

Is Direct Mail DEAD?

Although use may be waning, direct mail is still a viable fund-raising format. Here are 10 ways campuses are breathing new life into the medium

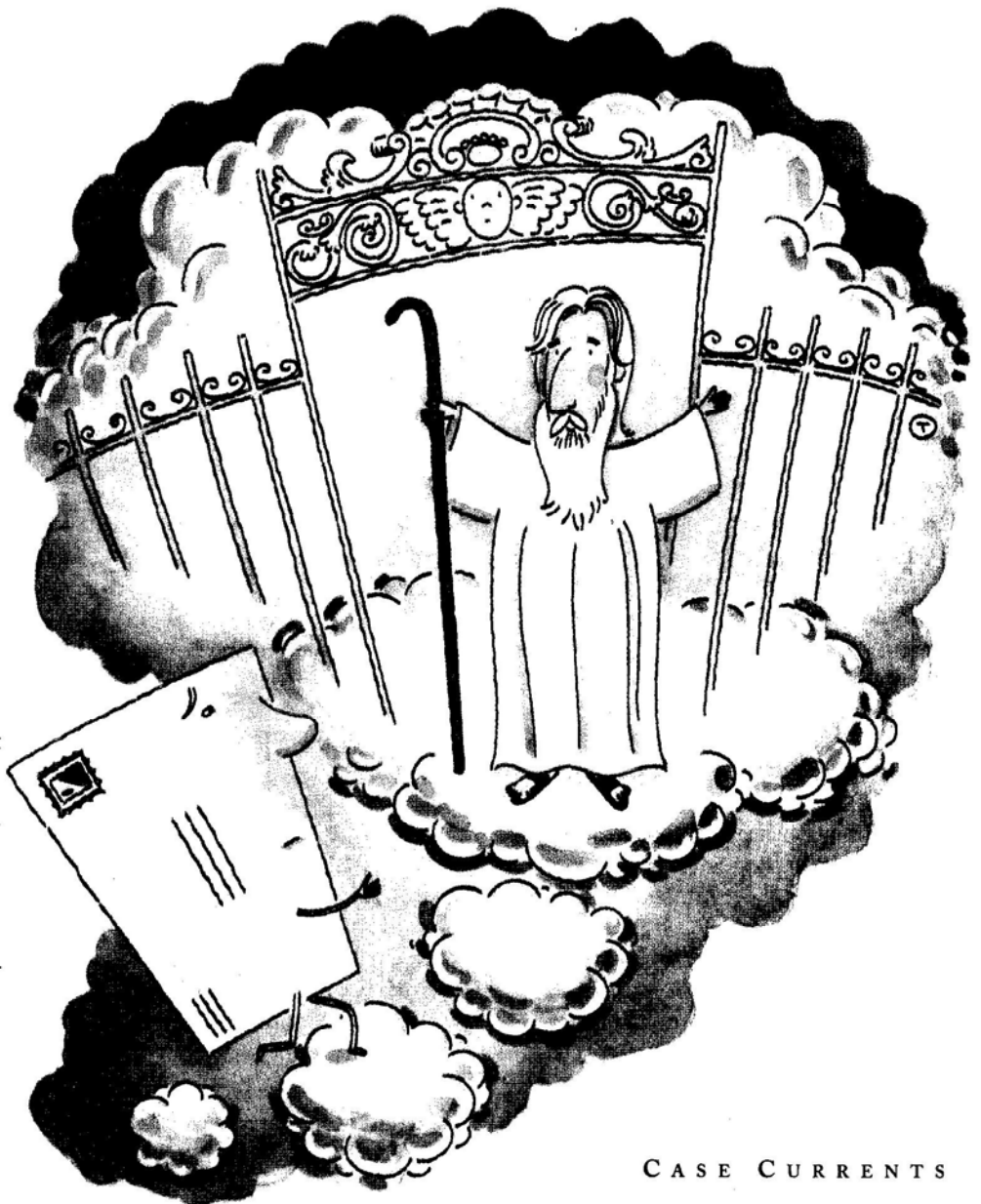
BY JEFF HAUK & ROBERT A. BURDENSKI

Last year, for the first time in history, people sent more messages by e-mail than by old-fashioned paper mail, the *New York Times* reported recently. Campus advancement offices are following this trend away from paper: They're increasingly turning to telemarketing for their annual fund dollars, and they're starting to solicit online. With all this competition, you might begin to wonder: Is direct mail headed for that big circular file in the sky?

If so, development officers are partially responsible. Your neglect of this once-prized tool is contributing to its demise. You fall back on the same familiar pieces year after year. After all, you tell yourself, the returns are still OK—and your superiors aren't all that receptive to a radical change.

What's more, you see samples of direct mail from other institutions that assure you that you're in step with everyone else: You've got the postscript at the bottom of the letter, the business reply envelope nestled behind, and the live stamp sparkling on the outside.

Jeff Hauk is annual fund director at Miami University, a public institution of 16,000 students in Oxford, Ohio. Robert Burdinski is a senior consultant with Campbell and Co. in Chicago who specializes in annual giving program strategies.



CLEAN SWEEP: Northern Arizona University's faculty/staff appeal looks like a typical sweepstakes mailing, but the prize went to the campus, not the donor. The clever copy, bright graphics, and strong concept helped NAU increase participation 32 percent.

The Annual Fund Official Rules

1. All NAU faculty, staff, and retirees are eligible. (Tell your NAU friends.)

2. A completed pledge card must accompany the entry form.

3. Entry forms submitted by April 19, 1996, will be entered into a drawing to select the winner of the \$5,000 scholarship endowment that will be established in the winner's name.

4. The drawing will take place during Employee Appreciation Week, April 22-26. The actual date of the drawing will be announced later in *Mountain Campus News*. The winner need not be present (but it would be nice to have you there.)

5. The NAU Foundation will fund the \$5,000 scholarship endowment. (Thanked)

6. Players of "It's NA Without U" win if their ticket spells "N-A-U." Winning tickets for "It's NA Without U" are valid only if accompanied by a completed pledge card. Winners of "It's NA Without U" will receive an additional donation of \$50 from the NAU Foundation to the fund of their choice, as indicated on the winner's pledge card.

7. Ed McMahon will not be coming to your door.

Named Endowment

Alumni

Alumni Board Scholarship
 Alumni Board Scholar Award
 Alumni Scholarship
 Tidwell Memorial Scholarship

College of Business Administration (cont'd)

Larry and Barbara Gardner Remembrance Scholarship
 Lillian Hall Scholarship
 The Knutson/Unland Scholarship
 LeVerne Pletcher CBA Scholarship
 Shaffer Memorial Scholarship
 Gene Thomas Memorial Scholarship
 Brian Keith Tinsfield Memorial Scholarship



John Smith,

This is not your usual NAU Annual Fund Campaign. (Aren't you glad.) This year, if you give to the university, you'll get a chance to win a \$5,000 scholarship endowment.

Your chance to win is one in about 6,000—that's why we're just waiting to hear from you.

It's so simple. Just make your pledge to the NAU Annual Fund and complete the enclosed envelope. Mail the pledge card and envelope provided. What could be easier?

Complete rules for the Annual Fund Giving Giveaway are on the reverse side of this envelope. Winner will be announced during Employee Appreciation Week, April 22-26, 1996.

In addition to the chance to win a \$5,000 scholarship endowment in your name, you'll also receive a \$50 donation to the Annual Fund. So what's stopping you?

We've included in your Annual Fund Giving Giveaway envelope a ticket to the 1996-97 NAU football game. If you have a lucky ticket that you'd like to use, please attach it to your pledge card.

The Annual Fund

Giving Giveaway

Pledge Card

To enter the Annual Fund Giving Giveaway, return this completed pledge card and the enclosed entry form in the envelope provided.

PERSONAL INFORMATION

Name _____ SS No. _____
 Department _____ NAU Box _____ NAU Phone _____
 Home Address _____ Home Phone _____
 City _____ State _____ ZIP _____
 NAU affiliation (check all that apply) Faculty Staff NAU retiree Alumni Former
 Sponsor's Name _____
 (If you wish the gift to be made in both names.)

METHODS OF PAYMENT

To make payroll deduction as easy as possible for our donors, we've designed our system. Now your deduction will renew automatically each year unless you request a change through the Northern Arizona University Foundation. If you'd like your donation to be paid through payroll deduction, simply indicate how much you'd like deducted each pay period and where you'd like your donation designated.

My greatest need _____ \$ _____ per pay period
 \$ _____ per pay period

I prefer payroll deduction

If I am my check for \$ _____ to be used as I've designated below, please make checks payable to the NAU Foundation.)

I prefer my credit card \$ _____ to be used as I've designated below.
 VISA MasterCard Card # _____ Exp. Date _____
 My greatest need _____ \$ _____

PLY

"It's NA Without U"

Scratch off the three boxes below. If your ticket spells "N-A-U," the NAU Foundation will add \$50 to your pledge.

If you have a winning ticket, return it with your pledge card and entry form in the envelope provided. Winning tickets are valid only if accompanied by a pledge.

The Annual Fund

Northern Arizona University

Giving Giveaway

Entry Form

The personal touch.

How can you make your prospects feel special? Get inspired by these two direct-mail pieces. • Miami University sends valentines each year to alumni couples. For a sample (50 available), contact Annual Fund Director Jeff Hauk, co-author of the article at right, at MU, 725 E. Chestnut St., Oxford, OH 45056; or haukjm@muohio.edu. • St. Ignatius High School follows personal notes from fellow alumni with a strong written ask. For last year's letter and pledge card, contact Annual Fund Director Arlene Bourisseau, SIHS, 1911 W. 30th St., Cleveland, OH 44113; or abourisseau@ignatius.edu.

Getting through to Generation X.

Humor and food: two very different—yet successful—ways Georgetown University and Grinnell College appealed to new graduates. Now see their direct-mail solicitations for yourself. • For Georgetown's "blah blah blah" letter (50 available), contact Annual Fund Director Joe Kender, GU, 2115 Wisconsin Ave., Suite 500, Washington, DC 20007; or kenderj@gunet.georgetown.edu. • For Grinnell's pizza challenge postcard, contact Annual Giving Assistant Director Nieka Apell by fax at (515) 269-3222 or by e-mail at apell@admin.grin.edu.

Gift policies that keep on giving.

When you share your gift policies with CASE, you help your colleagues improve their donor relations, which in turn creates a better fund-raising environment. The CASE Information Center is seeking gift naming and acknowledgment policies; descriptions of recognition clubs; and information on solicitation, stewardship, and recognition events from all types of institutions. Send samples to Director Barbara Perkins at CASE, Suite 1000, 1307 New York Ave. NW, Washington, DC 20005; or perkins@case.org.

A river runs through it.

Just as mighty rivers begin with tiny drops of rain, so does a mighty institution grow with each person's gift. That's the theme of the University of Missouri's 1996-97 development annual report. The booklet grabs readers' interest with donor profiles, descriptions of university accomplishments, and clearly presented financial data. For a copy (50 available), contact Karen Worley, Director of Publications and Alumni Communication, UM, 407 Reynolds Alumni and Visitors Center, Columbia, MO 65211; or worleyk@missouri.edu.

In focusing on direct mail minutiae, however, you may be ignoring the bigger question: Does your direct mail truly support your annual fund goals? Or is each piece a little bit of this, a little bit of that, with a whole lot of nothing in return?

To be blunt, a lot of direct mail is junk. But we've sifted through the mailbag and found some stellar exceptions—pieces that breathe new life into the medium. The examples that follow actually embrace new technologies and fund-raising strategies, but still successfully achieve traditional program goals.

These campuses question some aging direct-mail paradigms: Why do we ask for a gift only once a year? Why do we always use the same, cookie-cutter wording the experts say will get people's attention? Why do we only ask for checks or credit card numbers? And why do we even call it the annual fund?

The following examples aren't necessarily the first of their kind, nor are they appropriate for every institution or occasion. But we applaud these efforts and the philosophies behind them. To paraphrase Mark Twain, they show that reports of direct mail's death are greatly exaggerated.

1. Sweepstakes solutions for Northern Arizona University

To reach a traditionally difficult faculty and staff audience, Northern Arizona University sent a direct mail piece that cleverly spoofed the "You may already be a winner" sweepstakes mailings that clutter most people's mailboxes.

Instead of Dick Clark and Ed McMahon, the enthusiastic testimonials on the envelope ("Don't delay. Act today!") are from the faculty senate chair, director of undergraduate admissions, and facilities painting supervisor, among others. A scratch-and-win card gave some lucky donors the opportunity to add \$50 to their gifts, compliments of the NAU Foundation.

There was a real sweepstakes, too, with a \$5,000 prize. OK, the winner didn't actually get cash. Instead, the winning donor's name was put on a \$5,000 scholarship, also contributed by the foundation.

NAU's appeal was an irresistible draw for annual-fund gifts. Faculty and staff participation increased 32 percent—and one of the most popular support staffers on campus won the scholarship in her name.

2. Yada yada yada from Georgetown University

Although fund raising is serious business, a serious message might turn off some segments of your audience. Georgetown University avoids that problem by taking what could have been a boring, traditional letter to younger alumni and turning it into a colorful, quick-read, lighthearted piece that pokes fun at solicitation letters while still getting its point across.

Calling itself the "perfect Annual Fund letter for busy people," the text literally says "blah blah blah," with the exception of phrases like "Give something back to alma mater" strategically sprinkled throughout.

On the back, the letter explains each phrase in no more than three sentences. And the topics are those likely to interest young alumni, such as how they can give by credit card and get frequent flier miles or how annual fund participation rates factor into college rankings.

Georgetown's letter is effective target marketing to a segment that's difficult to reach, particularly via direct mail. It emphasizes themes that are important to younger graduates and offers familiar payment options. With this and other new efforts, the university has increased annual fund participation by young alumni from 24 percent to 30 percent in one year.

We'd like to give Georgetown credit for daring to make fun of direct mail in a direct mail piece—but the annual fund staffers admit they borrowed the idea from another institution whose name they can't recall.

3. Cupid cards from Miami University

Miami University in Oxford, Ohio, mails valentines each year to "Miami Mergers": couples who both graduated from the university.

While a valentine may not be a typical direct mail solicitation, Miami has found that there's no better way to pull at the heartstrings—or purse strings—of this select group. The cards contain a different poem and cartoon each year.

The piece has become a favorite of these alumni, some of whom say they look forward to receiving it each February. (That's right, they actually eagerly anticipate receiving direct mail.)

While the valentines say nothing about making a gift, they're a lighthearted cultivation tool that arrives in the cou-

Why Give to the Annual Fund?

Today's Georgetown students need your support

Tuition only covers 80% of the cost of an education at Georgetown. The Annual Fund helps to cover the gap and keep tuition costs down.

YOU CAN CHARGE IT!

Rack up the frequent flier miles and charge your gift. Charge

ALUMNI DID IT FOR YOU WHILE YOU WERE ON THE HILLTOP

You may not have realized it, but other alums helped pay for 12,000 undergraduate alums support the Annual Fund

Every gift is significant

We recognize young leaders to the Annual Fund as years of graduation. However, each gift is significant \$50, or \$25.

Give something back to Alma Mater

Help make it possible for other students to have Georgetown. Money raised through the Annual Fund supports sections of popular classes, visiting professorships

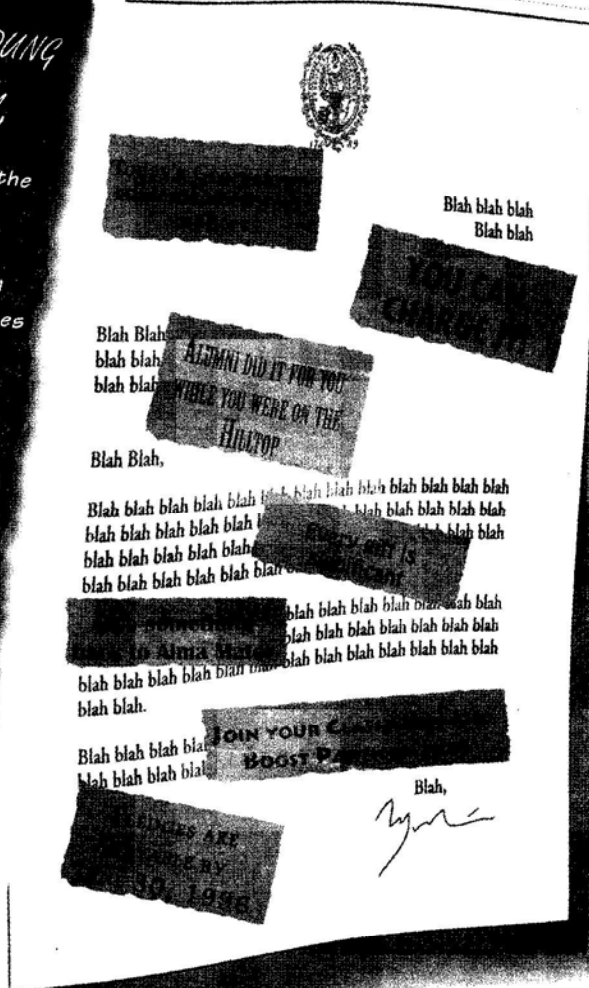
JOIN YOUR CLASSMATES AND BOOST P

The only way you can directly affect Georgetown is by participating in the Annual Fund. Corporate and individual levels when determining which institutions to help in these two areas.

Pledges are payable by June 1

You can pledge now and pay it off over the next year. An enclosed reply card to send in your gift to

HEY YOUNG ALUM,
Here it is... the traditional letter you always find in those envelopes from the Georgetown University Annual Fund. But let's face it, now that you're out of school you've probably got enough to read, so here's the perfect Annual Fund letter for busy people.



BANISH THE BLAHS: There's nothing boring about Georgetown University's appeal to young alumni. By replacing tried-and-true direct-mail language with blunt talk, the letter struck a chord with Gen-X graduates.

ples' mailboxes about a month before the year's first solicitation. The cards wish the couple a happy Valentine's Day and reinforce the continuing importance of alma mater in their lives.

4. Second solicitations at Kansas University

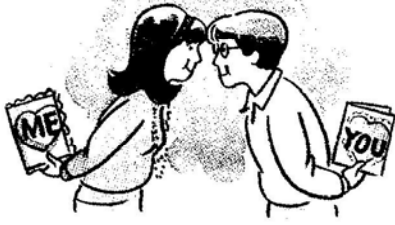
Many institutions send out a "draft" honor roll in hope of enticing nondonors to join the ranks at the last minute. But the

Kansas University Endowment Association takes the bold step of also asking those who've already given for a second, year-end gift.

Although the staff initially worried about the tone of the message: "Are you right where you want to be?" (in the honor roll, that is), they softened it by creating a colorful flier and putting the ask in the mouth of the university mascot, a jayhawk. The flier serves several purposes:

1. As a clean-up mailing, it's the last appeal of the fiscal year to 59,400 donors and nondonors.
2. Because it indicates the donors' current giving and goes out before work on the annual report begins, it confirms a donor's existing gift-club level.
3. It suggests a second gift to move the donor up to the next giving club. This request allows the donor to consider a larger annual gift in a way that's not as daunt-

In days of "old" when you were "young"
 All valentines were hearts and lace,
 On paper or, perhaps, were stung
 Or whispered while in tight embrace.

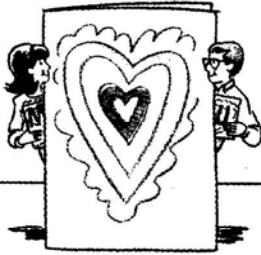


But now, you know, the whole wide world
 Communicates on Internet.
 Our wishes to you must unfold
 On w w w yet.

So, with a digital design,
 We'll send a modern message, too.
 You'll find your first e-valentine
 at <http://www.miami.edu/alumni/mergema.html>

If you are not as yet on 'net
 Do not despair, you'll get there yet
 While now, in this old-fashioned way
 We wish you two a "hearty" day.

HAPPY VALENTINE, MIAMI MERGERS



LOVE AND KINSHIP: These are two strong feelings that campuses have put to work in their direct mail. Miami University makes sure alumni couples don't forget where they met by sending them "Miami Merger" valentines each February 14 (above). And Kansas University (right) asks its prospects if they're in the right giving club—or if they'd like to move up to a better one—before the end of the fiscal year.

GREATER UNIVERSITY FUND



Are you right where you want to be?

If The Kansas University Endowment Association were to publish the 1995-96 Roll of Honor of contributors today, you would be included in the Annual Giving Club indicated below. The Roll of Honor will in fact be published after the close of the school year, and high printing costs dictate that only those donors whose annual support totals \$100 and more will be recognized.

We encourage alumni and friends to give to the Greater University Fund for their University in general and for their school within the University. Both areas urgently need your help to continue offering the best educational opportunities to today's generation of Jayhawks.

Please consider moving to a higher Annual Giving Club level through your support for KU's academic programs. Just tear off the card below and return it with your gift in the postage-paid envelope. This campaign year runs from July 1, 1995-June 30, 1996.

Thank you!

Annual Giving Clubs

- University Club Benefactors—Donors who give a total of \$5,000 or more in 1995-1996
- University Club Patrons—Donors who give a total of \$3,000 to \$4,999 in 1995-96
- University Club—Donors who give a total of \$1,000 to \$2,999 in 1995-1996
- Campanile Club—Donors who give a total of \$500 to \$999 in 1995-1996
- Crimson and Blue Club—Donors who give a total of \$300 to \$499 in 1995-1996
- 1865 Club—Donors who give a total of \$100 to \$299 in 1995-1996

Your 1995-96 Annual Giving Club as of today:

Thanks for your gift for KU (payable to the Greater University Fund!)

- | | |
|---|---|
| \$ _____ Unrestricted for the University of Kansas | \$ _____ School of Law |
| \$ _____ School of Allied Health | \$ _____ College of Liberal Arts and Sciences |
| \$ _____ School of Architecture and Urban Design | \$ _____ School of Medicine |
| \$ _____ School of Business | \$ _____ School of Nursing |
| \$ _____ School of Education | \$ _____ School of Pharmacy |
| \$ _____ School of Engineering | \$ _____ School of Social Welfare |
| \$ _____ School of Fine Arts | \$ _____ KU Libraries |
| \$ _____ School of Journalism and Mass Communications | \$ _____ Other academic area _____ (specify) |

(Name of spouse (include both names)) _____ (KU Club Year) _____
 Gift will be credited to name(s) printed below unless box is marked. Joint with spouse. Single.
 Private address change or correction _____

Charge my MasterCard Visa (Complete blank below)

Card No. _____
 Expiration Month Year _____
 Signature _____

_____ (Name of company)
 will match this contribution.
 Matching gift form enclosed.
 Other matching procedure initiated _____ (describe)
 I intend to give to the Greater University Fund annually
 send a reminder in _____ (which month)

Send additional information concerning:
 The Kansas University Endowment Association
 The Chancellors Club
 Deans Club
 Greater University Fund & Annual Giving Clubs
 Gift Planning and Methods of Giving (over)

Area code + home telephone number _____

Alumni News

Name: _____ KU Major/Department: _____ Class Year: _____ Degree: _____
 Occupation, Title or Position _____ (Please list to which you belong, and if available.)
 Business or Firm: _____ Address: _____
 City _____ State _____ Office Phone: _____
 Other news items: (Family, new address, career, professional or community activities, awards, interests, etc.) _____

Make check payable and send with this card to the Greater University Fund, The Kansas University Endowment Association, P.O. Box 928, Lawrence, Kansas 66044-0928. Telephone (913) 832-7400. Every gift will be used in its entirety, as designated by the donor, for the Greater University Fund to benefit the University of Kansas and is tax-deductible to the extent allowed by law.



ing as if it were solicited in one lump sum.

4. It also reinforces the existence of giving societies, which are largely an after-thought in many annual fund programs.

5. Finally, the year-end, second-gift ask strategy encourages prospects to get in the habit of giving multiple gifts in the same year.

In the past three years, the flier has shown consistent returns: The 1.4 percent response generates about \$102,000 from an average of 802 donors.

5. Persuasive arguments from Penn State

No phone calls. No mailings. More dollars. No kidding. That's the promise Pennsylvania State University makes to a small pool of past annual-fund donors if they give through electronic fund transfer.

EFTs are becoming increasingly popular because they're easy on the donor, they encourage regular (usually monthly) giving, and they make it easy for a campus to ensure that donors fulfill their pledges.

But few institutions would dare go as far as Penn State in promising donors that if they participate in the "Penn State Transfer," they may never receive another call.

In a two-page letter, Penn State clearly describes how the Penn State Transfer works and promotes it as an easy way to make an annual gift. With the message repeated in a two-color brochure, those alumni who received the package had no trouble understanding the process.

Currently 493 donors have accepted

- COLLEGE OF AGRICULTURAL SCIENCES
- COLLEGE OF ARTS AND ARCHITECTURE
- SCHOOL OF BUSINESS ADMINISTRATION
- SCHOOL OF COMMUNICATIONS
- COLLEGE OF EDUCATION
- COLLEGE OF ENGINEERING
- COLLEGE OF ENVIRONMENTAL AND FORESTRY SCIENCES
- COLLEGE OF HUMANITIES
- COLLEGE OF LIBERAL ARTS
- COLLEGE OF MANAGEMENT
- COLLEGE OF NURSING
- COLLEGE OF PHARMACY
- COLLEGE OF PUBLIC AFFAIRS
- COLLEGE OF REAL ESTATE
- COLLEGE OF SOCIAL AND BEHAVIORAL SCIENCES
- COLLEGE OF THEOLOGY
- COLLEGE OF VETERINARY MEDICINE
- COLLEGE OF WINE AND FOOD SCIENCE
- COLLEGE OF WORLD STUDIES
- COLLEGE OF ZOOLOGY
- COLLEGE OF ARCHITECTURE
- COLLEGE OF DESIGN
- COLLEGE OF ENVIRONMENTAL AND FORESTRY SCIENCES
- COLLEGE OF HUMANITIES
- COLLEGE OF LIBERAL ARTS
- COLLEGE OF MANAGEMENT
- COLLEGE OF NURSING
- COLLEGE OF PHARMACY
- COLLEGE OF PUBLIC AFFAIRS
- COLLEGE OF REAL ESTATE
- COLLEGE OF SOCIAL AND BEHAVIORAL SCIENCES
- COLLEGE OF THEOLOGY
- COLLEGE OF VETERINARY MEDICINE
- COLLEGE OF WINE AND FOOD SCIENCE
- COLLEGE OF WORLD STUDIES
- COLLEGE OF ZOOLOGY

March 1995

Mrs. Susan Powell
1024 Airport Road
Unit 1000
Bellefonte, PA 16823

Dear Mrs. Powell:

Three years ago the Annual Fund introduced its "fewer phone calls, less mail" campaign in response to alumni concerned with fund-raising efficiency (and interrupted dinners).

Now, we're introducing a "new and improved" version of that program — one that involves NO phone calls, NO mailings, and MORE dollars for the classroom.

We're calling it Penn State Transfer. We hope you'll call it a good idea.

Less Has Resulted in More

As a regular donor to the Annual Fund, you've already shown an interest and belief in supporting today's Penn State students — much like alumni did while you were in school. In 1991 we cut back the number of phone calls and reminder mailings to those alumni — like you — who could be counted on for their annual gift to the University.

The result? Forty percent fewer pieces of mail, 35 percent fewer phone calls, and a 72 percent increase in dollars directed to academic programs.

Together — you and the Annual Fund — can be extremely proud of these "less means more" results. Thank you for your continuing, generous support.

A New Opportunity For Efficiency

Now we'd like to take the program one step further — to a point where there are no mailings, no phone calls, and a projected one cent cost to raise a dollar.

This almost sounds too good to be true, but with the help of electronic funds transfer (EFT), it's very possible.

You're probably familiar with the growing practice of having your mortgage, car payments, insurance premiums and utility bills automatically deducted from your checking or savings account on a monthly basis.

**No phone calls.
No mailings.
More dollars.
No kidding.**

Why not use the same transaction method to make your annual gift to Penn State? Well, now you can with Penn State Transfer.

By authorizing the Penn State Annual Fund to deduct \$10 a month from your selected account, you will be making a significant \$120 a year gift to the academic program of your choice — something that may be difficult to do if a one-time check was the only option. Because there is no need for phone calls and reminder letters, fund-raising expenses are reduced, meaning more of your gift is used in the classroom where it belongs.

Penn State Transfer is easy to establish, is safe and reliable, and is in your complete control. You see the deduction on your monthly statement and you may cancel or change the amount of your gift at any time.

The enclosed brochure provides more details and other benefits of the program. Please look it over and consider the numerous advantages of Penn State Transfer.

What's Next?

In the next few days, a Penn State student will call to tell you more about Penn State Transfer. He or she will ask for your gift of \$10 a month to support the Penn State academic program of your choice. If you select this option, you will then receive a simple form to complete, along with a postage-paid envelope. It's easy! This may be the last phone call you'll ever receive from the Annual Fund.



If you choose not to participate in the program — and since we have you on the phone — the caller will ask for your gift to the 1994-95 Annual Fund campaign.

Either way, we hope you'll continue to support the academic program of your choice. Thank you for considering this new giving option. In the meantime, if you have any questions, please write or call me at (814) 863-2052.

Sincerely,

Dan Seftig
Dan Seftig
Director of Annual Fund

P.S. If 3,000 Penn Staters participate in Penn State Transfer, academic programs will receive an estimated \$500,000 boost this year. Consider being a part of this special option!

PENNSTATE

**No phone calls.
No mailings.
More dollars.
No kidding.**



THE ANNUAL FUND
for Academic Excellence
PENNSTATE

The Penn State Annual Fund is pleased to announce an electronic banking service to make your support of Penn State easier and more cost-effective. It's called Penn State Transfer — a way of supporting your academic program of choice by using the increasingly popular automatic deduction option.

Perhaps you already pay your monthly mortgage, car payment, insurance premium and utility bills through automatic deduction. Now your annual gift to Penn State can be spread out over 12 monthly donations of \$10 or more.

How Penn State Transfer Works

You complete a simple form to authorize Penn State to instruct your bank or savings institution to make gift payments from the account you indicate. Then send the form, along with a voided check, to The Penn State Office of Annual Giving.

Within the next two months, you will begin to see the deducted amount on your account statement (the first week of each month). The deduction will continue until you choose to cancel or change the amount of your monthly gift.

Every January you will receive a gift receipt from Penn State showing the amount you've

given during the previous calendar year. Save that receipt for tax documentation. It's that simple!

**Advantages For You
Advantages For Penn State**

A gift with greater impact
Your annual gift is easier to budget when it's spread over a full year. It also amounts to a gift with greater impact and ensures a record of continuous support.

No more phone calls and letters
Your monthly support eliminates Annual Fund phone calls and direct mail solicitations. There's less bother for you and less cost to Penn State, meaning more of your gift will be used for its intended purpose.

Cost savings
There are no sign-up costs or monthly fees. In fact, you save by eliminating check-writing charges and postage.

Complete control
You are in control of your monthly gift. You may cancel or change the amount at any time by calling The Penn State Office of Annual Giving. You will see the automatic deduction on your monthly statement.

PROMISES, PROMISES: Penn State offers a deal to a select group of donors: Give a certain amount through electronic fund transfer, and we'll leave you alone for the rest of the year. It's a win-win situation for both the donor, who gets peace and quiet, and the campus, which spends less on solicitation, guarantees fulfillment, and often gets a larger gift from each donor.

Penn State's EFT offer, a 9 percent increase from FY 1997. The EFTs generate \$7,115 a month; the average gift is \$173 (\$14.43 a month). Also, a special focus on \$50 annual donors has successfully convinced many to give \$100 or more through EFT.

6. Customized cards at St. Ignatius High School

Many annual giving programs solicit their top annual fund prospects in person.

But what if your office doesn't have the resources to visit all those with substantial giving histories or means? St. Ignatius High School in Cleveland turns to highly segmented and personalized direct mail.

Each year, the school hosts an annual-fund kickoff dinner. A corps of about 100 alumni major donors and volunteers at the dinner write "lead" notes on special cards to major prospects, thanking them for past support and encouraging continued support. Each attendee writes six to

10 notes for a total of 600 personal messages to prospects.

Less than a week later, the campus mails those prospects a compelling, three-page ask letter from the president that explains the need for financial aid. A centerpiece of this year's appeal is a challenge grant that will match gifts of \$500 or more. A challenge is the perfect motivation for this target audience and an excellent strategy for moving donors up the giving ladder.

APPEALING MESSAGES: Alumni leaders from St. Ignatius High School write on school notecards (below center) to thank and encourage donors. The school sends a solicitation letter and pledge card a few days later. Faced with a different problem—explaining the role of state funding in its budget—Metropolitan State University uses easily understood analogies (right).



September 15, 1997



Name
Address
City, State, Zip

Dear XXXX:

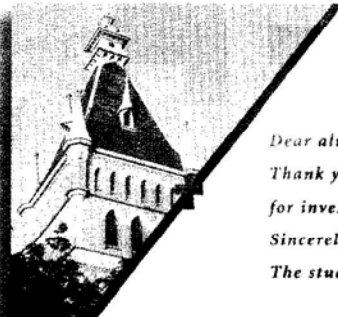
Well, this is going to be a long letter. I hope you'll bear with me, because I have a message I feel I must get across to you. It's a message of great hope, but also of great concern.

First, the hopeful side. Our mission continues to be the education of young men in the Jesuit tradition, encouraging them to be open to growth, intellectually competent, religious, loving, and committed to doing justice so that they may follow the example lived by Jesus Christ. We continue to teach our boys the importance of coming to know the Lord, for then they can love and serve Him. We continue to be blessed with a faculty truly dedicated to this mission, many being graduates themselves who love this school so much they have made teaching here their life's work. We continue to provide a challenging curriculum, while keeping pace with the changing needs of our students.

Of course, many things are different since your days in the class of XXXX. Certainly, the physical look of the campus has changed for the better, we think. Clearly, we have fewer Jesuit priests and scholastics. In addition, the cost of operating the school has risen to \$10 million per year. The course offerings and extracurricular activities are also different in some ways. What remains the same, however, is the preparation of our students as "Men for Others."

XXXX, I know you value the education you received at Saint Ignatius and that you are invested in the future of this old school and its students. I am grateful to you for this past support, most recently your gift of \$XXXX. Please know that your generosity helps us continue our important mission.

Now, let me share with you some real concerns about the future of the school and ask that you consider being a part of the solution.



Dear alumni, parents, and friends,
Thank you for investing in our education...
for investing in our futures.
Sincerely,
The students of St. Ignatius High School

US HIGH SCHOOL • 1911 WEST 30TH STREET • CLEVELAND, OHIO 44113 • 216/651-0222 • FAX 651-6313

RECOGNITION LEVELS

\$5,000 & above: Carnegie Society
\$2,500 - \$4,999: Starter Society
\$1,000 - \$2,499: Starter Society
\$500 - \$999: Starter Club
up to \$499: Honor Roll Donor

Gifts made to the Annual Fund in these categories will receive recognition in the President's Honor Roll of Donors.

Tax ID Number: 34-071-4300

For further information regarding gifts of securities, call Advice Brokerages at 216/651-0222, extension 213.
Please send me information on estate planning.
I've already included Saint Ignatius High School in my estate plan.

DONOR CARD

Saint Ignatius High School Annual Fund



1911 West 30th Street
Cleveland, Ohio 44113-3499
216/651-0222

[\$] amount I pledge (to be paid in full by May 31, 1998)
[\$] amount enclosed (make checks payable to Saint Ignatius High School)
[\$] balance due

Please bill me: [\$] monthly [\$] December 1, 1997 [\$] May 1, 1998

I prefer to make a pledge payment of [\$] charged to my [] MasterCard [] Visa
Account Number: _____ Expiration Date: _____

My gift will be matched by _____ (Please enclose completed form)
Donor Signature: _____

Gifts are tax deductible in accordance with the 1997 Charitable Contributions Act.

OUR FAMED ALMA MATER GRACES EVERY SHRINE WITHIN OUR HEARTS...

*With her unforgiving smiles
and the firm, firm, firm, firm,
years in, years in, all over
This of our days from the old*

**WE'RE IGNATIUS MEN FOREVER AS WE HAIL
THE BLUE AND GOLD.**

The school has seen an increase in giving with the cards—and comments, phone calls, and notes back from donors say how much they appreciate the effort.

7. Capital ventures from Metropolitan State University

Metropolitan State's direct mail piece departs from the usual annual giving nomenclature when it invites donors to support the Venture Fund. The name suggests the fund's purpose, not its tim-

ing—how revolutionary. But this mailing is exceptional in another way as well.

Using a simple yet effective design, the piece creatively illustrates how state funding doesn't meet all the institution's needs—a misconception that many prospects cite as a reason they don't give to state-supported institutions.

With examples such as a baseball game with only 5.4 innings or Snow White with only 4.2 dwarves, the university makes the point of how unfinished

the campus would be without private support.

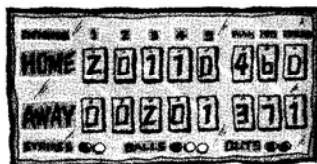
Metropolitan's solicitation teaches two important lessons: (1) Don't expect prospects to understand, let alone be inspired by, your annual fund terminology; and (2) Address your prospects' likely objections head-on, with a smile.

8. A cheesy challenge from Grinnell College

The Grinnell College Annual Fund sent

If Metropolitan State University were a baseball game...

...it would last only 5.4 innings.



If Metropolitan State University were a year...

...New Year's Eve would be August 7th.



pun-laden, pizza-themed postcards to recent graduates asking them to "raise some dough" for alma mater. A contest among classes four, five, and six years out awarded the one with the highest annual fund participation a reunion-weekend pizza party at an alumnus-owned campus hangout.

This is another example of effective young-alumni target marketing. With this postcard, Grinnell hits new graduates where they're most vulnerable—their

stomachs. The solicitation created a tremendous response among the three targeted classes. Annual fund participation by each class increased to at least 33 percent. The winning class—the Class of 1991—reached 53 percent participation, becoming the youngest class ever to achieve that level.

Annual fund staffers and college administrators helped make and serve the 57 pizzas and engraved the winning class year on a pizza pan.

9. Atypical appeals at the University of the Virgin Islands

"Help keep UVI afloat!" was a painfully accurate rallying cry on the outside of this piece, sent five months after Hurricane Marilyn struck the University of the Virgin Islands in September 1995. Inside, the letter explained how senior class gifts would help the university recover from hurricane damage.

The appeal worked: Senior class giving increased 100 percent, possibly because the students realized how recovery could disrupt the academic year. In 1997 giving returned to pre-hurricane levels, however.

This example is a reminder that current events can lend timely (and occasionally untimely) value to your direct mail appeal. Don't come off as an opportunist, but don't sweep under the rug circumstances that will strike a chord with your audience. The special circumstances may generate the first of many gifts to come.

10. Funding from feathered friends at Earlham College

What do you get when you cross a nature walk with a walkathon? Earlham College's Birding Big Day, the focus of possibly the most unusual annual fund appeal we've ever seen.

Birding Big Day is two popular biology professors' annual spring bird-watching expedition. They meet at a local restaurant at 2:30 a.m. for breakfast, then take to the fields around the college to look and listen for as many species of birds as they can find. Donors pledge a flat dollar amount or a certain amount of money per species—usually just under 150 each year.

The two professors write conversational letters to prospects before and after each year's event. The first tells what species they're hoping to see. It also explains that the college will use the money the event raises for annual fund support, typically student financial aid and scholarships. The follow-up letter describes the day's happenings and is accompanied by the list of species identified and numbers seen.

Now in its 16th year, this appeal has proven itself a fun way to attract donors who might not be interested in a typical direct-mail solicitation. It's raised more than \$25,000 in gifts and pledges from about 350 donors in each of the past four years and more than \$250,000 since it began. ■