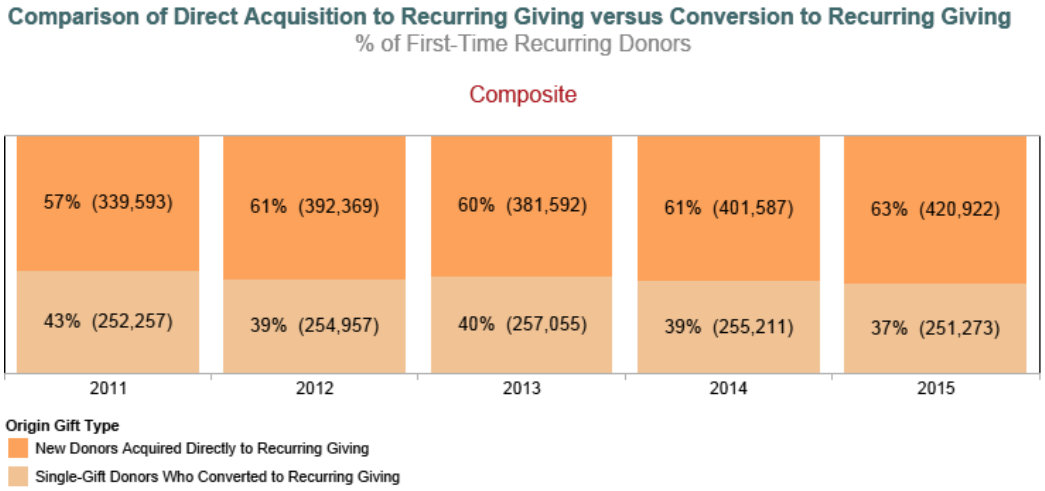


Revenue from **single gift only donors** fluctuated year-over-year, but was up 4.7% in 2015 compared to 2014. Revenue from donors giving **any recurring gifts** increased 7% compared to 2014 and increased 33% since 2011.

Figures are based on data from 37 non- Higher Education organizations participating in donorCentrics™ with sustaining giving programs

Growing Sustainer Populations

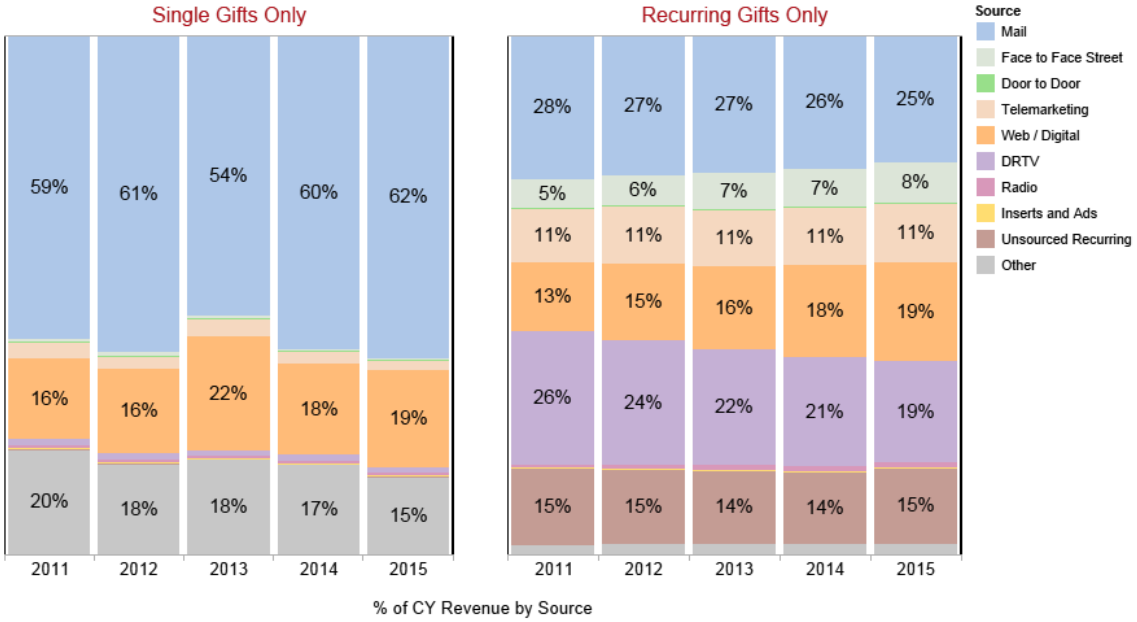
Direct acquisition to recurring giving grew steadily since 2011 – 63% of first-time recurring donors were direct acquired to recurring giving in 2015.



Figures are based on data from 37 non- Higher Education organizations participating in donorCentrics™ with sustaining giving programs

Sustaining Giving (non Higher Education)

Composite Trend in Percent of Revenue by Gift Type and Source



Figures are based on data from 37 non- Higher Education organizations participating in donorCentrics™ with sustaining giving programs

MARQUETTE
UNIVERSITY

BE THE DIFFERENCE.