

AVAP Conference Call
January 30, 2018
Notes

Attendees: University of Florida, Pennsylvania, Georgia, Ohio State, Guelph, Iowa State, Kansas, Cornell (sorry if we missed you)

AVAP – Conference July 11-13, full day Wednesday, Thursday; half day Friday with optional tour of CSU

Training of House Officers:

- Ohio State – part of initial orientation but not sure the message resonates.
- Melissa (Florida) – met with alumni affairs person on COM, matched sent welcome letter, bumper sticker, part of the orientation and holds events strictly for them (Taco Tuesday, more of a get to know them event), have a bucket list of different things to do around the city and use a hashtag to record completing the list. Receive a fleece after completion, do a BBQ just for the residents and the interns with it being all about them and getting to know them better. Do a basketball game in the spring with happy hour before the game, invited to homecoming weekend. Revolves around the bucket list to engage with them. Share with them what we do. Purina rep doing \$1,000 for each event and be there as a representative. Being in front of them – sit in service offices.
- Starting to consider them a part of the alumni group – inviting to receptions and events.
- Changed alumni council rule to make them a part of the council.
- Incorporate them into orientation, not interested in learning about giving. Invite them to pizza with a donor in September to get them a taste of philanthropy, introduce them.
- Cornell – structure of head residents = able to build relationships with them, monthly lunches to discuss issues across the hospital.

Setting Appointments:

- Going to their clinic – stop-by practices
- Message with Facebook, text messages, sit in office until free moment
- Writing name of front desk person (Jane) who takes message to include in follow up emails or messages to donor. Also could know appointment schedule and help give you an idea of when to stop by (surgery in morning, then takes a lunch before seeing appointments at 2)
- Football tailgate before each game, meeting someone and asking for a visit
- Canada – uses travel as an excuse, want to stop by practice while in town
- Patricia – retired faculty member traveled with her, made it easy to travel with and set appointments
- Use LinkedIn as a way to connect with alums / donors after first visit, may give some insight into them and another way to connect with them if traditional ways don't work.

Stewardship of Planned Gifts

- Karen (Florida) – hosted Dean's Circle, invited bequest donors – advancement in technology, more bequest people attend. More ways to engage them with the college (events). Some type of event (couldn't hear).
- Send out magazine cover letter with in-depth updates from the college
- Gordon – planned gift donor (husband & wife), he is a consultant, PhD, teaches at business school. Doing pro bono work for the college and bringing in donors. Has offered two spots,

faculty and fourth year student to come to MBA class (skill set class) working on client relations. Involve donors into curriculum and programs.

- Elizabeth – planned gift for scholarships, present day giving to establish fund or do annual scholarship gift to see their impact in current day.
- Margaret – coordinated effort between fundraisers, event to an invite or two throughout the year to incorporate them, regular stewardship reports with regular two-three touch points a year with larger university stewardship.
- Florida – bequest upgrade, check in with these people with increases and changes to bequest, increase \$9m. (10 years or greater)
- Ohio State created video cards for donors with large scholarships. Got genuine reactions from students. Have used to show potential donors the impact scholarships can have. Video cards are A LOT of work.

Future topics

- Wealth screening
- Event follow-up
- Structure of external affairs or development officers (team)
- Engaging with young alumni
- Maximizing event follow-up with donors
- Maximizing client visits – more meaningful visit (Dr. only has 15 minutes)