

Segments of One



The Art of Personalized Communication



Anne Curosh

Director of Advancement
Alpha Chi Omega Foundation



Jon Van Oss

Director of Analytics
Pledgemine

Announcing



Pledgemine has joined the EverTrue family!

About Anne...

9 years in fundraising - major gifts and annual giving experience

Alpha Chi Omega Foundation

Lives in Fishers, Indiana with her husband, Kevin and daughter, Sophia



About Jon...

30+ Years Working for Non-Profits,
both on staff and in a consulting role

Primarily focused on Database
Marketing and DB Analytics

Analyzed 200+ Non-Profit Databases
Across All Segments



What is Segmentation?

Definition: Segmentation means to divide the marketplace into parts, or segments, which are definable, accessible, actionable, and profitable and have a growth potential.





Art

Creative



Science

Data



Segmentation

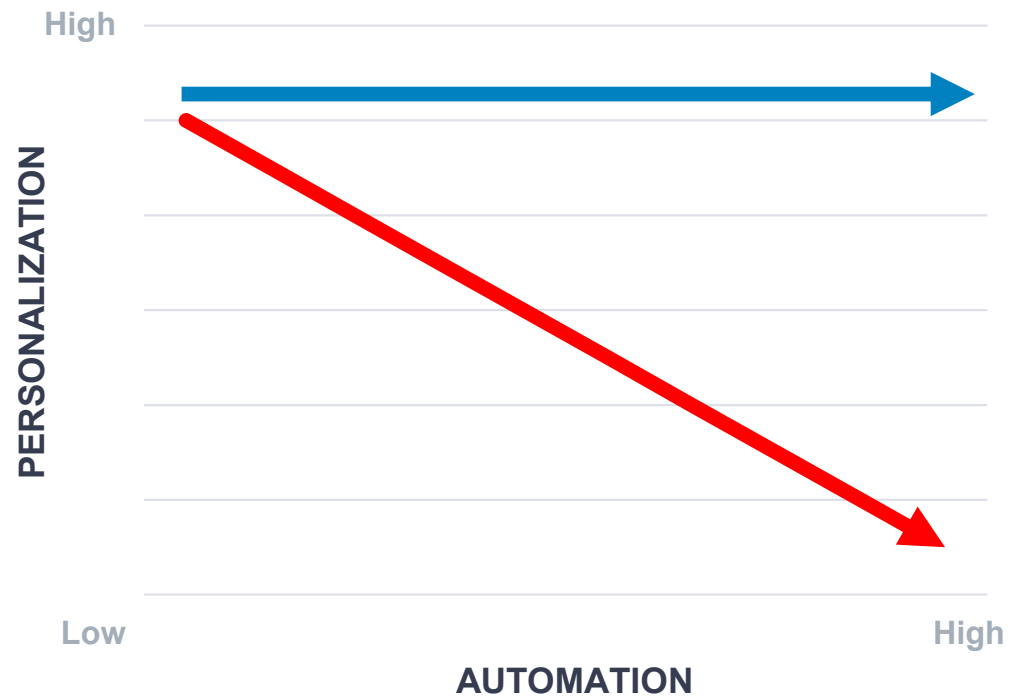
Benefits:

- Create stronger marketing message
- Identify the most effective marketing tactics
- Design hyper-targeted solicitations
- Attract (and convert) quality leads



Personalization vs Automation

- Historically, the higher the level of automation, the less personal the message
- Segmentation allows for high personalization, even with high automation



Beyond Traditional RFM

- **R**ecency
how long since the donor's last gift
- **F**requency
how many gifts does the donor give (per year, lifetime)
- **M**onetary Value
What is the size of the donor's largest gift, annual giving, etc.

FREQUENCY
Multiple gift donor

RECENTY

MONETARY VALUE

	\$0.01 - \$24.99	\$25 - \$49.99	\$50 - \$99.99	\$100 - \$499.99	\$500+
0-12 Months					
13-24 Months					
25-36 Months					
36-48 Months					
49-60 Months					

FREQUENCY
Single gift donor

RECENTY

MONETARY VALUE

	\$0.01 - \$24.99	\$25 - \$49.99	\$50 - \$99.99	\$100 - \$499.99	\$500+
0-12 Months					
13-24 Months					
25-36 Months					
36-48 Months					
49-60 Months					

Segmentation

- Digital printing supports maximum segmentation



Segmentation

- Digital printing supports maximum segmentation
- Variable text and images within the context of a design
- Personalize your messages without paying more
- Segments can be identified using multiple data markers





Alpha Chi Omega

Other Ways to Segment

Case Study

Valentine's Card

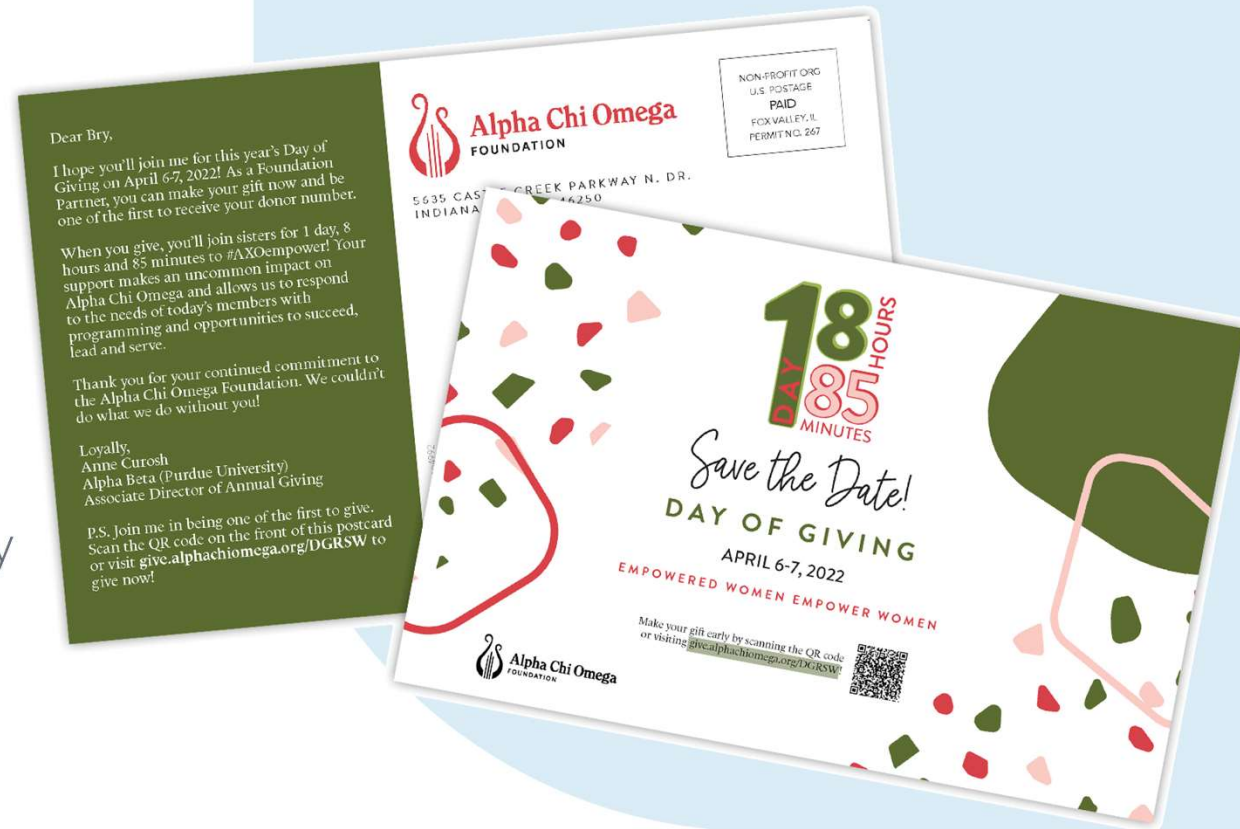
- Focus on stewardship
- Two segments looking at multiple categories



Case Study

Day of Giving Postcard

- Annual giving initiatives
- Three segments
- QR code on postcard vs. reply envelope



Case Study

Special Report

- Over 140 segments based on donor chapter
- Hard ask vs. soft ask in past fiscal year
- Play off annual impact report in fall



Case Study

Calendar Year End Appeal

- Project journeys
- Alternating solutions for fiscal year



Case Study

Impact Postcard

- Two segments
- Stewardship focus



Personal Relationship

- Student Callers
- Scholarship Recipients
- Assigned Advancement Officer



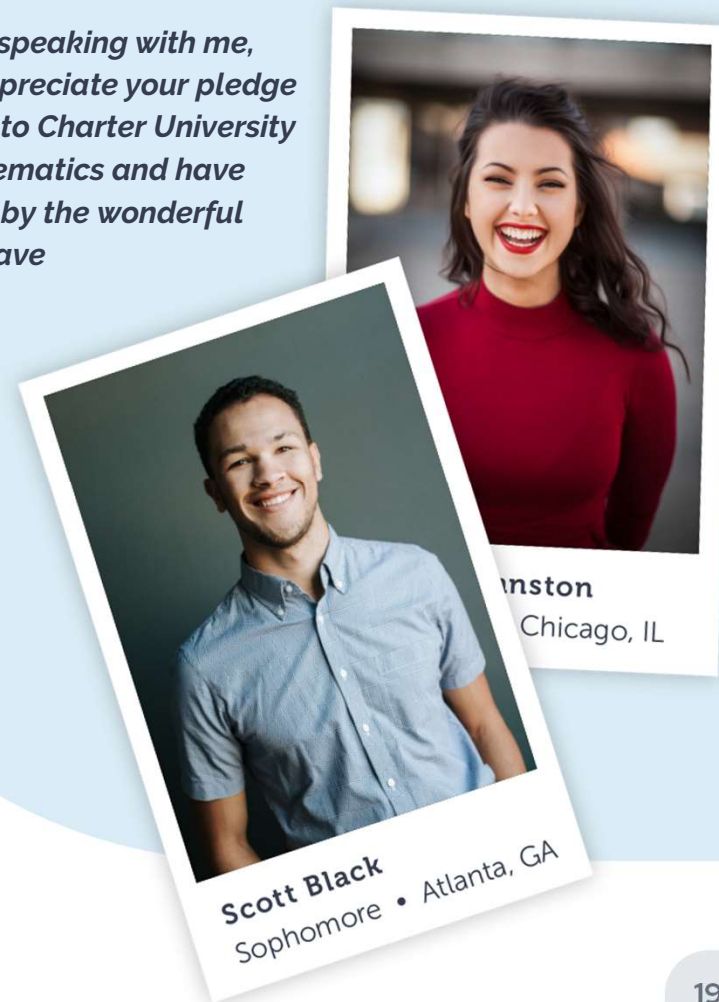
Personal Profiles

- Additional personalization on top of segmentation and variable data
- Include picture, major, grade level, personal statement, and custom fields
- Can be used for student callers, development officers, student athletes, scholarship recipients, and more!

Personal statements that are editable by you:



Thank you for speaking with me, and I really appreciate your pledge of \$50! I came to Charter University to study mathematics and have been enriched by the wonderful community I have found here...
-Scott



Case Study

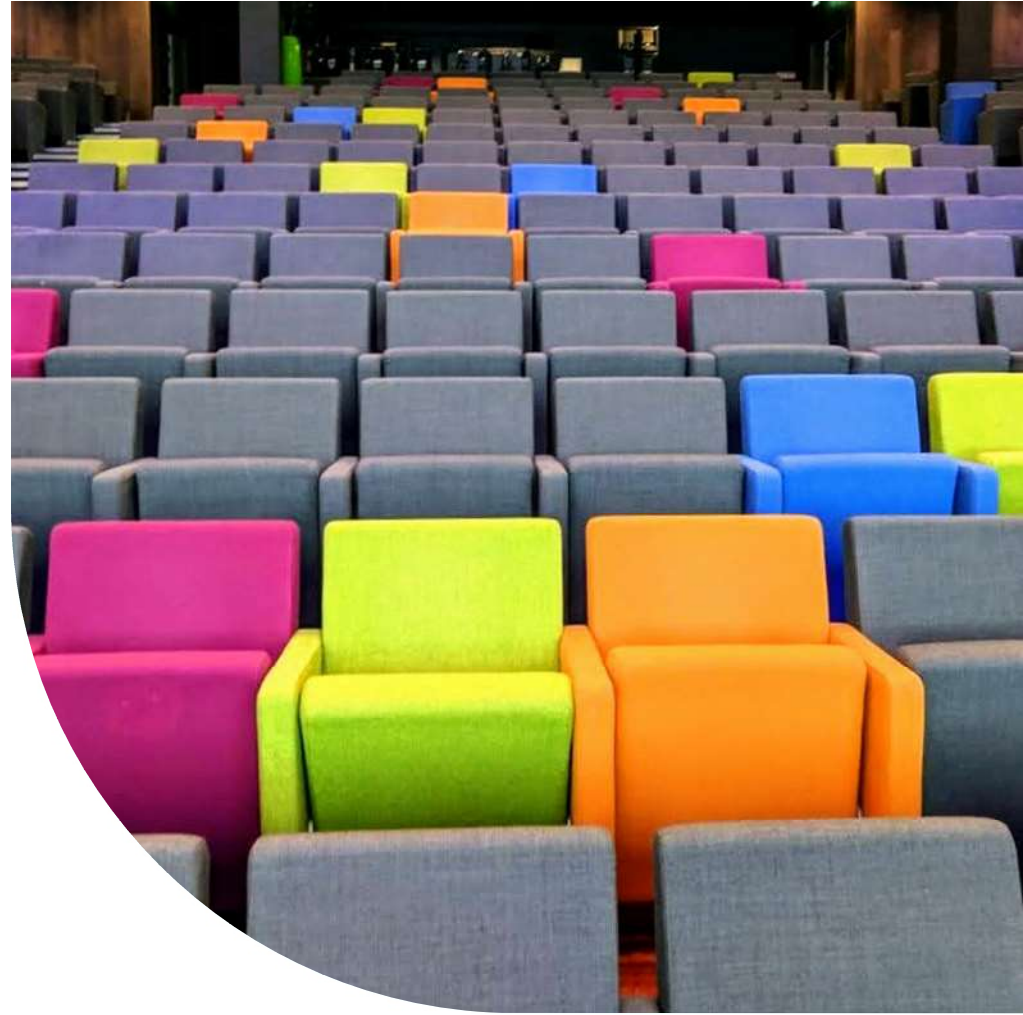
University of North Georgia Foundation

- Unlimited student profiles with personal messages
- On demand mailing and dynamic test
- Potential for peer-to-peer solicitations and stewardship



Demographics

- Age
- Gender
- Income
- Extracurricular



Case Study

Samford University

- Reunion Invite Campaign
- Photos taken from associated yearbook
- Reminds alumni of their college experience



Donor Preference

- Channel
- Seasonality
- Giving Frequency



Case Study

Charter University

- Behavior Based – sent when the donor is most ready to give
- Highly Personalized – images and text can be targeted to individual donor
- Seamless across multiple channels



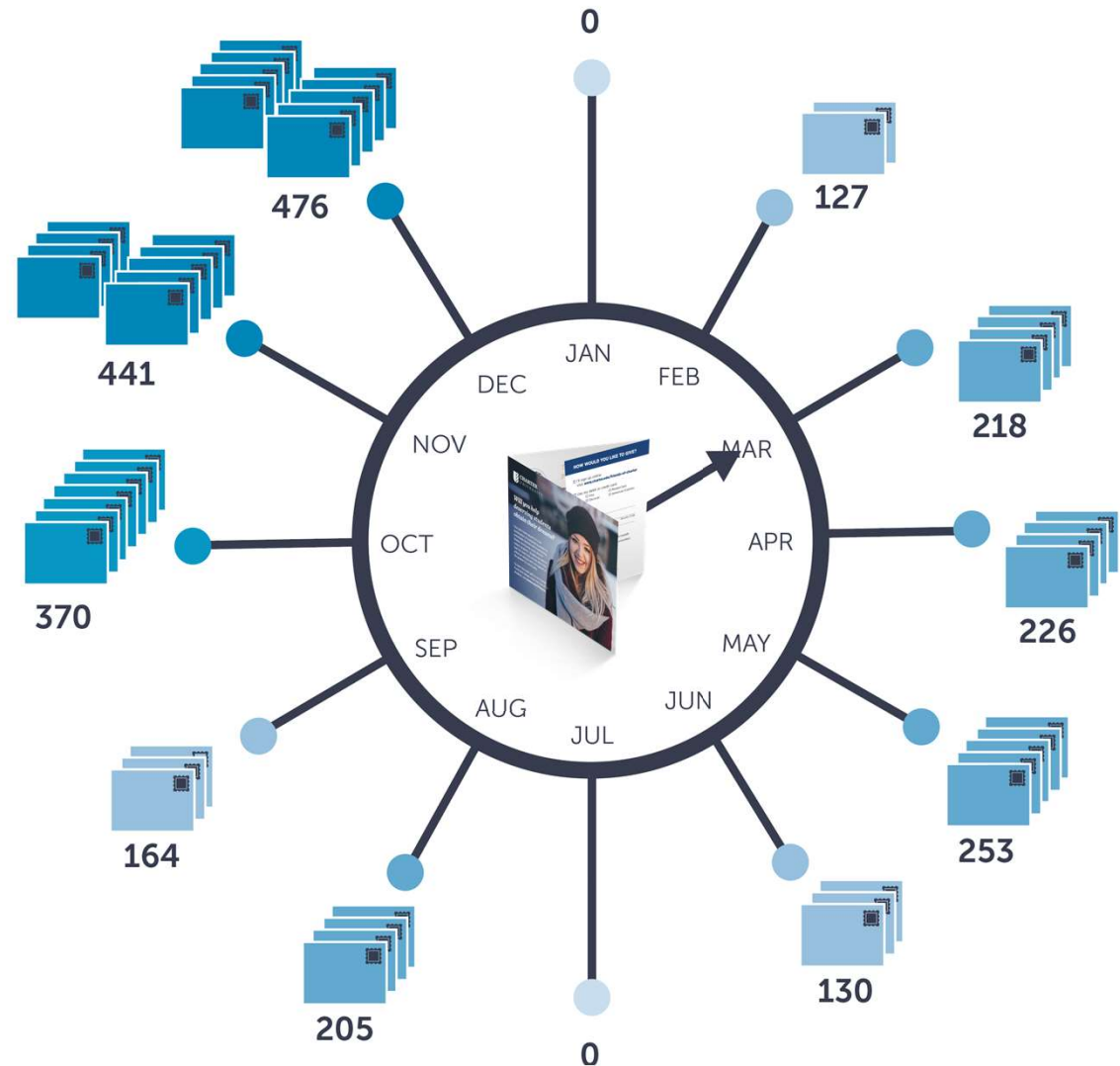
Email



Direct Mail

Monthly Giving Invites

- Timed to arrive shortly after a donor's 2nd gift
- Mailed with any frequency
- No Minimums



Combining

- Gender & Personal Relationships
- Age & Affinity
- Affinity & Donor Status



Case Study

Western Illinois University

- Common specifications: Letter in 6" x 9.5" Window Envelope
- Department Head feature changes per segment

“ROI of \$1 for every 12.5 cents (8:1) spent in the recent year”

Tim Hallinan • Western Illinois University

45 departments

x Donors vs Non-Donors

= **90 segments**



Segmentation within Emails


- Impact Emails
- Thank You Email
- Tax Receipt Email



Case Study

University of Alaska

- Tax Receipts emailed to donors
- Segment by campus
- Additional segment to exclude those who want paper copy
- Additional project setup in letter form (Omnichannel by donor preference)



Official Tax Receipt

Donor: Ernest A. Hamm Date Processed: October 19, 2021

Fund	Gift Designation	Total Received	Value of Goods and Services	Charitable Contribution
21158	UAA Annual Fund for Excellence	\$1,000.00	\$0.00	\$1,000.00
Total		\$1,000.00	\$0.00	\$1,000.00

Questions? foundation@alaska.edu Non-Profit Tax ID: 23-7394620

UAA UNIVERSITY of ALASKA ANCHORAGE

Dear Ernest,


Thank you for giving to the University of Alaska Anchorage, where life-changing learning, cutting-edge research and new opportunities converge, all powered by your support and partnership.

Your investment in UAA is launching Alaska's next generation of leaders who will shape our state's future.


Our hardworking UAA students are inspired to know you've donated to their educational and career aspirations. Your generosity makes a meaningful and lasting difference.

With gratitude,

Susan Powell
Susan Powell, Chancellor
University of Alaska Anchorage



by 1 - June 30, Please let us know if you prefer to be recognized differently from **Ernest A. Hamm**



Official Tax Receipt

Donor: Mary K. Hughes Date Processed: October 12, 2021

Fund	Gift Designation	Total Received	Value of Goods and Services	Charitable Contribution
20023	University of Alaska	\$10,000.00	\$0.00	\$10,000.00
20897	New Fund: Supporting Alaskans majoring in education			
	Excellence in Culinary Arts and Hospitality Administration			
	In memory of Carol Lawer			
20751	University of Alaska Anchorage			
	Athletics; Hockey. Return if discontinued.			
Total		\$10,000.00	\$0.00	\$10,000.00

Questions? foundation@alaska.edu Non-Profit Tax ID: 23-7394620

UNIVERSITY of ALASKA FAIRBANKS

Dear Mary,

Thank you for your gift to the University of Alaska. We have received your contribution and will assure that it is used as you directed.


Philanthropy is vitally important to the future of higher education at the University of Alaska. You are part of a strong team of supporters who invest in the margins of excellence at UAF. You invest in the leaders of tomorrow and bolster Alaska's future when you contribute here. I hope you will take pride when you hear of great things accomplished by members of the UA community, whether they are students, faculty, researchers or staff members. Your generosity is key to those accomplishments.


Thank you again for your generous support. We appreciate a you do to make UA the university for Alaska.

Sincerely,

Tod A. Burnett
Tod A. Burnett, Ed. D.
President, University of Alaska Foundation
Chief Development Officer, University of Alaska

We recognize donors on a fiscal year basis, July 1 - June 30. Please let us know if you prefer to be recognized differently from **Mary K. Hughes**





Official Tax Receipt

Donor: Timothy M. Lopez Date Processed: October 21, 2021

Fund	Gift Designation	Total Received	Value of Goods and Services	Charitable Contribution
40825	UAF General Support	\$50.00	\$0.00	\$50.00
Total		\$50.00	\$0.00	\$50.00

Questions? foundation@alaska.edu Non-Profit Tax ID: 23-7394620

UNIVERSITY of ALASKA FAIRBANKS


Dear Timothy,

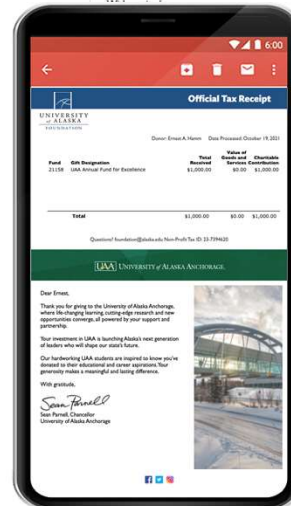
Thank you for your commitment to the University of Alaska Fairbanks.

We deeply appreciate your generosity. You play an integral role in the continued success of our students and UAF's mission of teaching, research and public service. Our alumni become leaders, business owners, problem-solvers and innovators, in Alaska and beyond. Your gift helps make that transformation possible.

Thank you for choosing UAF

Daniel M. White
Daniel M. White, Chancellor
University of Alaska Fairbanks





by 1 - June 30, Please let us know if you prefer to be recognized differently from **Ernest A. Hamm**

We recognize donors on a fiscal year basis, July 1 - June 30. Please let us know if you prefer to be recognized differently from **Timothy M. Lopez**



Giving Day Segmentation



Kristine Barker

Annual Fund Director
La Sierra University

kbarker@lasierra.edu



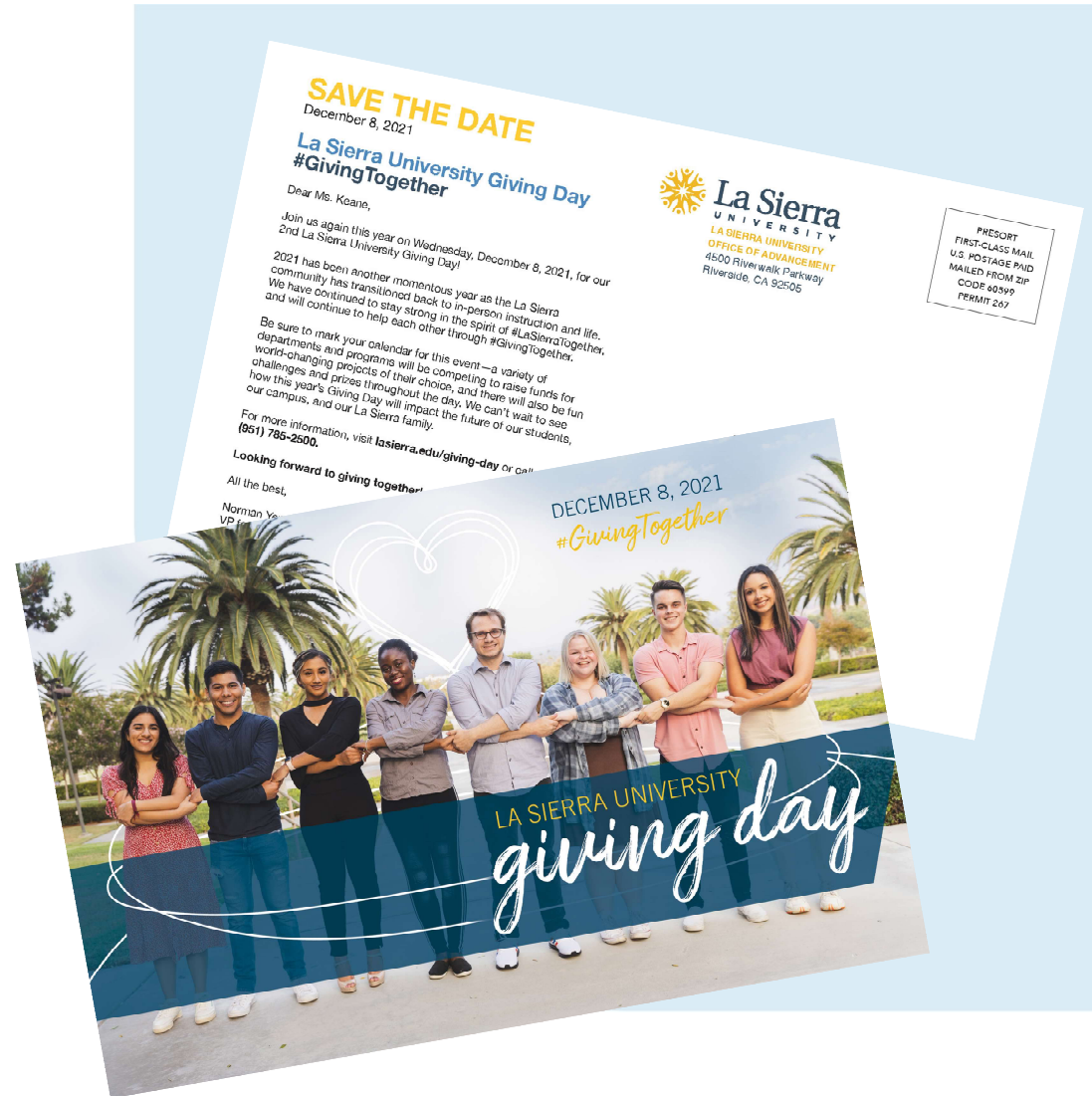
LA SIERRA UNIVERSITY
giving day



Case Study

Giving Day Save the Date 2021

- Pledgemine was HELPFUL during Giving Day
- Save the Date postcard mailed in October to the majority of our database (data based on likely participants)
- Benefits of postcards:
 - Simple, easy to read
 - No envelope to open
 - Easy to pin on a bulletin or fridge
 - More likely to read before trash



Case Study

Giving Day Appeal Fall 2021

- 26 total segmented appeals mailed
- 13 appeal letters segmented by department/project targeting age 35+



Case Study

Millennial Giving Day Appeal

- 13 appeal postcards segmented by department/project targeting Millennials (alumni age < 35 or based on graduation year)
- Used QR codes for easy access to department/project donation website



Case Study

Segmented Giving Day Emails

- Sent a series of email to everyone in our database
- Included:
 - Save the Date
 - Reminders
 - Follow-up to appeals
 - Giving Day Donate Here
 - Thank you email



Case Study

Segmented Giving Day Emails

- 13 email appeals segmented by department/project



THE UNIVERSITY MUSEUM

Dear Kristine,

It's here! La Sierra University's second annual Giving Day is tomorrow, **Wednesday, December 8, 2021.**

With 13 departments raising awareness and funds for various life-changing projects, Giving Day events will be a fun way for alumni, community, and friends to get involved. The department that has the most donors will receive an anonymous gift of \$5,000 toward their project.

To see the whole list of projects and fun virtual events, visit lasierra.edu/givingday. One area we thought you may be particularly interested in is the **University Museum**. Help them reach or exceed their goal of raising \$5,000 for curation funds and creating an online museum.

**CLICK HERE
TO DONATE**

With heartfelt gratitude,

-

Norman Yergen

Vice President

Strategic Engagement: Advancement and Marketing

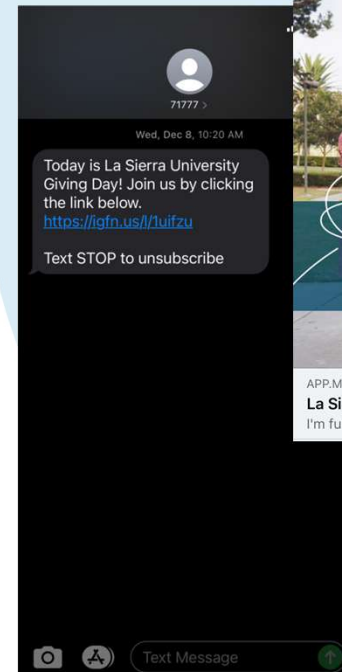
Free and Fun Virtual Events on Dec 8:

Case Study

Giving Day 2021 Other Channels

Multi-channel approach

- Webpage
- Direct mail
- Email
- Social Media (boosted/targeted posts)
 - Facebook
 - Instagram
 - Twitter
- Text messages (Millennials only)
- University magazine article
- Church magazine article



Text

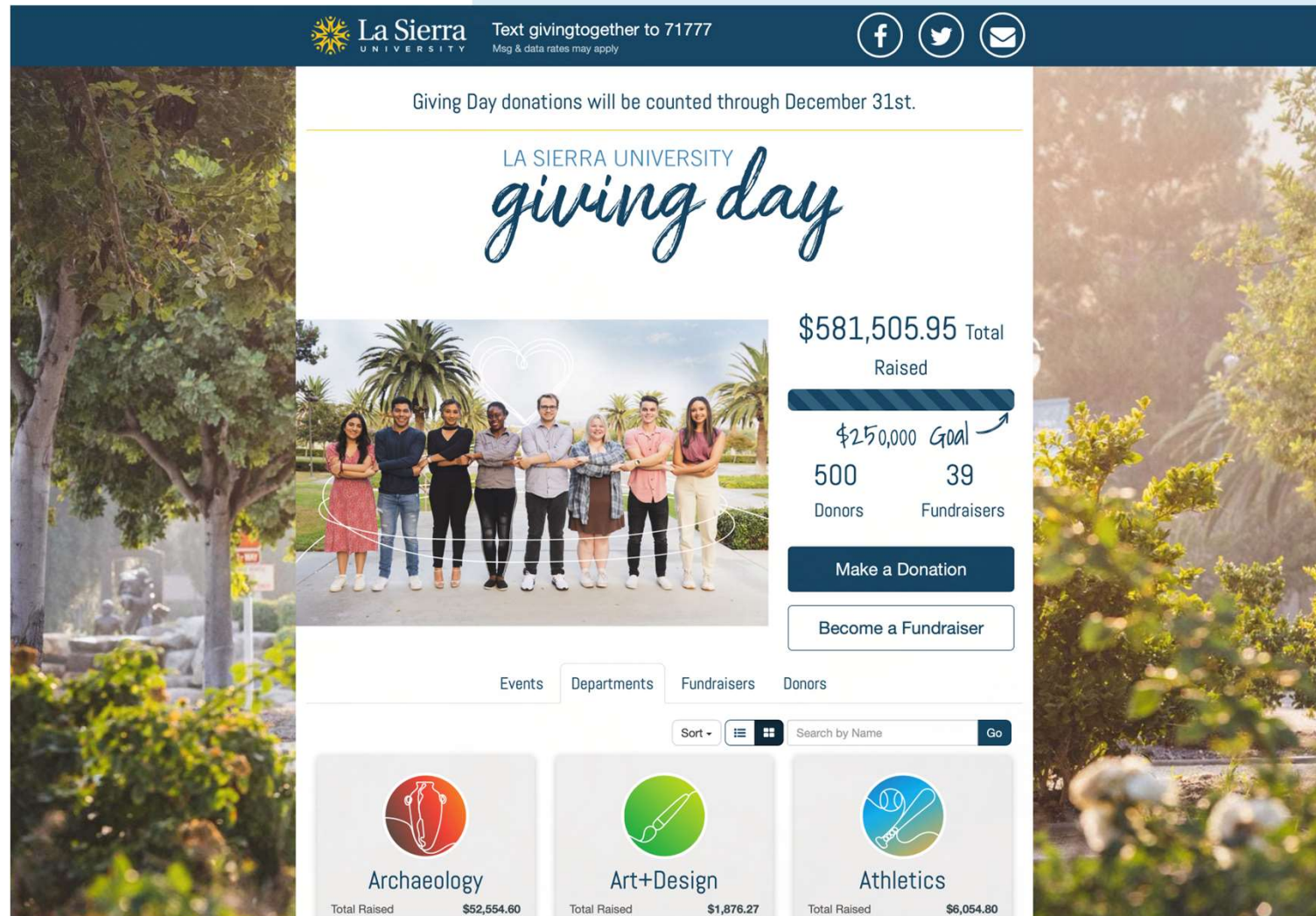


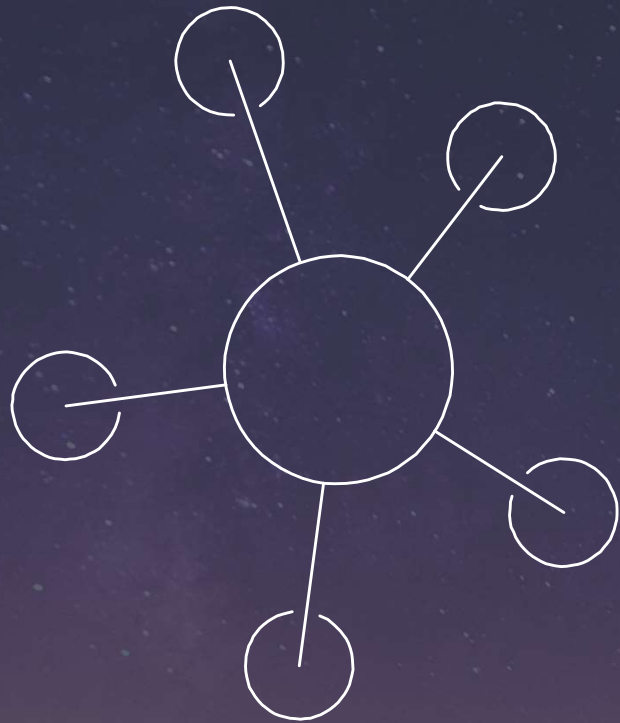
Social Media

Case Study

Giving Day 2021 Results

- Raised: \$581,505
- Total donors: ≈ 440
- Total gifts: 500
- 13 departments participated





These are not
"Segments
of One"



Using Variable Data

Making the Most Out of Variable Data

- Make your recipient a segment of one
- Data merge, but better

Common Applications

- Fund Names
- Gift Amounts
- Giving History
- Name Callouts/Combinations

YOUR GIFT TO FIU IS A VALUABLE INVESTMENT.

Giving helps improve the educational experience at FIU, keeps you connected to your University, and increases the value of your FIU degree.

Please renew your gift today!



YOUR RECENT GIFTS TO FIU:

☐ FY2018
☒ FY2017 ☒ FY2016
☒ FY2015 ☒ FY2014

Date of last gift: Jun 30, 2017
Amount of last gift: \$100

FIU's fiscal year runs July 1 – June 30.
The data above was compiled on April 20, 2018 and only includes outright gifts or pledge payments. Renew your support by June 30 to be counted as a donor in the 2018 fiscal year.

If you've already made your gift,
Thank You!



Date of last gift: Jul 26, 2019
Amount of last gift: \$1,863.85
Designation of last gift: George R. Adams Memorial End.

Renew online:
www.bsc.edu/give/renew
It's simple, secure, and sustainable!

Total gift amount:
☐ \$1,864 ☐ \$2,796 ☐ \$3,728 ☐ Other: _____

Please designate my gift for:

☐ George R. Adams Memorial End. ☐ Academics
☐ Forward Ever Fund/ ☐ Learning Spaces
Area of Greatest Opportunity ☐ Athletics
☐ Scholarships ☐ Other: _____
☐ Student Emergency Fund

Matching Gift

☐ My employer _____ will match my gift.
Check your employer's status at www.bsc.edu/match

Mrs. Dianne Adams
784 Oak Creek Drive
Lombard, IL 60148

☐ Enclosed is my check payable to:
Birmingham-Southern College · 900 Arkadelphia Road,
Box 549003 · Birmingham, AL 35254

☐ I would like to establish a yearly recurring pledge of
\$ _____ for _____ years to be fulfilled in the
month of _____ each year.

☐ Charge my card \$ _____.

☐ Charge my card \$ _____ monthly for _____ months,
or \$ _____ per year for _____ years (up to five years).

Name on card _____

Credit card # _____

Exp. _____ CVV code _____

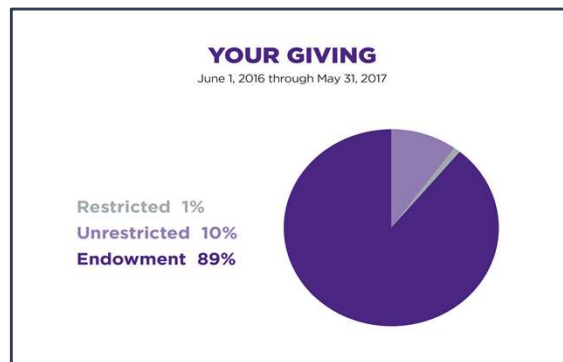
To make stock, DAF, or IRA rollover gifts please visit
www.bsc.edu/plannedgift or call (205) 226-4909.

1-419 tmp2977 ID: 1067754 GA21-noFEF/GF21-FEF

Case Study

Ashland University

- Solution 1Q: Horizontal Short Fold Self Mailer
- Each donor received personalized pie chart of their giving



Other Ways to Use Variable Data

Last Gift Reminders

Last Amount	Last Month	Last Year
\$50	December	2020



Your gift of \$50 in December 2020 made a huge difference. Will you consider another gift of that same amount today?

Variable Data can be “smart”

Last Amount x 1.2
\$60



Or perhaps you can raise your gift amount to \$60 to help even more students?

Other Ways to Use Variable Data

Salutation	Team	2019/20	2020/21	2021/22	Last Date
Anne and Neil	Rowing	\$1,200	\$1,500	\$500	October 28, 2021

Giving Histories



Anne and Neil, here is your recent Friends of Dartmouth **Rowing** giving history:

2019-2020: **\$1200**

2020-2021: **\$1500**

2021-2022: **\$500** (current year)

Your last gift to Dartmouth Rowing: **October 28, 2021**

Other Ways to Use Variable Data

Monthly Giving Ask Amount =
 $\text{round}((\text{Prior Annual Giving} \times 1.4) / 12)$



Giving Society	Attribute	2021/22	Monthly	Annual
Heights & Hearts Circle	loyal	\$150	\$20	\$240

Reinforce Donor Relationships



Thank you for your **loyal** support. The **Heights & Hearts Circle** is a recurring giving society that allows you to make a significant annual contribution through smaller monthly installments. A monthly gift of only **\$20** can add up to **\$240** on an annual basis.

Case Study

Le Moyne College

- Anniversary Cards mailed quarterly to donors with last gift 9 to 12 months prior
- Reminds donors of their previous commitment
- Contacts donors when they most likely want to be contacted

"Hi Christine! This time last year, you made a generous gift in support of Le Moyne College. On behalf of all of those your \$25 gift impacted, thank you and happy anniversary!"



Case Study

Le Moyne College

- As reinforcement, send a personalized ThankView video with the same messaging.
- Able to schedule at the same time for these messages based on anniversary date.

Hi Christine! This time last year, you made a generous gift in support of Le Moyne College. On behalf of all of those your \$25 gift impacted, thank you and happy anniversary!

WATCH YOUR VIDEO!



Renew your gift!

Thinking of you today as we celebrate your gift anniversary and all that it has enabled us to accomplish this past year. We are so grateful for all of your support, Christine.

Reply

Save

Share

Segmentation

Where your
“creativity” combines
with your data.



Request your free Pledgemine Solutions Library

Special FFE Conference Offer!

Receive 10 free segments
when signing your first
Pledgemine contract

Contact: sales@pledgemine.com



