



CLIENT SPOTLIGHT

Tufts

# BWF and Tufts University School of Medicine

## UNDERSTANDING PHILANTHROPY FROM A DONOR'S EMOTIONAL SIDE

*Tufts University School of Medicine (TUSM) has typically taken a traditional approach to fundraising. School officials knew who among alumni was donating but not why they were donating. They also didn't know much about those alumni who weren't donating to the university.*

Rebecca Scott, senior director of Development and Alumni Relations at TUSM, wanted to gain a greater understanding of donor motivation and see the correlation between donors and their levels of engagement and connection to the institution. Scott partnered with BWF to examine and try to increase donor engagement through a commitment to biannual survey work over a three-year period. TUSM completed wave 1 in February 2020, wave 2 in October 2020, and wave 3 in May 2021.

"We wanted to gain a different perspective beyond just giving, to understand why alumni are giving and try to increase their engagement over time," says Scott.

The Engage Dx Constituent Survey was just the right tool to provide Tufts with the intelligence they needed for decision making.

### ENGAGE DX

Engage Dx, a comprehensive suite of survey engagement products, helps answer essential questions about engagement and how it can be improved among donors.





**Engagement** measures deep emotional perspectives and inelastic feelings that are the core drivers of constituent support. Constituents self-reported how engaged they felt, and the survey provided a definition of “engagement.”

**Connection** is a constituent’s observable activity with TUSM. Constituents may be observably connected yet lack significant or deep emotional involvement.

**Affinity** is a constituent’s perspective of TUSM’s mission and its impact. A constituent can feel strongly about mission and impact (high affinity) but not feel emotionally involved (low engagement).

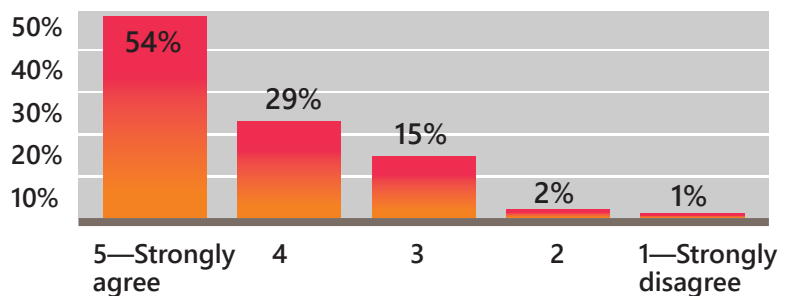
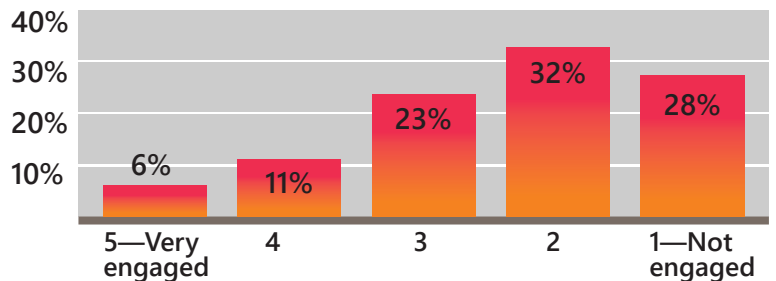
Measuring pride and engagement doesn’t tell the whole story because not everyone who gives annually or donates significantly to TUSM feels strongly engaged with the institution. Engage Dx highlights the important differences among pride, engagement, and connectivity as well as the role each plays in giving potential. Engage Dx helps identify unrealized potential with supporters who have not yet maximized their level of support, regardless of their current giving levels.

Rooted in behavioral economics and the science of understanding motivation, Engage Dx is at the core of helping clients understand philanthropy from a donor’s emotional side. This emotional side is impactful and drives sentiment; gaining a greater understanding of these emotions helps BWF understand the “why” behind donors’ giving decisions.

Using Engage Dx to better understand alumni perspectives, BWF partnered with TUSM to develop a survey that focused on engagement, pride and affiliation, communication preferences, and philanthropic priorities. BWF then analyzed responses by key constituent segments to gain clearer insight into demonstrated philanthropic activity, involvement, and demographics.

### Overall Engagement

*There has been improved engagement at nearly all levels since the first survey. Baseline results for survey wave one are reflected below.*





## Repetition is Key

It takes time to measure and track progress. The three-year relationship between BWF and TUSM enables important repetition and frequency of building and promoting engagement around select themes while measuring change through surveys every six months. This repetition helps ensure TUSM is on track and is seeing that as engagement increases, philanthropy is also increasing.

Using nine core questions in the survey with TUSM alumni, BWF obtained a baseline measurement. In subsequent surveys, the same core questions were asked in the same way (up to three additional questions were added in each wave). These questions involved volunteer opportunities and communication vehicles and channels constituents would like TUSM to use.

## Importance of Engagement

Engagement typically represents a wide variety of individual sentiments. When viewed together, the following sentiments have a greater impact on high engagement relative to others:

- understand TUSM impact;
- recommend others support TUSM; and
- couldn't imagine the world without TUSM.

## Summary of Third Survey Key Findings

### *Pride Paces Engagement*

54 percent of respondents reported feeling “very proud” to be affiliated with TUSM, while 6 percent feel “very engaged.”

### *Empowering Messengers*

Opportunities to empower constituents to share TUSM’s impact and their affiliation remain the institution’s strongest drivers of making alumni more feel more engaged.

### *Volunteer Consistency*

There is a strong consistency in volunteering themes (volunteering preferences, volunteering likelihood, etc.), providing an opportunity to scale up volunteer options for constituents.

### *Top Opportunity*

Only two of the top 10 recent donors to TUSM reported being “very engaged.”

### *Rising Engagement*

Self-reported engagement has increased 12 basis points, a significant improvement in 14 months following the first survey.

### *Constituency Passion*

87 percent of respondents gave a 4 or 5 rating out of 5 (very positive or positive), demonstrating positive passion among constituents.



*“Two of the biggest levers we can pull are questions of, ‘Do you share news about the medical school?’ and, ‘Do you promote affiliation with Tufts’ medical school?’ says Scott. “There are more opportunities to get a higher ‘news’ score and increase the ‘engagement’ score, and we’re thinking about how we can do this.”*







Respondents who describe themselves as “very engaged” are significantly more likely to give more frequently, give at higher levels, and be socially engaged with TUSM. Those who share the impact of TUSM are 18 times more likely to be “very engaged”; those who promote affiliation are 25 times more likely to be “very engaged”; and those who recommend support are 14 times more likely to be “very engaged.”

According to Scott, they have implemented a new process where when people are assigned a major gift officer by TUSM and fill out a survey, the officers follow up and ask, “How can we help you share news of the medical school?” and try to dig in on a one-to-one basis. From their experience, this helps these donors feel more affiliated and leads to more donations.

Engage Dx provides line-of-sight views into the impact of marketing/communications and other external relations roles on driving sentiment > engagement > philanthropy.

### Philanthropic Activity

If TUSM could increase expressed engagement from those who now score a 2 or 3, BWF estimates an approximately \$109 million increase in donor lifetime value.

Expressed Engagement	Average Lifetime Giving	Average Giving FY16–FY20	Average Gift Count
5— Very engaged	\$5,089,245	\$175,491	16
4	\$1,167,156	\$20,476	26
 3	 \$1,292,471	 \$11,337	16
 2	 \$622,476	 \$3,842	13
1—Not engaged	\$436,015	\$3,071	9

According to BWF Senior Vice President of Decision Science Alex Oftelie, “As we partner to promote affiliation with TUSM, respondents are nine times more likely to describe themselves as ‘very engaged’. The more respondents say they feel engaged, the more monetary support increases.”

## Receiving Actionable Data

In the past, TUSM created and distributed newsletters, alumni magazines, and other materials in hopes of motivating alumni and increasing donations. Thanks to the learning from Engage Dx, TUSM is now increasing engagement over time.

Scott finds value in Engage Dx as a quantitative tool TUSM can apply in multiple areas to understand the impact the team’s efforts are having among alumni. She’s focusing on those with engagement scores of 3 and 4 who give—and statistically will give more if their engagement scores increase. She recognizes this is where excellent growth potential exists, including more money on the major gift side for the annual fund among the school’s 10,000 alumni.

In the spring of 2020, when COVID-19 forced nearly all activities to go online, TUSM facilitated small group volunteer discussions with alumni. These types of activities provided good volunteer opportunities. Alumni volunteered to connect with fourth-year students who were seeking residencies and wanted to know more about their specialties and what it means to practice in particular cities. These were excellent, geographically diverse volunteer opportunities that alumni wholeheartedly embraced.

## Result

In October 2020, TUSM added three new questions:

- Are we among your top three philanthropic priorities?
- Are you interested in volunteering for TUSM?
- If so, what types of volunteer opportunities interest you?



**“We use Engage Dx in different ways every year. BWF is smart and innovative, always looking for new things. Using predictive modeling for donor engagement was ahead of the game,” added Scott. “Now, BWF and Alex are providing actionable data and really helping me understand how to use this information. Data for data’s sake isn’t valuable; actionable data gives value and can be repeated so you can look at things over time.”**

—REBECCA SCOTT, SENIOR  
DIRECTOR OF DEVELOPMENT  
AND ALUMNI RELATIONS



*From these 32 alumni, TUSM qualified three major gift prospects and five annual giving prospects by reaching out to those who expressed loyalty to the school, not because of their giving history. Now TUSM views everyone who ranked their loyalty to the school a four or five out of five as a potential major gift donor.*

"We think of these as very actionable questions/items. We asked everyone who answered the volunteer questions if they would volunteer," said Scott. "This has added to our body of knowledge of how they feel about us, giving us a 360-degree perspective, not just standard question information."

For those who indicated TUSM is a top three philanthropic priority, staff began qualifying donors as major gift prospects. This culminated in 32 alumni participating in an online Zoom meeting with the dean.

Although any alumni could be a major gift donor, Scott feels these 32 alumni are a great group to know and acknowledges that if TUSM had only looked at giving history, they wouldn't have identified those who view the school as a top three philanthropic priority. During the pandemic, knowing who viewed the university as a top priority was valuable information.

"The first survey asked, 'What priorities would you most support?' Based on their responses, these alumni were assigned a gift officer and we were able to move forward with the relationship knowing this information," explained Scott. "If we had only looked at giving, we find they're not very engaged but still give. If people give us a higher score on engagement, they give more money. This is a big opportunity to get them excited and engaged with Tufts University." ■

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## **ABOUT BWF**

BWF is an international fundraising consulting and services company headquartered in North America. As both experts in complex philanthropy and the leading innovator in the field, we bring both a global perspective and local know-how, providing deep cross-sector strategic and tactical solutions to advance our clients fundraising abilities. It's why clients turn to us as their trusted partner, expanding their knowledge and abilities through our panoramic view of philanthropy. Not only do we stimulate the industry through thought leadership, but we are an incubator of multidisciplinary "next practices," always testing new ideas and exploring innovative ways of doing things.

For nearly 40 years, nonprofits throughout the United States and across the globe have turned to BWF to empower philanthropy for their organizations. We're ready to do the same for you. **Contact us today at [info@bwf.com](mailto:info@bwf.com) or visit [bwf.com](http://bwf.com).**