

# FY11 Telephone Fundraising Report

Presented to:

**West Virginia State University**

Prepared by:

**RuffaloCODY™**

[www.ruffalocody.com](http://www.ruffalocody.com)

65 Kirkwood North Road SW  
Cedar Rapids, Iowa 52404

**Cynthia Arlene Brown**

Vice President and Senior Consultant, Strategic Fundraising Services



RuffaloCODY is proud to partner with CASE  
and its member institutions



RuffaloCODY's staff are proud members of the  
Association of Fundraising Professionals

## Table of Contents

<u>Glossary of Terms</u>	1-3
<u>Project Overview -- Timeline and Data Enhancements</u>	4-7
<u>Project Results</u>	8-11
<u>Project Costs</u>	12-13
<u>Looking Ahead: Recommendations for Future Success</u>	14-15
<u>Client Notes</u>	16
<u>Reports</u>	1-41

## Glossary of Terms

### **Prospect Count**

The total number of prospects folded into this year's calling campaign is listed on your daily statistical report. This count reflects the total number of prospects with valid phone numbers that were loaded into our system for calling, minus any records deleted at your request. The callers complete a set percentage of these records based on the terms outlined in your contract.

### **Completed Call**

When a prospect's record is recorded as a completed call, that record will not be attempted again. There are two different categories of completed calls – **Contacts** and **Other Completes**.

A **Contact** occurs when a caller reaches the prospect and receives a "yes," "no," or "maybe" response, translating into a specified, unspecified or no pledge (see below). Contacts are completed calls, meaning the phone numbers will not be dialed again.

**Specified Pledge** – The prospect responds positively to the request for a gift and commits to a specific dollar amount.

**Unspecified Pledge** – The prospect responds favorably to the request for a gift, but does not commit to a specific dollar amount.

**No Pledge** – The prospect declines the invitation to participate.

When a response is recorded and is not a contact as described above, but is a response that will prevent the prospect from being called again, it falls under the category of **Other Completes**. These responses include:

**Already Pledged** - The prospect suggests they have already made a gift to the current campaign.

**Disconnect** – The caller reaches a recording that says the number has been disconnected or is no longer in service. No new number is given.

**Reassigned Number** - The phone number called has been reassigned to a new person (usually referred to as a "wrong number"). The person answering the phone does not know the prospect we are calling.

**Whereabouts Unknown** - Contact was made with a relative, friend or former roommate of the prospect. The prospect no longer lives at that number, and there is no updated number provided to the caller.

**Do Not Call** - The prospect asks to be removed from the calling list. They are still interested in receiving mail from your institution.

## Glossary of Terms (Cont.)

**Remove from List** - The prospect asks specifically to be removed from all mailing and calling lists.

**Deceased** - The prospect has passed away (the client should verify deaths before listing them as being deceased).

**Out of the Country** - The prospect is living out of the country.

**No English** - The prospect does not speak English.

All remaining records that are attempted, but never completed, fall under the category of **Incompletes**. These are records that are still available for calling and can be attempted again. Incompletes can be any of the following:

**Answering Machine** - We reach an answering machine. Callers do not leave messages on answering machines unless it is part of our strategy for your program. Messages left on answering machines are counted as completed calls.

**Busy** - The caller receives a busy signal.

**Callback** - The caller sets a specific time and date to call the prospect back. Callbacks are set for various reasons, such as the prospect is out of town or the prospect would like to discuss the amount of their gift with a spouse.

**No Answer** - The phone rings several times with no answer.

**Not Available** - The prospect is not available at the time of the call, but no specific date or time is set for a call back.

**Privacy Manager** - This is a type of Caller ID feature that does not allow our automated call to go through.

### **Completion Rate**

Percentage of all prospect records in a segment that were completed. If budget allows, typically 75% - 80% of a callable base can be completed.

### **Contacts**

As described above, when a person is reached by phone and solicited, a contact has been made. Contacts are a subset, therefore, of completed calls. Contacts include specified pledges, unspecified pledges and no pledges or refusals.

## Glossary of Terms (Cont.)

### Contact Rate

Dividing contacts by completed calls determines your contact percentage. This percentage is your ask or solicitation rate. If the percentage is 75%, then three of every four completed calls are resulting in a solicitation (or contact). This is what we like to see. If it is 50%, then only two of every four calls are resulting in a solicitation, primarily because of bad addresses and phone numbers. The lower the contact rate, the fewer direct asks we are able to make.

### Segment Definitions

Current Donors - Donors who have made a gift in the current fiscal year.

LYBUNTS - Last Year But Unfortunately Not This - Alumni Donors that made a gift during your last fiscal year (FY10), but have not made a gift since then.

SYBUNTS - Some Year But Unfortunately Not This - Alumni Donors that made a gift at some point 2 or > years ago, but have not made a gift since then.

Non-Donors - Alumni that have never made a gift.

Faculty and Staff - Faculty and Staff of West Virginia State University.

Research - Records which were found to be bad in the Fall and then were sent to Pacific East and a new telephone number was found.

Second Gift - This segment contains donors that have made a gift in the current fiscal year and are being asked to make a "second gift" this year.

Second Ask - This segment contains previous prospects that have already been asked to make a gift in the current fiscal year, but declined.

## Project Overview

### Program Component

Program Design and Consultation  
 Senior Operations Manager  
 Project Management  
 Creative Services  
 Lead Calling Supervisor  
 Data Management & Information Services

### RuffaloCODY Project Team

Cynthia Brown  
 Gina Randlev  
 Lynn Hanna  
 Meredith Singleton  
 Adam Link  
 Michael Warden

PROJECT DETAILS	
Fall Start Date	October 25, 2010
Fall End Date	December 19, 2010
Spring Start Date	February 3, 2011
Spring End Date	April 10, 2011
Lead Call Center	Cedar Rapids, Iowa
Client Visit	Yes
Client Monitoring	No

DATA ENHANCEMENTS	
Area Codes Updated	0
Phone Numbers Appended	2,808
Phone Numbers Changed	1,917
Phone Numbers Verified	4,069
Phone Numbers Unverified	5,023
No Phone Number Available	3,317
Addresses Updated	0
Zip Codes Updated	0

RECORDS NOT AVAILABLE	
No Phone Numbers	6,472
Duplicate ID Numbers	264
Duplicate Phone Numbers	1,122
No Name	0
Hardcopy	0
File	1
Foreign / International Phone	4
State Do Not Call List (AR & IN)	33
<b>TOTAL</b>	<b>7,896</b>

MAIL SERVICES	
PreCall Letters	213
PreCall Post Cards	0
Pledge Acknowledgments	535
Pledge Reminders	35
Non Contact Letters	0
<b>TOTAL</b>	<b>783</b>

OTHER DELETES	
FY 2011 Donor	42
0	0
0	0
<b>TOTAL</b>	<b>42</b>

## Project Overview

### PROGRAM RESULTS

- 13,689 prospect records were loaded for calling.
- 522 prospects participated with a pledge or credit card gift.
- An additional 37 prospects participated with an unspecified commitment.
- \$27,980 was pledged (with an additional \$735 in matching gifts)
- \$53.60 was the average specified pledge for your calling program (\$55.01 including matching gifts).
- 16.12% of the prospects contacted participated with a pledge or gift.
- 24 of the prospects who participated fulfilled their gifts instantly via credit card (translating into \$1,507).
- 7,949 total prospect records were completed.
- 58.1% of the prospect records loaded for calling were completed.
- 3,239 total solicitations or asks were made during the course of the calling campaign.
- 40.7% of all completed calls resulted in a solicitation or an ask.
- 50,215 total attempts were made during the calling campaign.

### FY11 HIGHLIGHTS

#### → PLEDGE LEVELS

- 43.7% (228) of all the Combined phonathon donors participated with a pledge of \$50 or >.
- 76.5% (26) of Alumni LYBUNTS phonathon donors participated with a pledge of \$50 or >.
- 57.3% (98) of Alumni SYBUNTS phonathon donors participated with a pledge of \$50 or >.
- 43.7% (21) of 2nd Ask phonathon donors participated with a pledge of \$50 or >.
- 31.3% (76) of Alumni Non-Donors phonathon donors participated with a pledge of \$50 or >.
- 30% (3) of the Research phonathon donors participated with a pledge of \$50 or >.
- 25% (4) of the Faculty and Staff phonathon donors participated with a pledge of \$50 or >.

#### → GRADUATION YEAR ANALYSIS

- 1970-1974, 1950-1954, and 1955-1959 had the highest pledge rates with 66.7%, 57.1%, and 50.0%.
- 1955-1959, 1970-1974, and No Year had the highest average pledges with \$100.00, \$100.00, and \$59.54.
- 1970-1974, 1955-1959, and 1950-1954 had the highest dollars raised per completed call with \$40.00, \$33.33, and \$29.38.

#### → REFUSAL REASONS

- 74 [71 Elderly, Fixed Income and 3 Left Money In Will] planned giving prospects were identified during the course of the calling campaign.
- 97 prospects claimed to give through direct mail during the course of the calling campaign.
- 1,433 [806 No Reason Given, 560 Not Interested In Giving, 38 Has Ill Feelings About The Institution, and 29 Does Not Feel Associated With The Institution] willingness reasons were identified during the course of the calling campaign. In fact, No Reason Given and Not Interested In Giving were the primary refusal reasons. Obviously a great deal of cultivation seeds need to be sown amongst the alumni in order to encourage them to feel better about West Virginia State University.

## Project Overview

### → STATE ANALYSIS

District of Columbia, Michigan, and California had the highest pledge rates with 34.5%, 32.7%, and 30.6%.  
California, Maryland, and District of Columbia had the highest average pledges with \$88.33, \$72.95, and \$72.63.

### → AREA CODE ANALYSIS

Area Code 410 (Baltimore, MD), Area Code 202 (Washington, DC), and Area Code 313 (Detroit, MI) had the highest pledge rates with 36.0%, 34.5%, and 31.3%.  
Area Code 614 (Columbus, OH), Area Code 301 (Silver Spring, MD), and Area Code 202 (Washington, DC) had the highest average pledges with \$85.71, \$75.00, and \$72.63.

### → ZIP CODE ANALYSIS

Zip Code 200 (Washington, DC), Zip Code 482 (Detroit, MI), and Zip Code 207 (Temple Hills, MD) had the highest pledge rates with 34.5%, 34.4%, and 24.3%.  
Zip Code 432 (Columbus, OH), Zip Code 207 (Temple Hills, MD), and Zip Code 200 (Washington, DC) had the highest average pledges with \$85.71, \$85.56, and \$72.63.

### → RESEARCH ANALYSIS

Address and telephone research efforts yielded positive results:

- 3,018 new telephone numbers were added; 818 contacts made to these new numbers translated into 124 pledges and \$6,929.
- 1,901 telephone numbers were changed or updated; 469 contacts made to these numbers translated into 80 pledges and \$4,010.

### → UPGRADE ANALYSIS

78% (195) of the Combined Donors renewed at or above their last gift amount, with an average upgrade of \$39.92.  
91.7% (11) of the Faculty and Staff renewed at or above their last gift amount, with an average upgrade of \$151.67.  
91.2% (31) of the Alumni LYBUNTS (Credit Card) renewed at or above their last gift amount, with an average upgrade of \$41.54.  
33.3% (1) of the Research renewed at their last gift amount.  
76% (130) of the Alumni SYBUNTS renewed at or above their last gift amount, with an average upgrade of \$27.51.  
73.3% (22) of the Soft Refusals renewed at or above their last gift amount, with an average upgrade of \$18.50.

### → EMAIL ANALYSIS

276 new emails and 10 updated emails were captured during the course of the calling campaign.

### → CELL PHONE ANALYSIS

35 new cell phone numbers were captured during the course of the calling campaign.



## Project Overview

### → OVERALL ASSESSMENT

Overall the program was challenging because of the 3 following reasons:

- 1) Inaccuracy of the database which covers "Wrong Numbers," "Disconnected Numbers," "Whereabouts Unknown," "False Alumni Status - people who are attending events, people who are attending other schools, parents, and siblings," and "wrong giving history - donor history but actually never givers);
- 2) Lack of alumni affiliation which covers a total disconnect between the alumnus and the University. Many did not know which school that he or she had attended. The absence of alumni activities inhibited RuffaloCODY's activity to build bridges from an activities inhibited RuffaloCODY's ability to build bridges from an Alumni Affairs prospective and ignite the willingness in prospects to give. By the way, we noticed a trend in prospects who mentioned being involved in various activities as being the prospects who wanted to give. Several did not feel happy with the education that they had received; and
- 3) Lack of previous phonathon programs where the alumni are accustomed to being asked for money. Many alumni did not understand the need for the Annual Fund. In addition, in the future, a WVSU Caller ID would help to build a better bond of trust. Newsletters and emails sent to the alumni should speak about upcoming phonathon efforts to increase alumni participation and emails sent to the alumni should speak about upcoming phonathon efforts to increase alumni participation in the Annual Fund.

There are several areas in which the University can assist the future phonathon campaign in raising more dollars and donors.

They are as follows:

- Cleaning up the database to increase its accuracy in terms of good versus bad telephone numbers;
- Cleaning up the database in terms of accurate giving history – donor versus non-donor;
- Sewing good seeds in the next alumni newsletter or email in order to promote awareness and articulate the needs/benefits of the Annual Fund;
- Sending a pre-call letter which announces the call, sets the tone for the campaign, and recommends levels of giving;
- Sewing good seeds in the next newsletter or email that phonathons will be occurring to garner dollars and donors for the University. This will aid in giving more credibility to a phonathon program; and
- Hosting alumni events on campus so the alumni "can get involved;" feel better about their alma mater; and want to give back to the University.

# West Virginia State University

Program Start Date: 10/25/2010

Contact: Dr. John Berry  
Account Executive: Cynthia Brown

Project Manager: Lynn Hanna  
Supervisor: Adam Link

<b>PROGRAM SUMMARY</b> <i>(Estimated Projections &amp; Actual Results)</i>					
	Low Range Projections	High Range Projections	Current As Of 3/17/2011		
<b>Number of Total Prospects</b>	13,689	13,689	13,689		
<b>Total Percent Complete</b>	75.02%	75.02%	58.07%		
<b>Total Completes</b>	10,269	10,269	7,949		
<b>Contact Percentage</b>	36.70%	41.72%	40.75%		
<b>Total Contacts</b>	3,769	4,284	3,239		
<b>Percent Specified Participation</b>	13.64%	18.58%	16.12%		
<b>Specified Pledges</b>	514	796	522		
<b>Average Specified Pledge</b>	\$48.00	\$52.00	\$53.60		
<b>Specified Dollars</b>	\$24,990	\$41,570	\$27,980		
<b>Average Completes Per Hour</b>	11.40	11.40	10.53		
<b>Telemarketing Hours</b>	901.08	901.08	755.00		
<b>Specified Dollars Per Hour</b>	\$27.73	\$46.13	\$37.06		
<b>Credit Card Pledges</b>	Do not exceed 821 calling hours for the fall and 1300 hours for the whole program		24		
<b>Credit Card Pledges Participation</b>			4.60%		
<b>Credit Card Dollars</b>			\$1,507		
<b>Credit Card Dollars Participation</b>			5.39%		
<b>Unspecified Pledges</b>			37		
<b>Matching Gift Dollars</b>			\$735		
<b>Number of Matching Gifts</b>			9		
<b>Mid-Range Estimate</b>			\$33,280		

<b>LYBUNTS</b>					
	Low Range Projections	High Range Projections	Current As Of 3/17/2011		
<b>Number of Total Prospects</b>	170	170	170		
<b>Total Percent Complete</b>	75.00%	75.00%	72.35%		
<b>Total Completes</b>	128	128	123		
<b>Contact Percentage</b>	65.00%	70.00%	67.48%		
<b>Total Contacts</b>	83	89	83		
<b>Percent Specified Participation</b>	40.00%	45.00%	40.96%		
<b>Specified Pledges</b>	33	40	34		
<b>Average Specified Pledge</b>	\$100.00	\$105.00	\$98.82		
<b>Specified Dollars</b>	\$3,300	\$4,200	\$3,360		
<b>Average Completes Per Hour</b>	7.00	7.00	5.18		
<b>Telemarketing Hours</b>	18.29	18.29	23.75		
<b>Specified Dollars Per Hour</b>	\$180.47	\$229.69	\$141.47		
<b>Credit Card Pledges</b>	10 gifts of \$500 - \$1,000		3		
<b>Credit Card Pledges Participation</b>			8.82%		
<b>Credit Card Dollars</b>			\$275		
<b>Credit Card Dollars Participation</b>			8.18%		
<b>Unspecified Pledges</b>			5		
<b>Matching Gift Dollars</b>			\$100		
<b>Number of Matching Gifts</b>			1		
<b>Mid-Range Estimate</b>			\$3,750		verage Gift Loaded for Calling \$107.00

# West Virginia State University

Program Start Date: 10/25/2010

Contact: Dr. John Berry  
Account Executive: Cynthia Brown

Project Manager: Lynn Hanna  
Supervisor: Adam Link

<b>SYBUNTS</b>			
	Low Range Projections	High Range Projections	Current As Of 3/17/2011
Number of Total Prospects	2,197	2,197	2,197
Total Percent Complete	75.00%	75.00%	67.23%
Total Completes	1,648	1,648	1,477
Contact Percentage	45.00%	50.00%	44.69%
Total Contacts	741	824	660
Percent Specified Participation	25.00%	30.00%	25.91%
Specified Pledges	185	247	171
Average Specified Pledge	\$50.00	\$55.00	\$61.81
Specified Dollars	\$9,250	\$13,585	\$10,570
Average Completes Per Hour	10.00	10.00	7.88
Telemarketing Hours	164.80	164.80	187.50
Specified Dollars Per Hour	\$56.13	\$82.43	\$56.37
Credit Card Pledges	1560 donors are 2006 and prior		5
Credit Card Pledges Participation			2.92%
Credit Card Dollars			\$320
Credit Card Dollars Participation			3.03%
Unspecified Pledges			25
Matching Gift Dollars			\$485
Number of Matching Gifts			6
Mid-Range Estimate	\$11,417		Average Gift Loaded for Calling: \$83.00

<b>NONDONORS</b>			
	Low Range Projections	High Range Projections	Current As Of 3/17/2011
Number of Total Prospects	9,806	9,806	9,806
Total Percent Complete	75.00%	75.00%	56.47%
Total Completes	7,355	7,355	5,537
Contact Percentage	30.00%	35.00%	35.38%
Total Contacts	2,206	2,574	1,959
Percent Specified Participation	10.00%	15.00%	12.40%
Specified Pledges	220	386	243
Average Specified Pledge	\$40.00	\$45.00	\$41.50
Specified Dollars	\$8,800	\$17,370	\$10,085
Average Completes Per Hour	13.00	13.00	12.25
Telemarketing Hours	565.77	565.77	452.00
Specified Dollars Per Hour	\$15.55	\$30.70	\$22.31
Credit Card Pledges			13
Credit Card Pledges Participation			5.35%
Credit Card Dollars			\$777
Credit Card Dollars Participation			7.70%
Unspecified Pledges			5
Matching Gift Dollars			\$100
Number of Matching Gifts			1
Mid-Range Estimate	\$13,085		Average Gift Loaded for Calling: \$0.00

# West Virginia State University

Program Start Date: 10/25/2010

Contact: Dr. John Berry  
Account Executive: Cynthia Brown

Project Manager: Lynn Hanna  
Supervisor: Adam Link

<b>FACULTY AND STAFF</b>			
	Low Range Projections	High Range Projections	Current As Of 3/17/2011
Number of Total Prospects	213	213	213
Total Percent Complete	75.00%	75.00%	55.40%
Total Completes	160	160	118
<b>Contact Percentage</b>	45.00%	50.00%	55.08%
Total Contacts	72	80	65
<b>Percent Specified Participation</b>	15.00%	20.00%	24.62%
Specified Pledges	10	16	16
<b>Average Specified Pledge</b>	\$100.00	\$100.00	\$102.81
Specified Dollars	\$1,000	\$1,600	\$1,645
<b>Average Completes Per Hour</b>	7.00	7.00	5.02
Telemarketing Hours	22.86	22.86	23.50
<b>Specified Dollars Per Hour</b>	\$43.75	\$70.00	\$70.00
Credit Card Pledges	blocked for mailing		1
<b>Credit Card Pledges Participation</b>			6.25%
Credit Card Dollars			\$20
<b>Credit Card Dollars Participation</b>			1.22%
Unspecified Pledges			0
Matching Gift Dollars			\$0
Number of Matching Gifts			0
<b>Mid-Range Estimate</b>	\$1,300		Average Gift Loaded for Calling: \$3600

<b>RESEARCH</b>			
	Low Range Projections	High Range Projections	Current As Of 3/17/2011
Number of Total Prospects	434	434	434
Total Percent Complete	75.00%	75.00%	56.91%
Total Completes	326	326	247
<b>Contact Percentage</b>	45.00%	50.00%	44.13%
Total Contacts	146	163	109
<b>Percent Specified Participation</b>	10.00%	15.00%	9.17%
Specified Pledges	14	24	10
<b>Average Specified Pledge</b>	\$40.00	\$45.00	\$42.50
Specified Dollars	\$560	\$1,080	\$425
<b>Average Completes Per Hour</b>	9.00	9.00	11.62
Telemarketing Hours	36.22	36.22	21.25
<b>Specified Dollars Per Hour</b>	\$15.46	\$29.82	\$20.00
Credit Card Pledges			1
<b>Credit Card Pledges Participation</b>			10.00%
Credit Card Dollars			\$100
<b>Credit Card Dollars Participation</b>			23.53%
Unspecified Pledges			2
Matching Gift Dollars			\$0
Number of Matching Gifts			0
<b>Mid-Range Estimate</b>	\$820		Average Gift Loaded for Calling: \$0.00

# West Virginia State University

Program Start Date: 10/25/2010

Contact: Dr. John Berry  
Account Executive: Cynthia Brown

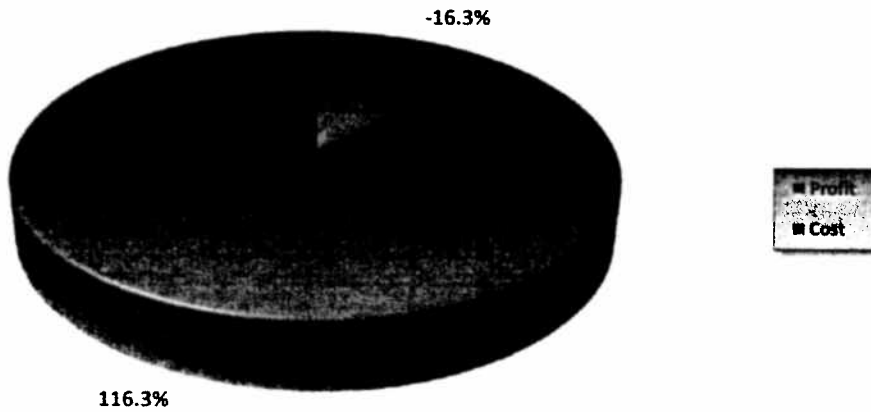
Project Manager: Lynn Hanna  
Supervisor: Adam Link

2ND ASK			
	Low Range Projections	High Range Projections	Current As Of 3/17/2011
Number of Total Prospects	869	869	869
Total Percent Complete	75.00%	75.00%	51.44%
Total Completes	652	652	447
<b>Contact Percentage</b>	<b>80.00%</b>	<b>85.00%</b>	<b>81.21%</b>
Total Contacts	521	554	363
<b>Percent Specified Participation</b>	<b>10.00%</b>	<b>15.00%</b>	<b>13.22%</b>
Specified Pledges	52	83	48
<b>Average Specified Pledge</b>	<b>\$40.00</b>	<b>\$45.00</b>	<b>\$39.48</b>
Specified Dollars	\$2,080	\$3,735	\$1,895
<b>Average Completes Per Hour</b>	<b>7.00</b>	<b>7.00</b>	<b>9.51</b>
Telemarketing Hours	93.14	93.14	47.00
<b>Specified Dollars Per Hour</b>	<b>\$22.33</b>	<b>\$40.10</b>	<b>\$40.32</b>
Credit Card Pledges	These are the soft refusals from the fall calling		1
<b>Credit Card Pledges Participation</b>			<b>2.08%</b>
Credit Card Dollars			\$15
<b>Credit Card Dollars Participation</b>			<b>0.79%</b>
Unspecified Pledges			0
Matching Gift Dollars			\$50
Number of Matching Gifts			1
Mid-Range Estimate	\$2,907	Average Gift Loaded for Calling \$0.00	

<b>COMMITTED SERVICES SCHEDULE</b>	<b>COST</b>
Program Set-Up	\$2,000.00
Information Services	\$2,000.00
Reminder System	\$1,500.00
Add Loads	\$500.00
Telemarketing Hours	\$21,609.00
REL@Y – Email Delivery System	\$2,500
Basic Research	\$778
Pledge Acknowledgment Production	\$312
Intermediate Research	\$508
Supplies	\$628.80
Postage for Next Day Acknowledgement	\$221
Postage for Pre-call Mailings	\$0
Postage for Reminder Mailings	\$0
Postage for Non Contact/Refusal Mailings	\$0
<b>Total (committed costs plus telemarketing services)</b>	<b>\$32,556.99</b>

# Cost to Raise a \$1

## Cost to Raise \$1 - Total Program Costs (Includes only Specified Dollars)

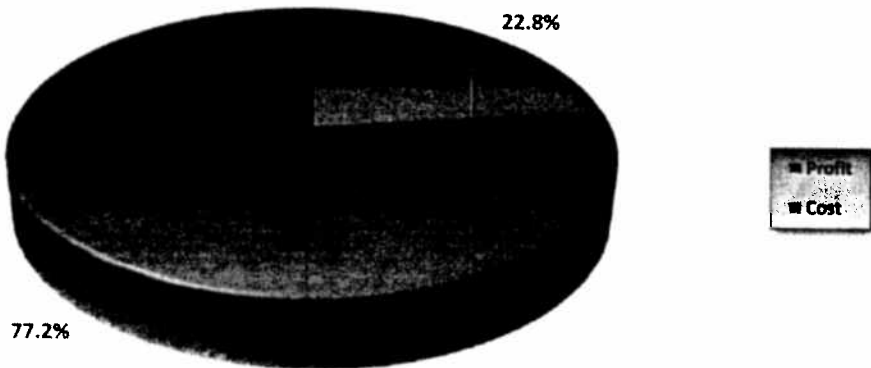


522 Pledges were secured

Raised	\$27,980
Cost	\$32,537

Cost to Raise \$1 = \$1.16

## Cost to Raise \$1 - Telephone Fundraising Costs (Includes only Specified Dollars)



522 Pledges were secured

Raised	\$27,980
Cost	\$21,609

Cost to Raise \$1 = \$.77

## Preparing for the Next Campaign

### **MESSAGING and CALLING CALENDAR**

- The 2011-2012 telephone fundraising program should commence in early January 2012 after data maintenance and cultivation strategies have been executed.
- The next phonathon program should be conducted on campus using student callers coupled with RuffaloCODY technology and on-site management.
- The first ask for the Non-Donors should remain at \$150.
- In light of the lack of cultivation, a pre-call letter should be sent announcing the call, setting the tone of the campaign , and recommending levels of giving.
- The use of real time talking points should be promoted in order to keep the messaging up-to-date.
- Alumni should be challenged to reach certain goals...let it be x number of donors or dollars by the end of the fiscal year.
- A challenge grant would improve the cost-effectiveness of the program. It would add to the bottom-line and encourage more support. In essence, grassroots support could be leveraged to get increased major donor support.

### **SEGMENTATION and DATA**

- LYBUNTS should be segmented and continued to be solicited to renew and/or upgrade.
- SYBUNTS should be segmented and continued to be solicited to renew and/or upgrade.
- Non-Donors should be segmented and continued to be solicited to become donors.
- Fall Soft Refusals from previous donors should be segmented and continue to be resolicited in the Spring to give by June 30th because it will seal the leaky bucket.
- Pledges-Not-Paid should be assembled and solicited from the outstanding 2010-2011 pledges who did not fulfill their commitments in the 2010-2011 fiscal year.
- Leadership Prospects that can not reached by Development Officers should be added to the program.
- RuffaloCODY should identify prospects with multiple dispositions/phone numbers at the outset. In addition, daytime calls should be assembled as soon as possible in order to maximize contacts.
- Prospects, who were marked "Deceased" should be re-attempted by Alumni Affairs to verify that the prospects are deceased and then marked accordingly.
- Prospects, whose disposition results were "Disconnected Number", "Reassigned Number" or "Whereabouts Unknown" should be removed from future phonathon programs until new telephone numbers are found for the prospects.
- Prospects, whose reasons were "Do Not Call" should be placed in a special calling pool, normally they should be excluded however in light of the present day economy, several "Do Not Calls" were simply an over-reaction to the uncertain times.
- Prospects, whose reasons were "No English" should be removed from future phonathon programs and solicited through direct mail.
- Prospects, who were marked "Out Of The Country" should be assigned for solicitation in the next fiscal year's program.
- Prospects, who were marked "Remove From List" should be removed from future phonathon and direct mail programs.



## Preparing for the Next Campaign

### **CONTACT PERCENTAGE and COMPLETION RATE**

- The contact percentage was 40.7% and this is far below the standard in terms of list cleanliness. Obviously, the database is suffering from benign neglect. Most of the segments [SYBUNTS, Non-Donors, and Research] suffered from Disconnected Numbers [28.5% - 2,262], Reassigned Numbers [13.2% - 1,053], and Whereabouts Unknown [7.6% - 603]. We even had 191 people who were claiming to be "Deceased." A contact percentage in the 65% – 68% range is considered a standard benchmark; schools with well-established programs can often reach a contact percentage in the 70% or > range. If the list had had a 65% contact rate, RuffaloCODY would have raised virtually \$40K in pledged revenue.
- RuffaloCODY added Wireless Identification Research to its basic research this year. This added feature was included in the program at virtually no additional fee.
- In addition to consistent NCOA/Telephone Append research, you should continue to routinely enter updated information into your development system, ask for biographical updates via mailings (including "Lost Alumni" pieces), magazines, online communities, alumni events, etc.
- In addition to NCOA/Telephone Append research, you should consider adding a Trace service to advance the accuracy of the database.
- The telephone program completed 58.1% of the callable database. A completion rate of 65% or more would have allowed for more renewal, reactivation, and acquisition (building base of support) possibilities. Of course, this would have required a higher investment of dollars in order to place more hours on the program.

### **OTHER NOTES, IDEAS, and CONCLUSION**

- RuffaloCODY wants to help strategize for better coordination and integration of all Annual Fund efforts (direct mail, phonathon and electronic appeals/messaging).
- Once calling begins, RuffaloCODY would like to have weekly, check-in meetings between the Program Center Manager and the staff to review the phonathon efforts. This will enable the program to stay on track.
- RuffaloCODY should continue to process next day pledge acknowledgment letters. It should also mail 30 day pledge reminder letters, make 60 day pledge reminder calls, and then mail 90 day pledge reminder letters.
- **RuffaloCODY has enjoyed working with Dr. John Berry, Jonathan Adler, and all of the staff at West Virginia State University. We would welcome the opportunity to assist the University as it takes its next steps towards a higher functioning Annual Fund program. Bringing the program to campus will promote a large, scale engaging communication. In addition, it will serve as Development 101 - where students are virtually donors in training so when they graduate, they are more apt to become donors themselves because they will have learned of the need for the alumni to give back to the institution. Partnering with RuffaloCODY's technology and on-site management, the well-trained, student callers will be the best ambassadors to negotiate with the alumni. This will ultimately foster higher pledge rates (more donors) and higher average pledges (more dollars).**



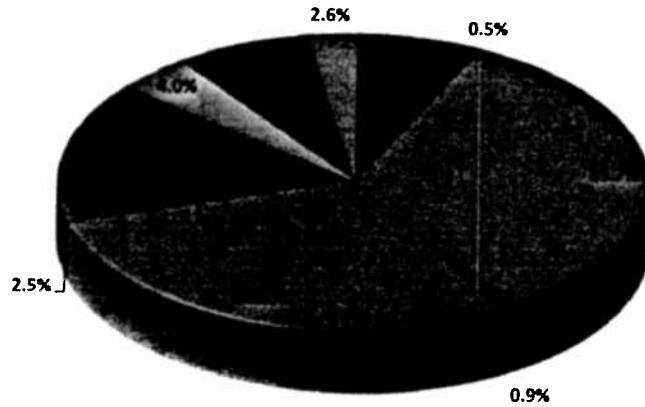
Susan C. [unclear]

[unclear]

West Virginia State University								
NO. OF RECORDS	170	2,197	9,806	434	213	869	13,689	
COMPLETION RATE	72.4%	67.2%	56.5%	56.9%	55.4%	51.4%	58.1%	
	LYBUNTS	SYBUNTS	NONDONORS	RESEARCH	FACULTY AND STAFF	2ND ASK	COMBINED	
TELEMARKETING HOURS	23.75	187.50	452.00	21.25	23.50	47.00	755.00	
SPECIFIED PLEDGES	34	171	243	10	16	48	522	
SPECIFIED DOLLARS	\$3,360	\$10,570	\$10,085	\$425	\$1,645	\$1,895	\$27,980	
SPECIFIED DOLLARS - YEAR 2+	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
SPECIFIED DOLLARS - TOTAL	\$3,360	\$10,570	\$10,085	\$425	\$1,645	\$1,895	\$27,980	
MATCHING DOLLARS	\$100	\$485	\$100	\$0	\$0	\$50	\$735	
MATCHING GIFTS	1	6	1	0	0	1	9	
TOTAL DOLLARS	\$3,460	\$11,055	\$10,185	\$425	\$1,645	\$1,945	\$28,715	
\$ PLEDGED PER HOUR	\$145.68	\$58.96	\$22.53	\$20.00	\$70.00	\$41.38	\$38.03	
PLEDGE RATE-SPECIFIED	41.0%	25.9%	12.4%	9.2%	24.6%	13.2%	16.1%	
PLEDGE RATE-UNSPECIFIED	6.0%	3.8%	0.3%	1.8%	0.0%	0.0%	1.1%	
AVG PLDG-SPECIFIED	\$98.82	\$61.81	\$41.50	\$42.50	\$102.81	\$39.48	\$53.60	
AVG PLDG-SPECIFIED TOTAL	\$98.82	\$61.81	\$41.50	\$42.50	\$102.81	\$39.48	\$53.60	
AVG PLDG-INCLUDING MATCH	\$101.76	\$64.65	\$41.91	\$42.50	\$102.81	\$40.52	\$55.01	
AVG ATTEMPTS PER HOUR	61.09	65.79	69.40	80.00	60.09	41.43	66.51	
AVG COMPLETES PER HOUR	5.18	7.88	12.25	11.62	5.02	9.51	10.53	
AVG CONTACTS PER HOUR	3.49	3.52	4.33	5.13	2.77	7.72	4.29	
CREDIT CARD PLEDGES	3	5	13	1	1	1	24	
CREDIT CARD PLEDGES %	8.8%	2.9%	5.3%	10.0%	6.3%	2.1%	4.6%	
CREDIT CARD DOLLARS	\$275	\$320	\$777	\$100	\$20	\$15	\$1,507	
CREDIT CARD DOLLARS %	8.2%	3.0%	7.7%	23.5%	1.2%	0.8%	5.4%	
TOTAL INCOMPLETES:								
ANSWERING MACHINE	489	3,273	7,269	429	594	336	12,390	
BUSY	32	310	961	55	10	41	1,409	
CALLBACK	25	120	128	2	40	18	333	
NO ANSWER	679	5,734	13,288	777	516	818	21,812	
NOT AVAILABLE	73	1,220	3,794	177	113	251	5,628	
OTHER	30	201	393	13	21	36	694	
COMPLETED CALLS:								
SPECIFIED PLEDGES	34	171	243	10	16	48	522	6.6%
UNSPECIFIED PLEDGES	5	25	5	2	0	0	37	0.5%
NO PLEDGE	44	464	1,711	97	49	315	2,680	33.7%
OTHER CONTACTS	0	0	0	0	0	0	0	0.0%
TOTAL CONTACTS	83	660	1,959	109	65	363	3,239	
CONTACT RATE	67.5%	44.7%	35.4%	44.1%	55.1%	81.2%	40.7%	
ALREADY PLEDGED	10	33	10	0	14	2	69	0.9%
DECEASED	0	60	107	22	1	1	191	2.4%
DISCONNECT	9	332	1,855	33	24	9	2,262	28.5%
DO NOT CALL	4	42	116	4	0	29	195	2.5%
NO ENGLISH	0	2	3	0	0	0	5	0.1%
OUT OF COUNTRY	1	2	10	0	0	0	13	0.2%
REASSIGNED NUMBER	5	92	874	68	8	6	1,053	13.2%
REMOVE FROM LIST	7	200	74	2	0	34	317	4.0%
WHEREABOUTS UNKNOWN	4	53	529	9	6	2	603	7.6%
OTHER	0	1	0	0	0	1	2	0.0%
TOTAL COMPLETES	123	1,477	5,537	247	118	447	7,949	
TOTAL NUMBER ATTEMPTS	1,451	12,335	31,370	1,700	1,412	1,947	50,215	
RECORDS DELETED:	0	1	0	0	1	0	2	

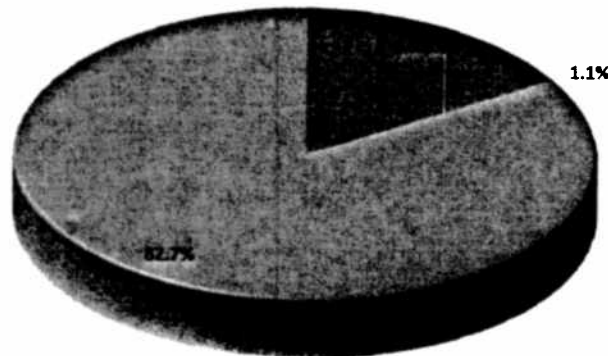
West Virginia State University

Completed Calls Breakdown



- SPECIFIED PLEDGES - 6.6% (522)
- UNSPECIFIED PLEDGES - 0.5% (37)
- NO PLEDGE - 33.7% (2,680)
- OTHER CONTACTS - 0.0% (0)
- ALREADY PLEDGED - 0.9% (69)
- DISCONNECT - 28.5% (2,262)
- DO NOT CALL - 2.5% (195)
- REASSIGNED NUMBER - 13.2% (1,053)
- REMOVE FROM LIST - 4.0% (317)
- WHEREABOUTS UNKNOWN - 7.6% (603)
- DECEASED/NO ENGLISH/OUT OF COUNTRY - 2.6% (209)
- OTHER - 0.0% (2)

Total Contacts

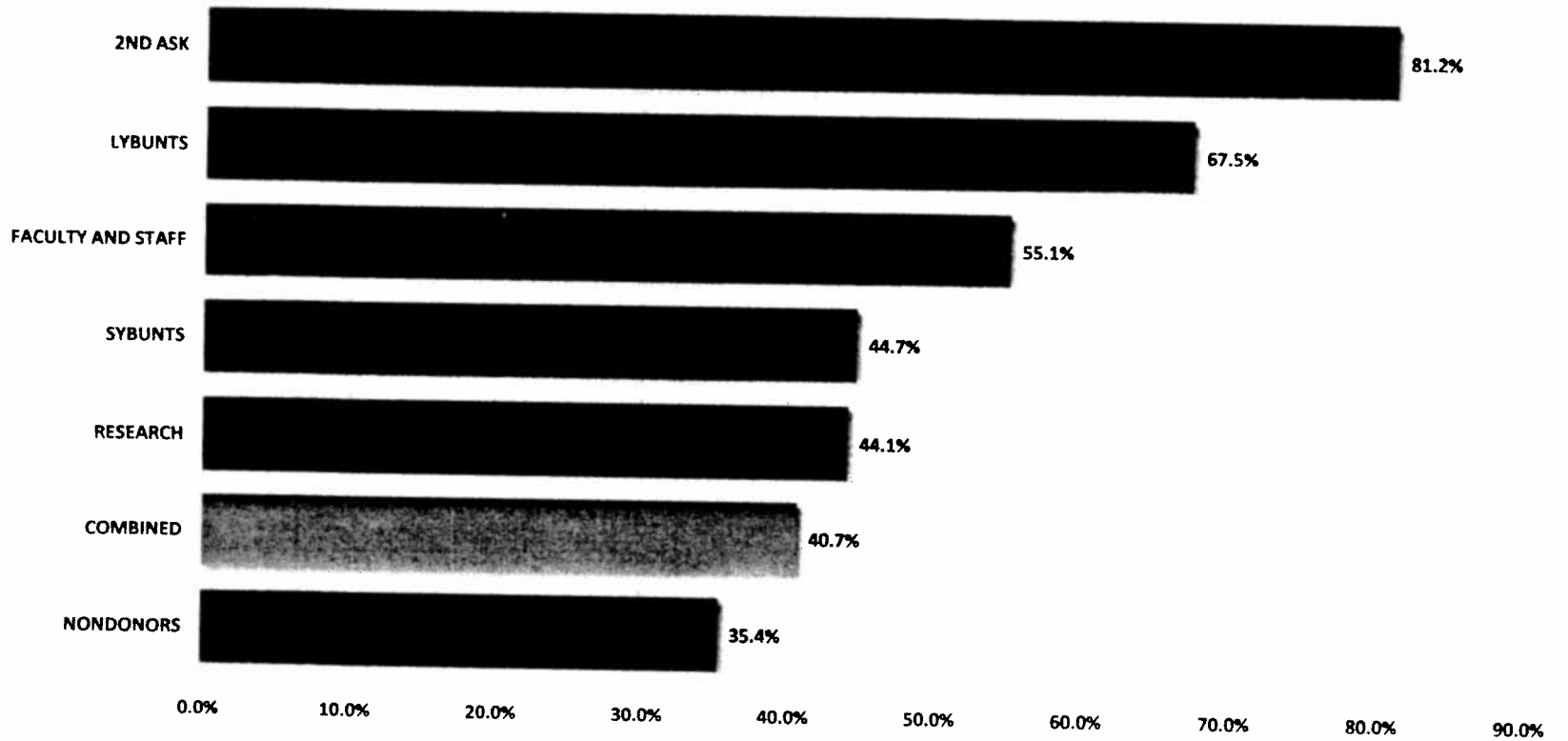


- SPECIFIED PLEDGES - 16.1% (522)
- UNSPECIFIED PLEDGES - 1.1% (37)
- NO PLEDGE - 82.7% (2,680)
- OTHER CONTACTS - 0.0% (0)

West Virginia State University

Contact Percentage - All Segments

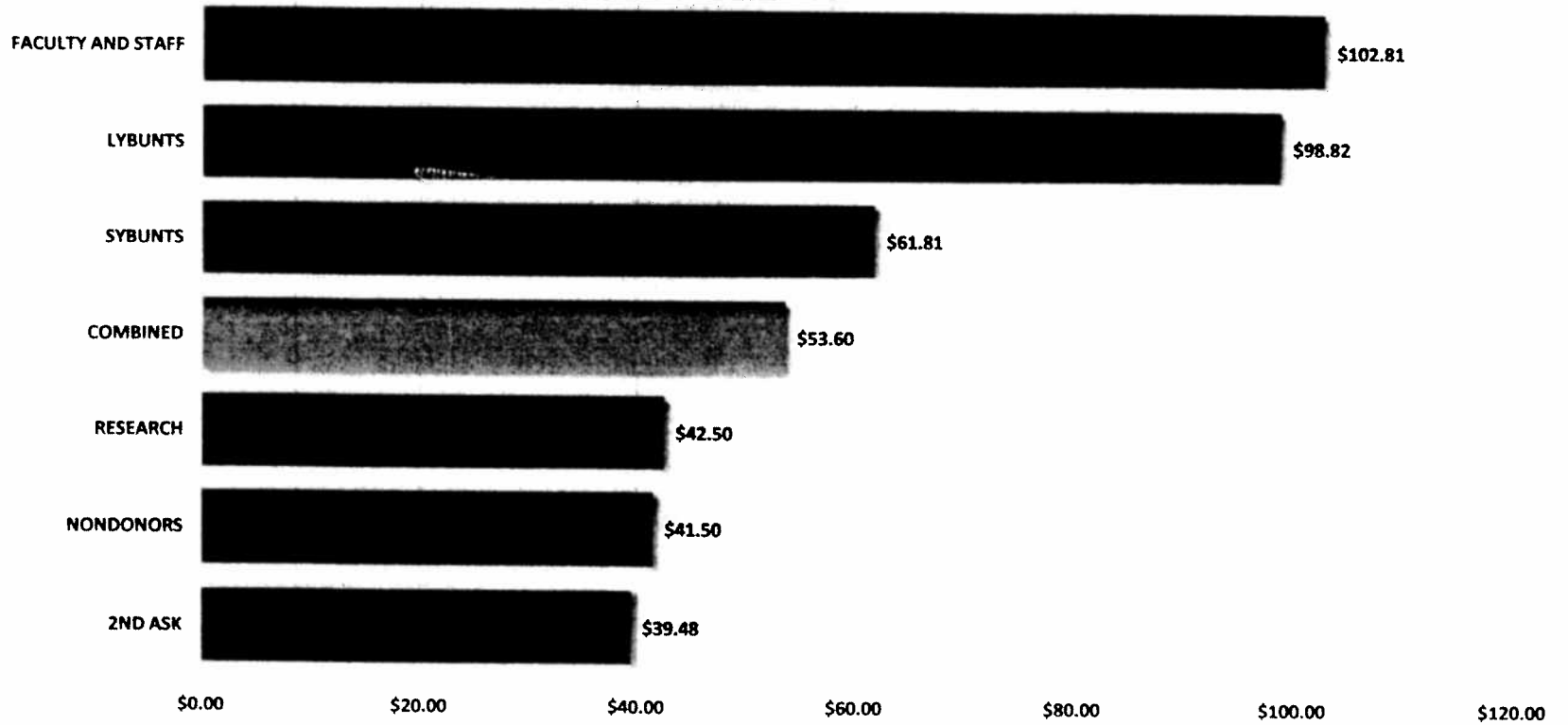
Total Contact Percentage - 40.7%



West Virginia State University

Average Pledge - All Segments

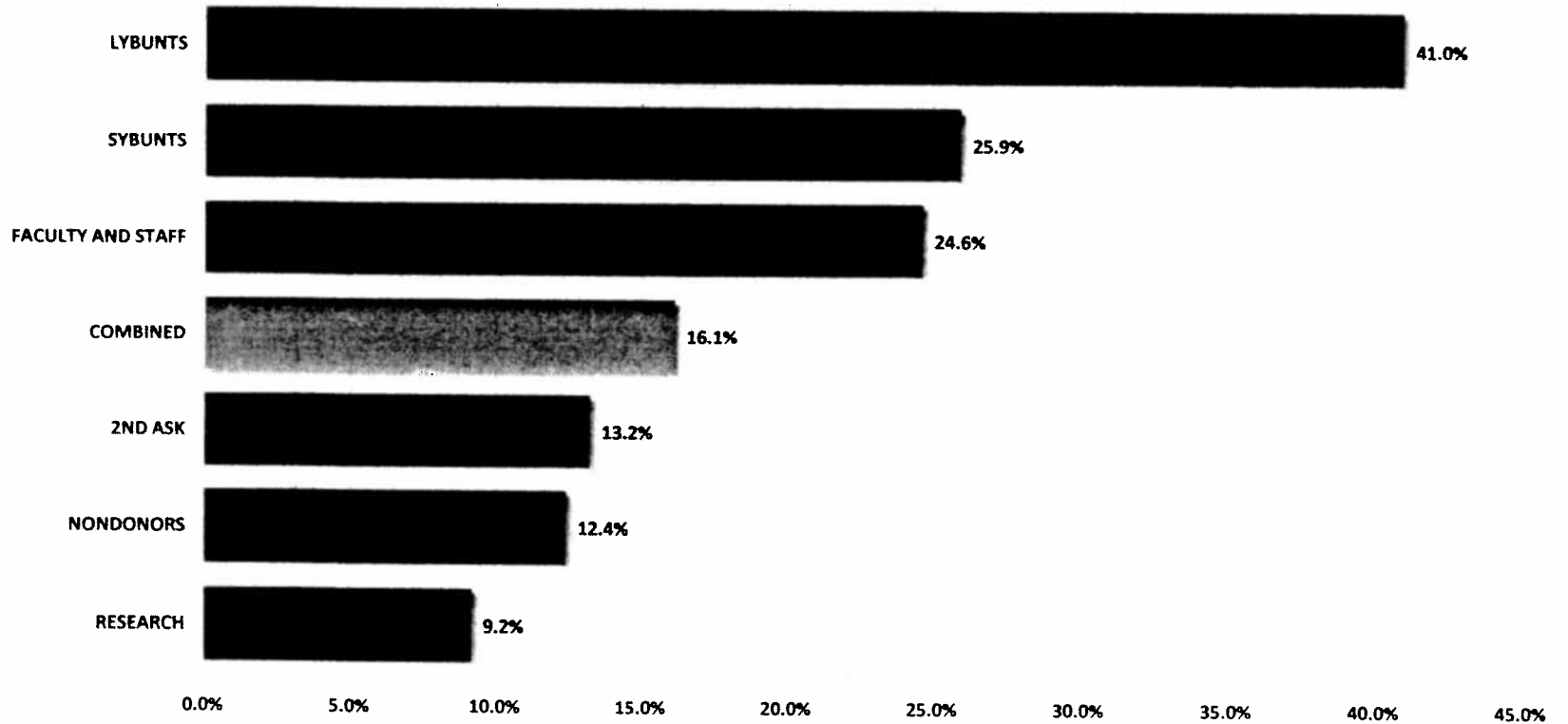
Total Average Pledge - \$53.60



West Virginia State University

Specified Participation - All Segments

Total Specified Participation - 16.1%





West Virginia State University

Dollars Raised Per Hour - All Segments

Total Dollars Raised Per Hour - \$38.03

