



Annual Giving Programs: Maximizing Your Results

**April 5,
2013**



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The Panel

Rick Ericson

University of Oregon
Assistant Director of Annual Giving;
Program Manager “DuckCall”

Julie Hambuchen

Mercy Corps
Sr. Director, Interactive and Direct Marketing

Linda Magee

Chamber Music Northwest
Executive Director (retired)

David Rubin

Legacy Health
Director of Development Services

Moderator

Diane Dickey

University of Portland
Director of Annual Giving



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Comparing our Organizations – most recent FY

Name	# of Staff	Overall budget	AF budget	Total \$ raised	AF \$ raised	Leadership Levels	Total donors
Univ of Oregon	4	Not available /not public	Not available/not public	Not available	\$3.8 M alumni only	\$ 2,500 annual giving	5,525
Mercy Corps	14	\$9 M	\$5 M	\$44 M private revenue \$268 M total	\$16 M	\$ 5K M.G.	138,500
Chamber Music NW	1	\$65,000	Not broken out	\$1.3 M	\$350,000	\$2,500	550
Legacy Health	31	\$3.5 M	Not separate	\$18.7 M	Not separate	\$10K major gift Society Level= \$1K (\$500 at 1 hospital)	6,139 total \$ 1-\$999= 5,365 \$ 1,000 + =
Univ of Portland	19	Not available	Not available	\$18.9 M	\$2.9 M unrestricted gifts and bequests	\$1K President's Club \$10K major gift \$50K endowment	6,086 total Pres. Club 621



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Comparing Our Organizations -Donor Information

Name	Retention /	Reacquisition /	Acquisition/ New Donor	Other donor recognition groups
Univ of Oregon	62.6%	28.5%	8.9%	President's Society = \$2,500+ annual giving;
Mercy Corps	40-60%	4-10%	30,000-90,000 new	Planned Giving
Chamber Music NW	Estimated at 85%			Planned Giving - Nautilus Circle
Legacy Health	In FY 12, of of 6,139 previously	4,047 donors (66%) had made a gift	In FY 12, 2,092 or 34% were new	Society \$1K+annually - individuals only Planned Giving Hour Club (employees give 1 hour of salary)
Univ. of Portland	54.6%	36% (6 yrs)	9.6%	President's Club - \$1,000+ per year; levels at \$2.5K, \$5K, \$10K, \$25K+



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Comparing Our Organizations – Solicitation Methods

	DM persona l	Bulk	Email	Onlin e	Social media	Phone	1:1	Events	Other
Univ Oregon	Y		Y	Y	Not AG	Y paid students	Not now	Not now	
Mercy Corps	Y	Y	Y	Y	Y	Y	MG team		Monthly giving Workplace giving Matching gifts
Chamber Music NW	Y			Y		Some	Some		
Legacy Health	Y	Y	Y	Y	Y	Dis- continued	Y	Y	
Univ Portland	Y		Y	Y	Not yet	Y paid students	Y	Rarely One scholarshi p dinner	6 week faculty-staff annual campaign



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DEFINITIONS OF ANNUAL GIVING/ANNUAL FUND

Univ. Oregon: Gifts to academic programs (non-athletic, non-membership from \$1 to \$25,000 annually

Mercy Corps: Annual Fund: Giving level or giving potential below \$5,000. Major Gift: Giving level or giving potential of \$5,000 and above

Chamber Music NW: “Annual Fund” is all contributions from individual donors of \$50+. Business/foundation support not included in annual giving.

Legacy Health: Any gift that is not directed toward a capital project, so theoretically could be renewed.

Univ Portland: Unrestricted, renewable gifts in any amount for current year use that are budget-relieving, not budget enhancing. Donor may indicate a general area to which s/he wants gift directed but not the use of funds (e.g. Library, School of Nursing, etc.



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**QUESTIONS?
COMMENTS??**

“Share your knowledge.
It is a way to achieve immortality.”

[Dalai Lama XIV](#)



Fundraising is the gentle art of teaching the joy of giving.

– **Hank Rosso**

Donors don't give to institutions. They invest in ideas and people in whom they believe

– **G.T. Smith**

In good times and bad, we know that people give because you meet needs, not because you have needs.

– **Kay Grace**

You make a living by what you get. You make a life by what you give.

– **Winston Churchill**

Life is an echo -- what you send out comes back.

– **Unknown**

There is a wonderful mythical law of nature that the three things we crave most in life -- happiness, freedom, and peace of mind -- are always attained by giving them to someone else.

– **Peyton Conway March**

Complete possession is proved only by giving. All you are unable to give possesses you.

– **Andre Gide**

No person was ever honored for what he received. Honor has been the reward for what he gave.

– **Calvin Coolidge**

I don't know what your destiny will be, but one thing I do know: the only ones among you who will be really happy are those who have sought and found how to serve.

– **Albert Schweitzer**



If you want happiness for an hour, take a nap.
If you want happiness for a day, go fishing.
If you want happiness for a year, inherit a fortune.
If you want happiness for a lifetime, help somebody.

– **Chinese proverb**

Fundraising requires both optimism and realism. Without the first, few if any gift solicitation efforts would be made. Without the second, few if any would succeed.

– **Howard L. Jones**

We should never forget that no Fundraising effort ever succeeds unless one person asks another person for money.

– **Andrew D. Parker Jr.**

Fundraising is not an event; it is a process.

– **Edgar D. Powell**

He who allows his day to pass by without practicing generosity and enjoying life's pleasures is like a blacksmith's bellows -- he breathes but does not live.

– **Sanskrit Proverb**

Be thankful for what you have; you'll end up having more. If you concentrate on what you don't have, you will never, ever have enough.

– **Oprah Winfrey**

Feeling gratitude and not expressing it is like wrapping a gift and not giving it.

– **Unknown**