



## Interactive Technology

Article Five

# Universities Embrace Enhanced Technology To Drive Alumni Engagement

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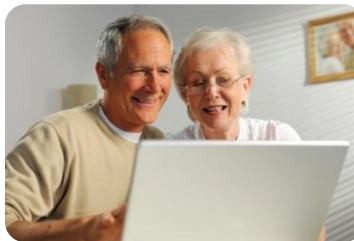
— **Trudy Lee**

*Director of Planned Giving for  
Southeastern Missouri State University*

Interactive technology is becoming an increasingly significant tool in university gifting. In an era when online social networking is the norm, the need for engaging donors as well as their families and advisors in meaningful dialogue, and for sharing stories of significance and opportunities for impact has quickly intensified.

Donor advised funds (DAFs) have played a role in the development of both interactive technology and non-profits for some time. Starting with community foundations, DAFs have ushered in a new era of communication needs, where overt accountability and instant access to results are expected. And now as

universities seek to reach a wider audience more deeply, they, too, are refocusing their energies in new directions by embracing DAFs and more contemporary technologies that come with them.



“When we began implementing donor advised funds our need for new technologies increased. We needed to provide more interactive donor relation opportunities in a secure online environment,” says Trudy Lee, Director of Planned Giving for Southeastern Missouri State University. “Our donors are looking at financial information regarding their gifts. They need a private place where they have the ability to network between and among themselves, their families, their advisors, the students who receive scholarships and university development officers.”

Lee attributes some of this increased need for more communication to an environment where donors are expecting to be able to get information via the Internet any time of the day or night. Information that took days or weeks to transfer in the past is now available with a thirty-second search online. She explains, “We found that our donors wanted more access to us and to information

about their gifting. We needed to find an efficient and effective way to report back to them about the significant impact their investments make. For us, an interactive, easy-to-use, online platform was a perfect fit.”

Southeastern Missouri State is not the only university embracing new technology. Michael Degenhart, Director of Gift Planning for The Pennsylvania State University needed to find a platform that would allow the organization to put information in front of their largest and best donors. “We need to create a dialogue between the university, the donor and the donor point of contact,” Degenhart says. “The platform that we intend to use is online. It allows our donors to immediately have access to the same type of technology that they are accustomed to seeing from their financial advisors *and* gives us direct access to their advisors.”



Although historically non-profits have not been proactive in engaging financial advisors, these universities see tremendous value in connecting with such potential advocates. “An interactive web platform affords us the opportunity to communicate with advisors through DAFs and helps us

**Crown Philanthropic Solutions is a pioneer in interactive technology for non-profits. Their flagship product, DonorFirst™, is a web-based dashboard that combines account management, charity research and due diligence, social networking, grantee communication and more. [www.donorfirst.org](http://www.donorfirst.org)**

build relationships with them,” Degenhart explains. “As we begin to better share our vision with them, we find they can be advocates for us, not just with our current donors, but with their other clients as well.”



In addition to financial advisors, universities are also interested in communicating with donors’ families. Family philanthropy is becoming increasingly important for a variety of reasons. “In planned giving, we see a strong need to work more effectively with grandparents, parents and children. What they can do together is incredibly powerful,” says Lee. “And in terms of legacy giving, it’s critical that we communicate with donors’ families. When an individual passes away, and has left a gift to us, we want to continue to be engaged with their family to honor their legacy.”

Sometimes universities find that they are working with fourth generation alumni. In other instances they see parents or grandparents who are alumni but the children have opted to attend a different school. Regardless, non-profits are seeing a trend where wealthy families are increasingly including children in their charitable donation decision-making. This may be in part due to the reality that children are involved in a family business or other entity, and philanthropy is just one piece of the overall succession planning.

Despite the motivation, engaging with

the entire family is valuable. “We find donors want to interact with other family members on an on-going basis, rather than having an annual family meeting,” Degenhart says. “A web-based interactive platform can help us communicate with the entire family and offer opportunities for them to connect with each other. This kind of steady communication allows a family to act on philanthropic interests more quickly.” Add to that the fact that the children of these families are accustomed to social networking and affinity groups and it’s easy to see why web-based technology is becoming an important strategy. Younger donors are looking for significant opportunities to make an impact on the world and they are using the Internet to find ways to get involved through donations and through volunteering. As Lee says, “A static cookie-cutter approach isn’t going to work. And while face-to-face communication is still key, the Internet is becoming an increasingly significant communication tool.”



Perhaps most importantly, non-profits in general and universities in particular are realizing the need to dialogue with donors of all ages about their passions and the results of their donations. The reality is that donors who can see the results of their involvement are more likely to remain involved. “It is a trust born out of continued communication,” Lee says. “Donors want to see that the building they are funding is of quality construction. They want to see the

lectorships making a difference. They want to meet the students who receive scholarships.”






An interactive platform that allows for faster and more secure delivery of compelling information is a more fulfilling experience for everyone. “Because a web-based platform is so interactive, it allows us to dialogue with our donors about success stories and potential gift possibilities quickly and efficiently,” Degenhart says. “When they see results and opportunities, there is a higher probability for them to put money into motion that might otherwise have been on the sidelines.”

By engaging donors, their advisors and their families around their passions, sharing success stories and maintaining a position of open, honest communication, universities and other nonprofits can potentially build better relationships and increase giving. Interactive web-based technology is one tool that can help them do that more effectively.

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