



RNL Phonathon Index 2018

Benchmarks and Best Practices
for Phonathon Campaigns



FUNDRAISING



Based on a review of phonathon results at 93 higher education institutions from 2014–17, with campaigns totaling \$303M in pledges through RNL’s comprehensive phonathon management

Table of Contents

PHONATHONS: THE MOST PERSONALIZED DONOR CONNECTION.....	3
PHONATHON CAMPAIGN PERFORMANCE	4
CAMPAIGN PERFORMANCE BY INSTITUTION TYPE.....	5
SPECIAL FOCUS: YOUNG ALUMNI	6
SPECIAL FOCUS: THANK-YOU CALLS.....	8
SPECIAL FOCUS: MOBILE-APPEND RESEARCH.....	9
PHONATHON GLOSSARY.....	9
PHONATHON BEST PRACTICES.....	10

SOURCE OF DATA

93 PHONATHON CAMPAIGNS FROM 2014-17

55

PUBLIC INSTITUTIONS

38

PRIVATE INSTITUTIONS

2,492,272

PLEDGES

\$303,747,927

IN TOTAL PLEDGES

Phonathon campaigns were conducted under Ruffalo Noel Levitz on-site management utilizing RNL CAMPUSCALL® software. Student callers made almost all calls to donors. Only results for annual giving campaigns were included in this index.



Optimize your outreach—talk to RNL today

What are the best strategies for engaging the right donors in the right channels at the right time? Talk with our fundraising strategists about what the best approach is for your institution.

Visit RuffaloNL.com/FundraisingStrategy

PHONATHONS: THE MOST PERSONALIZED DONOR CONNECTION

This index provides the results of 93 institutions' phonathon campaigns conducted under RNL's comprehensive on-site management program from 2014 to 2017. The campaign averages and best practices presented in this index provide a baseline for planning and program improvement as organizations utilize this time-tested approach to donor outreach to amplify annual giving response.

According to a recent RNL survey, more than two-thirds of institutions reach out to donors via phonathon. Phonathon is the top rated solicitation method for capturing new donors and securing donor upgrades.¹ While texting and smartphone use have altered the role of the phone, the unique personalization of calling donors has maintained phonathon as a key outreach method for fundraisers.

The programs profiled in this index engage in significant training and motivation for student callers, invest significantly in marketing the phonathon and developing conversation guidelines, and set high standards for donor engagement. In each program, an experienced manager assists callers during every calling shift. In addition, these programs engage in robust data enrichment to secure the best possible donor information and maximize the number of valid phone numbers, including mobile numbers. Many also use integrated multichannel campaigns to maximize donor contact and engagement.

Phonathon remains the only channel where institutions can reach out to donors with a person-to-person message at scale. While reaching donors via phone has become somewhat more challenging in recent years, this index shows that per calling hour, institutions continue to receive high return on investment when they follow best practices. The following pages also outline some of the key metrics and best practices used by top phonathon programs.



¹*Advancement Leaders Speak: Annual Giving Multichannel Best Practices*, available at RuffaloNL.com/papers

PHONATHON CAMPAIGN PERFORMANCE, 2014-17

Fiscal Year	2014	2015	2016	2017
Completed calls	5,160,323	5,263,676	4,659,355	4,034,367
Contacts	2,740,395	2,902,226	2,588,572	2,245,980
Contact rate	53.11%	55.14%	55.56%	55.67%
Pledge rate	23.88%	23.48%	23.60%	24.29%
Average pledge amount (total)	\$113.72	\$120.51	\$125.62	\$129.17
Credit card gift rate	33.86%	36.24%	37.83%	40.08%
Attempts per contact	22.0	21.8	23.5	25.9
Completes per hour	6.10	5.46	5.18	4.69
Contacts per hour	3.24	3.01	2.88	2.61
Pledge amount per hour	\$88.00	\$85.20	\$85.40	\$81.95

KEY TRENDS

- Credit card giving via phone has increased substantially over the past few years, continuing a decade-long trend.
- Pledge rates for various donor groups remain steady, with overall pledge averages increasing.
- Contact rates have not declined, indicating that aggressive data enrichment has paid off for top programs.
- Total attempts to reach the same number of donors have risen slightly over the past four years.
- Completed calls and contacts per hour have declined. In our research, we believe several factors have contributed:
 - Institutions tend to focus on higher-response donor pools, which maximizes time connected with donors but reduces total completed calls.
 - Many institutions have adopted significant credit card giving goals and are including contact report and stewardship practices in caller duties. This leads to a greater amount of total time spent (including off-phone time) per contact.
 - There is significant competition for phone attention, particularly leading up to the 2016 political campaigns. RNL research shows this was especially felt in “battleground” states.
 - The phone is one of many methods that donors have to respond. As institutions have added robust giving day, crowdfunding, and online giving portals, phonathon has evolved to support these channels, but those gifts may be captured through other channels.

PHONATHON CAMPAIGN PERFORMANCE BY INSTITUTION TYPE

PUBLIC INSTITUTIONS				
Fiscal Year	2014	2015	2016	2017
Completed calls	3,504,056	3,787,902	3,412,586	2,926,136
Contacts	1,869,824	2,077,477	1,863,028	1,615,950
Contact rate	53.36%	54.85%	54.59%	55.22%
Pledge rate	21.52%	21.16%	21.24%	22.02%
Average pledge amount (total)	\$105.34	\$112.52	\$116.21	\$118.58
Credit card gift rate	34.71%	36.82%	38.24%	40.69%
Attempts per contact	20.7	21.0	22.5	24.8
Total calling hours	548,594	669,669	616,045	590,326
Completes per hour	6.39	5.66	5.54	4.96
Contacts per hour	3.41	3.10	3.02	2.74
Pledge amount per hour	\$77.25	\$73.86	\$74.66	\$71.46

PRIVATE INSTITUTIONS				
Fiscal Year	2014	2015	2016	2017
Completed calls	1,656,267	1,475,774	1,246,769	1,108,231
Contacts	870,571	824,749	725,544	630,030
Contact rate	52.56%	55.89%	58.19%	56.85%
Pledge rate	28.94%	29.33%	29.67%	30.10%
Average pledge amount (total)	\$127.10	\$135.03	\$142.91	\$149.05
Credit card gift rate	32.51%	35.18%	37.07%	38.94%
Attempts per contact	24.8	23.9	26.1	28.5
Total calling hours	296,921	294,269	282,772	269,357
Completes per hour	5.58	5.02	4.41	4.11
Contacts per hour	2.93	2.80	2.57	2.34
Pledge amount per hour	\$107.86	\$111.01	\$108.80	\$104.95



Listen to the podcast

Learn how to apply the findings of this study to your strategy by listening to a special episode of *Fundraising Voices*, our popular podcast.

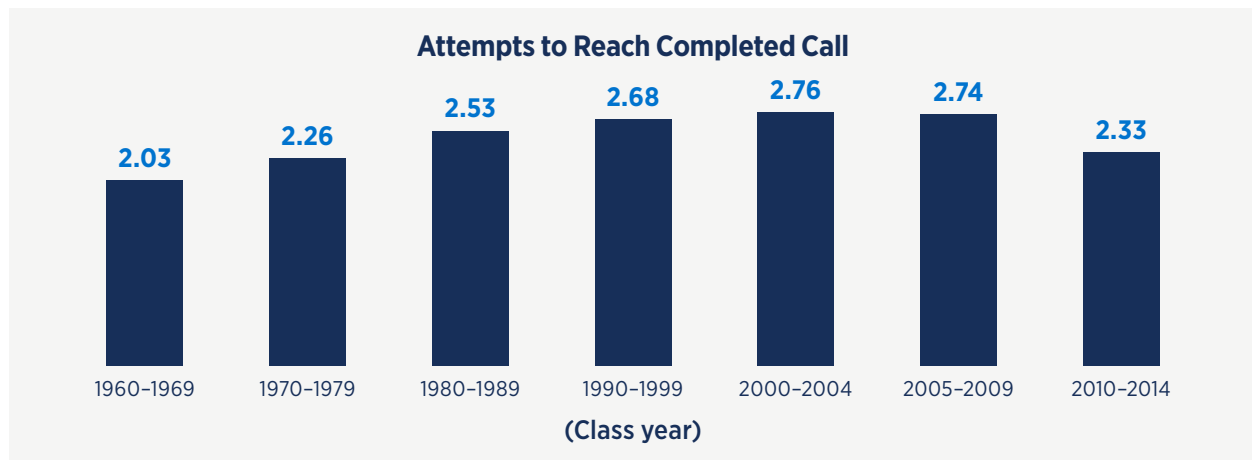
Available at FundraisingVoices.com

SPECIAL FOCUS: YOUNG ALUMNI

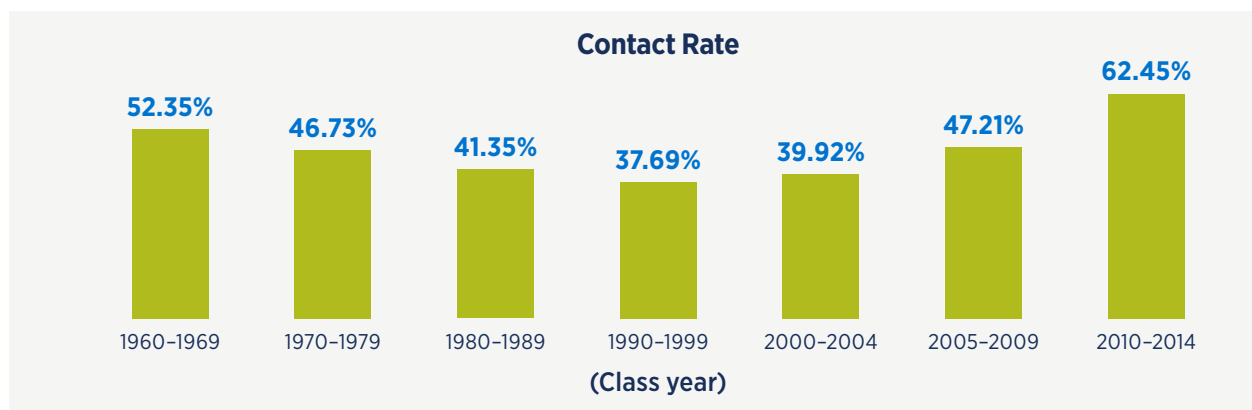
Millennials are quickly making up a larger part of the donor prospect base. While this group of increasingly influential donors spends much of their time online and on their mobile devices, institutions continue to reach out to young alumni via phonathon.

We looked at 72 colleges that had called more than 12 million alumni non-donor records through an RNL managed phonathon in 2015 and 2016. We parsed this data by class year to ask three key questions:

- Are alumni picking up the phone?
- Is young alumni contact information bad?
- Will young alumni give over the phone?

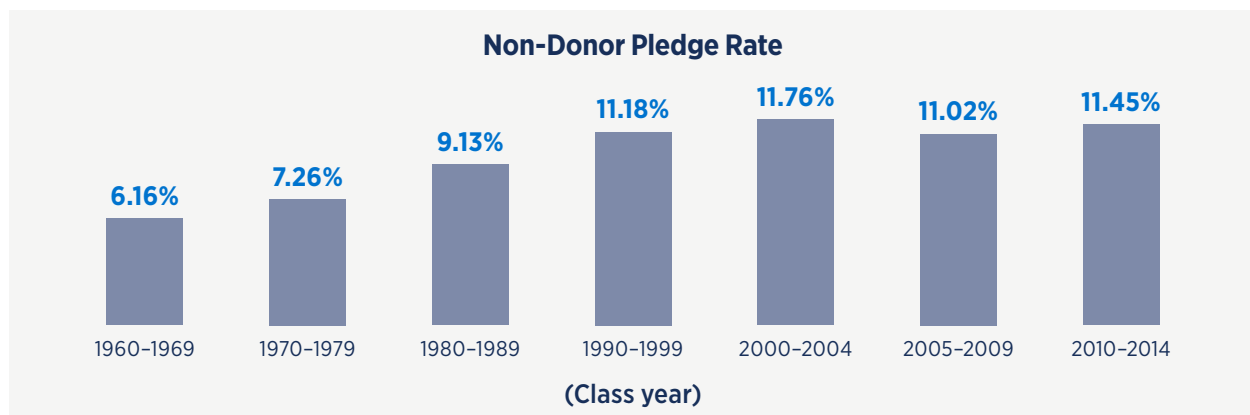


Results of 72 RNL-Managed Higher Education Phonathon Programs, 2015 and 2016.

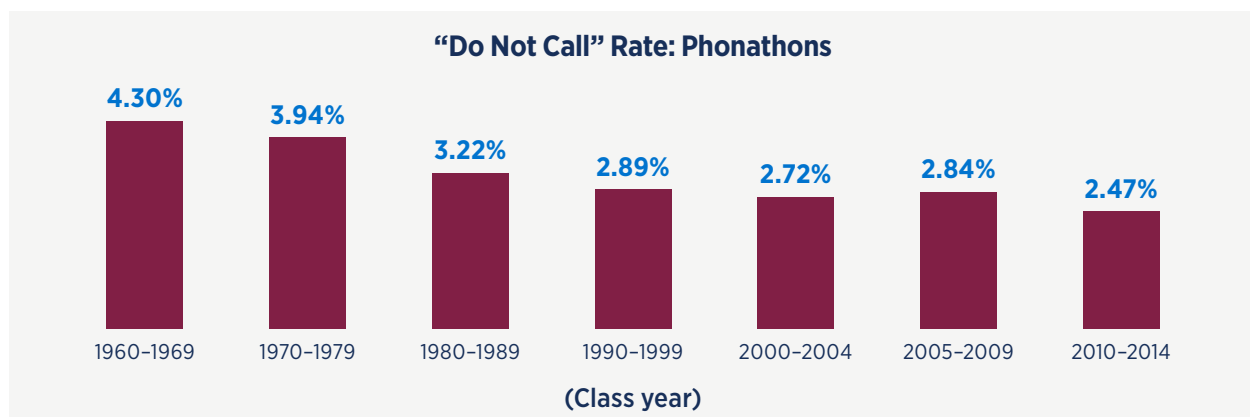


Results of 72 RNL-Managed Higher Education Phonathon Programs, 2015 and 2016.

The most recent group of graduates in our study needed fewer attempts to reach by phone than any group since the classes of 1980-89. Phonathon contact rates were also the strongest among the youngest group of alumni. Note that programs like the ones in our study that invest in cell-append research to keep their contact data accurate do very well with young donors, suggesting that young alumni will provide information and will accept calls from phonathon programs.



Results of 72 RNL-Managed Higher Education Phonathon Programs, 2015 and 2016.



Results of 72 RNL-Managed Higher Education Phonathon Programs, 2015 and 2016.

Non-donor pledge rates are higher for younger alumni. This is not surprising when we consider that these donors have not been called for 20 years or more. Young alumni are a fresh group to approach with your giving message.

One common concern is that phone calls "annoy" young alumni. However, the rates above for "do not call"—when a donor asks be removed from all future calling attempts—are lowest for younger alumni.



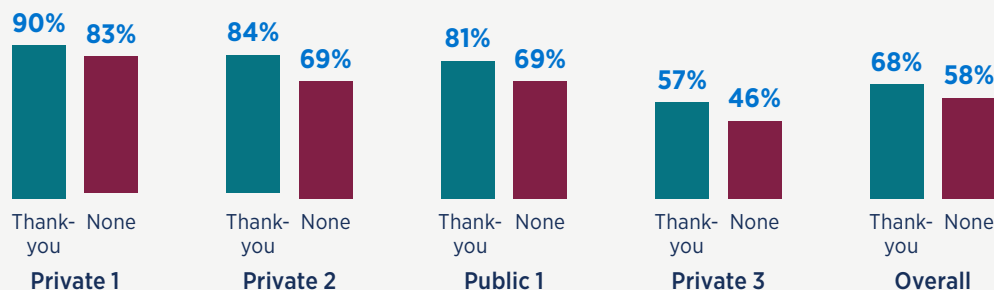
Phonathon remains a strong part of multichannel outreach to young donors.

The results above show that younger donors will respond to phonathon as part of an overall multichannel campaign, especially when deploying younger callers who connect with recent alumni more easily. The programs in this study also used practices such as data enrichment to maximize contact rates through mobile numbers.

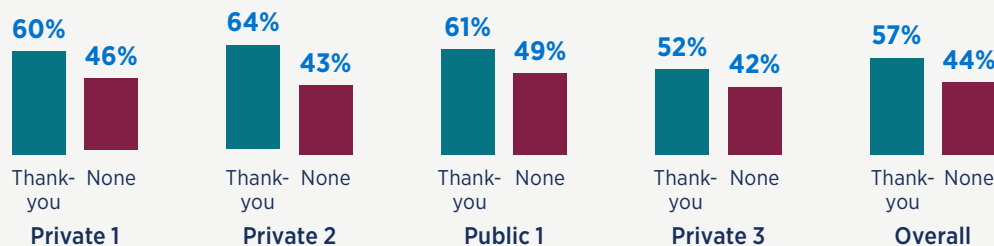
SPECIAL FOCUS: THANK-YOU CALLS

Institutions have increasingly relied on phonathon to do more than ask for pledges. We investigated thank-you calls made to annual donors from the previous year before reaching out again through the next solicitation.

FY15 Current Donor Contact Rate
(based on FY14 thank-you call status)



FY15 Current Donor Pledge Rate
(based on FY14 thank-you call status)



Based on 30,133 records with 4,098 thanked in previous year, 13,933 completed calls, and 3,902 phonathon pledges.

If you look at the combined impact thank-you calls have on pledge rate and contact rate, **donors who are thanked are 51 percent more likely to pledge again in the following year.** Considering the focus on improving ROI and increasing alumni participation at many organizations, these results make a strong case for deploying thank-you calls.

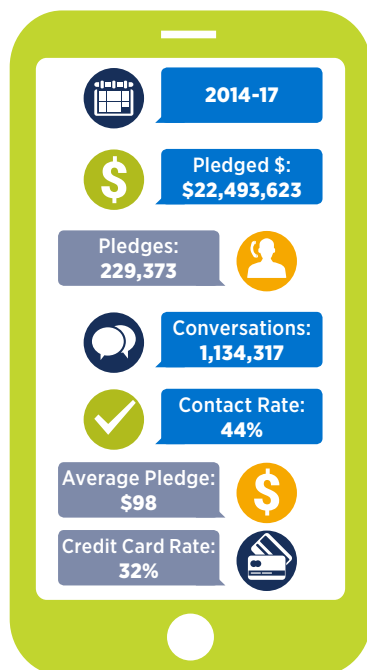
LIVE THANK-YOU CALLS VS. VOICE MAILS

We analyzed the difference between accounts where the student caller had a conversation thanking the donor (live thank-you call) and those where the student caller left a message. Live thank-you calls significantly outperformed voicemail, but even if institutions cannot make live calls, the data show a major advantage for making thank-you calls vs. not having callers thank donors.

FY15 Current Donor Pledge Rate
(based on FY14 thank-you call status)



SPECIAL FOCUS: MOBILE-APPEND RESEARCH



A significant issue for many institutions is finding the phone numbers needed to have a robust calling program, or concern that they are simply calling into landline phones that have been unplugged by donors.

Cell phone append research addresses this issue by significantly boosting your database with mobile contact information for donors. Utilizing commercial data sources, this research matches your database to known mobile numbers for your supporters. Institutions commonly ask whether these researched numbers yield strong results. In many cases, these records exceed both the average pledge and efficiency metrics of the overall calling program and do not lead to a higher rate of do-not-call responses.

PHONATHON GLOSSARY

Calling Hour: One caller at one calling station for a full 60 minutes.

Completed Call: A call that results in a record not being called again. This includes actual contacts, and also any numbers or results that would not be called again.

Contact: When a caller reaches the prospect and receives a “yes,” “no,” or “maybe” response, translating into a specified, unspecified, or no pledge.

Contact Rate: Dividing contacts by completed calls determines contact percentage. This percentage represents the ask or solicitation rate.

Credit Card Gift Rate: The percentage of specified pledges that are fulfilled immediately through credit or debit card on the call.

Pledge: The results in this index only track “specified pledges,” or results where the donor has given a definite commitment and with an amount.

Total Pledge Amount: The donor’s total commitment, including any employer match, and multiple payments for up to one year, in the case of recurring gift pledges.

PHONATHON BEST PRACTICES FROM THE DATA

This comprehensive analysis of 93 programs shows that phonathon continues to be a strong outreach channel. Crafting a successful phonathon requires an investment in top technology, a strong data plan, recruiting quality callers, training them, and creating call guidelines. While call output per hour has declined slightly over the past few years, some of this is by design as institutions focus on higher quality calls over the sheer volume of contacts.

Here are some key best practices we see in the top-performing programs included in this index.

- **Focus more on quality of your contacts versus quantity of contacts.** While calling efficiency is important, top programs are maximizing the time they have on the phone with donors that they reach. This means training callers to engage in conversation, listen to donors, and generally move away from reciting canned scripts.
- **Cross-channel synergy is key to boosting results.** Top programs follow up calls with email, digital advertising, and direct mail. Research shows that more than two-thirds of consumers “channel swap” during a commitment, which means phonathon can boost your direct mail, online giving, and even crowdfunding campaigns.
- **Embrace leadership and sustaining donors in phonathon.** Top programs engage the leadership donors that gift officers have been unable to reach and experiment with monthly or recurring givers.
- **Pass good data through to your CRM.** Your data quality prior to the phonathon and how you return data to your system after the calls are absolutely crucial to your phonathon success. If you have not engaged in data enrichment, cell phone append, and a data hygiene audit recently, your phonathon is suffering.
- **Get the cards.** The only barriers to immediate fulfillment via credit card are providing the right technology and implementing caller training. Credit card giving is likely to continue to increase in coming years.
- **Get help from your expert technology and management partner.** RNL has a massive storehouse of phonathon results, best practices, and systems to maximize the phonathon channel. If you are a CAMPUSCALL phonathon software user or even doing a manual phonathon, RNL experts can help optimize and enhance your phone program, allowing you to reach more of the right donors and increase your return on investment.



Find a multichannel strategy that will maximize donor contact and engagement

What are the best strategies to engaging the right donors in the right channel at the right time? Talk with to our fundraising strategists about what the best approach is for your institution.

Visit RuffaloNL.com/FundraisingStrategy

RNL Complete Fundraising

Today's fundraising landscape is highly competitive and quickly evolving.

How can you keep up with increasing pressure and shifting donor expectations?

RNL Complete Fundraising combines advanced analytics, engagement technology, and industry-leading insights to deliver a more intelligent modern approach to engaging donors and improving results. From donor acquisition to transformational giving, it's smarter fundraising tailored to how today's donors give.

Find out how you can engage the right donors at the right time with the right message through the right set of channels.

Visit: www.RuffaloNL.com/CompleteFundraising

Email: ContactUs@RuffaloNL.com

Call: 800.876.1117



ABOUT RUFFALO NOEL LEVITZ

Ruffalo Noel Levitz is the leading provider of enrollment management, student success, and fundraising solutions. Each year, more than 1,900 colleges, universities, and nonprofit organizations rely on RNL advanced analytics, personalized engagement, and industry-leading insights to achieve their mission.

How to cite this report

Ruffalo Noel Levitz (2018). *RNL phonathon index 2018: Benchmarks and best practices for phonathon campaigns*. Retrieved from RuffaloNL.com/PhonathonSuccess.

All material in this document is copyright © by Ruffalo Noel Levitz. Permission is required to redistribute information from Ruffalo Noel Levitz either in print or electronically. Please contact us at ContactUs@RuffaloNL.com about reusing material from this document.

19/03
FM-007