



# DRIVING PARTICIPATION

WITH BETH BRODOVSKY

## SESSION 143

### THINK SMALL: EXPERIMENTS IN PERSONALIZATION

WITH DREXEL'S IVY LANE, LIANA NATHAN AND LIZZ MILLER

**BETH:** Hello, this is Beth Brodovsky, and welcome to Driving Participation. Today I am excited to be on site down at Drexel University to do an in-person podcast recording with the team from the Drexel Fund. They are Drexel's annual giving team and I met Ivy Lane at a local association of fundraising professionals event and just knew I had to get this group on the show to talk about some of the interesting things they're doing. They've been doing some really unique things with some testing and taking some unique risks that I think are hard for a lot of people to take. So today I'm here with Ivy Lane, Liana Nathan and Lizz Miller from the annual giving team at Drexel. Thanks, everybody, for joining me.

**A:** Thanks for having us, Beth.

**BETH:** So I'm thrilled to be here today. So I always like to start off by asking everybody how they ended up wandering into this work. This isn't like the, "I'm gonna major in the nonprofit communications world," necessarily, but it is starting to change a little bit. So I'm curious about how you guys ended up doing this. Ivy, why don't you start?

**IVY:** I'll kick it off. So I was a public relations major in college and applied for my first job that I thought was marketing and turned out to be a fundraising job, and I was all right with it, so I stayed with it. It's been interesting and a lot of fun.

**BETH:** So all of you that are looking to hire people, just call the job "marketing," and you'll sneak them in under the radar. How about you, Lizz?

**LIZZ:** I actually went to Drexel and did two co-ops with our office. So I did know in college that I wanted to get into fundraising and when I started I was doing front line and I kind of wandered into a programming role in the absence of a





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colleague who moved to a different school, and I loved it. So I've been doing this work with the Drexel Fund ever since.

**BETH:** I think that's such an interesting thing. When I interview people who are my age, you know, it's like nobody knew they wanted to do it or that it even was a thing to do, but you guys now see it in the world and think, "Yeah, that's a direction that I'd like," and that you can take the opportunity to take the next step right even while you're in school. It's really fascinating to me.

**LIZZ:** Agreed, agreed. I feel really lucky that Drexel wanted to have co-op students, because I don't think I knew that Drexel needed to fundraise when I was 18, and I knew when I was 19, and I started working with institutional advancement.

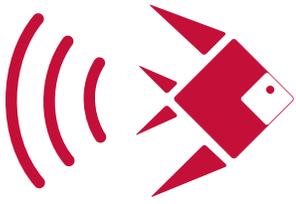
**BETH:** It's very meta. Like a co-op school that has a co-op at the school. How about you, Liana?

**LIANA:** So mine is very similar. I went here, and I did two of my co-ops, actually in the College of Engineering and after that I knew I wanted to work for Drexel. I didn't know necessarily where, but my major was political science in school. So nothing like that, but I knew I wanted to kind of work in nonprofit eventually in my life, and this job opened up and I was like "Well, why not? This is a first great step to seeing where that will take me," and I think that every nonprofit needs a fundraiser.

**BETH:** Absolutely and I love that. It's one of the great things that colleges I think have the opportunity to do because you've got students and people here. So in the work that you're doing, I always like to ask about this idea of participation. What does that word mean to you as you're trying to execute the things that you need to do across your jobs?

**A:** So in higher ed fundraising and annual funds specifically, participation means the very exact thing. It's a metric that US News and World Report uses to judge





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universities and rank them so it's basically like the percent of our alumni that are making a gift each fiscal year, but I think that in the way that we're approaching our program, participation means something a little bit more meta, like we look at people who are involved to volunteer, to attend events and who make gifts as our participants in the like greater alumni relations and fundraising paradigm.

**BETH:** Yeah, I think it's so interesting that out of all the people I talk to you actually are in a world where there is a literal definition of what participation means, and it's a really important definition because it contributes to the overall ranking of the university, but I love the fact that you're not just like kind of checking the box of that and thinking that's enough. And so how is it showing up? What are you guys starting to see by focusing on it the way you've chosen to focus on it?

**A:** So as a university, we're starting to look at a metric called AEI, which is basically ...

**BETH:** Say that again.

**A:** AEI

**BETH:** AEI, got it.

**A:** An alumni engagement index, which is something that is picking up a little bit of momentum nationally, but it's really taking the things we just talked about and making them part of a mathematical calculation. So how many of the alumni volunteer? How many of them attend events? And how many of them give? The distinct total of that compared to the alumni population is really like what does engagement at your university look like within the alumni and that sort of opens the door for us to approach fundraising from that perspective. That we're not just going after the people who make gifts every year. We're looking at like OK, who is self-identifying. Do they want to be involved in a different way or that this is important to them.





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**BETH:** I love that. It's like it gives you a benchmark that you can look at and it makes things so much more holistic than just somebody that at a distance writes a check. Do they come back? Do they, you know, send their kids there? You know, do they do the kind of things that are important to you to really thrive? So do you see that when people are giving and showing up at events, is there a difference?

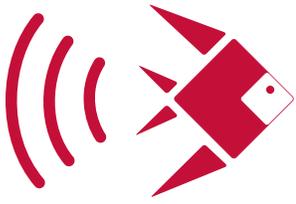
**A:** So statistically there is. People who volunteer and people who attend events are both more likely to make gifts and more likely to make bigger gifts and to continue that pattern.

**BETH:** Right, exactly. I was gonna ask you if the longevity was a factor. When it comes to the communications that you guys do, what would you say is broken in the way that a lot of people handle communicating with their alumni?

**A:** I would say that people like our team, if we were handling our communications based on what we want to hear or what we think our alumni wants to hear, we'd be doing a bad job, and we've been transitioning lately to what is the voice that resonates with different groups of people. How do we meet people at their level? How do we talk to them like we understand the position that they're in in their lives to the best of our ability knowing that we're talking to thousands of people and don't know them individually? So we have been taking time in the last year, year and a half, to really be targeted and smart about our messaging and kind of more casual and informal. I think that universities sometimes have a really institutional way of speaking, which is OK, however, we're talking to real people and we're asking them to do a thing that maybe isn't the first thing they want to do, and so talking to them in a way that's really institutional has not been the most successful way for us to reach them, and I think we see more success when we take kind of a casual, friendly voice in messaging.

**A:** I would also like to go off on that. I think something that is broken in many universities is that is the messaging, especially to their recent grad population. That's a population that we really want to capture because those are going





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to be our long-term alum that are going to give back. We want them to start giving back now and I think that's something we've all tried. We've all tried to don't want to say like have a modern voice, but really appeal to like the younger populations.

**A:** My team reminds me almost every day that if we only did appeals that I thought were cool we would have no donors.

**BETH:** I think that's raising a really important point because this happens all the time, is that people sit in a conference room like this, talk to each other and go, "I'm reading that. That sounds good." When we do communications for people, typically we're writing something, designing something, the team looks at it, approves it and it goes out and it either works or it doesn't. It's so hard to take yourself out of it, and remember that you're not your audience.

**A:** Yeah. A couple of months ago, so I work specifically with recent grads and students so my focus is on messaging that resonates with people who in general are younger, and I printed a ton of samples from other universities, and I went through and I started highlighting things that sounded good to me and crossing out things that sounded bad to me, and then I asked my friend who graduated last year, but doesn't work in our fundraising office to go through the samples and do the same, and I worked with, after that I worked with our copy editor to start developing a voice based on what things sound good, what things don't, but I think bringing somebody who is not me and who is not on our team was important. She's the true audience. She doesn't work in our office. She's gonna receive the things we send out, and getting her feedback on what she thinks makes sense and what sounds good and sounds genuine was a good way to approach and kind of hone in on how do we want to sound.

**BETH:** Right.

**A:** Lizz has also done some cool testing with email subject lines with our students.





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What makes people open an email and then you know if we jack up that open rate, are we being clear about the action?

**A:** Yeah, so we do solicit our students a few times a year. Our seniors we solicit more for the senior class gift, but all students receive at least two solicitations throughout the year. So one of them this fall was for a project we do called the Turkey Project. It's an alumni project at Drexel where we raise money to purchase turkeys, and we distribute them to families in our West Philadelphia community for the holidays. So we ask our students to contribute to that project and what I did was I took our student population, I cut it down the middle and I sent half of them an email where the subject line was vague. It was something along the lines of, "Be a hero today. Make a difference," and then the other line was direct. It said "Give \$5 to help feed a family," and or "Give \$10." I forget exactly the amount asked.

**BETH:** It was something very tangible and specific.

**A:** What I was going to ask them in the email was laid out directly in the subject line and it was interesting because the open rate was higher on the vague ones so more people opened that one. More people gave on the other one.

**BETH:** And I think that's such an important thing to mention, because everyone can get really focused on, "Well, this had a higher open rate," and like what you really want to know is what had the higher close rate. Like you got to look at that ending point and what actually generated it because if you can track, especially since you guys are all data people. Like if you start tracking and you just look at the beginning of things, you can really get a wrong answer.

**A:** Yeah and it's been helpful for me because I do sometimes have different end goals when I'm emailing students or messaging to students. Sometimes I'm going to ask them to participate in giving, and sometimes I just want them to open it and learn about ...





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**BETH:** Right, because there's definitely a lot of value in getting them to take intermediate action. Like just get them doing something or get them used to opening your stuff, but if you do everything like that, then that's all you're gonna get.

**A:** So that's a good example of the grand scale approach that we take to it, is we're trying to be really targeted about the outcome so we want any actions we can take to make those happen.

**BETH:** The other question that I have to ask is you guys are making a lot of changes here. I've heard people when we've talked about things like testing or splitting a list down the middle and half go this way and half go that way, a lot of people's immediate reaction was, "Well, basically what if you're killing 50 percent of our potential gifts that we could be getting?" How are you guys working with the management here to build trust and communicate what you're doing and make your choices?

**A:** So I have to say that we are so fortunate in that we have really awesome leadership that are smart and that agree with us that if we just continue to do what we've always done, we will continue to see declining results, which is what a lot of universities across the country are looking at in alumni participation trends. So you know, we have championed calculated risks, and I think that we're all like a little bit nerdy and cautious in that, but we've been really open about our outcomes and about what we want to do and about the results. So you know, there is always the risk in testing that you know you cannibalize the pool. We've been I think pretty smart about taking small test groups to split an A/B thing, seeing what works and then implementing that en masse and I think that's something that a lot of people get nervous about, but we haven't seen any terrible results.

**BETH:** because what Lizz talked about was an email where you split it down the middle and 50/50, but that's just an email.





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I think it's important to talk to people about that, an alternative way to do it that does really help manage risk. It is to send out a small search party you know kind of and see what works best from that rather than like taking it to your annual fund mailing. You're putting it in the mail, you can't take it back once it's out, 50/50 each way. That can be terrifying to a lot of people.

**A:** Yeah, we have the advantage though that in fundraising world, there are not a lot of things that work 100 percent of the time.

**BETH:** Can you say that again so that people recognize that?

**A:** I'm trying to be nice about it and there's really nothing that works 100 percent of the time, and we'd be having really amazing results if there was and we would not be likely to split them into a test group and not do them. So we're usually you know splitting it in a way that we're not at risk of losing half of our potential donors by making this decision and the only thing that we really are risking, it's not even a risk, it's a possibility of gaining more information that makes the next decision easier to make.

**BETH:** And I think that's a key mindset difference in what you're doing. It's so easy because it's like, "Wow, we need this money to survive," and go to make your decisions from a fear of loss as opposed to an opportunity to win and change and it's scary. So how are you guys doing it when you're saying, "Hey, let's test this"? How are you guys kind of showing up your own guts to say, "I think this is a good thing to test"? How do you decide what is a risk worth taking?

**A:** So we look a lot at what's been working well. So you mentioned like you know sort of pulling the plug on big fund mailings. That is a thing that we've done. So we sort of looked at the things that the Drexel Fund had been doing when we became a team and what worked well, and I think what Lizz said is dead on. Nothing is 100 percent, but there are some really successful things I think in most parts of actions of any university. So you know, we're sending a fall appeal letter.





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Obviously nowhere near 100 percent response rate, but there are sections that perform much better than the others. So if we look at the last five years of data and we see that people who graduated before 1985 and who never made a gift are not responding, then let's not. Let's send it to the other people and let's take that money and let's do something smarter and different with it. So we spend a lot of time talking to other schools about what they're doing that's cool and about running with ideas. We did a lot of conferences. We try to steal the best ideas. We're fortunate to have a super and creative team who come up with cool things to try that are formulated plans.

**BETH:** So tell me about some of the things that you've tried.

**A:** Let's go with what we're about to do.

**A:** Go with your heart appeal.

**A:** Very lucky I have a boss who hears my weird ideas and says, "All right, that could be cool," and so I love Rubik's Cubes. I love solving Rubik's Cubes. I am you know self-proclaimed and very proud to be a little nerdy and I kind of think that's an identity a lot of Drexel alumni.

**BETH:** There's one of the advantages of being a graduate of this program. It's one version I'm seeing here.

**A:** And it's the highest compliment. It's not meant to be a negative thing, but I thought why don't we instead of dancing around that, why don't we embrace that and why don't we stick a Rubik's Cube on an appeal and make it a puzzle and make the appeal interactive so that you can solve things within the appeal and the message still comes across. So that's apparently in production because my boss said yes! We will be mailing essentially a puzzle to a couple thousand, probably about 4,000 alumni. We're gonna be smart about it. It's fun.

**A:** Then the important part of that is so that idea would never be a great idea for





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all Drexel alumni, but you know, when we think about it and we tossed it around in here so that appeal goes to people like Lizz and, quite frankly, like me, and like Liana, too. So let's find those people. Let's find people who graduated recently. Let's find people who only made a gift for one thing that was a little bit weird. Let's find people who had degrees where that is likely what they're interested in and then let's take a thousand people that doesn't fit those categories, and let's see if we're right about what we think about who would respond to that. So let's grab you know some arts graduates and let's grab some theater people and let's see if the thing that is different appeals to only people we think or to more.

**A:** I think a lot of what we do is sit in this room and throw around ideas for like what populations are in need for what and what different populations we can appeal to and I think this is exactly where that appeal came from.

**BETH:** I think that's such a unique approach. Especially when you have, how many graduates do you have to communicate with?

**A:** One hundred thirty-three thousand!

**BETH:** So 133,000! I think that's sort of the easy thing to do is think, "Oh my gosh! I've got so many people to communicate with, let me just create big things and push them out and get it out there because it's such a big number," but the reality is somebody, like I have friends that are my age that graduated in the 80s from here, and they're so different than my son who just graduated just three years ago from here. They're different kinds of people. The school was a different school 20-30 years ago and to not look at that pool as one giant you know mosh pit of just, "Well, let's try to come up with something," because you end up with something that's so unique and generic that that's what a lot of times a lot of communications looks like when it comes to "Give us money because we need it to be better," and a lot of times what I really see in a lot of university fundraising is "Give us money to maintain the reputation of this school so that it increases your value and the value of your degree," and I'm always curious about why do





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schools just kind of rely on that? Like that's such, obviously it's almost like a fear tactic. Give us money so your degree isn't devalued 20 years from now. What do you guys feel about that? I'm sure that the whole philosophy like you've heard of it.

**A:** I imagine that I did front line for my first two years here at Drexel after school and so I had the opportunity to meet in person and have conversations with hundreds of young alumni, which I feel really helped me learn the kind of messaging that resonates, and, quite frankly, the idea that participating in giving has the opportunity to increase the value of a degree does resonate with people when earlier messages of this is important to our school because it helps students thrive, it helps us have better programs. When those messages don't resonate, sometimes you know the idea of increasing the degree does resonate. So I don't like that being the first. You know the fall-back message, but I don't think it's a bad idea to have multiple messages that we're willing to move to if the first one doesn't work. So I'm not opposed to sharing because it's true that participating and giving increases the value of a Drexel degree, but I don't think that should be our fall-back, but I also don't think we should eliminate it from our messaging.

**BETH:** And I think that's a really good perspective to share.

**A:** I run our phone program here at Drexel and when we ask, they're supposed to have three asks and that's usually the last ask that we do so obviously it's not the very first thing we want you to be giving for, but it is definitely in there, and I think it should stay because obviously when you go here and you are a Drexel grad, you want your degree to mean more in ten years than it does now.

**BETH:** Right. So when you guys first started doing this, you told me about a program you're about to do. Can you tell me about some of the early ones that you did and like some of the ideas that you had that have already shown that they worked?





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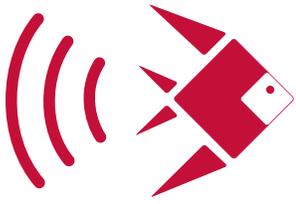
**A:** So I think the very first thing we did is look at where the gap is. So when I started a year and a half ago, I took a big look at the budget, at where we're spending money and what was successful and sort of where we needed to improve things to get to where we're going. So the first thing that stood out was that our retention rate isn't where it should have been. So we were either not making a good enough case to our donors that they come back every year, but our three-year retention wasn't so bad. So people are making a gift once every three or four years, but not every year. That's our fault. That means that we're not doing something right there. We need to invest a little bit more money in retention, and, quite frankly, when I looked at our appeals, they weren't very personalized. So a first step was to demonstrate to our population of donors or recent donors that like we know who you are, we know what you support, and we're gonna offer you more things to support that are similar to what you're supporting. So we sort of cut the approach that every fall we ask for unrestricted, every spring we ask for school/college and we decided every time we ask we're gonna do our best to ask you for the things you demonstrated caring about. So if we see that you played a sport, we'll ask you for that every time, and if we see that you were in the Rubik's Cube Club, we'll throw that in, and we know you graduated from business school and that you support the turkey project so we're just gonna ask you for those four things, and maybe we'll do some things that are a variant on that, but we're gonna demonstrate every time that we know what you've given to in the past and the gift band that you're in and we're gonna make reasonable asks to the things that you care about.

**BETH:** Wow! I mean it's such a great approach, and I'm seeing that there's three of you sitting here in this room. There's a big difference between sending four big 130-piece mailings a year and doing lots of little customized pieces. How are you guys managing it?

**A:** Well, we've gotten really, really good at Excel and Access.

**BETH:** OK, I mean like obviously from an emotional support, but I'm sure there are





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people listening going, “This all sounds great, but it’s just me,” or “It’s just the two of us.” What advice can you give people if you’re switching from like some people are even doing just one big, like one big here’s my year end annual giving. That means once a year. Right. One big ask or maybe two to switch from that to doing lots of little things. What are some tips you can give people as far as how to make that switch and keep track of everything?

I think one thing that I even learned yesterday and it worked for us in our calendar year end is mail merges on email. It’s really quick, it’s free and you can personalize them and when you respond, it can go right to you. They feel that they are getting a personal email, like you’re taking your personal time to reach out to this person and it goes a long way.

**BETH:** And what tools are you, are you guys on Blackbaud systems or what are you guys doing that with?

**A:** We are using a system which is specifically for higher end fundraising. Quite honestly, most of the data manipulation we’re doing is in Microsoft Office. So we use Excel and Access for everything. We don’t have any like super fast or super like expensive secret tricks up our sleeve. There’s a lot you can do in Access, and I think everyone on this team is happy to share that information with anyone who is interested in learning more, but when you’re talking about taking one appeal, like if you’re talking about pre-populating ask amounts and different designations in an appeal, and it doesn’t matter if you’re working at a theater or the SPCA or a religious group, when you set that up one time, like that’s something that’s easily repeatable. So you can look at somebody’s last gift and set up an equation like your last gift is \$100. Ask one is gonna be a 20 percent increase, ask two is a 50 percent increase, ask three is a 300 percent increase and that’s an equation you can drag through an Excel file, and so now your asks are done, and we do a similar thing with allocations. So if you say like for everyone, you know an if/then statement in Excel and if you’re last gift was to the business school, then your second gift, your second allocation will be a business scholarship. You know, you





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drag that down so that I think the hardest part is getting your mind around the process that needs to occur, but it's not actually terribly hard to do.

**BETH:** OK, and how are you keeping track of like sort of all the different pieces, so one thing is keeping track of who is giving, but you also have a lot of moving parts. You know, you've got to deal with what's at the printer and what's the next thing that's coming. What sort of project management stuff are you doing that's helping with any of this?

**A:** So on each project we do, one of the three of us takes the lead, and that doesn't mean the other people aren't involved in some way, but there's somebody ...

**BETH:** There's somebody to blame. Got it.

**A:** There's somebody who knows the ins and outs of that project and right now actually, I am the project lead for the affinity appeal that we call it, the one that's going out which involves the puzzles, but we also have some other versions that we're sending and Ivy is working on a different appeal to what could be an overlapping population and so you know we work together by making sure our lists don't cross and it's pretty easy to suppress lists. So just yesterday I sent her my list of here are the 8,000 people I'm planning to put in my appeal and she can make sure that none of those people are also on her appeal. Hers will actually go out before mine, so as a safety net, right before mine drops I will suppress her list against mine, but there's pretty easy ways to make sure that one person isn't hearing from us ten times in a month. So I would say having one of us as the lead, but having all of us in the know about every project is our strongest asset I guess in terms of project management.

**BETH:** Exactly because one factor about being a one-person team is that you know everything and there isn't anything that's gonna get, once you get multiple people, it's both helpful in the extra hands to do the work, but there's so much





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more checking behind each other that often has to happen.

**A:** I would say we communicate really well with each other.

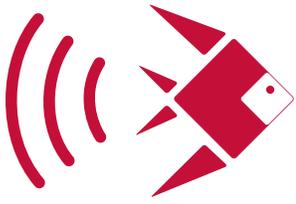
**A:** Together a lot. We're together all the time.

**BETH:** So that leads to the next question. How do you build a team that works well like this?

**IVY:** I'm lucky. So I started and inherited Lizz, who happens to be extraordinarily awesome, and Liana kind of found us, but I guess from a management perspective, like I don't really care a lot about anyone's fundraising knowledge. We're looking for you know, I think what makes our team good is that there are people that are ambitious and naturally curious and who want to do things differently and care about the success of it, so I think we all have a similar approach to do things. We're interested in doing things different and better. We're interested in making smart decisions, not necessarily unnecessary risks, but calculated risks. I think everybody has almost a business approach to it, so like if this appeal that like I'm working on tanks, eh, you know, that's not a thing I did wrong. If Lizz's test group doesn't go well, we don't have to worry about anybody's hurt feelings because we'll take a look at what did perform well within those segments. We'll make a smart decision and we'll do better the next time and I think that environment is what helps it to be successful.

**BETH:** I think what you said is huge. I joke about blame, but that's often the problem with a lot of situations. People are afraid to try new things because they're afraid that they're gonna be held accountable in a negative way for something that's not working as opposed to something not working being information input that goes into the system about you know what works and what doesn't work and I know in some ways cultivating that attitude is a lot easier when there's a budget for a next thing. When you're an organization that doesn't have the budget for something to not work, it's a lot scarier to





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do that, but it's still worthwhile. It's still worth it to cultivate this attitude of experimentation and trying new things.

**A:** I think the impression, I worked in a lot of small nonprofits before coming to higher ed, is that higher ed is in this like budget neutral place so we just grab money from everywhere.

**BETH:** Right. There's no budget. It's unlimited. You've got all the money in the world.

**A:** I worked in a small theater and my dream was to go to higher ed where I'm just rolling in these piles of budget money, and like pay people to do everything, but actually it's worth noting that last year we spent less money than the year before. We actually didn't get a budget increase at all. To do the things we're doing, we re-evaluated where we were spending our money and sort of cut out what we thought was the dead weight and redirected that to things we thought would be more successful. So you know, we probably have a bigger budget than a lot of small nonprofits, but it is still a distinct amount of money and I think with any distinct amount of money you can look at the things you've always done and make smart decisions about what portions of those are performing well and what you could give up without actually losing anything. Like we went from mailing to 133,000 people every year to mailing to 30, maybe 40 in the year, but our amount of donors increased by 5 percent because we were smarter about what we were sending and to who.

**BETH:** Right, and I've made some of those same decisions with small foundations that had their total list was 40,000 and when we looked at who had been giving, it was like 235 people. We cut the list down to 4,000 and ended up raising their money. It's this knee-jerk reaction of like every person needs to be on my list, and every person needs to hear from me because if I don't send it to them, maybe this is gonna be the year that they random generic thing I send them is going to really inspire them, but it doesn't. It's so counterintuitive, but that's the





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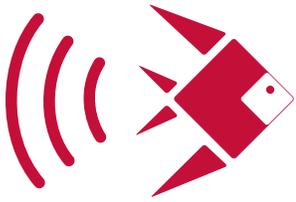
thing. How do we get people from that place of like fear of doing something wrong that's gonna break what they're doing. So I love your idea of saying well we're gonna start with an experiment of taking one, taking a look at your data and what people are doing. I'm a big proponent of looking for, I call it a valuable action. Like looking in your community for first deciding what is a valuable action in your organization and then going and looking for a group of people that have taken that action twice. You know, don't look for the zealots. You don't have to do anything different for that and don't look for the people that have left. You guys just said earlier there was a whole group of people who haven't given in three years so you just like let them go for awhile and then another theory could be I haven't given in three years. Let's set up something crazy because what's it going to hurt?

**A:** So yeah, we went from trying to target I think you know the people who made a gift in 1984 and haven't since aren't a great target, but those people who gave in the last six years are probably people we can get back, and based on how our retention looks, those are people that are statistically likely to give within the next 36 months. So let's start to shorten that gap. Like if I can get you to give every 24 months and then every 12 months, that's us showing that we appreciate their gifts. That's us demonstrating the impact and that's us reaching people in the way they want to be reached for what they want to give to.

**BETH:** I also love your attitude that you don't have to go from like 0-100 in one year, that your goal is get them to give and then maybe get them to give every other year or every third year and then move them down, that you're not looking at like a binary success. They're not giving now and they need to go right to every year givers, otherwise we won't determine this as a success. It's like a long game and I don't hear a lot of people talking about fundraising that way very often.

**A:** It is a long game and we quite honestly didn't hit our goal last year. We had a 9 percent increase in donors, but our goal was a lot higher than that and again. That's where great leadership comes in. They recognize that retrospectively that





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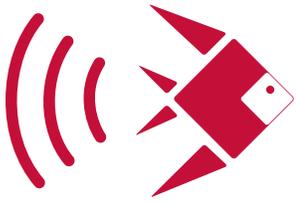
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you know maybe that goal wasn't based on something that was achievable and all of us celebrated our successes and leadership did too, which makes it a good environment to work in and we had a different discussion about this year's goals and what's achievable and you know what kind of progress makes sense.

**BETH:** Right and I think that's so great to have that. I have a lot of value for setting a high goal because if you set your goal at 80 percent, you get maybe 60 percent, but if you set your goal at 40 percent, you might get that 80 percent. So sometimes it's great to have this crazy goal out there, but then when you don't reach it, it can be, to set it up in a way that's not debilitating and it doesn't make you feel like a failure because when you feel that you failed, it's really hard to regroup and come up with these crazy ideas to do some things differently. You know because you think next year maybe I need to reach a little lower and next thing you know, like you've gotten so small again you can't move forward. What's your crazy idea? Do you have any like sort of things that are out on the horizon that you're like I haven't pitched this yet? Like if there wasn't a budget, like if somebody said you can do whatever you want, what are the crazy things you guys would do?

**A:** So OK, along with our puzzle appeal, we are doing some other test groups. So for example, we have a large population of people who have graduated from Drexel with an online degree. So their only interaction with Drexel has been in a digital sense, they haven't spent time on the campus, many of them have only come to campus for commencement and as is, we speak to them within our general alumni population so they get the same kinds of calls and the same kinds of mailings and so one of the test groups we're trying in our field coming up is a group of people whose only degree effort is an online degree and the copy of that appeal is very much written to that experience. So we're talking to them about being Digital Dragons and about being able to achieve your goals anywhere and about giving being a way to help other students get a world-class education from wherever they're at, and so that's going out soon as well. So I think that in a perfect world where time and money weren't a factor, the ability to





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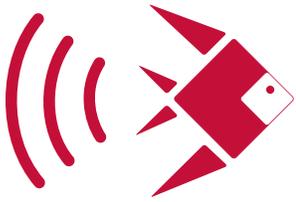
try little segments like that more. You know, I'm lucky that Ivy is supportive when I have these ideas and I want to try new things, but if we truly had no budget and no time, I think we would have those small targeted appeals more often.

**A:** My answer is so much more nerdier. So like, no I support that and agree with that completely, but what I would like us to do and I think we can do for next year is to sort of build the what I call like the Amazon approach to our allocations. So if you gave to something like the business school, what are the things similar to that that we can serve up to you in an automated way. So I see in the past, Beth, that you gave to the turkey project and you care about feeding people in the city of Philadelphia. Did you know that Drexel opened the first pay-what-you-can cafe? I thought that based on your history you would be really interested in this. That takes more time than money. It's like time and brain power that you know we have to put aside.

**BETH:** But time costs money, too, with your internal time.

**A:** Exactly. So I think things like that we can get smarter and a little bit more automated about it. Another thing that we often talked about yesterday is approaching our live population in a different way. So the people who gave last year, the concept of thinking about them different. So within that, there's first-time donors who made their very first action. There's people who have been giving for consecutive years. There's people who made their first gift in two years, people who made their gift in three years. We've talked a lot in stewardship about calling out the action we're happy about. So like starting to send out things like you made your first gift and that's awesome or hey, we noticed that you made your gift in four years. We so appreciate that and seeing if we can get those actions to repeat by mentioning them and then taking a different approach in just the way we talk to our most recent donors to recognize that that bucket of people is not all the same. There's very different segments within the standard like last year donor group that I think everyone wants together.





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**BETH:** So if somebody is listening and says thing sounds awesome. I really want to start taking steps in this direction. What's the best piece of advice that you guys can leave people with so they can get started and beginning to transform their department?

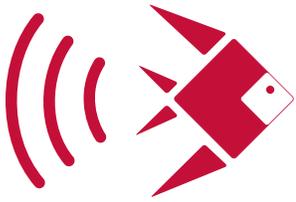
**A:** I would say think of one thing that you can implement, which is personal. So whether it be you know making asks around that reflect an individual's giving history or instead of leaving you know the allocations action open, be specific and targeted in things they've given to before and just pick one area that you can personalize and start there. Sometimes you know, Ivy mentioned we've been to a lot of conferences. Sometimes you hear a thousand great ideas and then you forget to implement them because there's so many good ideas, and so I think picking one place to start and working that into what you're already doing and then build on that as you go. Especially, we're lucky to have three, but if you're a small shop, that is something that would be manageable.

**A:** I think also like realizing what can you manage because again, we go to a lot of conferences and something you guys are doing is not necessarily going to work here at Drexel just because we are a much smaller shop. We're a much smaller alumni base, and it's different. So even if you have an idea and kind of working it to something that might work in your smaller house could make all the difference.

**A:** My advice would be to apply some level of math to like your decision-making, and it doesn't have to be complicated or scary or hard, but take a look at what you think is the most successful thing you do and then you know, take a step back and say why is that successful because once you get that why, that why is the piece that you can repeat in different ways.

**BETH:** Exactly and I am really starting, like data is the ultimate myth buster. It's very easy in organizations for people to say, "Well, this is what works," but like where is that coming from. I mean it's definitely huge in organizations especially that leadership is saying you know we need to do it this way because it works,





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but there's no actual information when you do take the time to go in and track and look at who is performing and what's happening. Like you could really create little magical moments for people.

**A:** Yeah, and I think that there's a ton of information so figuring out what information is the most important for measuring your own success or for helping drive the decisions you make and focusing on those numbers is OK. So, to your point earlier about somebody who has you know 40,000 people and being afraid to stop mailing to all of them even if only 200 of them are only responding, I would encourage somebody in that position to start looking at ROI. What are you spending versus what you're bringing in, and use that piece of information to drive your case, and if you have to defend that to your leadership, you have a way to do it. If you have to defend it to us or whoever, find the piece of information that supports what you're trying to achieve and focus on it and track it over time so that you can go back to it.

**BETH:** This was fabulous. I want to thank you guys all so much for sharing your knowledge and experience with both me and our whole nonprofit community.

**A:** We had a great time.

**A:** Thanks.

**A:** This was fun!

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