

**STAFF Conference
Hobart – William Smith
July 18-20, 2011**

Strategic Engagement

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Strategy

A strategy is a way through a difficulty, an approach to overcoming an obstacle, a response to a challenge.

If the challenge is not defined, it is difficult or impossible to assess the quality of the strategy. And, if you cannot assess that, you cannot reject a bad strategy or improve a good one.

Four Key Principles

I. Guiding policy

- Provides an overall approach chosen to cope with or overcome the obstacles.

II. Focused Objectives

- Works by focusing energy and resources on one, or very few, pivotal objectives whose accomplishment will lead to a cascade of favorable outcomes.
- It also builds a bridge between the critical challenge at the heart of the strategy and action—between desire and immediate objectives that lie within reach.
- Thus, the objectives that a good strategy sets stand a favorable chance of being accomplished, given existing resources and competencies.

Four Key Principles

III. Diagnosis

- Provides an explanation of the nature of the challenge.
- A good diagnosis simplifies the often overwhelming complexity of reality by identifying certain aspects of the situation as being the critical ones.

IV. Coherent actions

- Provides steps that are coordinated with one another to support the accomplishment of the guiding policy.

Five Elements of a “Bad” Strategy

I. Fuzzy strategic objectives

- A long list of things to do, often mislabeled as strategies or objectives, is not a strategy. It is just a list of things to do. The label “long term” is added, implying that none of these things need to be done today.

II. Weak strategic objective —“Blue Sky”

- Typically a simple restatement of the desired state of affairs.

III. Mistaking goals for strategy

IV. Failure to face the problem

V. Fluff

GOLD: Disengagement and Weak Giving

Fostering an environment conducive to building life-long relationships to the College requires a significant investment in resources — human and financial — to ...

Core Strategic Issue:

Create and sustain a program that provides meaningful and substantive opportunities for engagement for the graduates of the ten most recent classes.

Guiding policy

- Building a **life-long relationship model** begins during the undergraduate years while the future alumnae/i are a “captive” audience;
- Students have **multiple “touch points”** during their undergraduate years that help to shape and influence their affinity to the College;
- **Program goals**, objectives and design should be **influenced by the constituent group** it is intended to serve;
- The College must be willing to **invest resources in the programs** designed to foster greater engagement by and between recent graduates;
- The **President and members of the Board of Trustees must play a more active role** in the cultivation and stewardship of Hamilton’s future leaders;
- **Enhanced personal outreach should not be sacrificed** for the convenience of emerging communication technologies.

Focus

- Build a life-long relationship model
- Create multiple “touch points”
- Design program objectives influenced by the constituent group
- Make financial and human investment in the programs
- President and Trustees must play an active role
- Enhanced personal outreach should not be sacrificed

Diagnosis

- Mounting pressures to “mold” the GOLD performance creates a natural tension between core annual goals and a constituency that may have a less clearly defined understanding of its relationship to Hamilton.
- Balancing short-term, annual goals with a more strategic, long-term initiative requires clear understanding of what might be required in an effort to build a life-long relationship model.
- Can the College accept the current levels of financial and volunteer support in an effort to focus on building a more lasting framework for engagement?

Coherent actions

- Experiential and attitudinal assessment
 - Survey broadly and/or within focus groups
- Undergraduate enrichment
 - Create alumni leadership-in-training experience
- Presidential and Board influence
 - Create two-way access
- Volunteer leadership mentoring
 - ID, recruit and use leaders to expand GOLD leadership
- Total affinity framework
 - Create shared identity (brand)
- Marketing communications suite
 - Consistently communicate core messages

Tactical Actions to Realize Strategy

- Hamilton Alumni Leadership Training (HALT)
 - Built a core group (40+) of seniors who are leaders in training
- GOLD Group Engagement Committee
 - Created a 20 person GOLD committee as in-house focus group & members of Alumni Council
- GOLD Group Leadership Events with the President
 - Breakfast with leaders. Lunch with rank and file 3 x year
- Trustee Mentoring Calls
 - Calls with class leaders following each trustee meeting
- Coherent Brand Image
 - Built brand around GOLD Scholars
 - Created consistent look and feel for college correspondence
 - Built complimentary website

Less Frequent Givers – Alternative Solicitation Plan

Long-term strategies don't necessarily need to be complicated or elaborate. In this example, removing certain alumni from the annual solicitation process and engaging them in a less frequent program may generate larger returns for their lifetime giving.

Core Strategic Issue:

Create an alternative solicitation program for alumni who are not interested in giving every year.

Guiding Policy

- Despite our development expectations, not everyone is interested in giving annually;
- Aggressive annual solicitation attempts **may feel like harassment** to this group and **negatively impact** their giving all-together;
- We **have the data** which reveal individual giving behaviors and can identify those who are not inclined to give annually;
- Volunteers who are involved with soliciting classmates must be able to **identify and respect** individuals within this special group;
- Stewardship efforts must recognize these donors so that they **self-identify** as “consistent or regular givers”;
- As an individual’s **giving circumstances and interests change**, we must create a **dynamic** way to indentify these changes and respond with an appropriate solicitation process.

Focus

- Build and evaluate life-long giving model
- Identify and categorize various donor frequency behaviors
- Educate volunteers about alternative solicitation strategies
- Develop personalized stewardship program so that periodic donors feel equally thanked and appreciated, including life-time giving value

Diagnosis

- Attempts to “persuade” all alumni to give annually can create tension between core annual goals and a constituency that is not inclined or able to give charitably to the college each year.
- Balancing short-term, annual goals with a more strategic, long-term solicitation plan for this particular group, keeps them interested in giving and provides them with a rewarding giving experience.
- Can we isolate this group and implement an alternative solicitation plan effectively with our volunteer solicitors? How do we improve our stewardship program to include “periodic” donors and recognize their life-long giving value?

Coherent actions

- Evaluate data for donor behaviors
 - Identify and categorize various donor frequency patterns
 - Calculate lifetime giving totals
- Stewardship
 - Create methods to identify giving value based on frequency (consecutive, periodic, etc.)
 - Send personalized thank-you/acknowledgement
- Volunteer training
 - Identify and categorize various donor frequency patterns
 - Calculate lifetime giving totals

Results

- More satisfied donors who are solicited on the basis of their personal frequency interests rather than those of the development office
- Improved and personalized stewardship efforts that result in positive self-identification as an important and regular supporter
- Life-long giving value is included in evaluating donor's performance

Where Do You Have Challenges?

- **Annual fund/Major Gifts interactions** – for some prospects it would be better suited to solicit in conjunction with other gift conversations and timeframe rather than futile attempt to get large AF gift every year
- **Rolling out a 5 year keystone reunion program** - integrated w/Major Gifts
- **Stewardship program** – develop multi-year plan for stewardship gifts and thank-you communications rather than using same or similar items year after year
- **Alumni who are associated only through unconventional affinity based connections**
- **Deployment of “challenge efforts”** – rather than repeat annually, to spread out over time to keep fresh and appealing

STAFF Retreat

Where Do You Have Challenges?

- **Participation** — articulating the value
- **Participation** — extend the timeframe out beyond a single year and evaluate participation over 3, 5 or 10 years, perhaps broken down further by years out range or reunion year classes. This might reveal very different results and trends than conventional fiscal year charting
- **Disconcerted alumni** — i.e. denial of legacy applicants
- **Volunteer model** — for those who can't/don't want to volunteer each year but do want to volunteer
- **Other?**