

SFU

SIMON FRASER UNIVERSITY
THINKING OF THE WORLD

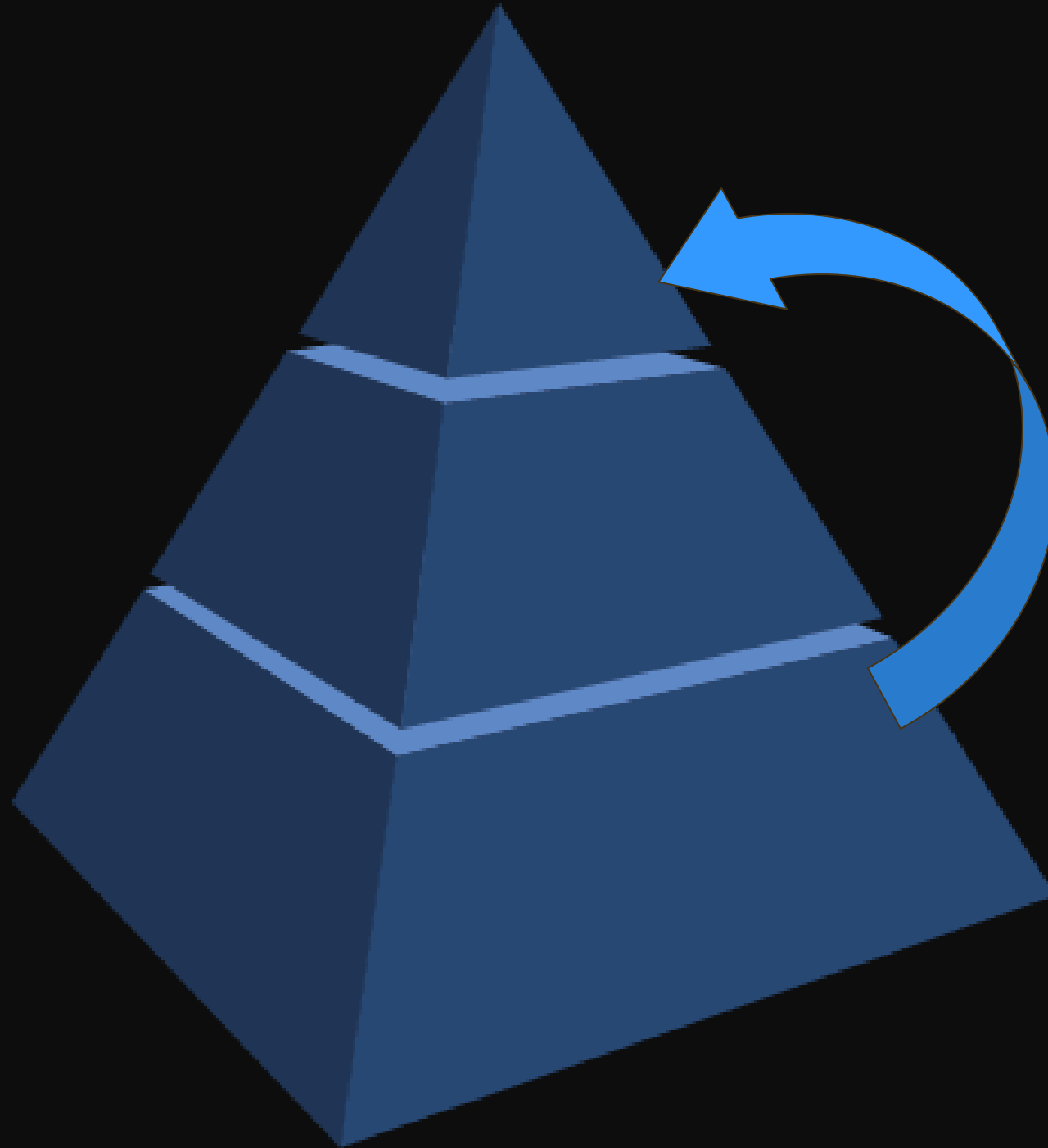
Pyramid Fundraising

Doug Puffer, Director of Planned Giving & Sofia Janmohamed, Manager Annual Campaign, Simon Fraser University

“CASEIPEDIA” District VIII Conference 2011 Vancouver BC

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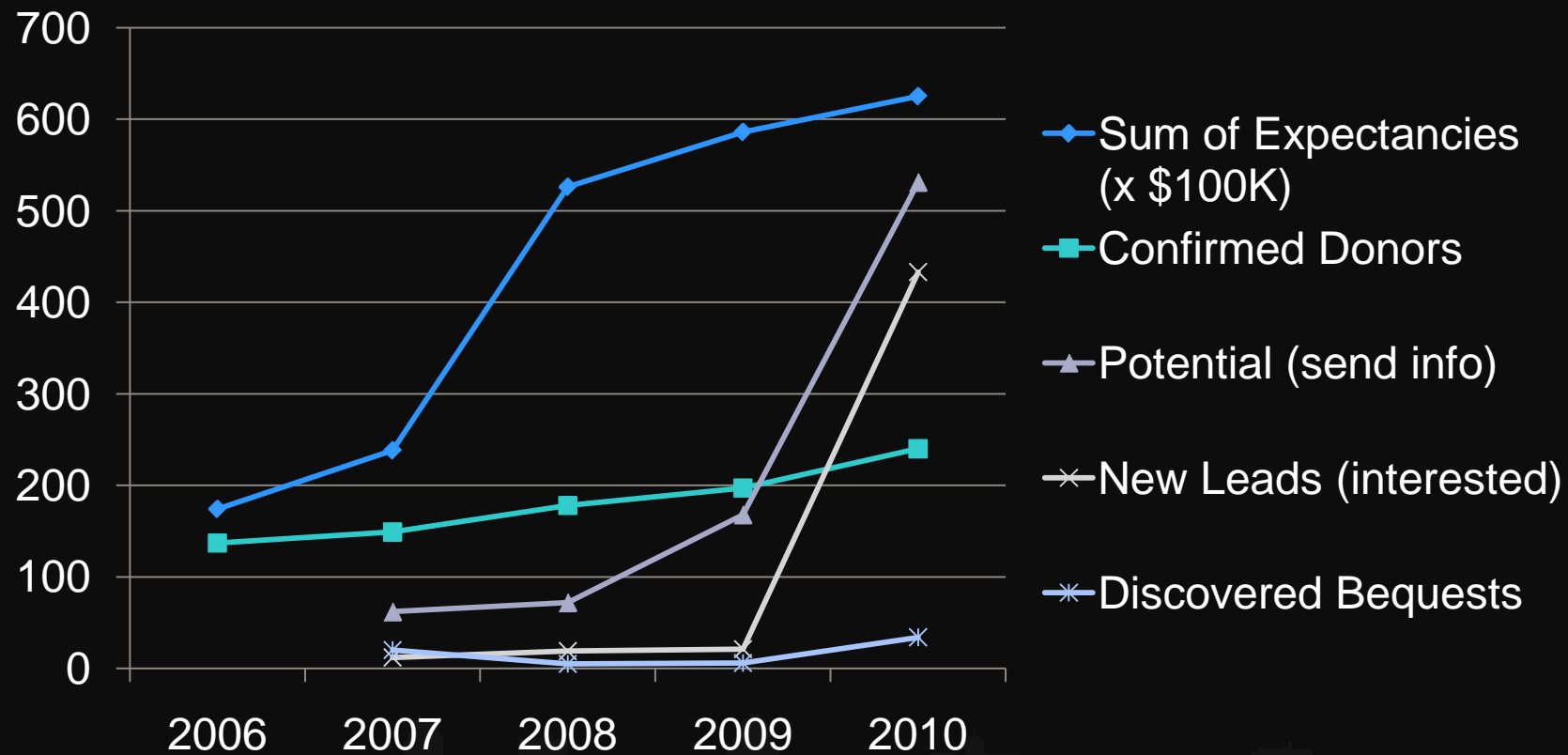
Overview

- Marketing Plan
- Prospect Profiling
- Data Analysis
- Creating the list
- Setting the stage
- Selecting the right callers
- Training
- Making the calls
- Challenges
- Results

Marketing Plan

- 2006 no PG program
- 2007 dm newsletters, brochures
- 2008 dm & e-newsletters, brochures, web page, SFU Future Circle, ads: legacy, Alumni magazine ads
- 2009 dm newsletters, brochures, dm annuities, SFU Future Circle, web page, Alumni ads
- 2010 dm newsletters, brochures, SFU Future Circle, web page, Alumni ads, branding, dm targeted letter ask student caller phone survey

Confirmed New Bequests and Leads



DIY Profiling and Data Mining

- Who gives? Lets analyze!
- SFU Institutional Research and Planning
- Profile first
- Parameters second
- Data mining third
- Prioritize lists
- Targeted markets

Data you need: who gives, who will, who didn't, who won't

- Everything you know about your confirmed PG donors
- Everything you know about: Who died and left nothing or who said NO PLANNED GIFTS!
- Giving records, degrees, job info, addresses, phones, email addresses, sports, campus clubs...everything!

The SFU Algorithm

Initial Profile

- Varsity athlete
- Number of actions
- (Alerts)
- Job title
- Graduate degrees
- Lifetime gift count
- Faculty
- Time since graduation

Second Profile

- Alumni volunteer
- Regular donor (3/7 years)
- Job title
- Number of actions
- Highest degree

Basic premises

- You are on a limited budget
- People already love you!
- They know you accept bequests
- They are old enough (over 53)
- Invisible to research
- Up to date coordinates

Direct Mail Package

- Brochure
- Letter
- Reply card
- 5000 sent (top 80% and test group)
- 3 weeks in advance of calling

Survey Questions

- Intro, establishment of rapport
- Questions about PG package and Futures Newsletters
- Leading into knowledge and interest in Legacy Gifts
- Opportunity for questions/comments
- Possibly Follow Up



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Student Caller Recruitment & Training

- Return Callers only
- Mature and professional
- Hand selected
- 1-2 hours of training
- Review of important legacy information

Challenges

- Survey system problems
- Determining best way to record data
- Amount of follow up generated

Data Flow

- Callers generate survey data
- Student Leader transcribes data into excel
- Reviewed by Manager and sent to PG Assistant
- Email/Mail follow up completed
- PG Director follows up by phone as necessary

Lessons Learned

- Most effective with fewer callers, over longer period
- Stronger contact and completion rates
- Less delay with follow up
- Better caller retention
- Stagger calling hours morning/evening
- Great partnership, not competition for annual fund

Results

	SFU	UBC	QU 2008
Calling Pool	4554	831	4957
Completion Rate	48%	66%	60%
New Leads	428	110	117
Potential	369	208	730
New Confirmed	35	17	60
Expected Value	\$3.15M	\$2.04M	\$6.60M
Actual Cost	\$12.7K		

Connecting People

SFU
FUTURES

VOLUME 1 EDITION 1 - FALL 2007
A PUBLICATION FROM SIMON FRASER UNIVERSITY ADVANCEMENT - PLANNED GIVING



Dr. Michael Stevenson,
President and Vice-Chancellor,
Simon Fraser University

During my tenure as president, I have paid particular attention and given my support to projects and programs at Simon Fraser University that build and sustain our reputation for excellence. Ensuring an exceptional SFU experience for our students is my first priority.

Endowment funds help us create these exceptional experiences by providing an everlasting legacy of support. This funding gives SFU additional resources to compete for the best students. Charitable bequests to SFU have helped build our endowments to over \$200 million.

Every bequest can make a powerful difference — one that can further enhance the high quality of the SFU experience for generations to come.

I strongly encourage our alumni and friends to join me in arranging a planned gift for the future of Simon Fraser University. We can make a world of difference.

Save Taxes:
Donate BCE Stock

As one of Canada's most widely held stocks, the looming privatization of Bell Canada Enterprises Inc. will trigger a windfall for investors and, ultimately, the taxman. If your shares are held inside a registered

plan, the capital gains tax will be deferred. If not, a bit of strategic tax planning is a good idea.

If you are thinking about donating BCE shares, don't wait until they are de-listed. Learn more at www.sfu.ca/advancement/planned_giving/



Janet Blanchet,
past secretary of the SFU Retirees Association,
SFU employee for 29 years

"I worked at SFU for such a long time and enjoyed the environment. When I told my financial advisor that I wanted to give something back to help SFU students, he suggested that I take out a life insurance policy."

Janet Blanchet wanted to create a lasting charitable gift. Donating a new life insurance policy allowed her to make a much larger gift than she thought possible. Each year Janet pays the premiums and receives a charitable donation receipt. Upon her death, SFU will receive the full value of the policy and endow a new scholarship in her name. This is a wonderful and lasting legacy for future generations!

Did you know?

An SFU gift annuity arrangement offers fixed, high interest payments for life in return for a gift of capital. Please call us for details.

For Professor Emerita Thelma Finlayson, who has inspired many great minds at SFU, a gift annuity was the perfect way to make a significant gift to SFU and provide guaranteed income for life.

"Every month the payments are deposited into my bank account, and the income is all tax free," says Thelma. "It has worked out extremely well for me and I donate the extra income back to the University."



ANNUITY RATES ARE BASED ON AGE AND GENDER, SINGLE LIFE OR JOINT LIFETIME PAYMENTS				
Age	Single Life Men	Single Life Women	Ages	Joint Life Payment Rates
65	6.32%	6.05%	65, 65	5.3%
73	7.20%	7.34%	70, 70	5.80%
81	8.69%	8.13%	75, 75	6.60%
86	10.00%	9.31%	80, 80	7.00%
88	10.00%	10.00%	85, 85	8.00%

Rates are subject to change. SFU adopts the gift annuity rates recommended by Canadian Charitable Annuity Association.



Virtual Handouts

1. Planned Giving propensity research (profiling)
2. Data mining
3. Prioritizing and selecting prospects
4. Survey questions
5. Presentation of results (tables, charts)
6. References

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Good Luck, Happy Hunting!

