

Partners in Giving: overall recommendations

Assets:

- Giving.wi.gov website: significantly improved from 2020-21 version
- Fairly stable level of fundraising from year to year (increasing year to year prior to the pandemic, and likely to grow as in-person events and printed materials become more relevant again)
- Well-established messaging and processes
- Campus buy-in in the broadest sense: visible campus administrators serve as co-chairs (Dean of DCS, Director of University Housing, formerly UWPD Chief)
- A strong culture of giving in some campus units
- Some longtime chairs, volunteers and participants
- Strong, consistent effort by United Way of Dane County as the responsible agency

Challenges:

- State board, UCC and its committees, and UW Health efforts have limited coordination and essentially no budget, relying solely on staff time volunteered by units
- Relatively rapid turnover among chairs and committee members, which reduces institutional knowledge
- Limited to no documentation of tasks and procedures
- Inconsistent levels of activity by unit chairs (and levels of participation by units)
- Pandemic interrupted the usual methods of promoting the campaign and reduced staff availability overall
- Same issue as with most fundraising efforts: average donation size is increasing alongside a declining number of individual donors.
- Giving website (while significantly improved in design and content for the 2021-22 campaign) continues to have technical challenges, including
 - Confusing navigation to the donation page (since it's built on several systems)
 - Extremely long delays during the login process (at least on the UW side), which undoubtedly suppresses participation
 - A database of employees that is apparently static and loaded onto the United Way side, which results in a growing number of people each year who are asked to contribute but are not technically able to log on (resulting in missed participation). It connects to the NetID system, one of the biggest delays in the process—so why isn't it pulling from live data? Why aren't new employees added? Employees can't give online during the first one to 365 days of their employment.

(continues)

General Recommendations:

- Create a manual / onboarding kit for all those new to the effort—start small and build collaboratively over time.
- Broadly survey volunteers (UCC, state board, UW Health effort, chairs, employees) to determine their levels of awareness and their opinions of PinG; use this data to guide further collaboration.
- Survey employees who donate (and those who don't) to find out why.
 - Survey/interview units with strong programs and their key contributors.
 - Use analytics, surveys, link tracking, personalized/customized landing pages, Mobile Cause, and so on.
- Ensure that employees at all levels who contribute their time, energy and talents to this effort are appreciated and recognized; consider revising award nomination system. Build in accountability.

Recommendations for Communications Subcommittee:

- Have more conversations with campus PinG leaders to establish shared expectations, define and understand priorities and locate resources.
- Clearly define the scope of the subcommittee's responsibilities & authority.
- During the summer, prepare to pre-promote the upcoming active campaign to volunteers and communicators after marketing materials become available in early August.
- Before the active campaign begins, prepare and distribute campus-specific materials (social media templates and toolkits, images for online publications, etc.) to campus units for their use. Apply new campaign branding to materials from prior years.
- Participate in State Board marketing committee calls/meetings to share information and make the process smoother.
- Limit activity in the offseason (December to June) to planning for the following year, except for one or two "there's still time to donate" mini-campaigns.

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