



## Survey Overview

Recently, RuffaloCODY conducted an online survey of private and public institutions across the country. The objective of the survey was to:

- Understand the internal processes used to meet fundraising goals and expectations
- Identify caller specific trends and expectations
- Understand target audiences for phonathon programs
- Gather information regarding communication processes
- Compare donor goals/information vs. budgets

The survey was sent to 6,261 Annual Fund and Development Directors and Vice Presidents at both public and private institutions. Two year institutions with fewer than 2000 enrolled students were excluded. There were a total of 661 surveys completed, over six business days, for a response rate of 10.6%.

**Figure 1** below summarizes the breakout of the survey respondents by type and size.

## Internal Fundraising Processes

The largest portion of respondents (48%) represent Private institutions with fewer than \$50,000 living alumni. Of this group, 89% responded that they **do** utilize a phonathon program to raise funds.

Phonathons To Raise Funds?

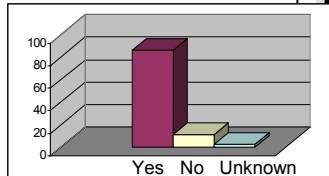
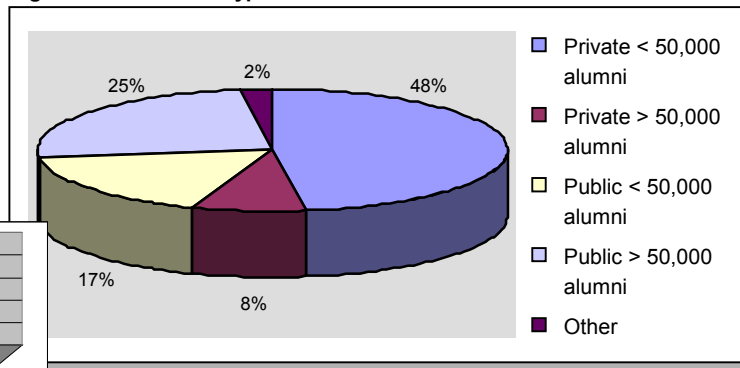
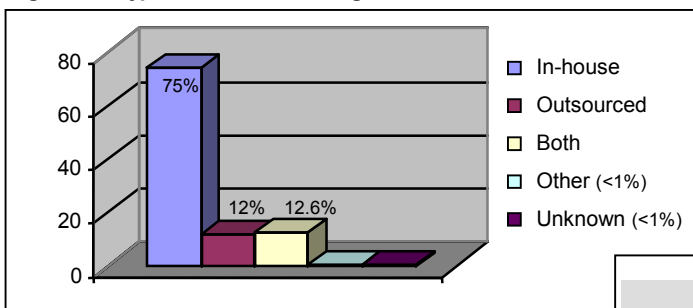


Figure 1 - Institution Type and Alumni Count



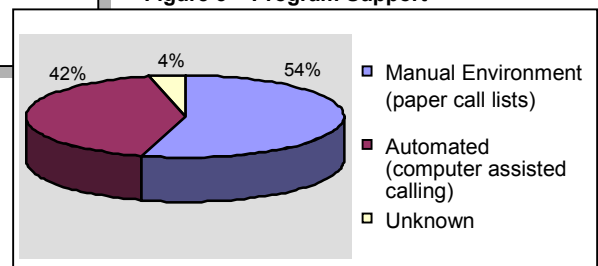
While the use of phonathon programs is clearly a factor in the effort to reach fundraising goals and objectives, the type of program varies. **Figure 2** shows that of the 89% that DO utilize a phonathon program, in-house initiatives far outnumber the use of outsourced or a combination of both, with less than 1% of respondents replying they use other resources or unknown.

Figure 2 – Type of Phonathon Program Utilized



Support for these in-house programs also varies. Respondents revealed (**Figure 3**) that the majority of in-house programs (54%) are working with a manual environment. Some 42% of respondents are currently utilizing a computerized calling system.

Figure 3 – Program Support



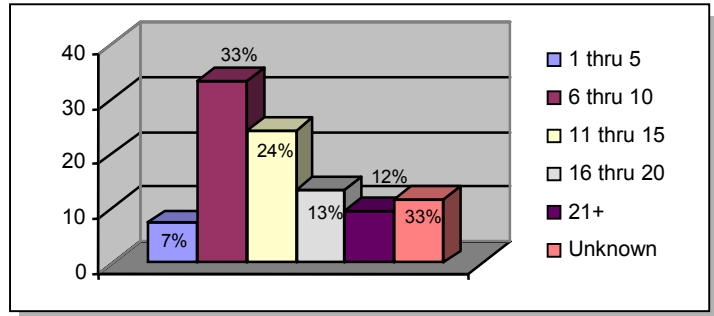
**Note:** Figures 20 & 26 show that the largest percentage of respondents indicated they expect budgets to remain the same and fundraising goals to increase. Will the manual environment be sustainable?

## Identifying Caller Trends and Expectations

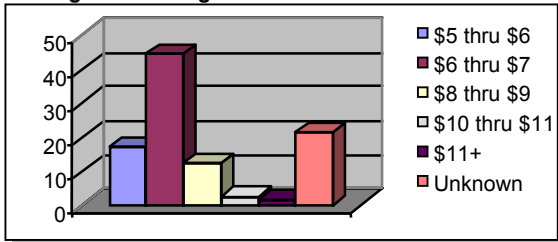
When identifying the average number of callers utilized during a phonathon program, the largest number of respondents indicated that 6-10 was the ideal number of callers (**Figure 4**) with 74% paid (at an average of \$6 - \$7 per hour) and 15% a combination of paid and volunteers.

Even fewer respondents (10%) revealed they organized volunteer supported programs.

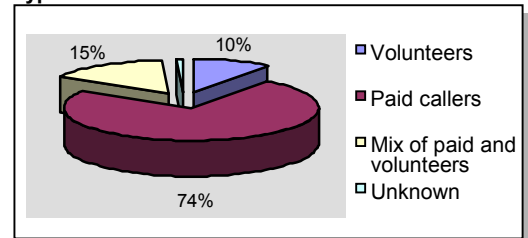
**Figure 4 – Number of Callers During an Average Shift**



### Average Caller Wage



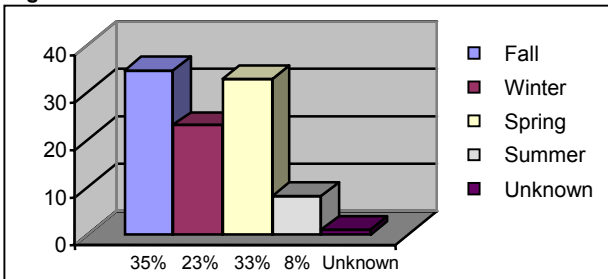
### Type of Callers



## Timeframe and Target Audiences

According to recent survey results, most Phonathon programs are conducted in the Spring and Fall (see **Figure 5**). Since many of these programs utilize student callers, programs are conducted during the school year. In addition, it may be interesting to note, that according to previous survey results (available on our web site at [www.ruffalocody.com](http://www.ruffalocody.com)) the fiscal year begins in July for a majority of institutions, indicating new budget opportunities.

**Figure 5 – Phonathon Timeframe**



### Phonathon Target Audience

Survey results showed a balanced focus on:

- Donors (33%)
- Lapsed Donors (34%)
- Non-Donors (31%)

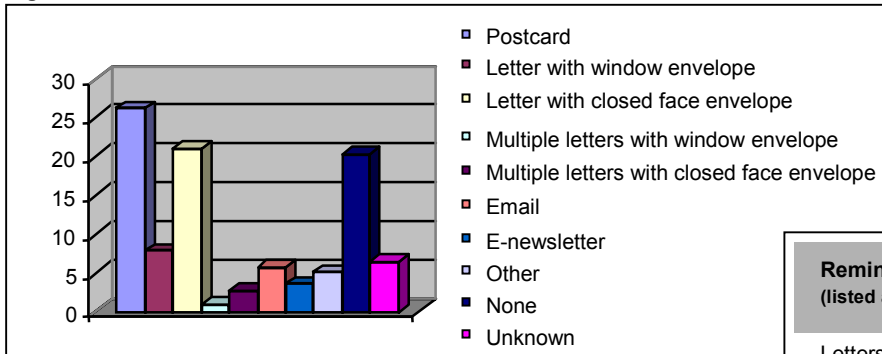
Respondents indicated that current **Phonathon programs target the following gift segments:**  
(listed according to weighted response)

Alumni	38%
Parents	24%
Friends	20%
Students	7%
(i.e., Senior gift)	
Staff	5%
Other	3%
Grandparents	2%
Unknown	<1%

## Phonathon Program Communication

Recent trends show that the increased use of electronic media, as part of the fundraising communication process, does not rate as highly as direct mail (see figure 6 below). Indeed, direct mail, specifically postcards, has the distinct advantage with 26% of respondents suggesting it as the pre-call communication of choice. Second, by only a few percentage points, is letters with closed face envelopes and none. Although direct mail postcards and letters are a budgeted expenditure, the opportunity to personalize may give the donor one more reason to give generously. Those that use Pre-call and Pledge Acknowledgements (see Figure 7) rely heavily on direct mail as a means of communication.

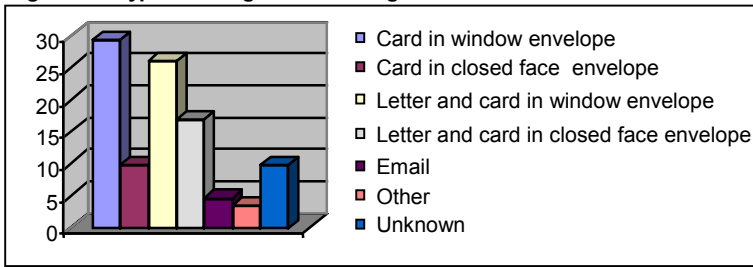
Figure 6– Pre-call Communication



### Reminder Communications: (listed according to weighted response)

Letters (in window envelopes)	29%
Letters (in closed face windows)	23%
Phone Calls	18%
Cards	11%
Email	8%
Unknown	7%
Other	2%

Figure 7 – Type of Pledge Acknowledgement



## Phonathon Data

Survey results show that over 38% of respondents complete Telephone and Address (33%) research and prior to the beginning of a phonathon program (Figure 8). With expected budget resources remaining about the same as previous years, institutions across the country are aware of the financial resources and time it takes to track and find lost alumni, making data integrity a top priority.

Figure 8 – Research Performed Before Phonathons

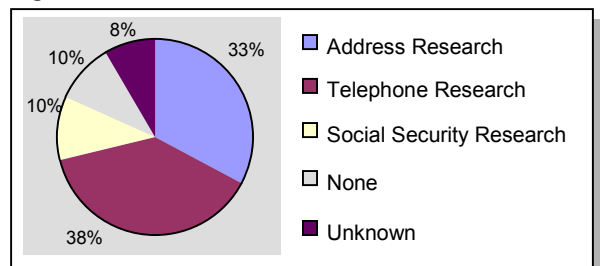
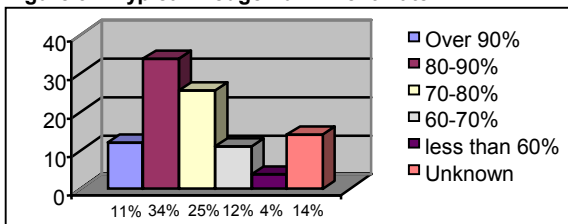


Figure 9 – Typical Pledge Fulfillment Rate



When asked what the typical fulfillment rate for phonathon pledges was, 34% of respondents indicated an average of 80-90%. 25% suggested a rate of 70-80% with nearly 12% indicating a pledge fulfillment rate over 90% (see Figure 9).

Financial Goals and Expectations – Current Fiscal Year

Figures 10 and 11 show that while dollars raised in the most recent fiscal year exceeded goal (according to 36% of respondents) that the number of donors only met expectations (31%). When evaluated, this leads to the assumption that institutions were able to exceed their dollars raised target goal through higher average gifts.

Figure 10 - Dollars Raised Most Recent Fiscal Year

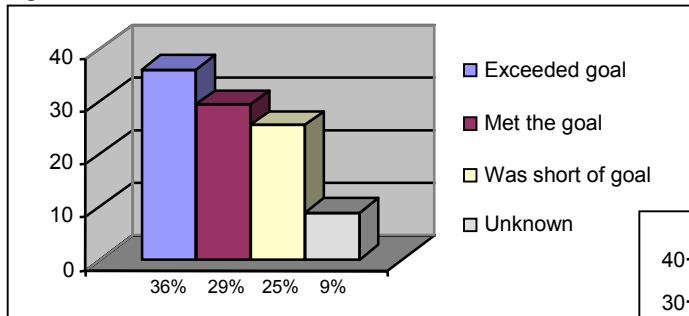
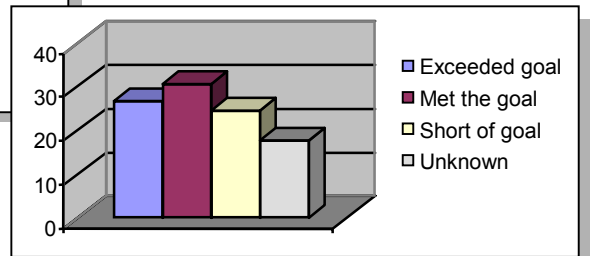


Figure 11  
Number of Donors Most Recent Fiscal Year



Despite current economic conditions, nearly half of the institutions who responded (47%) indicated that dollars raised so far this year are greater than the same time last year (see Figure 12) with only 25% indicating a less than last year status. This may indicate a slow return to consumer confidence as economic indicators stabilize.

It's interesting to note that in addition to the greater number of dollars raised, respondents indicate, by 38%, the number of donors so far this fiscal year is also greater than last year at this same time.

Figure 13

Figure 12 - Results  
Dollars Raised So Far This Fiscal Year

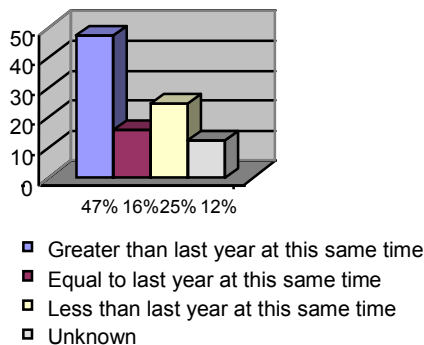


Figure 13 - Results  
Number of Donors  
So far This Year

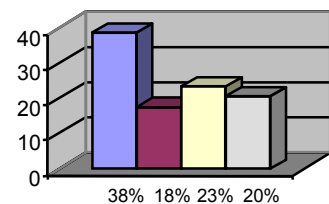


Figure 14 – Budget – This Fiscal Year

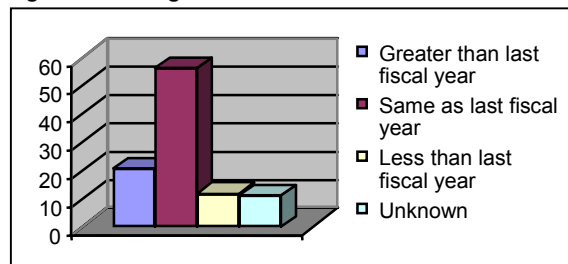


Figure 14 - According to survey respondents, phonathon budgets have remained the same (56%) which is an interesting result considering dollars raised this fiscal year have exceeded goals and are greater than the same time last year (see figures 10 and 12). Survey numbers may be indicative of the benefit of using a phonathon to communicate fundraising need vs. those who do not utilize calling programs, either manual or automated.

Financial Goals and Expectations For NEXT Fiscal Year

**NEXT Fiscal Year** - Expectations for the next fiscal year, as indicated by survey respondents, include budgets the same as this fiscal year (61%) with goals for dollars raised (57%) and number of donors (68%) set higher than current year results. Less than 2% of those respondents suggested donor and dollar goals would be lower. Only 10% indicated lower expected budgets. **Figures 15-17**

This data, also identified in our Fall 2002 market trends survey, suggests that productivity is expected to rise in order to meet higher expectations for dollars raised and number of donors.

Figure 15 – Budget

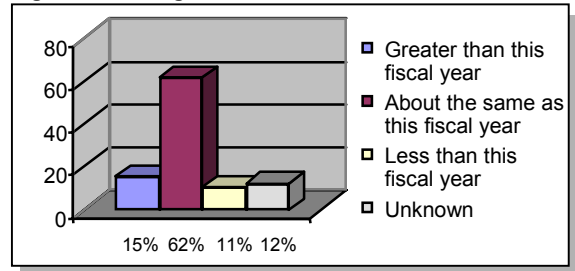


Figure 16 – Goal For Dollars Raised

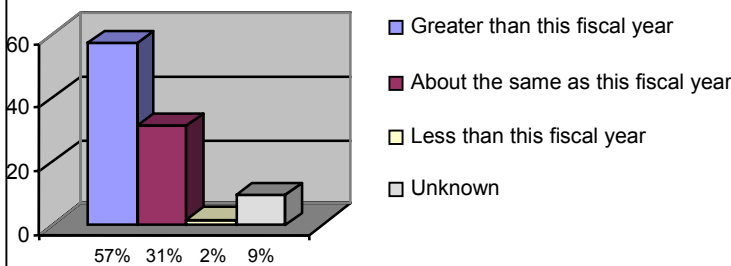
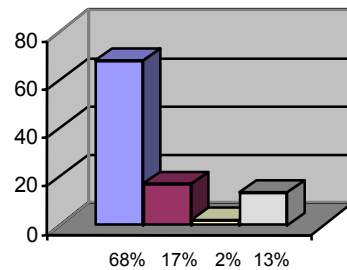


Figure 17 – Goal For Number of Donors



Summary

The fundraising survey focused on phonathon goals, expectations and results. An analysis of the responses indicates the following trends:

- Largest number of responses came from private institutions with over 50,000 living alumni.
- Over 86% of respondents utilize a phonathon program.
- In-house phonathon programs are dominant among respondents (75%).
- The greatest number of phonathon managers have less than 12 months of experience.
- Of those responding positively to a phonathon program, over 54% operate manual programs (paper call lists) with 42% utilizing automated calling programs.
- Institutions utilize paid callers over volunteers by a large margin (74% of respondents).
- Over 33% of respondents indicated the number of callers during an average shift was between 6-10 with 24% employing 11 –15. Average wage was \$6-\$7/hour.
- Most Phonathons are conducted in the Fall and Spring with a smaller percentage of institutions conducting phonathons in the Winter. Only 8% operate a program throughout the summer months.
- The largest gift segment targeted Alumni first, then Parents and Friends were ranked third.
- A split in target audience was indicated by a 33% - 31% spread over Donors, Lapsed Donors and Non-Donors.
- Communication prior to phonathon calling indicated that printed material, including postcards and letters were the most likely source of contact.
- Survey results indicated that 38% of respondents utilize some type of pre-phonathon research on available data (i.e., addresses, email, etc.).
- Typical pledge fulfillment rates were indicated to be between 80-90%.
- Dollars raised over the current fiscal year exceeded goals with the goal for number of donors being met. This is greater than compared to the same time last year.
- It was indicated that budgets are expected to remain the same, with goal and donor expectations in the next year increasing.

End.