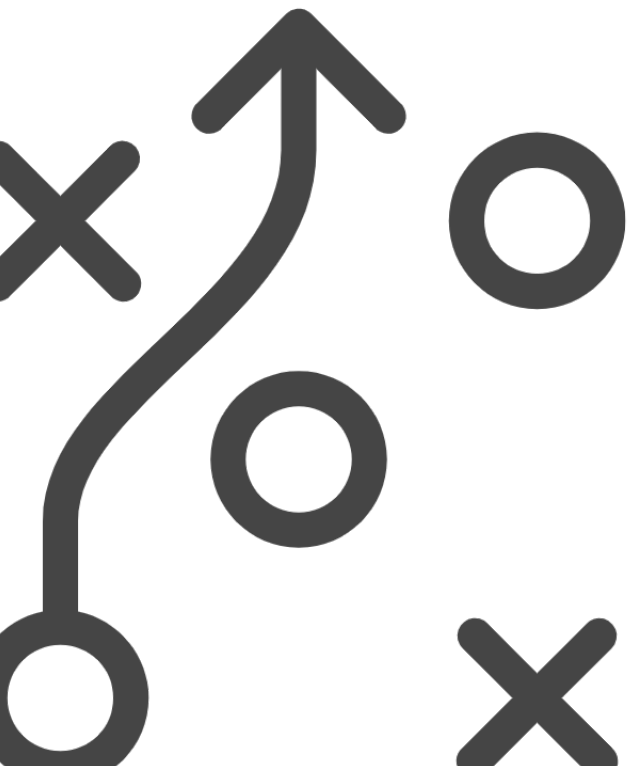# Giving Day Follow-up

evertrue

Contents

Welcome to your team's comprehensive playbook for giving day follow-up.

Giving days are so important. But so are the days after. Don't lose your momentum. We'll show you how to structure follow-up; assess social media engagement, giving patterns, net worth, job changes, and interests; and get more major gift prospects into portfolios.

Target: Giving day donors by designation

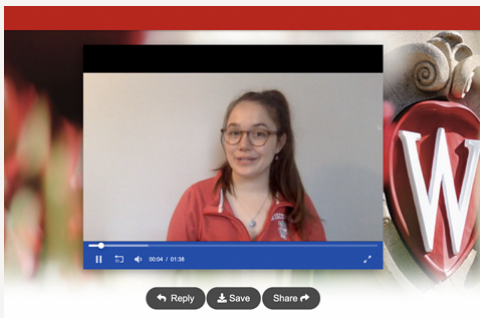**Action Item:**   Send a ThankView to all donors explaining the impact of giving day

Suggested Teammate: Work-study students or student callers

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Tech Tool: **ThankView**

Step-by-step: **How one organization sent 35,000 personalized ThankView videos from 7 student callers**

Notes: _____

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The University of Wisconsin Foundation and Alumni Association used personalized videos to thank every single donor.

Read More ➜

Target: Giving day donors in gift officer portfolios

Action Item: Send a ThankView to managed prospects from their assigned gift officer

Suggested Teammate: Major gift officers

Tech Tool: **Automatic gift notifications for prospects in portfolios**

EverTrue Tip: **A gift officer sent a giving day message to some unresponsive folks in her portfolio... here's one win**

Notes:

"The donor was so thrilled that he received a video message from a Senior Director. We ended up having a perfect visit. He will eventually become a major gift donor and an estate donor."

Anne Murphy, Sr. Director of Development, Oregon State University Foundation

Read More

Target: All giving day donors

Action Item: Send a "What did you think?" ThankView

Suggested Teammate: Giving day program manager

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Tech Tool: **ThankView**

EverTrue Tip: **Florida State University intro'd the "giving day mastermind" to donors**

Notes: _____

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> **"I sent a personalized ThankView to giving day donors saying,** _'Hi, I'm the program manager for FSU's giving day - you know that thing you just gave to? Well, I organized it. Could you do me a big favor and let me know how you liked it or how you'd like to see it improve?'"_
>
> Nora Clark, Florida State University

Target: Giving day VIPs/matching challenge donors

Action Item: Send personalized, "hand"written notes from leadership to up-level your stewardship

Suggested Teammate: Vice President/Dean

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Tech Tool: **IgnitePost**

EverTrue Tip: **Williams College gets their whole staff onboard with giving day follow-up**

Notes: _____

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Psst!

Handwritten notes have a response rate that is 21.3x higher than email.

Learn More

DAY 10

Target: Digitally engaged, unassigned giving day donors

Action Item: Flag key giving day prospects (digitally engaged, unassigned, increased gifts) and keep in touch

Suggested Teammate: Giving day program manager

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Tech Tool: **Flag key prospects in EverTrue**

EverTrue Tip: **Giving day is "day zero" at the University of Miami**

Notes: _____

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Test out an outreach cadence on your key prospects by downloading our EverTrue DX Starter Kit.

Download →

Target: Giving day donors with wealth indicators (lives in wealthy neighborhood; net worth over $1MM; C-suite job title)

Action Item: Review/revise ratings to uncover major gift prospects

Suggested Teammate: Prospect researcher

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Tech Tool: **Windfall**

EverTrue Tip: **The University of Miami follows up 1:1 with giving day prospects with additional wealth indicators**

Notes:

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> **"Windfall takes a lot of the guesswork out of prospect research and has made finding new prospects really easy and accessible."**
>
> Luciana Musto, Wilkes University
>
> **Read More ➜**

Target: Digitally engaged, assigned giving day donors
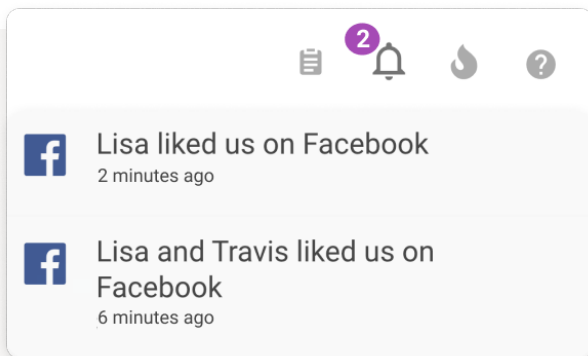
Action Item: Celebrate double-show of affinity (giving + digital engagement)

Suggested Teammate: Major gift officer

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Tech Tool: **Discover and utilize Facebook reaction data**

EverTrue Tip: **20 million alumni showed us why we need to pay more attention to online engagement**

Notes: _____

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Lisa liked us on Facebook
2 minutes ago

Lisa and Travis liked us on Facebook
6 minutes ago

Participation from alums who engage on Facebook is 3.4x higher than an average alum's participation.

Target: Digitally engaged non-donors

Action Item: Connect with folks who engaged with giving day content on Facebook but didn't give to create a sense of FOMO

Suggested Teammate: Alumni relations officer

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Tech Tool: **EverTrue Facebook insights**

EverTrue Tip: **20 million alumni showed us why we need to pay more attention to online engagement**

Notes:

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University of Miami
about 7 months ago

Learn how UMiami turned Facebook likes into gifts.

Read More ➜

DAY 60

Target: Rated, unassigned donors who engaged digitally since giving day
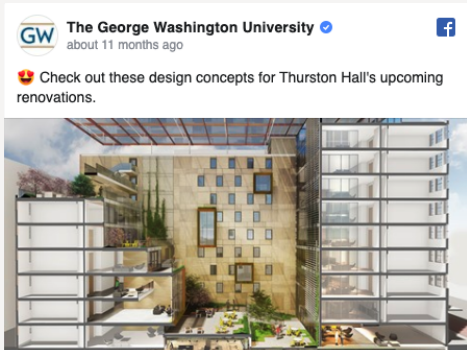
Action Item: Celebrate double-show of affinity (giving + digital engagement)

Suggested Teammate: Annual giving officer

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Tech Tool: **Use filters in EverTrue**

EverTrue Tip: **The end of giving day should be the beginning of a new wave of deepened donor relationships**

Notes:

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GW **The George Washington University** ✔ **f**
about 11 months ago

😍 Check out these design concepts for Thurston Hall's upcoming renovations.

See how GWU searches for keywords within Facebook engagement data.

Read More →

Target: Donors who changed jobs since giving day

Action Item: Send "Congrats!" video to celebrate job changes

Suggested Teammate: Alumni relations officer

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Tech Tool: **Turn your alumni Career Moves into ThankViews**

EverTrue Tip: **It's time to start tracking alumni Career Moves**

Notes:

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"**We cannot function without employment information, but it's also the hardest data to keep up to date. Career Moves is clean, verified, manageable data — all in one place — that's easy to get back into our database. It allows us to immediately take action.**"

Jessica Kuhlman,
Senior Director of Donor Strategy and Analytics,
West Point Association of Graduates

Read More ➜

DAY 90

Target: Key giving day prospects

Action Item: Send check-in email to all flagged giving day prospects or managed prospects to build momentum

Suggested Teammate: Major gift officer/Giving day program manager

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Tech Tool: Search past Facebook posts by keywords like "giving day"

EverTrue Tip: Our best-kept secret: you can filter by keywords in past interactions, too

Notes:

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Download our EverTrue DX Starter Kit to build a cadence plan to keep in touch with donors.

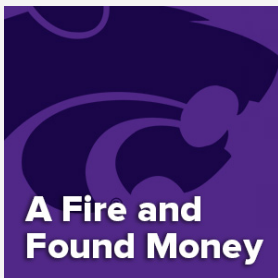**Read More →**

Target: All giving day donors

Action Item: Send 3-month "look back" message to all giving day donors

**Suggested
Teammate:**   Giving day program manager

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Tech Tool: **Filter by giving history in EverTrue**

EverTrue Tip: **Polite persistence is the key!**

Notes: _____

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A Fire and Found Money

For your next giving day, go all-in to solve ONE problem on campus, like K-State does.

Read More ➔

Giving Day Assessment Form

METRIC	TOTAL	COMMENTS
# of donors		
# of dollars raised		
# of Facebook engagers		How many people engaged on giving day-themed posts leading up to and during your giving day?
# of Facebook engagers who gave		keep nurturing people who engaged, but didn't give, with impact stories. Look at this list again in 3 months. Who has made a gift since giving day? How much additional revenue did you gain?
# of assigned prospects who gave		Ensure gift officers follow up and thank them quickly with a personalized ThankView.
# of unassigned, high net worth prospects who gave		What is the stewardship plan? Gift officers should reach out and book virtual qualification visits.
# of new assignments		Look at the above list in 3 months. Who is now assigned to a gift officer?
$ of pipeline created		In 6 months and again in 12, look at how much major gift pipeline was the direct result of giving day (i.e. new assignments with open proposal or target ask amount)?