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FALL 2010

FUNDRAISING Strategies

The Newsletter for Nonprofit Organizations

Offering the **DIRECTION** you need to
move your organization forward
and realize results.

SINCE 1991



THE EXPERTISE YOU NEED TO DO MORE WITH LESS



Duane J. Jasper
President



Dear Colleagues,

It's the fourth quarter of 2010 already and what an amazing year it has been! While the economy may be slow to recover, many of our clients have found success: Oglethorpe University saw dramatic growth in its phonathon campaign with a 40% increase in specified dollars; the University of Wisconsin - River Falls, increased overall revenues by 11% and the number of donors was up 8%; Alpha Sigma Phi Educational Foundation increased phonathon revenue by 25%; and the University of North Dakota Foundation campaign increased the total number of pledges by 10%. These stories of partnership, and more, are available on our website - www.ruffalocody.com/resources.

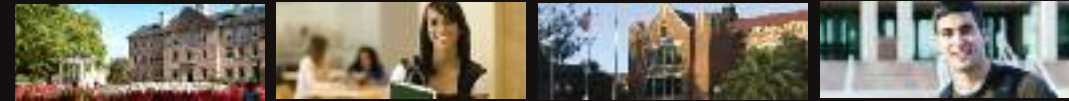
RuffaloCODY has been privileged to partner with outstanding organizations across the country - many of whom are on the list of top colleges and universities published by *U.S. News & World Report* magazine. In total, there were more than 130 RuffaloCODY clients listed on this year's report - including our Software, Enrollment Management, Fundraising, Graduate Services, and MASTERS Program clients. Congratulations to all of you!

Earlier this summer, RuffaloCODY announced the acquisition of the MoonFire Corporation. The addition of the Mead, Colorado staff is an exciting development for both organizations. We look forward to offering our software clients some pretty amazing options in 2011. Both CAMPUSCALL and DialVision clients will now have the opportunity to attend our Users Group Conference (July 25-26, 2011) in San Francisco.

As always, RuffaloCODY will continue to focus on providing the solutions and technology you require, the knowledge and expertise you expect, and the dedicated staff to help you succeed.



TOP RANKED NATIONAL UNIVERSITIES Include Many RuffaloCODY MASTERS Clients



Once again this fall, the influential list of 'America's Best Colleges' from *U.S. News & World Report* is brimming with premier educational institutions that have chosen RuffaloCODY's **MASTERS Program for On-campus Phonathon Management** to assist them with their annual fund campaigns - helping increase awareness among alumni, building a stronger giving foundation, and maintaining consistently high levels of professionalism and enthusiasm.

The MASTERS Program is a total management option. RuffaloCODY focuses on day-to-day phonathon operations, allowing institutions to

concentrate on other pivotal giving programs. By freeing up staff time, the MASTERS Program allows clients to initiate new programs, resume activities that have been dormant for a time, or enhance existing programs.

We congratulate our partner institutions on their accomplishments and the recognition they deserve. We consider ourselves privileged to assist them with their annual fundraising efforts and look forward to helping them with their future successes.

For more information about the RuffaloCODY MASTERS Program for On-Campus Phonathon Management, visit www.ruffalocody.com/masters.

Abilene Christian University	Pepperdine University*	University of Massachusetts, Lowell*
Ball State University*	Providence College	University of Mississippi*
Binghamton University - SUNY*	Southern Methodist University*	University of Missouri - Kansas City
Boston College*	Stanford University*	University of Nevada - Las Vegas
Bowling Green State University*	Temple University*	University of North Carolina - Chapel Hill*
Butler University	Texas Tech University*	University of North Carolina - Charlotte*
California State University - Fresno	Tufts University*	University of North Carolina - Wilmington
Carnegie Mellon University*	University at Buffalo - SUNY*	University of North Dakota*
Columbia University*	University of Arizona*	University of Northern Iowa
Florida State University*	University of Arkansas*	University of Oklahoma*
Georgia State University	University of California - Irvine*	University of Pennsylvania*
Indiana University*	University of California - Los Angeles*	University of Rochester*
Indiana University of Pennsylvania	University of Chicago*	University of South Carolina*
Johns Hopkins University*	University of Cincinnati*	University of South Florida*
Long Island University	University of Colorado*	University of Texas at Austin*
Miami University (OH)*	University of Connecticut*	Villanova University
New York University*	University of Delaware*	Vanderbilt University*
Northeastern University*	University of Florida*	Washington State University*
North Carolina State University*	University of Georgia*	Washington University in St. Louis*
Ohio University*	University of Houston	Wayne State University
Oklahoma State University*		

These institutions were ranked in either the 'Best National Universities (Tier 1 & 2)' or 'Best Regional Universities' for 2011. (*indicates National and/or Top 50 Public University Ranking)



PARTNERSHIP

Results

40% increase in specified dollars

29% of all phonathon donors gave via credit/debit card

39% of previous alumni donors increased their gift amount

Oglethorpe University posted a significant jump in revenues and realized overall phonathon program improvements after partnering with RuffaloCODY.

Oglethorpe's Director of the Annual Fund, Lesley Cole, says that a variety of factors influenced the decision to partner with RuffaloCODY in 2009 for the University's phonathon campaign. "Our existing phonathon program was not meeting our goals. We realized that we needed a dedicated partner to help us achieve our goals and we have that with RuffaloCODY."

Cole is quick to point out that Oglethorpe's **phonathon**

revenues jumped by 40% in a single year -- and she credits the industry experience of RuffaloCODY's team and the company's flexible systems for that improvement.

One of the brightest spots for the Oglethorpe campaign, according to Cole, is the University's strong credit/debit card fulfillment rate. "29 percent of our donors gave via credit or debit cards this year. The dollar amount fulfilled instantly was equal to 66% of the entire total we raised the year before," she said. "That's incredible!" ■

Read more about how RuffaloCODY partners with organizations to help them achieve success. Visit us online at www.ruffalocody.com/fundraising.

NEW BOARD MEMBERS OFFER PROFESSIONAL EXPERIENCE FOR CONTINUED GROWTH

We are proud to welcome our newest members to the Board of Directors: Molly Broad, John Casteen and Brian Madocks. Together, they bring years of professional expertise in the areas of admissions, fundraising, and software. With the addition of these three highly respected individuals, RuffaloCODY is positioned to meet the challenges of the future with leadership and expertise unmatched in the industry. - Al Ruffalo and Duane Jasper



Molly Broad

- President of the American Council on Education (ACE)
- Former President of the University of North Carolina
- Former Senior Vice Chancellor for Administration and Finance for the California State University System



John Casteen

- Former President of the University of Virginia
- Former President of the University of Connecticut
- Served as the Virginia Secretary of Education



Brian Madocks

- Chief Executive Officer, PC Helps
- Former CEO of SunGard Higher Education
- Former Senior Vice President and General Manager of SAP America, Inc.

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PHONATHON

The Changing Landscape of Telephone Outreach Why This Comprehensive Tool Still Works

An editorial by Jason Fisher, Director of Marketing, MASTERS Division

Much time has passed in the 35 years since colleges and universities first began dialing alumni to ask for support of their annual fund programs. Rotary phones, volunteer callers, and hand-written index cards have been replaced by sophisticated calling software, highly-trained student ambassadors, and targeted demographic data. Yes, many programs still call from the basement (although they seem much nicer today) and pizza still works like a charm on the starving college student who needs extra motivation. But don't be fooled into thinking this old-school approach has lost its luster. Actually, it's quite the opposite. Here are several reasons why institutions need that phone program now more than ever.

E-COMMUNICATION AND THE PHILANTHROPIC PRIORITY LIST

The internet and globalization have dramatically altered how much competition there is for the charitable dollar. Consider that in 1995, at the beginning of the internet revolution, there were around 1.1 million non-profit organizations in the United States alone. 13 years later, at the beginning of the worldwide recession in 2008, there were over 1.5 million. That's a 35% increase in the number of organizations in the market place who are fundraising for the same philanthropic dollar. The internet is likely not the sole cause of this increase, but rather is a driver of marketplace conditions. *Continued >>*

MEET KRYSTAL FLOYD



Krystal Floyd is one example of RuffaloCODY's solid commitment to training. Krystal joined the company in 2007 as a student-caller, and then became a supervisor at a phonathon center before serving as a Program Center Manager (PCM) for two different institution's campaigns. Most recently, Krystal has been a trainer for new PCMs, sharing her wisdom and experience with employees who will become RuffaloCODY's rising stars of the future.

Krystal credits her extensive training for her successes - especially when she was starting out as a PCM. "RuffaloCODY's training is rigorous and intense, but it provides the necessary foundation for becoming a successful PCM," she said. The support she received from more experienced RuffaloCODY staff members was also a key to her development. "I was able to go to them with any concerns. My Senior Operations Manager also showed personal interest in my development, and

provided the necessary support that I needed. That, more than anything else, helped me focus on being a better manager."

Now that Krystal is responsible for helping to prepare new PCMs for their roles in a phonathon center, she says she is still drawing upon the training she received. "It's important to me as a trainer to involve the newly hired PCMs as soon as possible in the learning process, while keeping in mind the different management styles that we may have. I allow each manager to decide what works for them and allow them to practice it in their own style daily."

Krystal says she is impressed with how RuffaloCODY's training program has evolved. The one thing that hasn't changed, is the pivotal role a PCM performs every day. "A well-trained PCM is absolutely essential to any successful phonathon campaign - and the PCM has to be the best trainer, analyst, cheerleader, and problem-solver he or she can be," she said. "In my experience, RuffaloCODY is committed to making that happen." ■

A well-trained Program Center Manager is absolutely essential to any successful phonathon campaign...

certification from The International Board of Standards for Training, Performance and Instruction.) The new managers are then carefully mentored as they practice their newly learned skills; monitoring and coaching callers, conducting caller training classes, managing calling programs, and leading staff motivation sessions.

Once the new managers have completed training and are assigned to begin conducting their respective programs, they can rely on additional training and mentoring from an experienced PCM. Bi-weekly meetings are conducted for sharing ideas, brainstorming new phonathon strategies and best practices, and providing answers to

questions. In addition, each new manager receives program-specific guidance and advice from a Senior Operations Manager on a regular basis. RuffaloCODY also offers divisional conferences, leadership opportunities, and incentives that help to increase new manager retention rates.

The success of this unique and comprehensive approach clearly is in the results. Over the past two years, RuffaloCODY has an 80% retention rate among its new Program Center Managers. A majority of the remaining 20% no longer working as PCMs are still RuffaloCODY employees who are working in even more demanding roles or for different corporate divisions. ■



TRAINING STRATEGY

HIRING AND TRAINING THE RIGHT PHONATHON MANAGER

Has your institution struggled with finding and retaining the right phonathon manager? The MASTERS and Graduate Services divisions at RuffaloCODY recruit and train up to 40 new phonathon managers each year, and a great deal of time is devoted during the hiring process to ensuring each candidate is the most qualified for each available position. We also develop a tailored training program for each candidate; setting the tone for each program they will be responsible for managing. After all, we understand that a phonathon campaign is only as successful as its student-callers -- and those callers depend upon their Program Center Manager (PCM) for guidance, support and inspiration.

New manager training is rigorous and thorough, and long-term retention is a priority from the very beginning. MASTERS PCMs undergo four weeks of training at existing MASTERS phonathon sites nationwide. For Graduate Services PCMs, four weeks of training are conducted at RuffaloCODY's corporate headquarters in Cedar Rapids, Iowa, where they are exposed to our unique corporate culture and where they work in an operating call center environment.

Our hand-picked and experienced trainers, who are accomplished phonathon managers in their own right, cover a vast array of materials, applications, and exercises to provide the fledgling PCMs with the tools they will need to manage a successful program. (In order to be a trainer, individuals are selected by the company's senior operation staff and must complete a training course conducted by RuffaloCODY's on staff training manager, who in turn has earned

Continued >>

Today's potential donor is exposed to information on many more non-profits than ever before. Simply put, they have more choices regarding where they can give their money.

Now consider that higher education has historically struggled with internet-based giving. The percentage of gifts coming from online sources or e-solicitations is often at 5% or less. That means your constituents are seeing philanthropic information on the internet from many sources but not typically using online giving to complete the transaction to your organization. So what does this mean? It means that [despite society's growing dependence on the internet, the main source of donor retention and acquisition in higher education still comes through personal contact and the phone program.](#)

AN INTEGRATED APPROACH

The best telephone outreach programs in the country use a comprehensive, integrated approach for maximum effectiveness. They combine all the major tools of an annual giving office: direct mail, e-communication, and stewardship to compliment what remains the most important component for finding and retaining donor support: the phonathon. Today's outreach programs have well-thought out segmentation plans, sophisticated stewardship components that thank the donor electronically and invite them to participate in campus activities, well-timed direct mail pieces to market the campaign and support the pledge process, and now, text-message campaigns that can be used as a tool for alumni relations and donor solicitation. [The modern phonathon is more than just making the call and asking for money.](#) It's a spoke-and-wheel coordinated, donor-focused method for institutional advancement.

STEWARDSHIP

With all the bells and whistles of today's new social media, personal communication and stewardship remains a central element in long-term gift cultivation. Without proper stewardship and donor education, constituents may look elsewhere when deciding where to make their charitable contributions. An institution with a sizeable database of prospects only has so many effective options for building relationships. When callers are properly trained, the telephone outreach program becomes a perfect conduit for giving the latest updates and sharing stories in addition to raising money.

THE ORIGIN OF LEADERSHIP GIVING

With the increased funding demands at most colleges and universities, leadership giving and major gifts are a critical component to the success of a development office and the institution as a whole. Phone programs are helping with this too. As the dominant donor retention and acquisition tool in annual giving, phonathons are primarily responsible for identifying, educating, and cultivating a donor's giving habits over time, helping to prepare these valuable constituents for a larger contribution later in the giving cycle.

[A quality telephone outreach program has a strong upgrade strategy in place](#) for just such a reason. When a leadership gift is traced back to its origin, it often begins at giving levels the phonathon is responsible for cultivating. The calling program helps plant seeds to grow major gift trees that will bear fruit at some point down the road.

Continued on page 7.

"Each session was thought provoking and provided good discussion..."

Marty Wold | Baylor University



SAN FRANCISCO

Software Users Group Conference | July 25-26, 2011

The Software Users Group conference is an opportunity to gather with other development professionals, exchange best practices, discuss fundraising trends and the functionality of phonathon software/future enhancements. Topics at this event are client-centered, and include tips, hints, and strategies for getting the most out of our industry leading CAMPUSCALL software as well as valuable networking opportunities.

RuffaloCODY welcomes all CAMPUSCALL and DialVision software users and encourages you to join us in San Francisco!

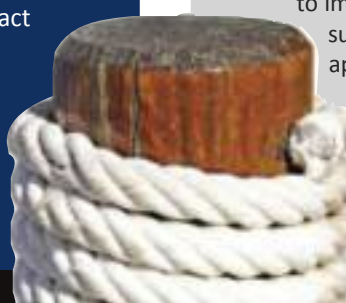
www.ruffalocody.com/events-registration

ADDITIONAL TRAINING

CAMPUSCALL Training will be available prior to the conference, beginning Friday, July 22nd. Details will be posted on our website beginning in January 2011.

INTERESTED IN SPEAKING?

We encourage our clients to participate in the conference by offering their knowledge and expertise. A Call For Presentations will be sent in November - please contact us if you have an interest in presenting at the 2011 conference!



WE'RE COMMITTED TO YOUR SUCCESS

RuffaloCODY Expands Software as a Service (SaaS) Initiative

As a leading provider of strategic fundraising and phonathon software services, we know that developing tools that help nonprofit organizations realize their fundraising goals - as economically as possible - is an ever-increasing challenge. Our recent acquisition of MoonFire Corporation - whose values and vision are shared by RuffaloCODY - provides additional expertise to the Software as a Service (SaaS) opportunities available to both CAMPUSCALL and DialVision clients. *The combination of our two organizations assures our clients receive the very best the industry has to offer in phonathon software.* Our goals are the same - to provide our clients with superior service and software initiatives that move their organizations forward. Together, we look forward to providing strategic solutions and unmatched customer support. ■

PHONATHON

The Changing Landscape of Telephone Outreach

Continued from page 5.

DEMOGRAPHIC UPDATES FOR A RAPIDLY CHANGING WORLD

One of the main benefits of a comprehensive phone program, aside from raising money, is the improvement in the quality and accuracy of the constituent's demographic information. In addition to conducting strategic research before calling begins, the best outreach programs have always captured new mailing addresses, changed phone numbers, or updated employer information.

Today's modern phonathons also aggressively seek e-mail addresses and cell phone numbers, knowing these two updates will be crucial to the future of fundraising efforts at that institution. Accurate e-mail addresses allow the institution to implement a quality e-communication support mechanism for stewardship applications, the phone program, and e-fundraising appeals. Thousands of e-mails are captured or verified through calls made by the phonathon.

For cell phones, increased Smartphone functions hold the key to more than just placing a call to the intended party for that year's phonathon. Having a prospect's cell phone number means that you have the tools to use text messaging, e-mail, social media applications, the internet, and of course, physically speaking to them and asking for support. And with number portability, more people are keeping their cell phones as permanent numbers - leading to better data quality for upcoming phone campaigns.

THE FUTURE OF PHONATHON

What started out as a simple way to raise a few extra dollars in the development office has now evolved into a sophisticated outreach effort responsible for millions of donors and dollars brought in each year. Despite changes in strategy, technology and communication cycles, phonathon has remained true to its original objective: raise money, foster good feelings, and update demographic information. The more things change, the more they stay the same.



Jason Fisher is Director of Marketing, RuffaloCODY MASTERS Division and the author of "The Phonathon Manager's Planning Handbook" - published by the Council for Advancement and Support of Education (CASE). ■