

CASE Annual Meeting of Donor Relations Professionals

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Re-imagining Gift Clubs

We are often quick to establish giving societies in order to honor donors for their generosity. Yet gold-plated, star-studded, benefit-laden gift clubs often become management nightmares. In this workshop, we'll look at some ways to use gift clubs to cultivate as well as recognize donors, and discuss how we can move away from a benefits model to an engage-and-communicate model for donors. Bring your examples of gift club successes as well as challenges.

Re-imagining Gift Clubs

Give regularly
Give in usable ways
Give to priorities
Give to capacity
Feel recognized
Agree to participate
Spread the message
Bring others along

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STRATEGIC DIRECTIONS FOR ADVANCEMENT SERVICES

A matrix of gifts and donor behavior

Re-imagining Gift Clubs

<i>Status</i>	<i>Descriptors</i>	<i>Behaviors</i>	<i>Goal</i>	<i>Recognition</i>
Integrating	5 percent of donors; 80 percent of giving	<i>All behaviors</i>	Reward; reinforce commitment; extend feeling to others; build affiliation	Naming ops; board membership; prez visits; special duties; committees; ackn; listings
Engaging	10 percent of donors; 10 percent of giving	<i>Gives often to priorities; feels recognized; participates; message brings others along</i>	Reward; reinforce commitment; engage in the life of the institution; build affiliation	Group visits; participation in events; select publications; use of institution; committees; ackn; listings
Connecting	15 percent of donors; 7 percent of giving	<i>Gives often to priorities Feels recognized Participates</i>	Strengthen connection; raise sights; build affiliation	Group visits; select publications; ackn; listings
Responding	20 percent of donors; 2 percent of giving	<i>Gives intermittently to priorities Feels recognized</i>	Strengthen connection; build continuity of giving	Ackn; annual report; select publications; phone calls; visits
Organizing	50 percent of donors; 1 percent of giving	<i>Gives once in a while</i>	Make connection	Reinforce institutional values; ackn; annual report

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STRATEGIC DIRECTIONS FOR ADVANCEMENT SERVICES

Using gift clubs to recognize and manage donor behavior

Re-imagining Gift Clubs

<i>Status</i>	<i>Descriptors</i>	<i>Gift Club</i>	<i>Goal</i>	<i>Type of program</i>
Integrating	5 percent of donors; 80 percent of giving	<i>Highest Donor Club</i> <i>Benefactor Club</i>	Continue giving at all levels and by all means	Board membership Campaign leader Event host Subject of articles Solicitation volunteer
Engaging	10 percent of donors; 10 percent of giving	<i>Planned Giving Club</i> <i>Annual Fund Club</i>	Encourage bequest intention Advance annual giving	Invitation A-list Annual Fund vol Host regional events Annual visit
Connecting	15 percent of donors; 7 percent of giving	<i>Annual Fund Club</i>	Encourage increasing annual giving	Special AF ackn Stew calls from AF vol Annual visit with vol
Responding	20 percent of donors; 2 percent of giving	<i>Annual Fund Club</i>	Encourage participation	Special AF ackn Stew calls from AF vol
Organizing	50 percent of donors; 1 percent of giving	<i>Annual Fund Club</i>	Encourage annual participation	Direct phone and mail appeals Special contact

Re-imagining Gift Clubs

Assessing Your Gift Club Program

- Are gift clubs part of the communications strategy, with an emphasis on message delivery and a focus on donor recognition for philanthropy?
- Are gift clubs constructed against a five-year giving pyramid?
- Are they flexible, renewable every five years; redesigned with campaigns?
- Are they focused on a particular type of giving in order to promote that way of giving—major gifts, annual fund, planned giving?
- Are gift club categories used to promote giving at the next highest level?
- Is there a special effort to use membership to recognize planned gift donors?
- Is there a dollar goal set for the gift club donors?
- Is the success of the gift clubs measured in terms of the cost per dollar raised and the extent to which the gift clubs promote the overall fundraising goal for the development office?

Re-imagining Gift Clubs

How do you get from the chart to the club?

- *Begin with a review of your own data* →
 - What are the levels of giving (gift pyramid)?
 - What are the particular problems you face?
 - Low participation
 - Low dollar amounts
 - No upward momentum
 - Undeveloped planned giving program
 - Absence of higher level recognition
- *Develop gift clubs around your cycle of fundraising* →
 - Is there a campaign in the near future?
 - A short-term opportunity
 - Something significant as recognition
 - “Offer ends. . .”
- *Two clubs to invest in* →
 - Current-use, unrestricted giving
 - To spread the message
 - To inculcate the value of giving
 - To regularize stewardship
 - Planned giving
 - To recognize the living
 - To encourage other giving

Re-imagining Gift Clubs

Managing gift clubs

- *Things to avoid* →
 - Gift clubs from hell
 - Complex rules
 - Extensive, extravagant benefits
 - No variability; static
- *Things to try* →
 - Gift clubs that serve
 - You give, you get
 - Cafeteria benefits
 - Bring them home again
 - Create serendipity
- *Rules of engagement* →
 - Get buy-in from the highest level
 - Managing gift club program is a good idea
 - Assist fundraisers in using gift clubs
 - Avoid one size fits all

Re-imagining Gift Clubs

In conclusion

- *Measure results and act accordingly* →
 - Quarterly and annual numbers
 - Survey donors on **outcome**, not output
 - Be bold in adjusting program for success
 - Jettison what doesn't work
- *Provide adequate management* →
 - Manager of gift clubs? Or director of donor relations?
 - Responsibility and accountability
- *What about those trinkets and benefits* →
 - Serendipity
 - Flexibility
 - Reinforce the message
 - Will the donor "pay" for the premium as demonstrated by the size of next year's gift?
- *Some things to consider* →
 - The gift club IS the annual fund program
 - A beginning, a middle, an end
 - Article that makes the case
 - Direct appeal, phone appeal, personal visits
 - Acknowledgment and correspondence
 - A mini-annual report
 - Publish the results, the growing statistics