

Seminar





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FOR FRATERNAL
EXCELLENCE

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Degrees of Change

Collaboration Successes from a 3-Year Strategy

Julie Burkhard, Chief Development Officer *Alpha Tau Omega Foundation*

Chris Smith, Director of Systems *Alpha Tau Omega Fraternity*

Our Roadmap

1. Intros
2. Background
3. 3-Year Strategy
4. Year 4 & Beyond
5. Q&A

FOUNDATION
BOARD

DIRECTORS OF
DEVELOPMENT

FUNDRAISING
PORTFOLIO



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1. Intros



Julie Burkhard

**Chief Development Officer
Alpha Tau Omega Foundation**



Chris Smith

**Director of Systems
Alpha Tau Omega Fraternity**



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2. Background

ATO Foundation pre-2019



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3. 3-Year Strategy

Year 1: Capacity

Y
E
A
R

Board

DODs

Portfolio

1

Silent Giving Expectation

Team of 2 inherited, 2 new
\$1000 asks

800-1000 prospects
Capacity - donors-only



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3. 3-Year Strategy

Year 2: Propensity

Y
E
A
R

Board

DODs

Portfolio

1 Silent Giving Expectation

Team of 2 inherited, 2 new
\$1000 asks

800-1000 prospects
Capacity of current donors

2 Stated Expectation: \$1000

Team of 4
Alumni Events & Giving Clubs

400-600 prospects
Propensity Score leveraged



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Propensity Insights

Chapter
President

Alumni Relations
Officer

Chapter
Secretary

Philanthropic
Donor

Political Donor

Named in a
Trust



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3. 3-Year Strategy

Year 3: Affinity

Y
E
A
R

Board

DODs

Portfolio

1	Silent Giving Expectation	Team of 2 inherited, 2 new \$1000 asks	800-1000 prospects Capacity of current donors
2	Stated Expectation: \$1000	Team of 4 Alumni Events & Giving Clubs	400-600 prospects Propensity Score leveraged
3	Stated Expectation: \$2500 Fraternity Board Soft Ask	Team of 4 More Events & Targeted GCs	250-300 prospects Affinity chapter targeting



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Affinity Chapters

Nebraska

Purdue

San Jose State

Florida

Georgia Tech

Mississippi

Alabama

Missouri

Oklahoma

Simpson



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4. Year 4 + Beyond

Year 4: What's next?

Y
E
A
R

Board

DODs

Portfolio

1	Silent Giving Expectation	Team of 2 inherited, 2 new \$1000 asks	800-1000 prospects Capacity of current donors
2	Stated Expectation: \$1000	Team of 4 Alumni Events & GCs	400-600 prospects Propensity Score leveraged
3	Stated Expectation: \$2500 Fraternity Board Soft Ask	Team of 4 More Events & Targeted GCs	250-300 prospects Affinity chapter targeting
4	\$2500 Expected New Board Members	Team of 3 GC Event, New GC Levels	100-125 prospects & donors CRM AI Targeted Predictions

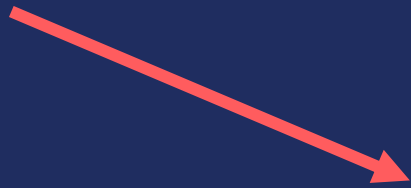


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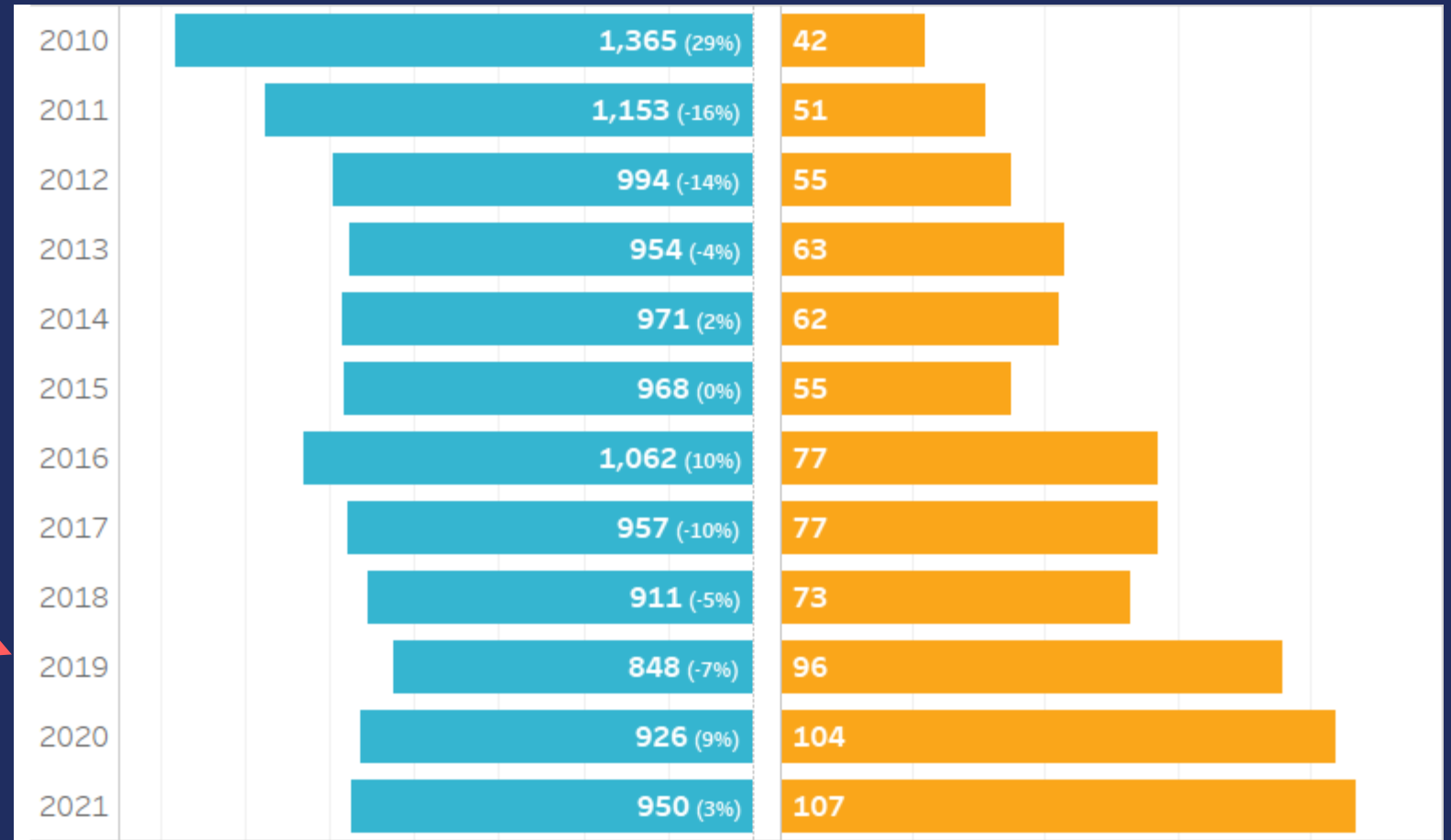
The Impact

Year 1



Donor Count

\$1000+ Donors

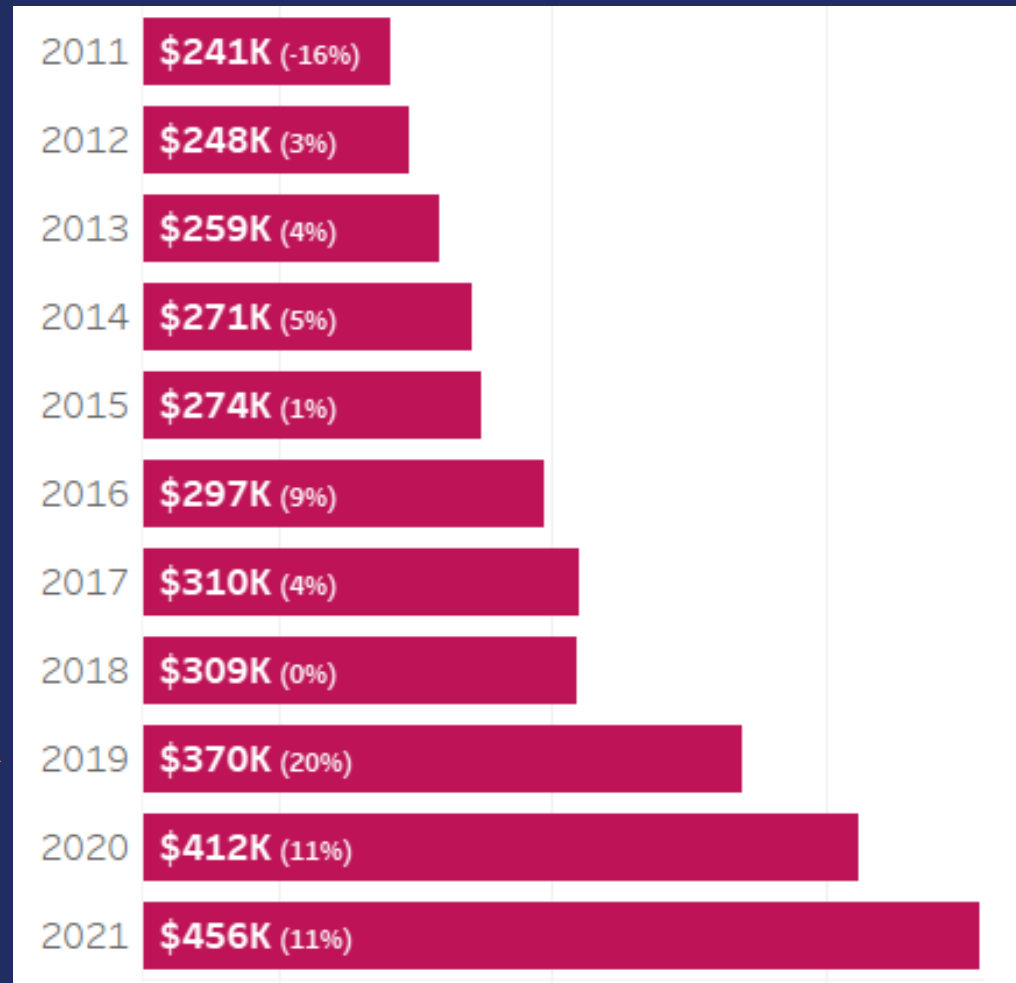


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The Impact

Annual Fund Donations



Year 1



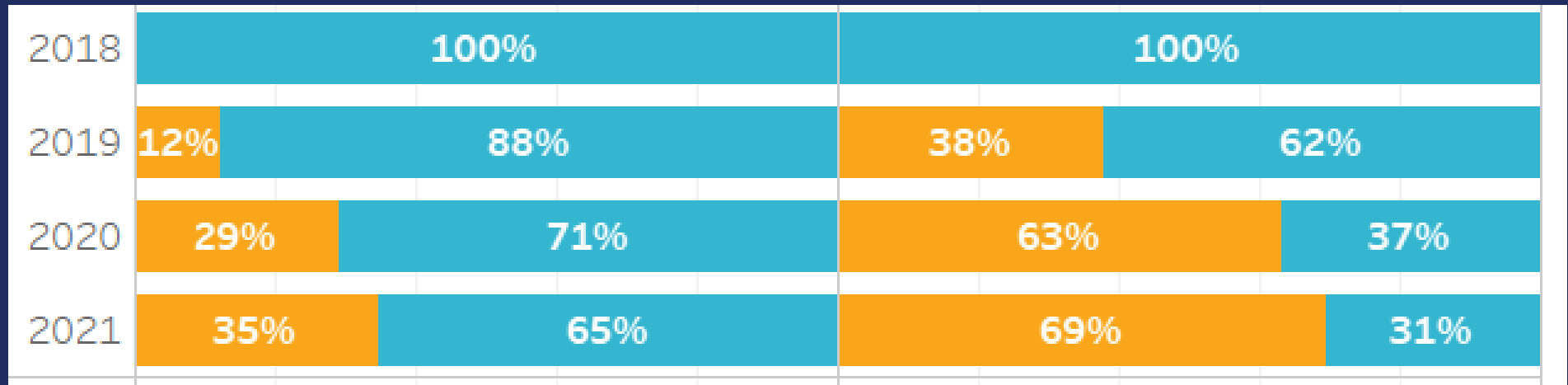
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The Impact

Annual Fund Donations

DOD Donations



Year 1

% of Donors

% of Donations



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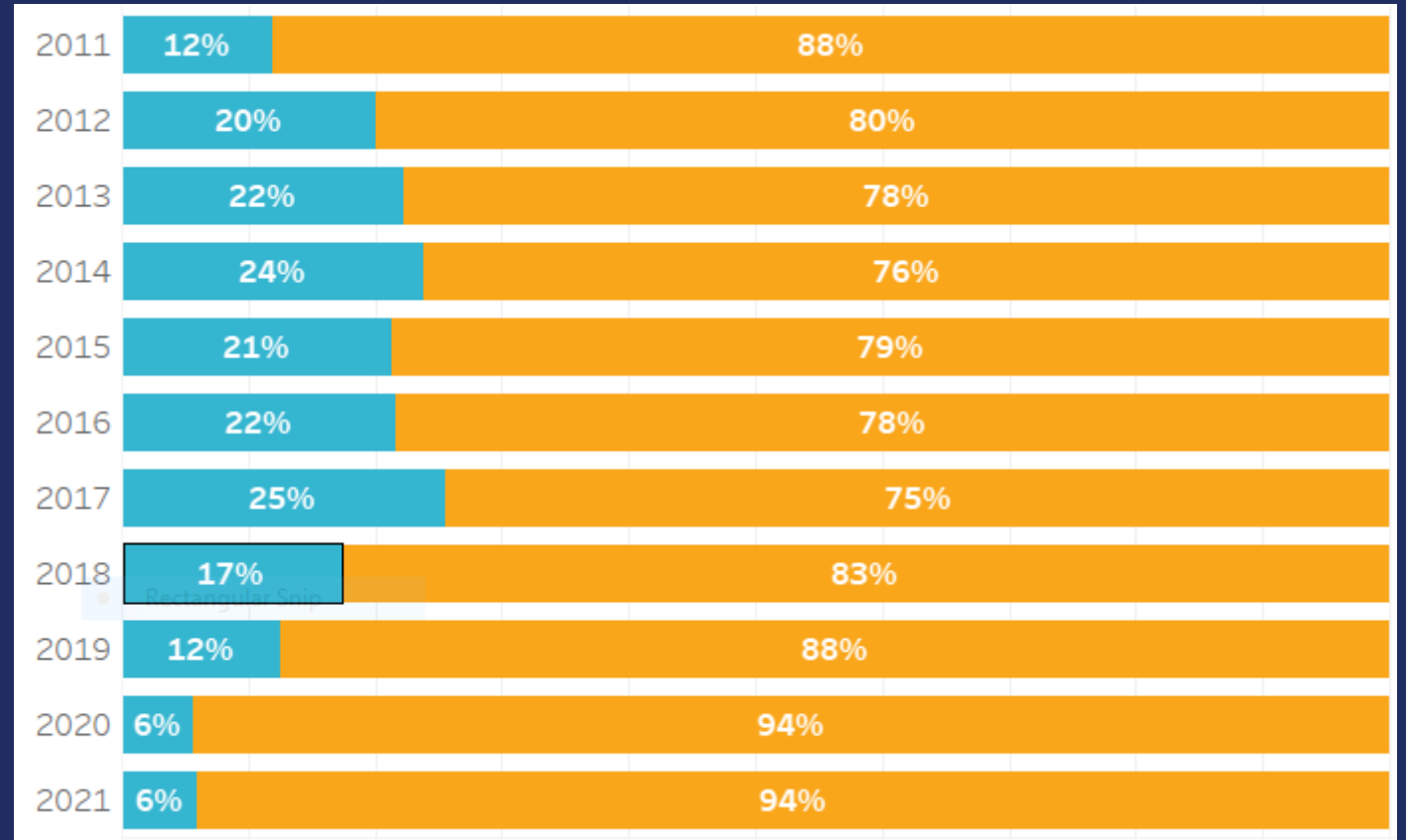
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The Impact

% Chapter Restricted Donors

% Unrestricted Donors

Year 1



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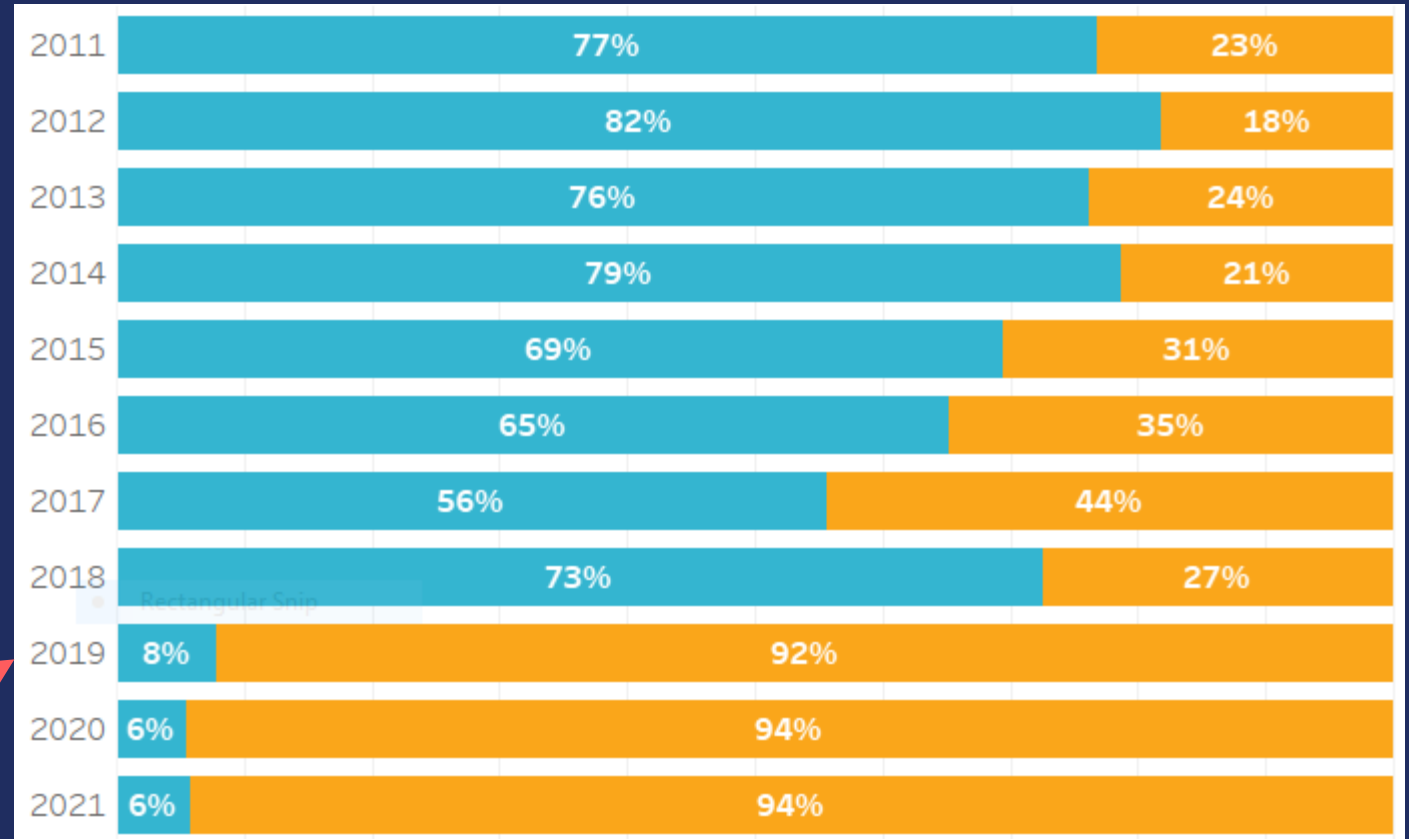
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The Impact

% Chapter Restricted Donations

% Unrestricted Donations

Year 1



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5. Q&A

Questions?



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