ENGINEERING WARM FUZZIES:
APPLYING UX PRINCIPALS TO CREATE MULTI-CHANNEL
PHILANTHROPIC EXPERIENCES

BY

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THESIS

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Abstract

As we have moved firmly into the 21st century and as our society and its expectations are continuously evolving, so must our higher education advancement practices. Rather than asking *How do we want alumni and donors to engage with our universities?,* we must ask *How are these individuals already intuitively engaging the world?* Instead of falling into the trap of thinking *What are global best practices in higher education advancement?,* we should be asking *Which global companies are curious and responsive in their interaction with humans, and what can we learn from them?* In answering these questions, this thesis tests a human-centered solicitation approach via three primary channels: mail, phone, and email. For each channel, multiple tests were performed and the principles and tools of human-centered design and user experience are implemented, including ethnographic interviews, user personas, and A/B testing. The results of these tests lead to the recommendation of a user-centered approach to philanthropic interactions that is constantly testing and evolving practices. Now more than ever, consciously building and testing systems centered around removing obstacles impeding giving defines the work of the modern advancement professional.

To my daughters

Thank you for understanding that mommies have homework and that homework is important.

Your admiration inspires me and your wisdom humbles me.

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Chapter One: Introduction

The seed of this project began with an error. In the fall of 2012, the Annual Giving Program at the University of Illinois, of which I was a team member, sent a solicitation letter to 13,000+ individuals. Each solicitation letter contained one entire nonsense paragraph, mid-way through the text. This was an error by our vendor after our internal proofing process was complete, which is not to say errors never occur. When you send hundreds of thousands of pieces of mail a year, there is naturally an error rate. However, I had never witnessed something this large scale or this drastic. But what happened afterward was what made the incident even more memorable. No one called to complain.

This was unusual. We received these types of calls, comments, and complaints daily. Having our telephone number on hundreds of thousands of pieces of mail made it a hotline of sorts. It was at this moment that several of us on staff begin to suspect something we hadn't yet fully considered – *no one is actually reading their mail*. This of course confirmed what we were already living in our personal experiences. As producers of direct mail and industry practitioners, we suspected we opened more letters than most. Even when we did open the mail, even when we were looking for ideas or the latest trends, how often did we actually read the letter? Yet how much time had we been devoting to crafting beautiful letters, writing compelling case statements, and polishing narratives?

When I was hired by the University I was given a writing test. I had to prove my ability to craft a compelling narrative and to build a case for support from that narrative. The University assumed – the industry assumed – writing a brilliant piece would increase our dollars raised. Yet year after year we watched as our return from direct mail pieces continued to decline even as our total dollars raised increased. Now, I am certainly not a champion for mailings. My goal is to increase total dollars raised regardless of the method, but I began to wonder if we were using our mailing packages effectively.

Flash forward a few years. In February 2015, I was newly named the Director of Annual Giving Programs and Super Bowl XLIX was being played in Arizona. I am not particularly a sports fan, but each year I make sure that I see the must-watch commercials. As I was watching a Dorito's ad I had a light bulb moment. "*You can't buy Dorito's from this commercial,*" I thought. This commercial is a brilliant piece of marketing. It is entertaining, it brands the experience – but it does not allow me to purchase a single chip. In essence, it divorces the case

for support from the ability to take action. Separating those two things in my mind allowed me to conceptualize these as two different experiential stages for the user. In this model, the first stage is really coming to a point of decision. It is the process of creating desire. The second stage is effectuating action.

Put simply, an individual opening an envelope had already made a decision. The desire to make a gift to Illinois was already there. I no longer needed to spend space in a letter convincing them to make a decision. A brilliant case for support, while perhaps satisfying to write, was reaching the wrong individuals at the wrong time.

Keeping my budding suspicion in mind, I decided to begin by testing my hypothesis. I planned two separate spring mailing campaigns that year, one in March and one in May. In each of the mailings I blindly split the population, which in both cases included over 10,000 people who had made a gift to the University in either of the two prior fiscal years, for an A/B test. Letter A included bullet points in the middle of the letter detailing the case for support. In letter B we removed the detailed case for support, making the letter shorter by half. The results, which were replicated both times we ran the test, further cemented my early suspicions. The number of individuals responding to letter A was nearly identical (within 2 individuals) to the number of individuals responding to letter B – but another interesting and unexpected trend emerged. The people who received the shorter letter gave more money.

A compelling case for support was not increasing the dollars raised, but somehow a shorter letter, which removed the case, prompted donors to give more? What about the process of reading a shorter letter effectuated what good writing could not? I had determined that stage one, creating the desire to give, was not something I could do in the space and timing of a solicitation letter. But this new data suggested that perhaps stage two, effectuating action, needed to be explored more deeply. Now that a decision toward action had been made, now that desire was created, how easy and convenient was it to fulfill that desire? It is then that I began to realize, the second stage, effectuating action, is where my work most influences donor behavior.

As I began to wonder how to apply these results to my work more broadly, a colleague introduced me to the field of Human-Centered Design and User Experience by recommending I read *The Design of Everyday Things* (Norman, 1988). This work and subsequently this field of research began to expand my thinking by leaps and bounds. Reading Norman prompted my search of the literature to discover if and how this line of thinking had been applied to fundraising. Simply judging the state of most online giving forms, it was not surprising to find that there was very little written about this practical philosophy within my industry. What I

found, more often than not, was a lack of realization that while connected, inspiring the desire to give and effectuating that desire are two distinct steps in the user's experience. This piece seeks to add to the literature by providing clarification and nuance.

As I explored this new framework, my Annual Giving team and I began experimenting. Every letter, every email, every landing page became a test. Our question was simple, if we sought to improve the user experience by simplifying design and making forms clearer, could we influence our donors' behavior? In short, could our efforts focused on putting our donors at the center of our collection of financial support have a positive impact on our ROI? In a giant petri dish of 625,000 individuals, each solicitation became the chance to learn something new. And what we learned continued to surprise me. We began to get a better idea of the points of influence our work has on donors as well as where donors find interacting with us tedious and difficult. It also became more and more obvious that donors were willing to pay a premium for simplicity.

This study details these efforts to look at each solicitation: mail, email, and web based, through the lens of User Experience. It chronicles the journey of asking very human centered – and often simplistic – questions. It complies the data of multiple tests. This study certainly offers some conclusions, with the realization that these conclusions may only apply to a very specific group of individuals. *How do we apply this thinking and this framework?* – takes center stage over a prescriptive list of fundraising how-tos. More than anything, this study seeks to help readers formulate the questions they can be asking of their own work, of the tests they can run in their own petri dishes. Together, it is my hope that we will push the conversation around effective fundraising practices forward.

Background

Higher Education Advancement is an industry that survives on the altruistic nature of humans. From the first gifts that established higher education to the daily support of millions of alumni across the globe contributing to their institutions, the legacy of support for higher education has never been stronger. And it is a good thing! The cost of a basic four-year college education has never been higher or more necessary for an individual's economic stability. At the same time, public funding at both the federal and state levels continue to decrease. Many

institutions are capping tuition costs and doing everything they can to broaden their funding portfolio, including investing in advancement programs.

The field of Higher Education Advancement, as it has come to be known, or philanthropy in support of higher education, was birthed in the United States in conjunction with higher education itself. In the 1600s, three clergymen were sent to England to raise funds for Harvard and one returned with 500 pounds. George Whitefield, during his influential preaching tour, made his way through seven colonies soliciting funds for the poor, for those seeking relief from disaster, and to mitigate the cost of higher education by providing funds for books and tuition for students at Harvard, Dartmouth, Princeton, and the University of Pennsylvania. (Gurin & Til, 1990) While this funding model of relying on philanthropic support has always been in place for the private higher education sector, it is a model that continues to increase in importance within the sector of publicly funded higher education.

In the last several decades, higher education has lost public funding as both state and federal governments have struggled with budget deficits. In addition, enrollment for some institutions has plateaued, limiting tuition dollars while costs have continued to increase. The Boston Consulting Group (Henry, Pagano, Puckett, and Wilson, 2014) describes this reality. "Leaders of U.S. Universities and colleges are navigating a challenging economic environment. Revenues from enrollment, government, and other sources have fallen, leading many institutions to raise tuition to unsustainable levels and putting a number of the weakest schools at risk of failing."

Continuing to increase the rate of tuition while making deeper cuts is no longer a viable operating model. As Legon (2005) noted, "The cuts…are having significant effects on issues of access and global competition, making it more difficult for higher education to achieve its mandate." As a recent example, in the fiscal year beginning July 1, 2015, the state of Illinois did not pass a budget appropriation. Without this appropriation, institutions across the state have been required to make necessary budgetary adjustments, often laying off staff and providing less aid to students.

"At risk," reports Navo Safo, referencing the state of Illinois, "are the state's 57 public universities and community colleges, which were once a model for access and diversity. In the mid-to late 1990s, Illinois was the top performing state in helping its residents attain higher education through need-based grants and affordable tuitions, according to a report by the University of Pennsylvania's Institute for Research on Higher Education. The biggest of the

state's nine universities, including the formidable University of Illinois, can weather the storm by relying on money coming in from endowments and private donors." (Safo, 2016)

As Safo notes, with support and funding for higher education continuing to dwindle and higher education costs continuing to rise, university presidents of public institutions see philanthropy as an increasingly important revenue stream. As early as 1994, Heyns wrote, "Publicly supported institutions are continuing to depend on private support to supplement traditional funding sources...Dependency on voluntary support such as gifts from alumni, friends, and corporations has grown." (Heyns, 1994)

While since the time of Heyns writing fundraising tactics have continued to evolve, most advancement programs and strategies still remain centered on the idea used by the first fundraisers in the 1600s, that a personal visit from a charismatic individual closely connected to the institution is the most effective means of fundraising. The proof of this assertion can be measured by the overwhelming majority of advancement budgets focused on "major gift" fundraising staff and their travel budgets which for public universities was 47% and rises to nearly 60% when the costs of advancement leadership, positions that typically secure gifts in a similar fashion, are included in the totals. (Kroll, 2012). For far too long the field of higher education advancement has centered its fundraising strategy on the untested assumption that practices begun in the 1600s should be adhered to today.

In addition, in the greater philanthropic sector, as in higher education advancement, each year fewer donors are giving more dollars. (Low, 2015; Tyson 2014) While a host of organizations are enjoying year over year historically high dollar returns, the current path within the industry is unsustainable. According to the Voluntary Support of Education Survey (2014), the fraction of alumni supporting their institutions is historically low and "Colleges and universities are becoming more reliant on a small number of wealthy donors."(Tyson, 2014) As the importance of this revenue stream grows, the field and practice of raising philanthropic support has become increasingly professionalized. However, the profession lags behind the for-profit sector in applying the lessons of User Experience (UX) and Human-Centered Design.

Higher education needs to explore more sustainable models of funding. If higher education advancement hopes to contribute to the widening gap left by the lack of governmental support with philanthropic dollars, it is necessary for higher education advancement as an industry to closely examine its contribution by evaluating the return on investment and rethinking models for future growth. While internationally the United States is perceived as the expertise leader in this area, the expertise achieved here is due more to the length of practice

and the maturity of programs and the culture of charitable support, rather than the proven effectiveness of strategies and tactics.

Purpose of the Study

The purpose of this study is to evaluate the body of literature regarding User Experience and Human-Centered design and determine how to practically apply this literature to the multi-channel solicitation process of higher education advancement. Once evaluated and applied, these principles will be tested through experimentation. This experimentation will be done by creating and testing multi-channel (mail, email, and website) solicitation and reply devices. These experiments will be evaluated based on whether the implemented experiments increase the dollars raised, the response rate, and/or the return on investment.

Individuals who provide philanthropic support to not-for-profit organizations (donors) are also consumers accustomed to the ease and convenience afforded by technological advances. As a gap widens between the consumer experience and the donor experience, donor expectations often go unmet. How long will our donor/consumers continue to make an exception for our lack of technical expertise? How will we be able to inspire and gain new donors in this increasingly competitive market place? As Krajicek noted four years ago, "In virtually every industry, the need for usability is urgent and palpable." In the ensuing years, this has become even more the case. Meanwhile, in the for-profit sector, User Experience research and firms have become a lucrative economic niche. As companies are eager to launch the next industry disruptive applications, they are spending increasing amounts of capital on User Experience at sometimes a lagging return on investment. As not-for-profits make the move into the UX space and as the for-profit sector balances their approach to UX, much can be learned in human-centered approaches that lead to an increased return on investment.

The results of this study will help apply the concepts of UX to Higher Education Advancement's mass solicitation strategies, specifically at the University of Illinois. As these UX principals are applied they will allow for a simplified and streamlined process for making a gift to the University of Illinois, which it is hoped in turn will lead to an increased return on investment. This study will also help identify barriers in the process of making a gift. After cataloguing these barriers, new designs will be implemented and future recommendations to continue to improve the process of streamlining solicitations will be made. By implementing a

more user centered design, it is expected that the results of this study will be to increase either the average gift and/or the response rate among the target populations.

Significance of the Study

The potential benefit of this type of study lies in the ability to provide scientifically tested practices to an industry which often lacks the resources or sample sizes to perform similar tests. In addition, if conclusive methods of improving the return on investment are discovered, the implications could help maximize revenue and return on investment. This study is important not only to advancement professionals in the field of higher education, but it is hoped that this work can also be applied to fundraising in organizations across the not-for-profit sector. This research would be of interest to annual and regular giving professionals, higher education advancement leadership, as well as non-profit administrators seeking to improve their donor experiences. Without this type of research, organizations will not have the knowledge necessary to improve the donor experience with the goal of maximizing a return on investment. This research has the added benefit of pushing UX testing into a new field and area of application.

The aim is that this study, and others like it, will introduce the principals of UX and Human-Centered design to the field of Higher Education Advancement and not-for-profit fundraising. By testing and becoming more aware of the user experience a greater ROI can be gained through streamlined practices as well as increased revenue as generous donors are more satisfied and less frustrated by their giving experiences. It is also the researcher's hope to continue to professionalize the field of Higher Education Advancement by bringing a more rigorous method of testing and decision making to the field.

Definitions

- Acquisition – the practice of gaining a new donor.
- Annual gift/giving – this definition varies by institution and organization. At the University of Illinois, an annual gift is a single gift from an individual or an organization which is less than $25,000, is not a payment on a major gift pledge, or is not a gift made in memory/honor of another

individual. Some organizations also refer to this category as "regular" giving.

- Annual Giving donor – a donor who gives a philanthropic gift that is considered to be an "annual gift".

- Channel – a method of solicitation, i.e. – mail, telemarketing, email, website.

- Direct Marketing – a mass solicitation or a mass marketing piece (regardless of channel) which has been personalized to the individual receiving the piece.

- Development – the practice of cultivating, soliciting, and stewarding donors and donor prospects. Advancement is a related term.

- Higher Education Advancement – the practice of raising philanthropic support for institutions of higher education through the practices of marketing, alumni relations, and development.

- Human-centered design (HCD) – "An approach that puts human needs, capabilities, and behavior first, then designs to accommodate those needs, capabilities, and ways of behaving." (Norman, 2013, pg. 9)

- Interaction design – "how people interact with technology. The goal is to enhance people's understanding of what can be done, what is happening, and what has just occurred. Draw upon principles of psychology, design, art, and emotion to ensure a positive, enjoyable experience." (Norman, 2013, pg. 5)

- Keep rate – the number of individuals who keep a direct marketing piece divided by the number of individuals that received the piece, expressed as a percentage.

- Mass Solicitation – Solicitation via either mail, phone, or email to an audience greater than twenty individuals.

- Non-donor – a prospect of an organization that has not yet made a gift. This prospect is a part of an organization's acquisition population.

- Open rate – The number of individuals opening a mail or an email divided by the number of pieces sent, expressed as a percentage.
- Philanthropy – donation of money to a not-for-profit organization.
- Purl – personalized url. These urls often include personalized information. In the case of the University of Illinois, a purl is a giving link which is unique to a donor household and contains personally sensitive information such as address and prior giving history.
- Remittance Form – reply device used in direct mail, which a donor fills out and mails along with their charitable gift.
- Renew(al) – When an individual who has made a gift to a particular organization the past, makes another gift to the same organization in the next fiscal year, they are said to renew their support.
- Response rate – The number of individuals who respond to a direct marketing piece divided by the number of individuals who received the piece, expressed as a percentage.
- ROI – return on investment.
- 'Slipiness' – online interactions that are "very brief, have a low focus of attention, and require minimal copy." (Fichter and Wisniewski, 2016)
- Usability – "the effectiveness, efficiency and satisfaction of using a particular device or service to achieve a certain goal." (Karjicek, 2013)
- User Experience – the overall experience an individual has while using a product, form, website, etc. It relates to the measure of ease, convenience, and/or enjoyment during use.

Scope, Limitations and Assumptions

In an ideal world, this study would be conducted by having researchers study and observe an individual from the moment they received university marketing (in any form), and then a mass solicitation piece, through the moment they chose to make a charitable gift and

finally through their experience being stewarded by the University. This would allow researchers to capture the distinct stages of the creation of the desire to give and the fulfillment of that desire to give. It would allow researchers to observe at what point, individuals were inspired to make a gift, and at what point, if any, individuals aborted their attempt to make a gift. Weber and Chen recommend taking a long-term approach to this type of UX design by employing user diaries, to be collected at the time of ethnographic observation. This type of long term study would allow researchers to study whether certain types of donors are more resilient than others in overcoming obstacles, and most importantly what the obstacles look like that they must overcome, and individual donor's strategies for overcoming these obstacles.

Weber and Chen relate the most ideal circumstance, "For each interview, imagine what it would take to create the ideal experience for that user." While it is unlikely this ideal unique experience can be created for each user, they go on to note that the lessons learned from this imagining can be applied more broadly. "Many of these ideas will be unrealistic or too specific, but you will likely uncover a few opportunities and innovations that could apply to a broader audience." (2013)

This study assumes that the value of higher education is self-apparent, and that it should be funded. This study does not tackle or make value judgements on the reasons for the explosive costs in the sector of higher education, instead focusing on funding the current model. This study also assumes that higher education advancement does in fact make a positive outcome in funding higher education. Again, this study does not seek to critique the advancement model's impact in funding the current higher education model. While an ROI of the practices which were assessed will be included in this study, an evaluation of the overall ROI of the higher education advancement model is not included or addressed.

This study also assumes that alumni engagement and the creation of the desire to give happens independently and is a process wholly separate from the fulfillment processes of giving. While the advancement model does include marketing as a function, the role that marketing plays on user experience was not studied in-depth. However, Krajicek makes the case that marketing and the user experience should be examined in tandem. "In a macro sense, the way we understand and assess brands has fundamentally changed. As we move to a relationship-based evaluation of brand health, the connections between brand experiences, marketing and revenue have never been clearer." He goes on to note the artificial separation between usability and brand experience is an illusion, "Usability is crucial today because there have never been more ways to share a negative brand experience with the world."

Chapter Two: Literature Review

Imagine yourself at the checkout counter of a Walgreens. The cashier has scanned your purchases. The following message appears on the transaction screen:

Would you like to donate $1 to the Institute of Noetic Sciences?

Fig 2.1 – Noetic Sciences sample imaginary appeal. While this appeal is simple, the marketing essential to make the case for the organization is missing.

Would you add $1 to your transaction amount? As often as I or my colleague have asked this question in presentations, most individuals decline. A few say that they would, simply because of societal pressure in this situation. The amount of money is small and the required action is easy enough. But most people still say they would not make a gift because they have never heard of the Institute of Noetic Sciences and they don't know what the organization does.

Imagine yourself in that same situation with the following transaction screen:

Institute of Noetic Sciences (IONS)

The Institute of Noetic Sciences is a nonprofit organization dedicated to supporting individual and collective transformation through consciousness research, transformative learning, and engaging a global community in the realization of our human potential.

We conduct, advance, and broaden the science of what connects us, reaching new understandings about the nature of reality and our extended capacities.

From what we learn, we create real-world tools that empower people to apply conscious awareness in their personal lives, and in healthcare, education, and business.

We host a vibrant community of explorers and change agents who are working together to make a difference in the world.

Our goal is to create a shift in consciousness worldwide—where people recognize that we are all part of an interconnected whole and are inspired to take action to help humanity and the planet thrive.

Ask the cashier about how you can donate to support the amazing and impactful work of IONS today!!

Fig 2.2 – Noetic Sciences sample imaginary appeal version 2. While this appeal provides ample information, the process of making a gift is complex and the text difficult to read, making it a poor example of marketing and a poor example of solicitation.

The response to this message is always much worse. The likelihood of this ask being converted to an individual making a gift is nearly nonexistent. Why is that? Why when presented with a case for support does the likely hood for support decrease so rapidly? In this situation, the case for support is presented at the same time as the opportunity to make a gift. The result is poor, unengaging marketing and a buried solicitation. The suggested method of making a gift, "asking a cashier how you can donate," is neither easy nor convenient. Building the case for support, creating the desire to give, has been conflated with the solicitation.

On the other hand, what if in the same situation, you were presented with the following screen along with a button to accept or decline:

Fig 2.3 – Susan G. Komen sample imaginary appeal. This appeal is both simple and most consumers are familiar with pink ribbon marketing.

When presenting this choice to an audience, my colleague and I have never had an individual decline to make a gift. Like you, individuals seem to be well aware of the Susan G. Komen Foundation mission. The case for support and how that connects personally to their lives has already been made and they know what the pink ribbon means. The Komen Foundation has worked to saturate the marketplace with their messaging by utilizing brand partnerships (68 and counting). Similar to the Dorito's Super Bowl ad, none of these marketing partnerships offer the chance to take action. There is not a 1-800 number to call on the side of a Tic-Tac box to make a gift to the Foundation.

Fig 2.4 – Pink Ribbon Tic-Tac box.

The Komen Foundation has recognized that building their brand and case for support, and thus the desire to give, is a User Experience separate from that of making a solicitation. The key component of this successful ask in Walgreens is the very simple platform on which to make the gift which is singularly focused on making this task as easy as possible.

The studies reviewed in the literature do not recognize this important separation between marketing and solicitation. The desire to give and the creation of that desire often occurs separately from the willingness to fulfill that desire to make a gift. Assuming an individual already has the desire to make a gift prior to opening a mail or email piece or prior to visiting a website changes the way the entire way a solicitation is envisioned. Suddenly the story makes less of an impact. The new questions become: *how can the process of giving via mail be simplified and barriers to fulfillment removed? What are donors trying to do when they come to our websites? Are they able to easily and quickly make a gift?* If they have already said yes by opening our envelope, *what decisions are they actually making as they are looking at a direct mail piece?* The literature reviewed from a philanthropic stand point did not address these issues, rather the focus of the literature in this area views the vehicle for the solicitation as a means of making the case for support.

The Annual Giving Program at the University of Illinois is considered by external practitioners to be a mature program because the University has been using a sophisticated, personalized, segmented, multi-channel, multi-touch approach for more than ten years. Testing response devices and approaches in this type of well-developed fundraising program will likely have different results than at a small not-for-profit with a single channel strategy. Most of the programs described in the literature, with a few exceptions, are less mature programs and most tests are performed via a single channel.

Overview of the Literature

I have the benefit of reviewing this literature from the stand point of a practitioner. While I enjoy reading about tests and innovative techniques, and while I myself do not rely on my field to generate best practices (I don't, for example, seek to copy tactics used by the University of Michigan), I am aware of commonly known metrics which influence both my testing and my reading of the literature. A sophisticated solicitation program asks donors multiple times throughout the year in multiple methods (channels) to make a gift. Practitioners refer to this process as a solicitation cycle. In this systematic way, it is believed donors will find a solicitation in the channel that is easiest for them to make their gift at a time that is most convenient for them. Much of the strategy employed by practitioners relies on segmenting audiences, and timing solicitations to coincide with moments of convenience for their donors

and prospects. To that end, this study includes experimentation on multiple solicitation channels and when practical, tests are repeated multiple times.

In contrast, the literature does not take into account a multi-channel, multi-solicitation approach. It does not address the solicitation cycle. Most of the tests described in the literature involve a single channel (mail, email, and website) and a single touch, while practitioners recommend six to ten multi-channel touches annually to renew the support of prior donors. Acquiring a new donor is much more difficult and most successful programs use a multi-channel approach, with over ten touches annually. The literature fails to recognize the solicitation cycle as a standard, industry best practice. Instead, the literature generally focuses on a single channel and does not provide a broader view of a donor's full experience with an organization. Each individual solicitation is viewed as a success or a failure, conclusive or inconclusive based solely on the results of one solicitation via a single channel, as if each solicitation and donor response were created in a vacuum.

The studies reviewed also conflated creating the desire to give and reasons individuals make a gift with the actual process of making a gift. In Collins' piece "Interaction Design", which focuses primarily on a website as a channel for giving, she explicitly states the misnomer it seems many researchers and practitioners alike hold when it comes to the purpose of a mail piece in the solicitation cycle. "Interestingly, this thread [here she refers to the *compositional thread* which Wright and McCarthy include in their user experience theoretical framework], coincides with a common fundraising tactic of using direct mail to tell donors a story, with the hope that they will donate to the cause because they identify with or are moved by the story."

As this study will show, conflation of creating the desire to give, (which happens through marketing), with fulfillment of that desire, (which happens through solicitation), creates both ineffective marketing and complex, ineffective solicitations. This piece seeks to add a new angle to the ongoing discussion.

Theoretical Framework for UX

My introduction to UX and Human-Centered Design came through Don Norman's work, The Design of Everyday Things. As I was reading through his work, still as relevant today as when he wrote it in 1990, I found myself continuously agreeing and highlighting point after point. While his observations may seem simplistic at first glance, his insight cuts to the heart of

the dilemma that captured my interest. If my job was to make it as easy as possible to make a gift to the University, and I was becoming increasingly convinced that this was the most accurate description of my job, how was the design of our processes either helping or hurting our donor experiences? As Norman notes early in his work, "It is the duty of machines and those who design them to understand people. It is not our duty to understand the arbitrary, meaningless dictates of machines." (Norman, 2013) Norman recognizes that as each new development in human history is made, it takes time for the principles of good design to catch up. His recommended approach, human-centered design, sparked my curiosity.   "The solution is human-centered design (HCD), an approach that puts human needs, capabilities, and behavior first, then designs to accommodate those needs, capabilities, and ways of behaving." (Norman, 2013)

While Norman's work was foundational, many others followed him, creating a robust literature which is as easily digestible and applied as Norman's work. The writing style of many of these authors is accessible and non-technical in their approach with the hope that application will be broad. Many authors inherently focus on web design. Steve Krug's Rocket Surgery Made Easy and Don't Make Me Think, present excellent examples. Authors in the field also present or comment on tools or methods of design development.

Priestly (2015) describes the import of this work. "What designers and design thinkers such as Don Norman have done is to make use of user research techniques to identify these touchpoints and match them to user-centric design techniques such as low-fidelity sketching and rapid prototyping, thereby creating a robust and flexible design methodology that puts the user's experience at the heart of the design process."

Framework: User Persona

"Where marketing research (demographics) segments a collection of individuals into audience groups, personas flip this around: personas are individuals that represent groups." (Priestley, 2015) While working with our communications team on the redesign of a portion of our website, the concept of User Personas became a central topic of conversation. The idea of this individual working within a situation with specific goals in mind made the development and design decisions much more simple.

Within the conversation of User Personas, Alan Cooper's work, The Inmates are Running the Asylum: Why High-Tech Products Drive Us Crazy and How to Restore the Sanity is foundational. His chapter titled "Designing for Pleasure" includes a personal example of employing User Personas to create a product, providing not only important concepts, but demonstrating those concepts in action.

Framework: Ethnographic Discovery

Where quantitative methods such as A/B testing have long been recognized as essential, ethnographic observation is becoming increasingly recognized as an important tool for creating User Centered design. As Weber and Chen, UX practitioners note, "Business stake holders who are accountable for digital product innovation, strategic roadmaps, or multi-channel user experience are increasingly looking to ethnographic research. Its application to technology innovation has never been more relevant." (2013).

As early as 2004 Ghosh and Chavan, in seeking to combine the insights gained from ethnographic observation with User Centered design methodologies developed a "systemic multidisciplinary" toolkit they refer to as 'Contextual Innovation'. They note, "Users are the best source of new ideas." Unlike more traditional market research, Contextual Innovation allows Ghosh and Chavan to "use tools and methodologies that elicit the most 'deep' responses that are difficult to articulate in a standard contextual interview."

UX applied to Higher Education Advancement and Not-for-profit Philanthropy

In an investigation that reviews and summarizes over fifty other studies, Bekkers and Wiepking (2010) categorize what they have determined as the eight mechanisms that drive charitable giving or create the desire to give. While my study focuses on what happens after desire has been created, this was a broad based and instructive piece which is cited by many other sources.

Literature specifically related to the use of UX testing and User Centered Design applied in the context of Higher Education Advancement is unavailable. The field of Higher Education Advancement has become increasingly more professionalized in the last thirty years, but like many areas of not-for-profit management, has evolved without the type of rigorous testing, ROI

analysis, and prototyping more common in the for-profit sector. This study seeks to add to the literature available for nonprofit managers seeking to make informed decisions.

Rather than focusing on the User Experience, most of the research completed in the field of Advancement focuses on the "why" of giving. There are very few sources available that examine the User Experience as it relates to philanthropy. The sources chosen for this portion of the literature review focus on the "how" of not-for-profit fundraising and multi-channel user experiences, not the "why" or the motivations behind philanthropic giving.

Rather than focus on ways to make the giving process easier, the literature examines systematic, technological, and psychological ways to convince a donor to make a gift. Many researchers have performed tests seeking to incentivize donors rather than starting by removing the barriers to give. These incentives are not based on building the desire to give or establishing a pattern or habit of giving, rather they are persuasive methods. For example, throughout my experience as a practitioner, I have relied on what one researcher calls a voluntary contribution mechanism [VCM]. "In a VCM, donors contribute to a public good with no guarantee on the total amount that will be raised, and with no direct private return, although of course the donor can obtain private utility from the public good that is provided." (Chen, Li, MacKie-Mason, 2006) This mechanism, which relies on a desire to give, comes in stark contrast to many of the tests performed by the researchers as further detailed by Chen, Li, and MaKie-Mason.

Since the phrases "UX", "User Experience," and "Human-Centered Design" are relatively new, sources reviewed rarely include these key words. While I began my search in the literature with the terms "philanthropy" and "user experience", it became clear rather quickly that neither of these terms is preferred. Initial searches did provide a few results once the switch was made to using the term "fundraising" or "fund-raising" and combining that search term with a channel, for example "fundraising" and "email". Most of the relevant studies located focus on a single channel and describe a User Experience, though they do not use this terminology.

The channels explored in the citations include mail, websites, and even mobile technology. Most notably absent was an in-depth discussion in the literature are phone solicitations (both in-bound and out-bound calling) and email solicitations. The literature that does make use of these channels focuses on the why of the donors involved and not the how specific to the channel.

Channel: Mail

The articles reviewed that focus on the channel of mail as a solicitation device do delve into the ROI of various tactical decisions made by researchers performing the test, but none of them specifically address the experience from the perspective of the user. Several mail studies (Helms-McCarty, Diete, & Holloway [insert List]) reviewed the tactic of offering donors the opportunity to have their charitable support matched as a means of increasing donor response. Researchers (Bruyn & Prokopec; Verhaert & Van Den Poel) explored the use of segmentation and personalized ask ladders as a means of increasing both the response rate and the dollars raised for direct mail efforts. Gyoo also tested the idea of involuntary indebtedness by sending coins via mail along with a solicitation, noting that this strategy proved to be ineffective. The literature concludes that segmentation and personalization increase both response rate and dollars raised with donor populations while various gimmicks used to gain the support of new donors, even if they work in the near term, hinder the long-term relationship with the donor.

Looking outside the philanthropic sector, testing the effectiveness of direct marketing mail packages has been a standard practice in the for-profit sector for decades. Marketers frequently test everything from the type of postage and envelope teasers to signatories and mailing inserts. While this research is readily available, it does not necessarily dovetail with the research on user experience. It would be difficult to make the case that the changing the signatory will impact the ease of the user experience. Companies testing the signatory are usually most often focused on how that signatory impacts or lends credibility to the case for support.

After examining quite a few direct mail tests, authors Feld, Frenzen, Krafft, Peters, Verhoef (2013) present the idea of a response funnel which includes distinct measurements at each stage: Open Rate, Keep Rate, and Response Rate. As the authors note, in direct mail, which can also be applied to email, these linear stages can be explicitly linked because the outcome at a specific stage depends on the outcome of the previous. "Opening a mail item is equivalent to a qualified contact because the envelope and its design create a certain degree of curiosity and interest in further investigating the content of the mail item. Taking a closer look at the letter, the brochure and/or response device at the second stage reflects a larger extent of processing information."

According to their research, "Design exerts its primary influence on the first 2 stages of the direct mail funnel, while the final stage of actual response is largely driven by targeting,

timing, and the actual offer characteristics." They further divide design of mail packages in to four elements: (1) the envelope, (2) the cover letter, (3) any supplements, and (4) the response device.

According to these authors, "NPOs [non-profit organizations] should use long rather than short letters to convey enough information. Providing information is important for non-profit organizations because the prospective donors must first believe the charity's message depicting need. Longer texts could be helpful to present a variety of details on the non-profit organization itself as well as regarding the cause of the need and the objective of the corresponding donation." (Feld, Frenze, Krafft, Peters, and Verhoef, 2013)

Several scholars further break down the steps of responding to a direct mail piece noting that the total response rate, while instructive, obfuscates the other steps in the process which include opening the piece, reading and/or keeping the piece, before finally responding. The steps before responding are referred to several times in the literature as the "black box". It seems that the habits of those receiving the mail pieces are presumed, but little is known in detail about these steps, and ethnographic studies do not seem to exist. In their study on Business-to-Business direct mail marketing, De Wulf, Hoekstra, & Commandeur (2000) note that an individual's attitude towards a brand or an organization impacts the likelihood of an increased open and keep rates. This was the only nod toward the idea that the desire for a product, service, or philanthropic experience is created prior to opening an envelope. Even the for-profit sector could use more testing around this hypothesis.

Channel: Website

In one of the first web-based online field experiments in fundraising, (and one of the most often cited) Chen, Li and Mackie-Mason tested voluntary contributions without incentives in comparison to seed campaigns, matching campaigns, and offering premiums (small token gifts) in exchange for giving. Compared to the number of visitors that saw their solicitations, their number of donors was extremely limited. They repeated the experiment twice, once in the first half of the fiscal year and once in the second half of the year. The number of donors in the first half of the year far exceed the number of donors in the second half of the year, in keeping with typical fundraising practices. On average 30-45% of all charitable giving to an organization takes place in the month of December. The study did not have the benefit of referencing other

studies or referencing industry standards in order to compare their relative success. Other studies done by John List, an economist and principal investigator at the Science of Philanthropy Institute, question the long-term value of using any type of incentive when asking a donor for their first gift. Research done by Noris and Potts reveal that the timing of these incentives is important. "Typically, charity sites can often start off the donation journey with a reward and therefore people can lose interest and abandon the process. The reward is most effective once a person has completed the donation task. In fact, the correct use of the reward allows additional tasks to be set which have a much greater chance of successfully establishing a deeper donor relationship." (Noris & Potts, 2011).

Sausner, in her aptly titled piece, "Getting to One-Click Giving," reminds readers that most universities interact with their students entirely online, until they graduate, when the universities begin to try to engage their alumni via phone and direct mail, breaking the cycle of the relationship they have created. She sites national data showing that online giving is on the rise both in the amount of the average gift and in the amount of money given online.

 Collins applies Wright and McCarthy's (2003) user experience framework to an online fundraising environment. She councils non-profits to create compelling visual environments that make use of storytelling to prompt further online giving. While she also discusses the user interface and advocates for usability she was not able to test the designs she advocated.

Goecks, Voida, Voida, and Mynatt (2008) research a number of online charitable organizations and giving portals to determine how non-profit organizations are using technology to assist in fundraising. They categorized the role of a non-profits website in assisting fundraising in six ways, concluding that these websites help organizations build stronger relationships with donors by facilitating communities and further strengthening the fundraising cycle. Hazard (2003) also reviewed several library websites looking specifically at the fundraising portions of those websites. She evaluated these sites for the inclusions of seven fundraising elements and concluded in keeping with other UX designers, "the placement of links and the descriptors used may be more important than an extensive, feature-laden site."

Weiss (2008) in her work on interaction design makes the case that designing a University website should take into account several fields of study. "Many disciplines and professions inform effective website development, including user interface design, user-centered design, experience design, and interactive system design." She promotes an important method of website development: "an early focus on users and task, empirical measurement, and iterative design." She challenges developers to move past creating a design that simply satisfies the users

goals but one that is also driven by the business goals of the organization. She offers a number of questions to ask when building a website for an educational institution as well as several well-developed ideas to test. She doesn't seek to provide a formula of what should be done at any given institution rather she provides a framework and a thought process to work through. She is the only author I noted that mentioned developing a website (or any channel) while considering a prospects experiences with an organization in other channels. "Remember the importance of making the website part of an integrated marketing communications strategy...the website should not be working independently to reach the school's applicant goal. Other communications should also address – or at least not inhibit or contradict – the goal."

Similar to several mail studies, Lange and Stocking, use the idea of a membership "discount" to entice more donors to give, with interesting results. "Reducing the minimum donation threshold did not lead to more subjects donating, but to lower average donations." These results, similar to the results of the mail studies, seem to suggest that it is not the incentive or the discount which influences giving, but that these donors were already predisposed to give, or not, before they were ever directed a solicitation.

Channel: Smart Phone

While few studies have been done on the use of smart phones for making charitable donations, this work represents a direction the industry needs to move in order to keep pace with our donors' other consumer experiences. Lyons (2013) noted that the most important positive and negative factors contributing to a respondents self-reported likelihood of making a gift via smart phone in the future include the ease and convenience of use of a smart phone, mobile friendly websites, their history of giving, attitude towards the organization asking, and finally perceived risk. The author also noted that age was not a predictor of likelihood of giving via this method. While this was designed as a survey and not a test, it provides a guideline for practical application. Van Noort, (2013) documents his field experiment testing the usability of a mobile app designed for making charitable gifts. His work includes recommended guidelines to enhance the user experience in the field of philanthropy via mobile devices. Rather than track donations, he tracks intention to donate.

Channel: Email

While not scholarly in nature one of my favorite pieces I read during my research was Madrigal's (2016) essay "When the Nerds Go Marching in," chronicling the details behind the tech team that helped propel Obama to a second term. The article discusses the culture of testing - every webpage, every email, every bit of text – without really describing what was tested, just that it worked. "They raised hundreds of millions of dollars online, made unprecedented progress in voter targeting, and built everything atop the most stable technical infrastructure of any presidential campaign."

I'm not sure why more has not been written in the scholarly literature about email testing in a philanthropic context. These tests are fairly simple to create and relatively much less expensive than testing direct mail or website applications. I quickly turned my search to industry and began looking for information on the "behind the scenes" workings of the Obama campaign. I found resources created by Kyle Rush. While Rush wasn't one of the staffers mentioned in the Atlantic piece, he served as the deputy director of front-end web development. According to Rush (2012), in six months the Obama campaign platform raised $250 million from 4,276,463 donors and conducted 240 a/b tests with a 49% increase in donation conversion rate. While not a subject of the tests in this paper, it was interesting to note that they increased the donation conversion rate by 14% by making their new platform 60% faster. Through a series of tests, they changed their giving form from one long scroll to a series of smaller steps with an indicator of how much of the process you had completed. Their goal was to make the form look easier to complete. This process alone increased their conversion rate by five percent. They also were the first to employ one-click giving which resulted in participants giving four times as often and three times as much.

For teams who have already embraced the idea of testing, Rush recommends not getting carried away with your ability to test as he feels like it might lead to paralysis in decision making. He recommends beginning with a hypothesis, creating experiments to test that hypothesis, and finally employing A/B testing. He also recommends prioritizing the tests in terms of RIO. In the Obama campaign, they found they had the highest ROI by making copy changes, followed by photo changes. (Rush, 2013) These articles by Rush were helpful in that they took in a view of the entire campaign and the way that the emails interacted with the website. The strategies they employed were holistic and took a broader view and were not simply limited to the implementation of a single tool.

Finally, I also used a piece produced by MailChimp (2013), an email database and marketing company, which studied the subject lines of 24 billion delivered emails. While not specifically written towards non-profits, it was a helpful general guide and did include a few non-profit and fundraising pointers.

Conclusion

At the end of the day, each of the channels discussed here are only tools. To focus to heavily on any one tool would be remiss. It is important to see how each of these tools work together to create a holistic strategy. In the future, it is my recommendation that more literature be written to take a look at the entire fundraising strategy of an organization through the lens of user experience and human-centered design. My study breaks pieces of this strategy into chapters as the easiest way to apply literature and findings to specific activities, but certainly more needs to be done to look at the whole.

Chapter Three: Experiment Mail Channel

The results of first mail test we ever completed surprised me. It is easy to say in retrospect that if a donor received a piece of mail from the University and chose to open that piece of mail, they were self-selecting as donors. The desire to give had already been instilled and now my task was to make that fulfillment as easy as possible. But I didn't know that yet. I started with the goal of testing the assumption that people didn't read their mail. Even after that first test, when I was beginning to dive into the UX literature, I didn't fully realize just how I could influence donors. I realized shorter letters were important so I kept pushing into that idea.

I began to read about a trend increasing among other tier-one public research institution's Annual Giving Programs, the Ugly Betty. The Ugly Betty is industry jargon for a short, no frills piece of mail that looks more like an invoice than a letter. At the time, our standard mail package was a black and sepia two 8½ x 11 pages and also included a full color card stock insert that looked like a book mark. The remittance form (the response device portion which can be returned with the payment) was the front and back of half of a second page. In an Ugly Betty, the remittance form is prominent. In the fall of 2015, we decided to redesign our direct mail package. We reduced the package to a single 8½ x 11 full color page and we prepared to send our first Ugly Betty.

Since the physical package was so different from our prior look and feel we tested the approach with in the first mailing of the fall with our most loyal and generous donors and asked them, in light of their close relationship to the University, to provide feedback along with their gift. And they did!

Fig 3.1 Letter copy for our first "Ugly Betty" mail piece. The highlighted text at the top indicates the donor groups that received this mail piece. The bolded text is personalized to each donor indicating the area(s) of the University the donor has supported in the past. In this case, the donor previously supported the Department of Plant Biology.

One donor wrote, *"You asked for our .02 on your new method, so this is mine: Two thumbs up!"* Another wrote back, *"I like the new short format for the **I Give** donation request which I received today.. Better than several pages of text which I never read. Thanks."*

give

To make a donation online, visit **giving.illinois.edu/yourgift**, and enter this secure personalized webcode ▓▓▓▓▓▓▓ or call the Annual Fund office at 217.333.9174.

☑ **YES, I want to support the University of Illinois at Urbana-Champaign with my gift of:**

☐ $3,500 ☐ $2,500 ☐ $2,000 ☐ $1,500 ☐ Other $_____

▓▓▓▓▓▓▓▓▓▓

‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖
%800024725-5M2DK.330007

Please direct my gift as follows:

$_____ Plant Biology Annual Fund (334872)
$_____ College of LAS Annual Fund (332201)
$_____ Illinois General Scholarship Fund (343007)
$_____ Chancellor's Fund/Campus Unrestricted (330007)
$_____ Other: _____

==Designation options for all donors:==
==- Prior Areas of Support==
==- Degree Unit==
==- General Scholarship / Chancellor's Fund==

All gifts are tax-deductible and will be processed and receipted by the University of Illinois Foundation

Fig 3.2 This is the front of the new remittance form. The original form (which can be viewed in the appendix) was front and back of a half page. This remittance form includes a personalized webcode which has been blacked out as well as the donor's personal address. Highlighted in yellow are the areas of support each donor is offered as a designation option which include a donor's areas of past support, the unit from which they received their degree and general University funds.

GIVING OPTIONS
☐ I have enclosed a check payable to *University of Illinois Foundation*
☐ Please draft/charge my account for a one-time gift of $ _____
☐ Please draft/charge my account for a monthly gift of $ _____
  starting _____, until I cancel.
☐ My company, or my spouse's/partner's, will match my gift.
  Company Name: _____

☐ MASTERCARD   ☐ VISA   ☐ AMEX   ☐ DISCOVER
Card Number: _____
Exp Date: _____
Signature: _____

AUTOMATIC BANK DRAFTS
Bank Name: _____
Routing #: _____
Account #: _____

DID YOU KNOW?

The University of Illinois also accepts employer matching gifts, endowments, honorary/memorial gifts, and planned gifts including assets, bequests in a will, charitable gift annuities, charitable remainder trusts, charitable lead trusts, retirement plans, and life insurance policies. Learn more about these opportunities to show your support by visiting **giving.illinois.edu/giving/typesofgifts.html**.

Please mail this completed form to:
University of Illinois Foundation
P.O. Box 3429, Champaign, IL 61826-3429

Update your address, visit http://giving.illinois.edu/about/update.html

Fig 3.3 The reverse of the "Ugly Betty" remittance form. All payment information has been included on the reverse. Figure 3.2 and 3.3 represent the front and reverse of a tear off form which was attached to the bottom of Figure 3.1.

Even after the success of this package we didn't immediately begin to look more closely at the remittance form. We were forced into reconsidering the form when the University of Illinois changed the database that tracks constituents (alumni, and other supporters) and their support of the University. This new system changed the way gifts were processed by the

University and meant we needed to request more information from our donors for our new system to process credit card payments. With these new requirements in mind we began looking at remit forms across higher education and not-for-profit philanthropy. In our opinion, the easiest remit forms to use were big. They used design elements and white space to draw attention to the most important pieces of information. It was at this moment that we began to practically conceptualize the User Experience around these remittance forms.

As we were developing our remit forms we often met with the individuals who worked in Gift Processing. It was their job to scan and process the remit forms they received through the mail. Their requirements and needs, due to the scanners and software they used, were often different than those of our donors. Because we were unable to change the constraints posed by the software they used, we had to find creative ways to work within their parameters but keep our donor's needs and preferences front of mind. This at times frustrating process brought to mind Cooper's observation of a similar process in web development. "The programmer wants the construction process to be smooth and easy. The user wants the interaction with the program to be smooth and easy. These two objectives almost never result in the same program." (Cooper, 2004) We found that we would make different choices if we didn't have to take the needs of Gift Processing in mind. Their requirements meant that we had to include more information which would be meaningless and potentially distracting to the donor, for example QR codes, on the front of the form. While these elements could be small, they also had to be placed at specific spots on the form which added to the distraction component. The amount of credit card information necessary to collect and the specific required wording of the charging options made this portion of the form dense. Users are given very little space to fill out the required information.

We asked some of our colleagues, other advancement professionals at the University of Illinois – some of who are also donors – to serve as a focus group to begin usability testing for this new larger remit form design in advance of an A/B test with our donors. We had them test two forms as we observed their behavior. The goal of these ethnographic observations was to determine the way individuals use response devices and their workflow when using a response device. In this case, ethnographic observation was an opportunity for us to identify inefficiencies in the devices including where there were gaps of understanding, disconnects with the user, and opportunities for error. We hoped to identify the additional opportunities to improve the response devices and thus the user's experience. Thanks to the literature, we realized we would likely not be able to anticipate these opportunities before the study began. "Ethnographic

research is all about discovery of the unknown – disproving assumptions about user behavior and uncovering unexpected insights. Whenever you're in the field, something you see is going to surprise you, and those surprises are almost always at the root of innovation." (Weber and Chen, 2013)

By using ethnographic observations before A/B testing we hoped to combine the strength of both qualitative and quantitative methods. Pavliscak (2016) champions this approach in UX design as a means of gaining a fuller perspective of end users. She warns against simply using "Big Data" or a quantitative approach to inform or evaluate UX design. "Numbers represent the actions of real people with complicated lives," she notes. "But rolling the behavior of millions of people into a single number is not always useful, or reliable. Even the most organized set of numbers don't answer a lot of the questions we still have about user experience, like why people take action or why they don't, or how they felt about it, or what expectations they bring to the experience."

Ma (2011) notes the wide spread acceptance of quantitative methods of testing to inform UX design. "During A/B testing, you can collect data regarding key performance indicators (KPIs) such as conversion rates, enabling you to compare the results of two versions. The reason big companies such as Amazon and Google are fond of A/B testing is simple: data talks. Either version A works better or version B does –as the numbers easily demonstrate." But as other researchers note A/B testing does not always reveal "why" one version works better and when both versions perform similarly, results and thus design decisions become unclear. To that end, many UX designers are leaning on both quantitative and qualitative testing to make design decisions.

Similarly, Ma recommends using multiple methods to come to design decisions. "If A/B testing is driving a project, you can do a small-scale usability study in preparation for the A/B test to enable you to come up with better design alternatives that have their foundation in user input." She goes on to recommend a broader approach when collecting data for UX design. "Interviews, ethnographic studies, and usability tests fill in the gaps left by numeric data." Pavliscak concludes that data from a variety of sources should be used to inform design, including "analytics, A/B tests, social media sentiment, customer service logs, sales data, surveys, interviews, usability tests, contextual research, and other studies."

Larsen notes the valuable qualitative data gained by going into the field. "Ethnographic methods focus on producing sincere and introspective feedback by building rapport and engaging users as experts rather than research subjects. By placing a high value on real life user

narratives, ethnography builds empathy and provides rich media assets and anecdotes for client-facing enterprises…While market research gives you facts, ethnography allows you to understand the experience." (2016) Priestly's comments add to this understanding, "By… involving users in testing prototypes and A/B testing (comparing different interface designs), we are effectively getting the users of a system to design that system for us. As UX designers, our role is often simply to facilitate and guide this process along." (2015)

We didn't have as many aha! moments as we had hoped from our observations. Unsurprisingly in retrospect, our colleagues were biased by their opinions formed from the industry. Since we wanted to replicate the entire process of a donor receiving a solicitation mail piece, we used a real letter. In keeping with our prior test results, this letter was short. Our colleagues provided most of their commentary around the content of the letter, the length of the letter, and the photos of the students represented rather than the form. However, it was clear from observation that the changes made to the form did, in fact, make the form easier to use. Perhaps because of this ease of use, commenters decided to focus their attention elsewhere.

From our small-scale usability test among our colleagues we were able to formulate the basis for our next A/B test. We created one letter package designs with two different remit forms. Aside from the remit form – which did impact the length of the letterhead – every other piece of the package from design, to images, to text, was the same. One package was an 8½ x 11 letterhead with an 8½ x 3½ double sided remit form. This form had a few new pieces of credit card information requested, but was essentially the remit form we had been used the year before in our first Ugly Betty. The new package, based on our usability testing, was an 8½ x 14 letterhead with an 8½ x 7½ single sided remit.

I give

YES, I want to support the University of Illinois at Urbana-Champaign with my gift of:

☐ $400 ☐ $300 ☐ $200 ☐ $150 Other $_____

☐ My company, or spouse's/partner's, will match my gift
  Company Name _____

Please direct my gift as follows:
$_____ Engineering at Illinois Fund (776346)
$_____ General Scholarship Fund (343007)
$_____ UIUC Chancellor's Fund (330007)
$_____ Other _____

CHECK ENCLOSED

☐ Check payable to University of Illinois Foundation

CREDIT/DEBIT CARD

☐ **One-time** gift of $ _____
☐ **Monthly** gift of $ _____
☐ Process my monthly gift on the: ☐ **1st** ☐ **15th**
☐ **MasterCard** ☐ **Visa** ☐ **Amex** ☐ **Discover**

Name on Card _____

Card Number _____ Exp. Date _____

Cardholder's Signature _____ CID _____

Billing Street Address _____

City _____ State _____ Zip _____

ELECTRONIC FUNDS TRANSFER

☐ **Monthly** gift of $ _____

☐ I authorize UIF to debit my checking/savings account, on the 15th of each month, until I cancel.

☐ I have included a blank preprinted voided check (write "VOID" across the check) with this form. Gifts will be debited from the bank account number provided on the voided check.

Account Holder's Signature _____

"@63654421175 !!776346"
Lookup ID 11440900

Please mail this completed form to: University of Illinois Foundation, P.O. Box 3429, Champaign, IL 61826-3429
All gifts are tax-deductible and will be processed and receipted by the University of Illinois Foundation.

Fig 3.4 The newly designed remit forms include personalized designation options and designation amounts, similar to past forms. All payment options have been moved to the front and grouped down the right side of the form.

information requested on both forms was the same, the test in this case was to learn what was easier for a donor – to flip over a remit form and fill out information on the reverse before placing it in an envelope, or to fill out a single sided simplistically designed form which included more white space, before folding it in half and placing it in an envelope.

This test was implemented as our first mailing in the fall of 2016 and, as in the previous fall, we targeted our most generous and loyal donors first. We first looked at the results twelve weeks later, at the end of November. Even then we recognized that people continue to use mailed remit forms for months after they are received.

University of Illinois at Urbana-Champaign					
Coordinated Colleges Campaign (CCC)					
FY17 Direct Mail Results					
Effort: U17-41640DM (Quick Renewal)					
Launch Date: 8/26/16					
Gifts and dollars recorded through 11/30/16					
Segment	Quantity	Responders	Total Gift Amount	Avg. Gift Amount	Response Rate
RE/LA15 $1K-24,999/Loy Mult Lrg Remit	2,304	326	$252,632.00	$774.94	14.15%
RE/LA15 $1K-24,999/Loy Mult Sml Remit	2,353	313	$220,000.08	$702.88	13.30%
FY17 TOTALS	4,657	639	$472,632.08	$739.64	13.72%

Fig 3.5 This chart represents the number of letters mailed, the number of responders, the total dollars raised, average gift size, and the response rates for the two segments: Large Remit and Small Remit. These results represent all gifts given using these forms between August 2016 to November 2016.

Other than the response rate we also collect the total number of donors in each segment, the dollars raised by each segment, and the average gift size per segment. We had learned from previous tests to expect similar response rates. That again held true in this test. The average gift size for the larger remit form at this point in the test was about $70 more per donor. Overall, the segment with the larger remit form segment generated about $32,000 dollars more.

As the year progressed, we were eager to continue to watch these results. We knew from prior experience that unlike an email, donors would continue to use this remit form throughout the year for their giving transactions – even when they received other similar pieces of mail or email from the University. We checked our results again after the calendar year had come to a close.

University of Illinois at Urbana-Champaign
Coordinated Colleges Campaign (CCC)
FY17 Direct Mail Results

Effort: U17-41640DM (Quick Renewal)

Launch Date: 8/26/16

Gifts and dollars recorded through 12/31/16

Segment	Quantity	Responders	Total Gift Amount	Avg. Gift Amount	Response Rate
RE/LA15 $1K-24,999/Loy Mult Lrg Remit	2,304	427	$380,047.00	$890.04	18.53%
RE/LA15 $1K-24,999/Loy Mult Sml Remit	2,353	407	$352,885.08	$867.04	17.30%
FY17 TOTALS	**4,657**	**834**	**$732,932.08**	**$878.82**	**17.91%**

Fig 3.6 This chart records the same data as 3.5 with the but the date range is now August 2016 through December 2016.

As we expected, over this critical one month period in December, donors continued to make gifts using this form. In fact, one quarter of all donors responding up to this point did so in the month of December. We noticed with this snapshot the size of average gift began to close as it began to increase, although the larger remit form was still resulting in nearly $30,000 of additional revenue. It was also during this time frame that we learned of a new gift processing procedure. All gifts being made on this form but using a credit card were being processed by the University of Illinois Foundation as though it were made online. This meant that none of the revenue was being tracked back to the mail piece which resulted in the gift. We realize from this point forward, this would skew the results of any mail piece we were tracking.

WE ARE ILLINOIS

As we celebrate 150 years of the transformative impact of the University of Illinois, it is a natural time to reflect and give thanks for your support of Illinois earlier this year. In the past you have also supported **the College of Education and the Undergraduate Library.**

At Illinois, we have been shaping the future since 1867. Every gift moves Illinois forward, and we hope you'll renew your support today. Thank you for making Illinois a philanthropic priority.

In Orange and Blue,
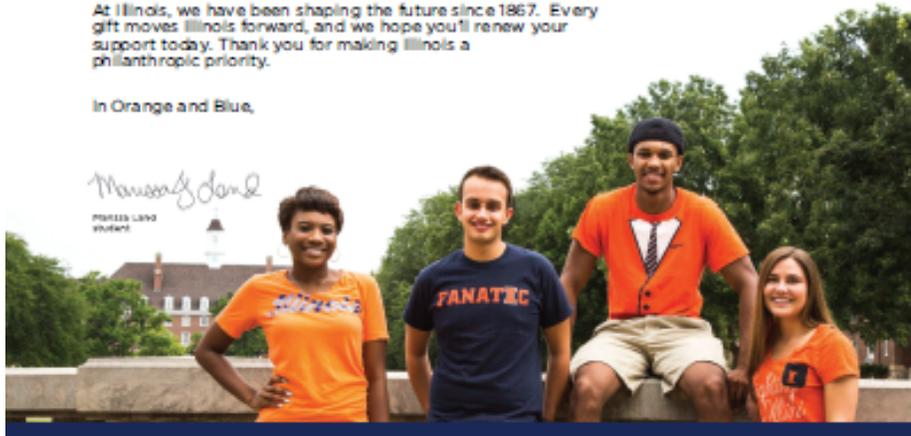
Marissa Lane
student

To make a donation online, visit **give.illinois.edu/yourgift**, and enter this secure personalized webcode: ▮▮▮▮▮ or call the Annual Fund office at 217.333.9174.

I give

YES, I want to support the University of Illinois at Urbana-Champaign with my gift of:

☐ $1,600   ☐ $1,400   ☐ $1,200   ☐ $1,000   Other $_____

☐ My company, or spouse's/partner's, will match my gift
   Company Name _____

Please direct my gift as follows:

$ _____ College of Education Fund for Excellence (331425)
$ _____ Undergraduate Library Fund (332485)
$ _____ Educational Illinois Scholarship Fund (341317)
$ _____ Chancellor's Fund/Campus Unrestricted (330007)
$ _____ Illinois General Scholarship Fund (343007)
$ _____ Other (enter fund name) _____

CHECK ENCLOSED

☐ Check payable to University of Illinois Foundation

CREDIT/DEBIT CARD

☐ One-time gift of $ _____
☐ Monthly gift of $ _____
☐ Process my monthly gift on the: ☐ 1st ☐ 15th
☐ MasterCard   ☐ Visa   ☐ Amex   ☐ Discover

_____
Name on Card

_____
Card Number   Exp. Date

_____
Cardholder's Signature   CID

_____
Billing Street Address

_____
City   State   Zip

ELECTRONIC FUNDS TRANSFER

☐ Monthly gift of $ _____
☐ I authorize UIF to debit my checking/savings account, on the 15th of each month, until I cancel.
☐ I have included a blank preprinted voided check

Fig 3.7 This is a sample of our mid-spring mailing in 2017. By then, our letters evolved to be quite short. In other mail tests we performed we found that student signers and student photos afford us the best results. We currently use a one sided large remit form which includes donor personalized designation options and designation amounts.

Looking to the literature for inspiration, our latest test is that of our envelope. We are testing to see if we can influence our response rate, which is not a metric we have been able to move, by personalizing information on the envelope. As of this writing, the test was being performed but results are not yet available.

UNIVERSITY OF ILLINOIS
P.O. BOX 2567 Station A
Champaign, IL 61825-2567
giving.illinois.edu

Thank you for your gift to the Department of Recreation Sport and Tourism and the RST Alumni Scholarship Fund

Fig 3.8 This sample of an envelope lists the fund(s) a donor has supported in the past. It will be tested against an envelope which does not include this language.

The results of our testing overall have lead us to use a short letter which is never more than three paragraphs long. We use photos of students as well as student signers. Our biggest take away from this process is to continue testing and to recognize that each of the other channels also influence our donors' behaviors. Consistency of these messages, visuals, and solicitations in each of those channels is essential.

Chapter Four: Experiment Website Channel

We've all been there before, a delayed flight or road construction begins your vacation a bit later than you planned. Perhaps, like me you have tired kids in tow, just a little too young to appreciate the complexities of airports and interstate systems. Last December, we were on the last leg of our journey, a taxi-ride to our hotel/apartment. There in the taxi, with sleepy heads resting against me, I was able to take out my cell phone, open an Amazon Prime Now app, and order a delivery of breakfast items, from bread and milk to eggs and bacon, to be delivered in an hour to our location. I was excited to use this new feature and curious as to how it would work. Sure enough, within the hour we received a delivery in two brown paper sacks.

I have long been impressed with Amazon's model – continually pushing the limits of how we experience shopping. They now have a physical store in Seattle where shoppers are encouraged to browse the store, select items from their shelves, and then simply walk out of the store – removing the process of standing in line to check out. "The checkout lines are always the most inefficient parts of the store experience," said Neil Saunders, managing director of retail research firm Conlumino. "Not only would you save a lot on labor costs, you actually would make the process much quicker for consumers and much more satisfying." (2016, Medhora & Dastin) Amazon thought about the part of the shopping process we all hate the most, and found a way to remove it. Their laser focus on the User Experience combined with meeting the company's objectives is a model that continues to impress me. So when I'm asked as a Director of Annual Giving, *"who do you consider an aspirational peer?"* I don't give the standard list of high performing University Advancement programs. Instead, I say Amazon.

Through my work in Annual Giving, I encounter generous people on a daily basis. I also encounter frustrated people. People who are used to the ease and convenience of one-click-shopping who simply get tired of overly long, unnecessarily detailed online giving forms. As modern day consumers, they fill out these forms wondering why our institutions haven't figured out a way to save at least some of this information. These donors are people who are used to the simplicity of a web search, but can't seem to get our websites search function to return the name of the fund they wish to support, funds they have supported for years. These are individuals who are trying to give us money but are being hindered, not helped, by our technology. The warm glow, altruistic feeling that perhaps prompted them to make a gift has been replaced by irritation.

How long can we expect that these individuals will make exceptions for us or excuse our poorly executed mechanisms for collecting funds?

Norris and Potts echo this concern, "From just a cursory glance at the online giving process of the majority of non-profits, it is clear that from those heady early days of online giving fueled mainly by global emergencies, when people would donate however hard we made it for them – we have not done enough as a sector to make a science of that act of giving online." (2011)

As my team and I began designing giving opportunities with the donor's experience in mind, we began thinking of these donors as consumers and began cataloguing their (and our) other consumer experiences. If we change credit cards, or have our credit card numbers compromised, Amazon allows us to change our payment card in under five minutes. If our credit card is about to expire, they will send us a reminder. Amazon saves our data, tracks our movement throughout their site, and makes recommendations based on our preferences. And while perhaps Amazon is unique in the lengths they go to, many of the other companies we interact with daily are similar. Spotify, Netflix, Apple – the list could go on and on. Even our banking we handle from our phones. As we catalogued these experiences, we decided to make Amazon's model of fulfillment our goal and sought ways to pattern our program after their methods.

First, we noted that Amazon relies on external marketing. Other companies focus on marketing products which can then be purchased on Amazon, thus separating the creation of desire for a product from fulfillment of that desire. People arrive at Amazon already having some idea of what they want or are searching for. Amazon relies almost exclusively on brand-building done by others. In recognition of this model, we began working more intentionally with our marketing partners across the University. We recognized that our efforts would be more successful if we focused on soliciting alumni who were engaged by partners while they were at Illinois and continued to stay engaged through those same campus partners' marketing efforts after they left.

Next, we recognized that Amazon continues to work to remove barriers to fulfillment. Amazon is on the cutting edge of developing new ways to make shopping easier. The first to offer one-click shopping, they make it as easy as possible to complete the transaction. The new model

they are piloting in their physical stores brings to light another important pillar of the Amazon model. Amazon relentlessly incorporates user-generated feedback into their designs. They are constantly testing and making improvements. We recognize that in order to provide a similar type of service to our donors we must begin by making our current ways of accepting payment more in keeping with our donor's experiences as consumers and by continuing to improve and test our processes.

Finally, Amazon harnesses the power of user data by tracking user habits. We have all had the experience of having Amazon suggest an additional, similar item when you found the item you were looking for. Or, "Customers who bought this item also looked at these items." Their customizable homepage is dedicated to guessing what it is you might like to purchase based on your past purchases and browsing history.

At the University, we continue to seek to link a prospect's engagement with our University to solicitations. We recognize that the most recent point of connection is the most salient ask. For example, a parent is more likely to give to a program funding an extracurricular activity in their child's course of study than they are to support a program of their own major. Similarly, if prospect studied communication as an undergraduate but their profession has taken them into agriculture, making them naturally more appreciative of the research the University is undertaking, they are much more likely to support this research than their undergraduate major. As a prospect's relationship with the University evolves and grows, our understanding of that relationship and our solicitation strategy must also evolve.

Our first conversation toward implementing these ideas began with our own internal communications team around the way our website was used. When our communications team was brought on board they were handed a website that was attempting to do many things and none of them too well. The first page of the giving website was a shopping cart which, while functional, was unattractive and admittedly a bit clunky. The main selling point of this page was the ability to robustly search for funds. However, from this single shopping cart page were main tab links to giving stories, other ways to give to the University, and even and about us page which included a link to job opportunities.
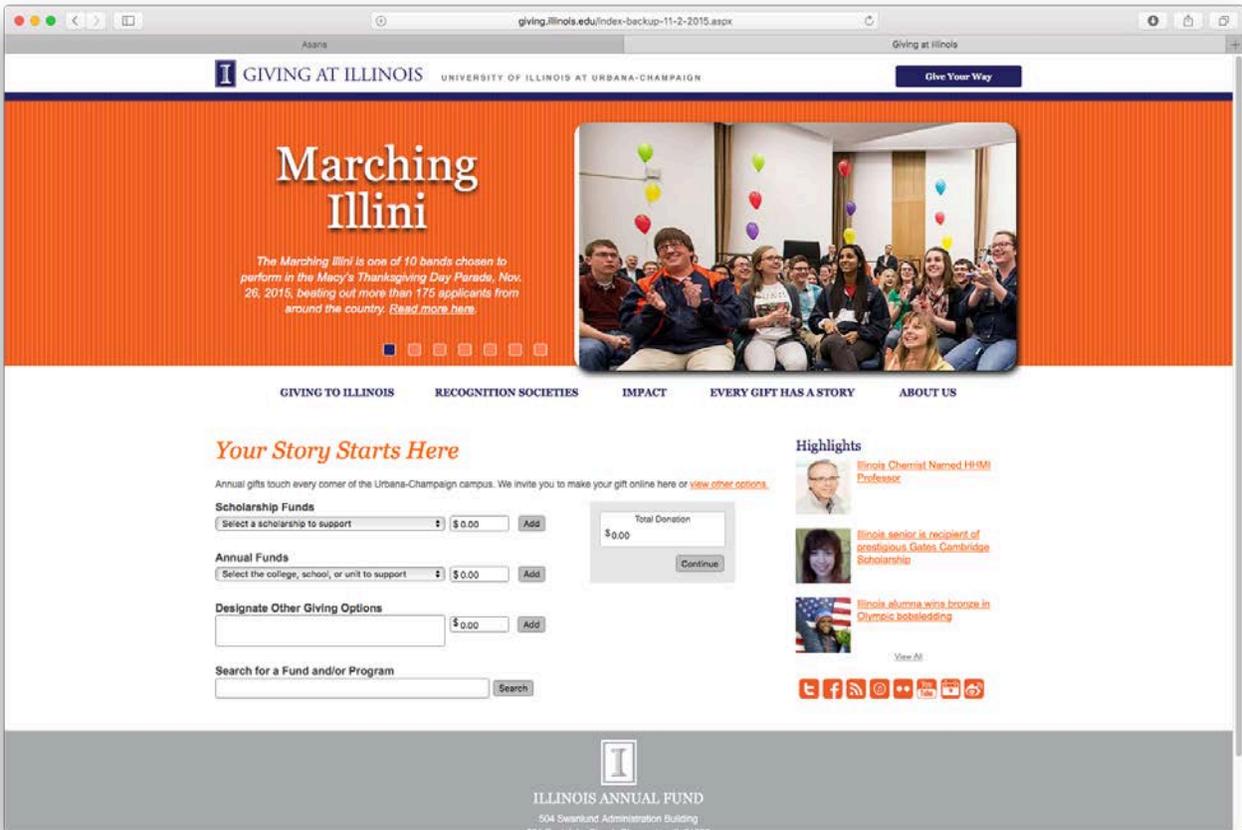
Fig. 4.1 Original giving.illinois.edu landing page. This page was a shopping cart where funds could be added, searched for and amounts selected from this page without moving to a new page. It also included several links nonessential to the giving process.

In her piece "Results Based Interaction Design," Weiss (2008) describes the partnership we found with our communication team as we worked to create a site that was both convenient and compelling. In this process, my team and I, as interaction designers, were focused on the user tasks and easily completing those tasks. We began with a clear knowledge of our users and the tasks they regularly performed on our site. "The interaction designer looks at potential site visitors to evaluate the project throughout the process and strives to understand users (their abilities, needs, desire, frustrations) and what they do, including how they interact with each other, with the technology, and with information." (Weiss, 2008)

The communications team set out redesigning the site. They designed a user experience that assumed the most likely site users were prospective donors or people who had never made a gift to the University, rather than donors. The shopping cart was no longer the landing page of the giving site. The communications team envisioned prospective donors coming to the beautifully designed site and increasing their level of engagement as they traveled around the site reading various articles. For them, a measure of success would be the length of time an individual engaged with the site. They believed that once inspired, these donors would make a gift. Without sending out a single email that pushed individuals towards this content, the annual giving team asked why these prospective donors would simply come to the University giving website to browse around? This was counter to our experiences with these constituents.

Fig. 4.2 – New landing page for giving.illinois.edu. This screen shot of the landing page "above the scroll" illustrates the shopping cart function – "make your gift" - is now a click away.

The result of this redesign was a very beautiful site. It included drone footage and easy to understand icons. It was mobile friendly! The shopping cart page was now a click away and included multiple layers of options, suggesting Cooper's idea of uninformed consent. "At each step, the user is required to make a choice, the scope and consequences of which are unknown." (Cooper, 2004) Our donors called with more frequency to say they didn't understand how to navigate the website. They weren't commenting on the new features or beautiful new design. We

were seeing Cooper's warning demonstrated, "Product successes and failures have shown repeatedly that users don't care that much about features. Users only care about achieving their goals."
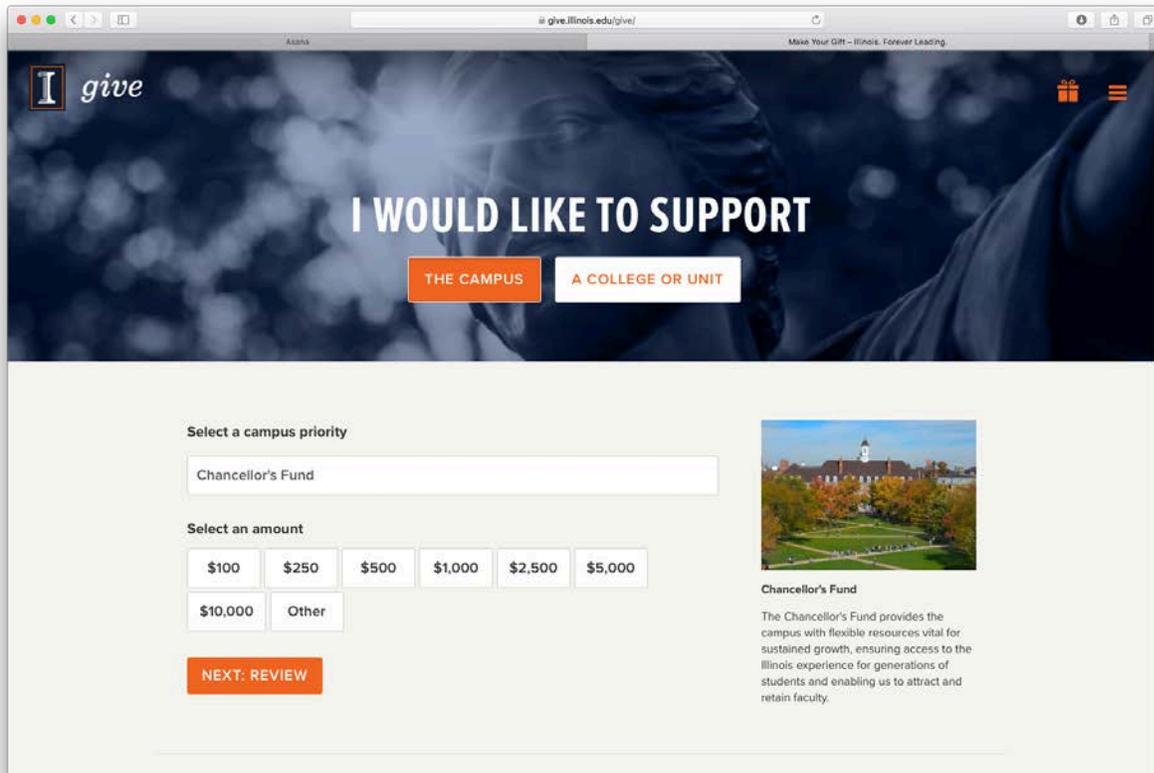
Fig. 4.3 – After clicking "Make Your Gift", donors are taken to this screen which is preset to "The Campus". Many donors used to having college or unit options available missed the "A College or Unit" button.

A new feature of this site also included a description of the fund and a representative photo on the right side of the page. The photo and description changed with each fund selected from the drop down menu.
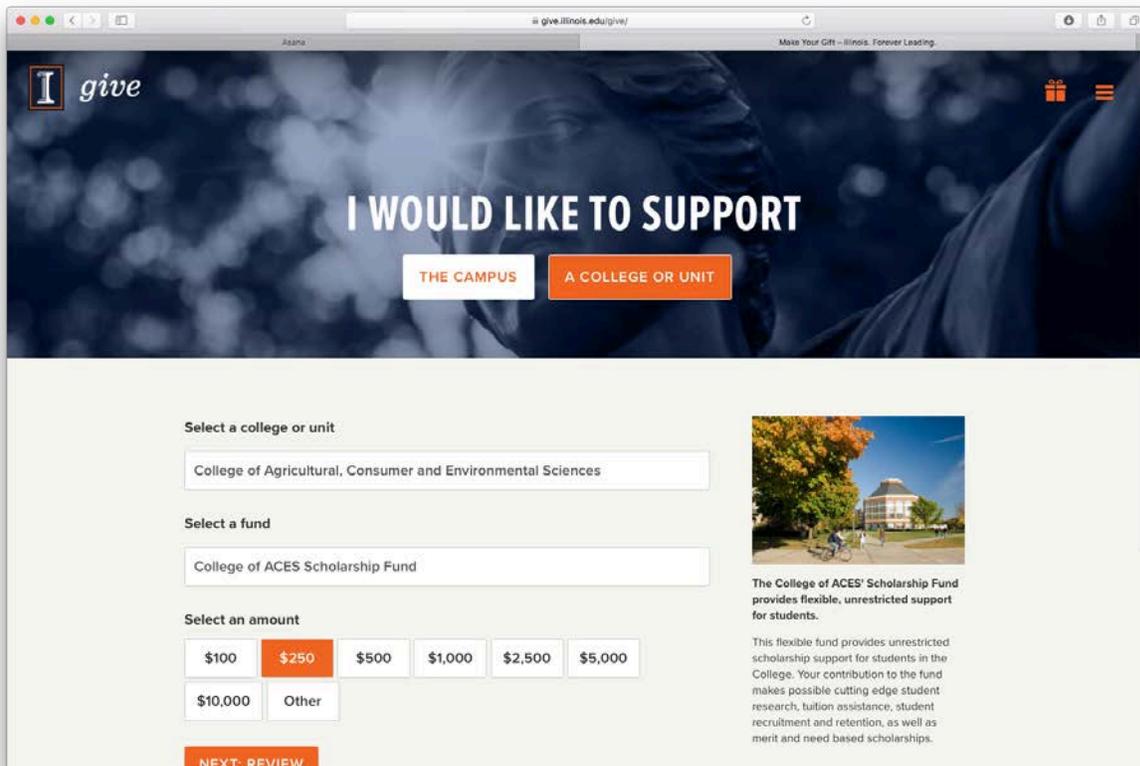
Fig. 4.4 – If a donor wishes to make a gift to a College or Unit this is the page displayed after their selection. This page then includes two additional drop down boxes, one to select the unit and an additional drop down to select a fund within the unit.

Similar to the campus page, a new feature of this site provides a photo and a description of the fund to the right of the selection.

To further complicate matters, because of a change on the contact page, these donor phone calls were no longer routed to us, but to the communications team, which meant it was at least one layer of individual a donor talked to before being transferred to someone that could help them complete the giving process.

The fund search engine also functioned poorly and there wasn't a clear way to add funds if the donor did not wish to go through the hassle of using the search function. The manual "other" option, which we knew from giving receipts was used frequently, was hidden behind additional layers. While the site as a whole became more engaging and visually appealing with more features, some of the functionality of the simplistic shopping cart was lost. Our loyal donors were telling us that we were having problems with our site, but those prospective donors remained to be seen. Again, we found Cooper's advice salient as we reviewed donor feedback,

"Tasks change as technology changes, but goals have the pleasant property of remaining very stable." (Cooper, 2004)
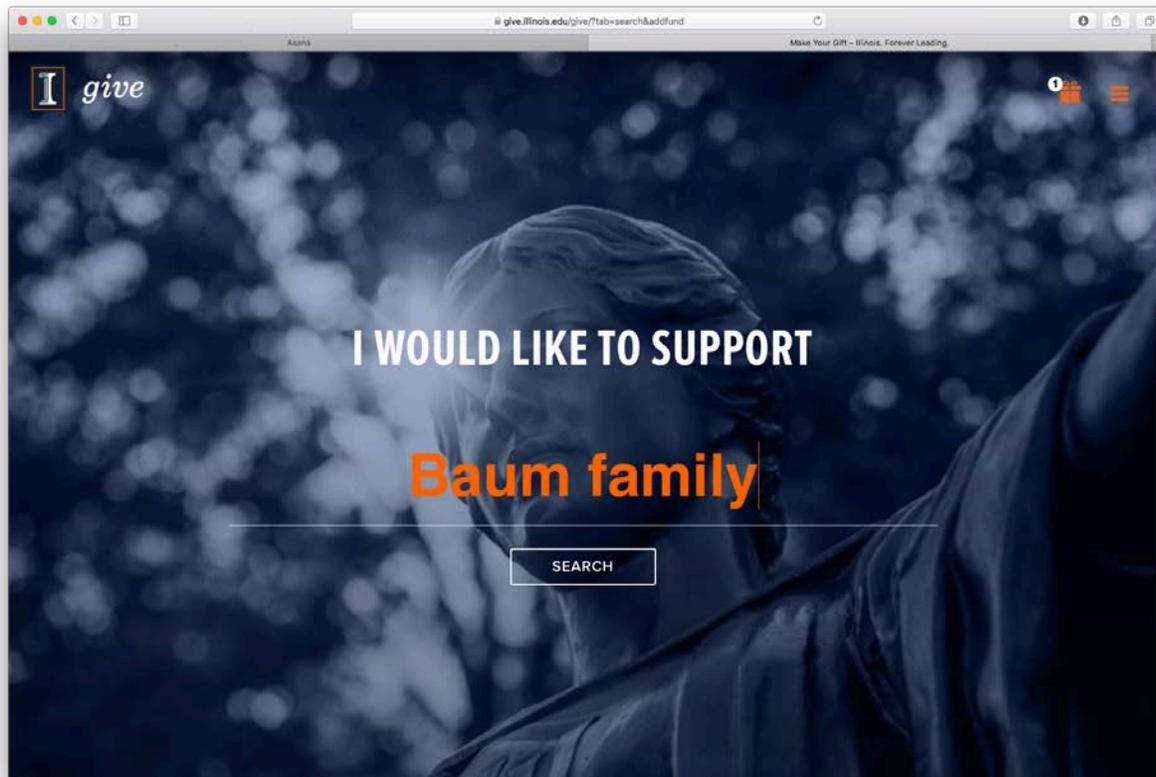

Fig. 4.5 – The search link took donors to a new page. The text no longer invited donors to search for a fund but was instead designed to appeal to non-donors by suggesting they support a thematic area. However, the search behind the website looked at the fund titles for key words and only returned the first twenty results. In this scenario, if a donor searched for "alumni association" they would never find the main alumni association fund because it would never appear high enough in the results.
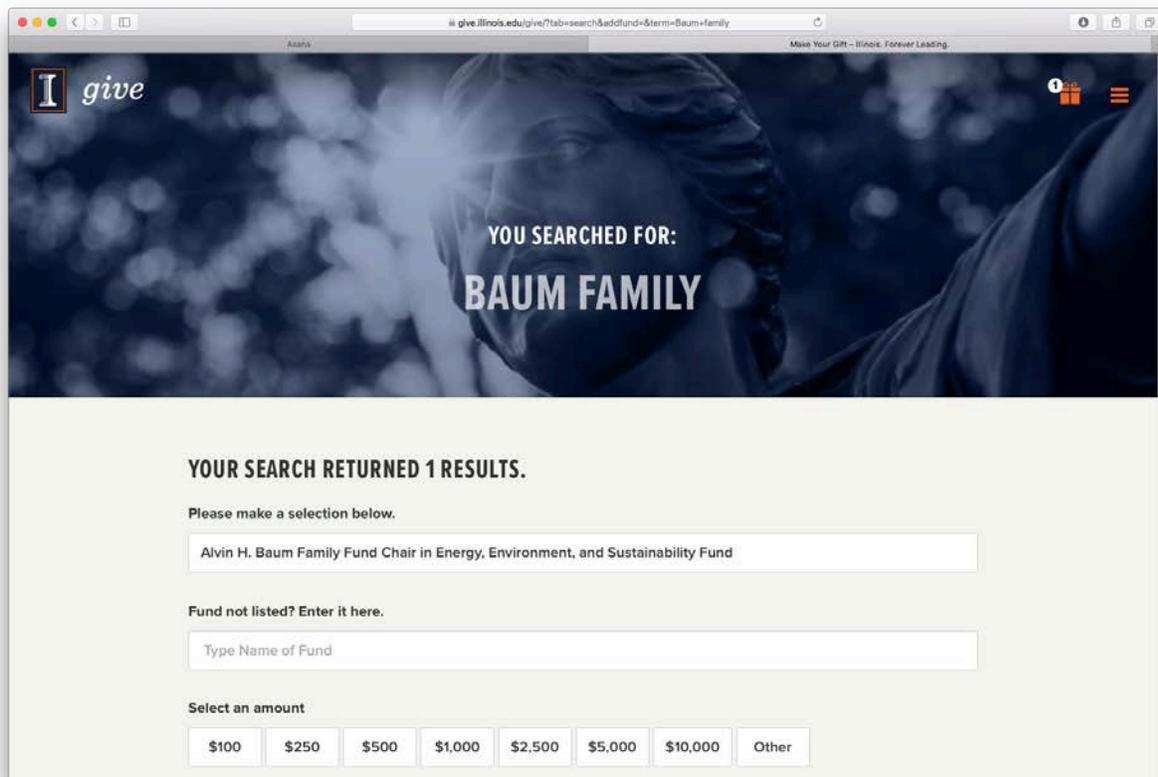
Fig. 4.6 – If, after their search, a donor was unable to find their fund, they were then offered the opportunity to add it in the "other" field, but not before they went through the process of searching.

With the end of the calendar year approaching, a time of year when we see thirty percent of our revenue acquired, we knew we had to reassess the website to determine if we could make it easier to use for our donors.

Harkening back to Cooper, our hypothesis was that most donors visiting our website did so with a purpose. From our phone conversations with them, we believed that they came to the website with a task they hoped to effectuate. However, our website was designed to pull users in and keep them looking at the site as long as possible. Our communication team sought to design a "sticky" User Experience with the hypothesis that more time spent on the site would increase the amount of money given.

As a compliment to the design idea of the 'sticky' experience, Jake Zukowski coined the term 'slippy UX' to describe experiences designed to get users in, out, and on their way. "'Slippy' experiences are positioned in stark contrast to 'sticky' ones, a key design goal for many websites." (Fichter and Wisniewski, 2016) Our communication team's goal was certainly a sticky

website and it was a goal they effectuated very well, but we believed, much like our mail pieces, the case for support was being directed to the wrong individuals at the wrong time.

We believed our donors hoped to make their gift and move on. The ones we spoke with did not intend to spend long periods of time browsing the website, seeking more information or inspiration before making their gift. They were looking for something more slippy. "Slippy UX techniques help create a harmonious experience that not only works but also does so with finesse." (Fichter and Wisniewski) Speaking about the slippy experiences needed to make an app successful, Fichter and Wisniewski describe these features. "[they] draw minimal attention to themselves and remain largely invisible, becoming visible briefly only when needed."

Keeping this in mind, we looked at two years' worth of data on all the transactions made via our site. Ninety-six percent of the individuals visiting our site had made a gift to the University of Illinois prior to making their gift online during the two-year window we were evaluating. As our anecdotal data suggested, the primary users of our website had made gifts to the University before. Providing our internal communication team with this data began to change the way we all looked at who was coming to our site and how they were using the site once they were there. The donor our communications team was designing for was not using our site to make a gift. The data further showed that five percent of all transactions for the year occurred in the final week of December. After looking at individual cases represented in the data set, patterns began to emerge. These I categorized into several use cases:

- Donors who use the website to make gifts to multiple funds across the campus.
- Donors who use the website to make payments on their major gift pledges.
- Non-alumni donors who have no other connection with the University who are making a gift in memory/honor of a loved one.
- Donors who wait until the very last minute – the last week or day of the calendar year to make their gifts.
- Donors who use the website to give to a very specific fund which they helped establish.

Using these general descriptions of our largest user groups, I began going through individual transactions for real, live examples of our donors who fit the descriptions. Following the literature on donor personas and using these sample transactions as a rough guide I created five donor personas. By using personas, my hope was to bring to life and paint a clear picture of

the people using our website, in a way that was less abstract than quantitative data. As Pruitt and Grudin note, "Personas used alone can aid design, but they can be more powerful if used to complement not replace, a full range of quantitative and qualitative methods. They can amplify the effectiveness of other methods." In practice, these personas added dimension to our donors.

The personas I created included a description of the household, their goals as donors, tasks that they undertake on our website, and photos. The literature strongly recommends using photos and first names as a way to strongly in grain the idea that these are real people. These personas were then distributed at a broad staff meeting which included annual giving and communications staff members familiar with the website, as well as many other staff members who had never used it before.

This experience echoed Pruitt and Grudin's findings. "Personas can engage team members very effectively. They also provide a conduit for conveying a broad range of qualitative and quantitative data, and focus attention on aspects of design and use that other methods do not." (2003) Staff members were broken into pairs and asked to use the personas to make gifts via our website while I monitored each group to make notes on the type of issues they were facing. After an adjournment from the meeting everyone came back to the table with a new appreciation for what our donors endure to make a gift on our website. We walked through each scenario, using donor's first names and each group discussed the things about the process that were difficult or easy. We used the scoring set out by Pruitt and Grudin to evaluate various website features, "-1 (the Persona is confused, annoyed, or in some way harmed by the feature), 0 (the Persona doesn't care about the feature one way or the other), +1 (the feature provides some value to the Persona), +2(the Persona loves this feature or the feature does something wonderful for the Persona even if they don't realize it)." (2003) Each pair gave a ranking based on their persona for the following pieces of the site:

- Search function
- Drop down box – Unit Funds
- Drop down box – Campus Funds
- Suggested Giving Amounts
- Drone footage / introduction

Through this process we made multiple discoveries. We even learned that a back-end function with the payment processor that had recently changed made one of our scenarios

(which was based on an actual occurrence), impossible. This exercise, more than any other we undertook, illustrated our users' experiences and clearly painted a picture of decisions we could make to benefit these individuals. But most of all, it gave us a platform and a framework for openly discussing the website. As Pruitt and Grudin insisted, "their [personas] greatest value is in providing a shared basis for communication."

Steve Krug's chapter *"Usability Testing on 10 Cents a Day,"* on the value of usability testing describes exactly the experience those of us familiar with the site were having. "Testing is like having friends visiting from out of town. Inevitably, as you make the rounds of the local tourist sites with them, you see things about your hometown that you usually don't notice because you're so used to them. And at the same time, you realize that a lot of things that you take for granted aren't obvious to everybody."

The total scores for each of our five areas as given by the individuals using the personas were revealing:

- Search Function: -2
- Unit list of drop down funds: 1
- Campus list of drop down funds: -1
- Suggested giving amounts: 5
- Drone footage / introduction: -1

Many of our perceived functions and upgrades to the site were met with neutrality. The only universally appreciated feature was the list of suggested giving amounts. But on further analysis even this preference seems to be a false positive. The testers were given user personas that correlated with amounts actually given by donors. When the testers were filling out the form they were asked to make a gift as the donor persona had done in that past and found that most often, those personas had selected giving amounts that correlated to the suggested giving amounts on the site, making it easy for the testers to find the amount they were asked to contribute. Preiestly described our experience of meeting our perceived upgrades with neutrality well, "We all have our preferred solutions and outcomes, usually for seemingly rational reasons, but seeing your own expectations confounded and discovering insights previously hidden from you is the best antidote to adhering a little too much to your own predilections." (2015)

One of the themes present in the literature was the idea that our design decisions can actually increase the cost of the user's experience. We recognized from this exercise that our new design would need to decrease the cost from a user experience perspective. As Noort advised, we

knew we needed to "ensure that a potential lack of clarity and transparency does not turn into a perceived cost increase for the donor. Proper form design plays a significant role in clarity and transparency. For instance, a clear idea of progress throughout the process increases the process transparency." (2013)

Our communication colleagues participated in this exercise as well and it crystalized for them a picture of our users. "With representations of users in the room, it becomes much easier to frame discussions, conversations and decisions within the context of the user's needs and desires." (Priestly, 2015) We then met with our communications team and went back to the drawing board and focused more heavily on the shopping cart as the most important function of our site.

With this new online shopping cart model, we strove to make some of the choices, which our test users did not see, more obvious. At the same time, we limited the number of choices readily available while making it easier for sophisticated users to find what they were looking for.   We used the advice of Norris & Potts. "The main differences are the way the new designs provides a superior page layout and helps guide the donor to make decisions by not providing too many choices." (2011).

Fig. 4.7 – After much discussion, the new giving form looks very similar to the first giving form without the distracting navigation. It strips many of the "features" of the second iteration, opting for a streamlined form that keeps all navigation on the same page.

After much discussion, we reverted almost entirely to the basis of the original form. The newest shopping cart page removes the distracting navigation from the original shopping cart page, but keeps the same functionality including adding funds and gift amounts without navigating away from the page, the ability to search without navigating away from the page, and most importantly, an easy to find "other" field which allows adding additional funds without navigating away from the shopping cart page. We found that this layout best met the user needs we uncovered in the User Persona testing. In keeping with Norris and Potts advice, we sought to simplify the giving form and making obvious the features our donors told us they were using most often. "This demonstrates the power of a donation landing page design that presents the information in a more meaningful way. . . without overloading them with choices." (2011)

So, what were the results of these efforts? Unfortunately, the answer is a bit obscured. Because of a database conversion we don't have unambiguous hard dollar figures. Anecdotally, we know that the number of phone calls we receive from confused donors has gone down. Our

users are back to much more of a self-service model. We hope to continue to disentangle our web results so that we can keep learning more.

Chapter Five: Experiment Email Channel

As the spring semester began to wind down, I started thinking about how to keep my children learning and occupied throughout the summer vacation. Companies seemed to anticipate I might be feeling this way and I began receiving emails about summer camps and newsletters about the dangers of straying from a routine during the summer months along with swim suits for summer and the latest in sunscreen technology. Through the din of subject lines with sun emojis and hashtags, one particular email caught my attention. Kiwi Crate was having a 40% off sale as a celebration of the beginning of summer.

While I knew my kids would spend plenty of time outside, there would be rain days. What to do with active kiddos on those rainy days had been on my thoughts for some time. I had started seeing advertisements about Kiwi Crate – a monthly STEAM subscription box for kids – over the winter holidays and had made a mental note that these project boxes might be a good idea for the summer. I opened the email, clicked through to the website and quickly made a purchase. The entire process took less than five minutes.

I opened that email and converted from a casual receiver to a customer for two reasons. 1) The email came at the right time. I had already been thinking about summer activities, rain days and STEM projects for my kids. Without realizing it, I was already looking for that email. 2) The subject line grabbed my attention by promising me a sale. My email inbox is full of messages from retailers – some of them sending me several emails a day. And those are just from retailers. Knowing my own habits, I began to wonder, how can the solicitation emails I'm sending stand out in an inbox and how can we convert individuals from opening to making a gift? Since the literature surrounding email solicitation from non-profit organizations is thin, we set out using our daily lives and intuition as our guide to determine what we should begin testing. There really isn't much scholarly literature systematically investigating this aspect of our lives. The industry is more helpful in publishing tips for email creators, but it seems as soon as these tips are written and circulated, they are no longer effective. Email as a mode of communication is constantly evolving, much more quickly than mail or even the web.

When discussing the topic of emails around the water cooler, it was easy to recognize that of all the emails retailers were sending, we seemed to open the emails that are eye catching and unique. But those clever emails have their limits. Even when I do open them, I am not influenced towards a purchase. I am much more likely to make a purchase when I have a need

and an email appears in my inbox that coincides with the moment of my need. Going back to the Kiwi Crate example, I was already primed for that purchase in part, from previous marketing received through channels other than email and my own need in the moment. From a retailers' perspective, these moments which may seem like serendipity to consumers are part of a long-term marketing plan, where both information about the product and the opportunity to purchase the product are married together in well-conceived dance that introduces need and desire and then masterfully fulfills it at just the right moment. That type of choreographed nuance and timing requires a deep understanding of needs and cycles at an individual level while also rolling those individual needs up to groups of similarly behaving people. But building these mass strategies starts by understanding the individuals.

Our revenue traffic throughout the year is fairly steady with few obvious spikes. By observing our donors, we wanted to dive into those small peaks to better understand their thinking and motivations. The calendar year-end, is of course, the stand-out. We recognize donors are thinking about the generosity of the season as well as their own taxes. This moment seems to transcend all non-profit spheres. For Illinois, thirty percent of our program revenue occurs in the month of December. The second heaviest time of giving is the fall, which also isn't a terribly surprising realization. It seems natural that as the leaves begin to change alumni would start to think about their days walking the Quad. But the third point of traffic did surprise me. It was in mid-March, usually around the time of spring break. It took interacting with colleagues to understand why this point of the year was significant for our donors.

In Division One collegiate athletics, the March Madness NCAA basketball tournament is the highlight of the spring. It has become part of the national consciousness to fill out a tournament bracket. And even if Illinois hasn't made the big stage this year, there is always the recognition that they could, maybe next year. It seems perhaps as alumni are filling out their brackets they think back to the years Illinois was in the tournament. They think back to their own school days and are filled with pride.

Using these data points, we began to make recommendations to our colleagues in marketing about the messaging strategy that, in our experience, would increase alumni desire to give back throughout the year. We asked that they begin their marketing in the summer with information on how gifts had been used in the past school year. In past surveys our own donors have indicated that transparency and accountability are one of the greatest motivating factors of their charitable giving. The importance of providing this information to donors cannot be overstated, as WINGS notes in their transparency toolkit, "Today, the importance of

transparency and public disclosure of information about philanthropic giving is widely acknowledged. Nevertheless, building a culture and practice of transparency and accountability faces a range of obstacles." (2015)

We then asked that they focus their messaging in the fall around nostalgia and reminding donors what it was like to be on campus. We encouraged them to focus the timing of their marketing in the month of October, wherein we noted that many donors and alumni were thinking about the tradition of homecoming. In spring, particularly the month of March, we encouraged our marketing partners to send pride building messages, reminding alumni and donors of the ways Illinois has been first or is at the leading edge of a sector. In keeping with this model, we also asked that our marketing partners not send mail and email in the month of December. We asked that they avoid this time of heavier traffic to allow the solicitation pieces to standout. As many marketers enjoyed sending holiday pieces, this was at first an unnatural way of thinking.

While it is too soon to see the cumulative impact of this partnership between marketing and solicitation, we are finally moving toward an integrated relationship between creating the desire to give and making it easy to fulfill that desire. At Illinois, we are beginning the nuanced dance that products like Kiwi Crate are perfecting.

In the meantime, we have spent the last year A/B testing our emails. We first tested using a personalized salutation in our emails. While that might have worked in the days when that was a new feature, it gave us no lift in either the open or click through rate or in dollars raised. In keeping with what we have learned in via other channels of solicitation, our emails have become short, graphical snippets with a prominent give button. As a part of our program we send short surveys to our first-time donors several months after their first gift. Through a series of tests, we found that these donors were most likely to respond to our surveys on Friday afternoon at 3pm. Our renewal donors seem most likely to open emails and respond on weekday mornings, while our non-donors prefer Friday afternoons. After learning some of this information we began planning one of our biggest tests at the calendar year-end. We split our populations into donors and non-donors and further split these groups at random into A and B. We sent two emails in the month of December 2016. The first was sent on December 23 and the second December 28.
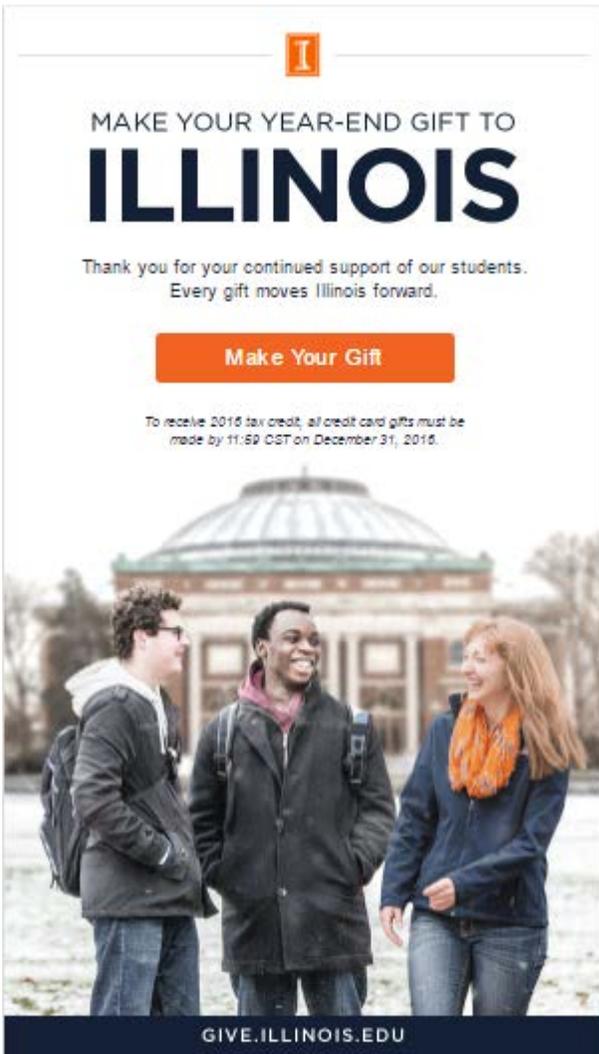
Fig 5.1 – Calendar year-end email featuring students.

Fig 5.2 – Calendar year-end email featuring Altgeld.

Fig 5.1 and Fig 5.2 – Each of these graphical emails were designed with animated falling snow over each of the images. Both emails were sent to renewal populations on December 23. The subject line for both emails was: Make your 2016 Gift to Illinois Today!

As can been seen from the illustrations above, the text for each of these emails, as well as the buttons, are the same. The subject line, timing, and population are also the same. In this instance, we sought to test the images. Kyle Rush in his work with the Obama campaign found

that photos are a simple and effective ways to create a lift in an email message. As we expected, the open rate was similar because the subject line was the same.

Population	Renewal and Lapsed Alumni and Friends
Test: Photograph	A. Students with snow B. Altgeld with snow
Response Rate:	A. .63% B. .74%
Average Gift:	A. $481.60 B. $610.56
Total Dollars Raised:	A. $25,525 B. $37,855
Open Rate:	A. 25% B. 24%

Table 5.1 – This chart shows the differences between the A and B population. The results are not statistically significant.

We noticed in this campaign that the higher average gift and the overall highest dollars raised were in the B campaign, which featured the image of Altgeld. In order to see if this result would hold true in the future, we performed the same test with the same group a second time on December 28.
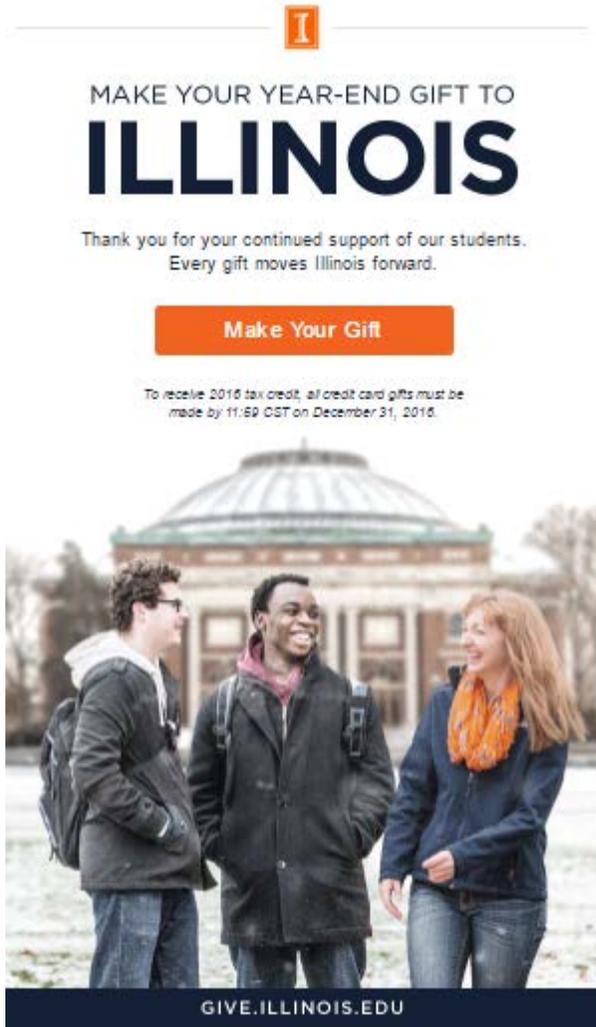
Fig 5.3 – Calendar year-end email featuring students round two.

Fig 5.4 – Calendar year-end email featuring Altgeld round two.

Fig 5.3 and Fig 5.4 – These emails were nearly identical to the emails sent on December 23. The only difference was the date and the subject line, which for both emails was: Only Three Days Left to Support Illinois in 2016!

In our second test, we changed the subject line but sought to replicate the results of our first test. It was our hypothesis in the second test to find that the image of Altgeld outperformed the image of students.

Population	Renewal and Lapsed Alumni and Friends
Test: Photograph	A. Students with snow B. Altgeld with snow
Response Rate:	A. .89% B. .60%
Average Gift:	A. $725.56 B. $598.88
Total Dollars Raised:	A. $52,250 B. $29,345
Open Rate:	A. 23% B. 20%

Table 5.2 This chart shows the results of the second test performed on December 28 with a similar email. While the emails were similar to those sent on December 23, the results were the opposite of the first test.

Much to our surprise, the opposite occurred. This time the photograph of the students far outperformed the photograph of Altgeld. This test alone taught us the importance of continuing to test our hypothesis to seek reliable results.

With our non-donor population, we tested subject lines and messages, but not photographs. We chose the Altgeld image for all four emails. On December 23, we tested the subject lines: A. Remember how cold it gets in Illinois? And B. Education is a gift. Support Illinois today!
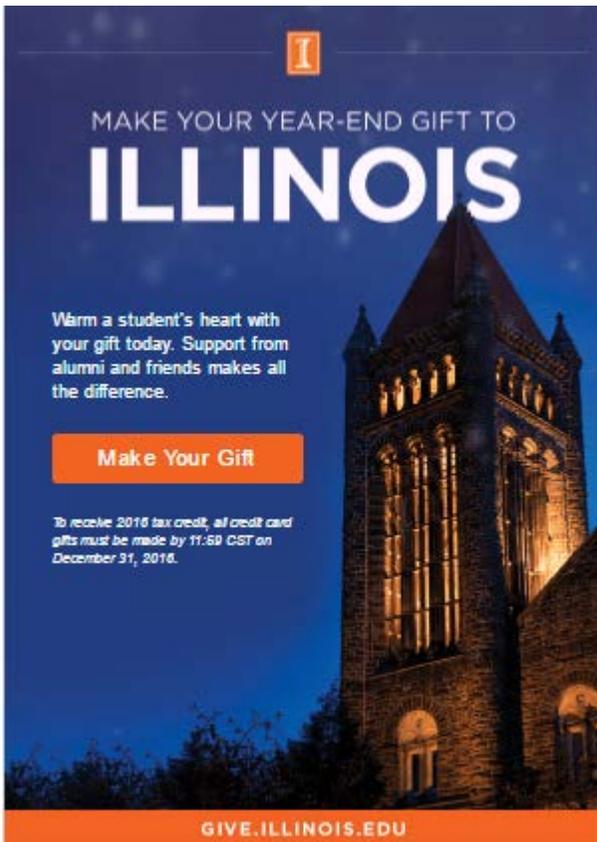
*Fig 5.5 – Calendar year-end email subject line test version one.*
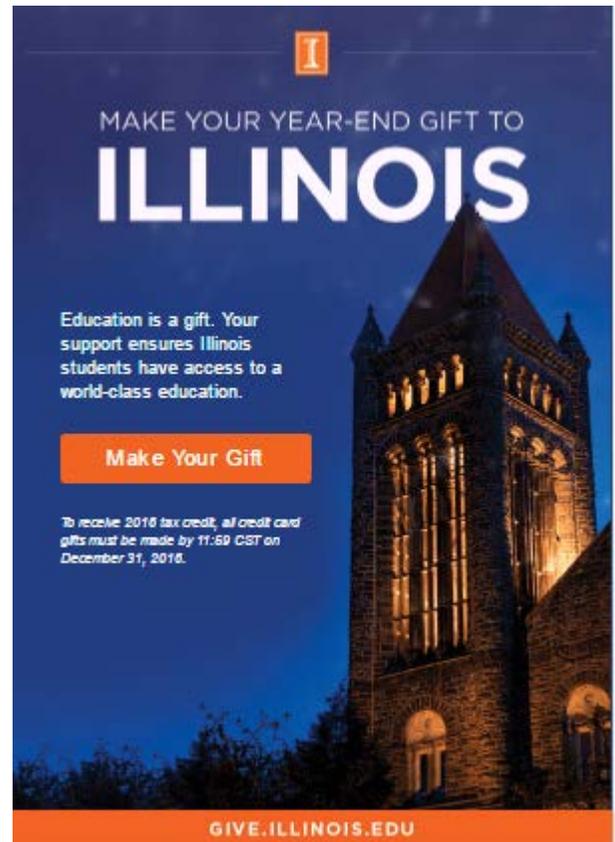
Fig 5.6 – Calendar year-end email subject line test version two.

Fig 5.5 and Fig 5.6 – While the images in these two emails are the same, the subject lines and text are different. The subject line for 5.5 was: Remember how cold it gets in Illinois?? And 5.7 was: Education is a gift. Support Illinois today!

As we were building this test, we were less clear on our hypothesis. This was an instance in which we were trying different ideas to see what we should be testing. At this point we had identified nostalgia as a motivating factor. We had also historically believed that when a donor supports the University, they do it to impact the life of a student. Of all the email tests we performed, this one taught us the most and was the most statistically significant. The open rate and the total dollars received for this pair of emails was higher than any set of acquisition emails we have sent out, before or since.

Population	Non-donors
Test: Subject Line and Email Text	A. Remember how cold it gets in Illinois?? B. Education is a gift. Support Illinois today!
Response Rate:	A. .03% B. .04%
Average Gift:	A. $242.80 B. $182.19
Total Dollars Raised:	A. $6,070 B. $5,830
Open Rate:	A. 20% B. 17%

Table 5.3 – The chart above represents the results from the most successful acquisition email the University of Illinois has performed, to date.

The increase in open rate was significant. Prior open rates to similar populations typically hovered between 12-14%. Having such a significant increase in the open rate made us pause to examine the subject line. It was also worth noting that the segment with the increased open rate also ultimately made larger gifts. With our next email, we wanted to follow the pattern we were using with donors to test the urgency of the subject line.
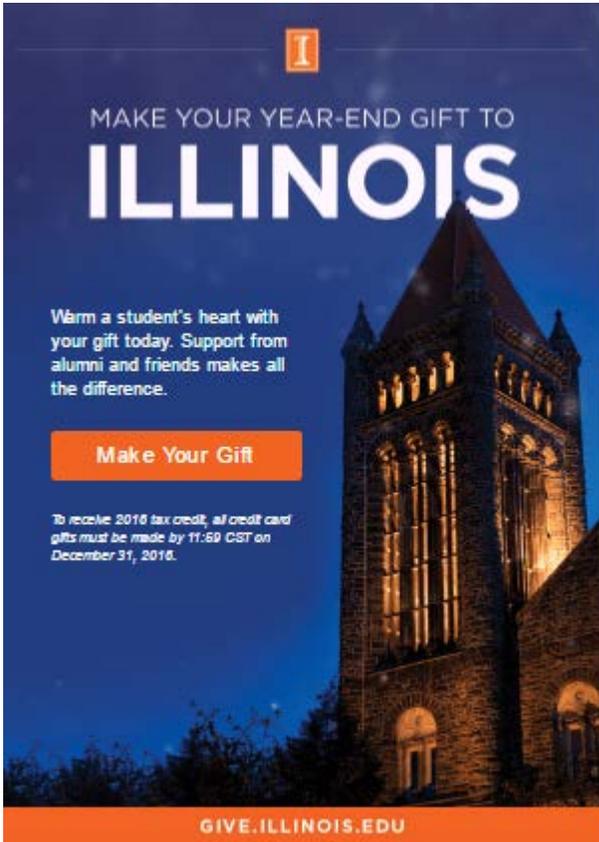
*Fig 5.7 – Calendar year-end email interior copy test version one.*
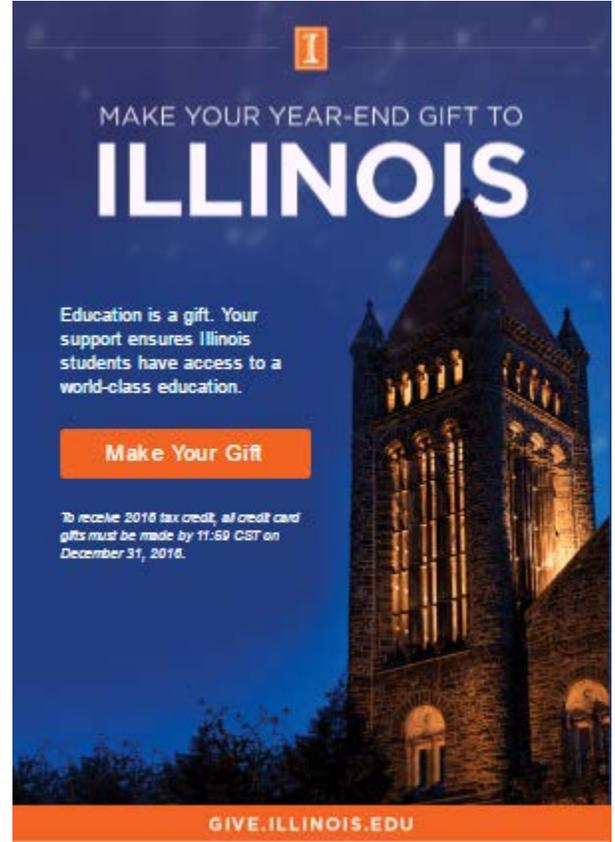
Fig 5.8 – Calendar year-end email interior copy test version two.

Fig 5.7 and Fig 5.8 – The emails above share the same image, subject line, launch time/date, and population. The only difference in these two emails are the interior text. The subject line for both emails is: Only three days left to support Illinois in 2016!

Since the subject lines for both emails were the same, we anticipated a similar open rate. As we expected, there was no statistically significant difference between the open rates. We were also unsurprised to find that the open rates overall were significantly lower than the open rates for the first round of emails. We did not except the urgency of the calendar year-end to resonate with our non-donors.

Population	Non-donors
Test: Message	A. Warm a student's heart with a gift today. B. Education is a gift.
Response Rate:	A. .04% B. .02%
Average Gift:	A. $155.47 B. $391.07
Total Dollars Raised:	A. $4,975 B. $5,475
Open Rate:	A. 16% B. 14%

Table 5.4 – The chart above represents the results of the second non-donor email test launch on December 28. It is worth noting that the email open rate was significantly lower than in the campaign launch on December 23.

From this series of email tests, we learned several things we could take into our next series of email tests.

- Our donors respond to the urgency implied in calendar year-end. Their open rate and giving rate increased when we reminded them they only had three days left.
- The urgency of calendar year-end had the opposite effect on our non-donors. Contrary to popular thinking, they were less likely to open when we implied urgency.
- For our non-donors, the best open rate segment was also the highest revenue generating segment.
- For our non-donors, subject lines did influence open rate.
- Perform multiple tests of the same hypothesis to confirm results.

Our best performing subject line was a question. This question increased the open rate of our non-donors far beyond anything we had ever experienced. This result made us wonder if we could influence subject line open rates by testing questions versus declarative statements. We began planning our next test. The next email series was scheduled to launch the Friday

before spring break. For this test, we used the same image and button but the subject line and interior text varied.

Fig 5.9 – Spring break email subject line test version one.
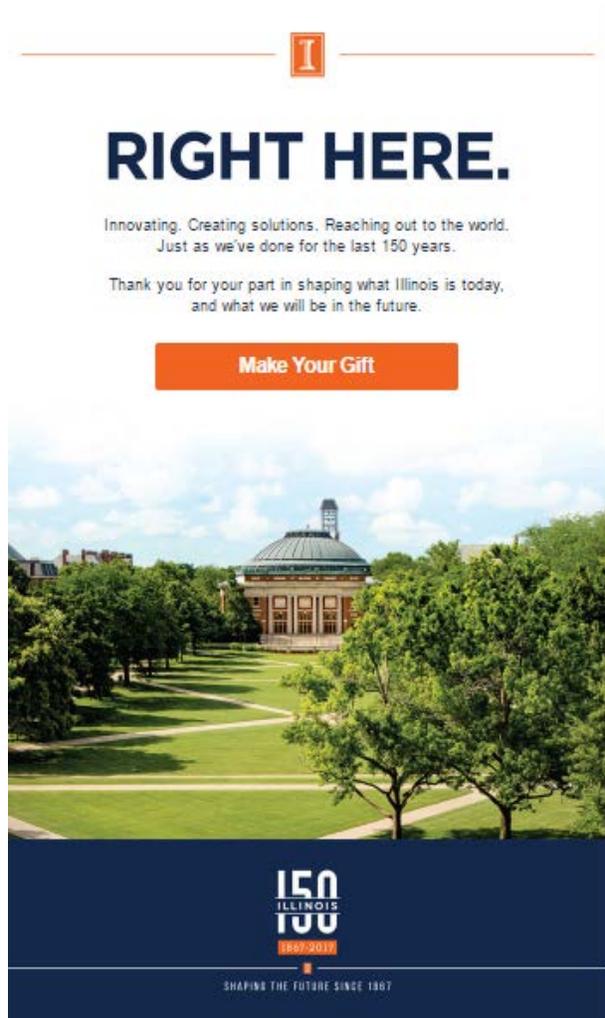
Fig 5.10 – Calendar year-end email interior copy test version two.

Fig 5.9 and Fig 5.10 – The two emails above were used in an A/B test with donors and nondonors. The subject line for email A was: You Can't Predict the Future, with the interior reading, But you can help shape it. The subject line for email B was: Where will we be in 100 years, with the interior reading: Right here.

Based on our prior results at calendar year-end, the consensus around the water cooler was that email B, with the question in the subject line would win. We didn't, however, anticipate an emerging trend. Whatever our donors seemed to prefer, our non-donors preferred the opposite. As we expected, our non-donors far preferred the question, albeit they still did not

open the email at the same rate as the question email in December. Our donors, on the other hand, preferred the statement.

Subject Line:	Where will we be in 150 years?	You can't predict the future.
Donor open rate:	21%	23%
Non-donor open rate:	18%	11%

Table 5.5 – For the second time in a row, our donors and our non-donors have different preferences.

One of the other patterns that we started noticing with this effort is the diminished effectiveness of repeating a tactic with our non-donors. While a question had been a successful way to increase our open rate in December, the same strategy was slightly less effective in the spring email.

Later in April we sent a non-solicitation, thank-you email to both our donors and non-donors. We again tested the subject lines, this time using hashtags and emojis. We again found that our donors and non-donors preferred opposite emails, with our donors opening the hashtag subject line more often, and our non-donors opening the emoji subject line more often.

These tests help us conclude that novelty is important to our non-donors, but once a technique is introduced, it immediately begins to lose effectiveness. We continue to do market research and notice our own in-boxes, but novelty is difficult to maintain. Our donors respond to the creation of urgency more than our non-donors and appreciate traditional approaches. A segmented strategy between donors and non-donors will remain a key element of our strategy. Since we know that thirty percent of gifts tend to be made at the calendar year-end, we will focus our novel efforts towards our non-donors in this window, which we think will be the most important time to capitalize on their interest.

Chapter Six: Conclusions

On the Friday before Spring Break a group of my colleagues and I crowded into our tiny office kitchen (just a counter at the end of a hallway with a small microwave and fridge), to participate in our office's latest A/B test – Thin Mint Girl Scout Cookies. Not many people realize that there are two bakeries in the United States that make Girl Scout Cookies. While both cookies are clearly recognizable as Thin Mints, the ingredients, nutritional facts, texture, and taste are all different. We already had our local office cookie dealer, but the second box was procured from a few states away. As each individual tasted a cookie, reacted to the differences, and made their votes, another individual made tally marks. The entire group waited to see what the outcome of this latest test would be.

Fig 6.1 – Girl Scout cookies.

I took a step back and watched.

This moment felt like the culmination of everything I have wanted to achieve with the annual giving program. Only three years before, when I was wondering what it meant when donors gave more when reading less text, the program had never done an A/B test. This testing as well as considering the user's experience was now so ingrained in our culture the question became not will we test, but what will we test next? While this example of Girl Scout Cookies might seem trite, it meant we had metabolized this as a part of our culture. Asking questions we didn't know the answers to was a good thing. We finally had the right frame for the program. While my team's business cards may say "Annual Giving", among our larger working group this team is now known as the UX experts – the ones always pushing, testing, and strategically thinking about the way donors interact with us at every level.

UX is a culture, not a design decision.

As a part of this cultural shift, we might now casually discuss the UX of certain event decisions or the UX of a magazine. We have internalized UX as one frame for making strategic decisions, and A/B testing is one of the many ways we have learned to gather information. As Priestley noted, "Any conceivable touchpoint you might have with a product or service makes up

your whole experience: the packaging, the process of purchasing, how a helpdesk operator speaks to you. All these touchpoints need the same level of design consideration." (2015)

In these pages, I am reporting about a process and the results of applying UX in a specific context. But what I am writing about, what I am saying here – is that UX is one lens through which we can view our work in philanthropy. I don't believe any of the A/B testing, or ethnographic research, or user persona work led to practices I would recommend another institution blindly implement. I do think that this lens provides important questions that each institution can practically apply to their situation.

Understand the limits of UX.

It is also important for practitioners and researchers alike to understand where their work can positively impact the overall organization. Priestly gives us a clue as to where we can make that impact. "We cannot design our users, and we have little or no control over the context in which users interact with a particular system. What we do have control over as designers is the system, or platform, or service – so as UX practitioner I help to design systems by working between those aspects of a user's experience that we can control and those we can't." (2015)

Even in this context of design, our work still has limits. For us, when it came to influencing the marketing aspects of higher education philanthropy, our reach was limited to that of advisors and consultants. Based on our findings, we were able to provide insights to University marketing teams. We believe that when marketing and solicitations are aligned we will see a positive lift in the dollars raised. However, marketing implementation is outside the scope of our work and is an important variable, but one, in this scenario, we don't control.

I've also learned through these experiments that philosophy is far removed from both the process of practical application and evaluating or reporting the results of that application. More than once we found we couldn't clearly demonstrate our findings because of new procedures in the way money was processed once it entered the institution. This unintentional obfuscation, while frustrating, gave us a clearer picture on the workings of the entire organization.

Focusing on the best implementation of a tool is not a strategy. Ultimately, it is a dead end.

Hearkening back to the literature, many of those writing about non-profit philanthropy see their one test as a standalone success or failure. In reality, this isn't the case. To truly effect positive results in an organization, the goal should not be to perform a single A/B test which will inform every solicitation that follows. Instead, the goal should be to introduce a culture of testing. And as Kyle Rush notes, the approach to testing is also important. "It's really easy to fall in this trap when you realize how much you can test. You just start to test everything. You don't want to make any decisions. You just want to test. It's like 'Oh, what color should the submit button be?' 'I don't know, test it.' Don't do that. That's not a good idea. Create high level hypotheses. Create many experiments to test your hypotheses." (McGillivary, 2013)

It would be easy to fall into the trap of seeing UX tactics as an overarching strategy. Don't allow these efforts to be seen as the shiny new thing that will attract new younger donors. Even when these tools are implemented flawlessly, if they aren't pieces of a strategy, they will fail on their own. UX is not a strategy. But it can be one lens of thinking for a robust, well-developed mass-solicitation strategy.

Getting to one-click giving

In the future, it is important to continue to test the relationship between marketing and solicitation. While out of the scope of this work, I hypothesize that one of the easiest ways to increase the open and keep rate of our mail and email pieces, is to build the desire to give prior to the solicitation. We found in many of our mailings that the response rate, which is related to the open and keep rate, did not waver from segment to segment. While we found that we were able to influence the open rate with email by varying subject lines, perhaps prior marketing would increase these rates even higher.

While as a part of this study we redesigned the user interface for the front portion of our website, we did not have control over the click through payment processing page. In fact, during the course of this study, the payment processing page became even more cumbersome. Again, these processing pages were out of the scope of our influence. While we are told that much information is needed in order to securely process a credit card transaction, form design and form testing is another area ripe for exploration. The team from the Obama campaign found that a series of shorter forms with a progress bar had a higher lift than a longer form. Is it

possible to remove some of our currently required fields? Does filling out more personal information make us better prospects? Or is filling out more personal information enough of a hurtle that donors who complete these steps are self-selecting or filtering to indicate they are a better prospect?

Advice to Researchers

Much of the literature written in the field of philanthropy is often done through the lens of theory and philosophy and without much practical understanding of the applications in the field. My recommendation to future researchers interested in this topic is to take time to understand the field: the cyclical nature of the work in the field, the best practices, and the baselines, otherwise it is difficult to understand your contribution. Solicitation cycles are just that, cycles. Each individual effort – whether it be mail, email or a phone call – is necessarily influenced by the rest of the cycle. A test performed at one time of the year might seem a resounding success while when performed at another time of year might seem like a failure. It is important to compare year over year results and A/B tests performed at the same time, rather than thinking one effort is a resounding success or failure and should dictate the scope of the entire strategy.

Universities rightly take seriously the role of protecting their alumni data. It is much easier to test theories as an imbedded member of an advancement team at a university than to request alumni data for the purpose of testing solicitation methods. While testing practices at a large university will give you larger sample sizes, it is often more bureaucratically difficult to implement tests. Smaller organizations are often more nimble and more open to outside expertise.

The future of philanthropy is user friendly.

It is my hypothesis that in order to continue to thrive, philanthropic organizations, whether in higher education or not, must pursue making the giving experience as similar as possible to other consumer experiences. That means making our processes easier and more seamless for our donors. The theme present across each of our tests was that when we make it easier to give – people give more. Right now, many organizations are allowing their back-end

processes, the way remit forms are processed, the way the online payment processor collects information, to inform the design of the systems their donors use. In the consumer world we live in, we can change our credit card information within five minutes and we can make purchases with the click of a button. It should always be as easy to give to our favorite charities as it is to make a purchase on Amazon. The industry at times laments the growing age of the philanthropic population. Would we increase our popularity among new, younger donors if our methods were more in keeping with those donors' other experiences?

How long will our donors make exceptions for our cumbersome processes?

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Appendix A: Donor Personas

Tom and Barbara

Fig A.1 - Tom

Persona:

Tom and Barbara are in their late fifties. They live in Eden Prairie, MN, near Minneapolis where Tom works for Syngenta in Product Marketing of Soybean Genetics. Tom graduated from the College of ACES in 1980. While at Illinois, Tom belonged to Nabor House, a small agricultural fraternity. He was also a member of the Ag Council as well as the ACES Illini Dairy Club.

Tom is the son of John, an alum of the College of ACES class of 1951 who graduated with a degree in Agriculture Dairy Science. Tom's mother began a fund to honor his father which supports a Dairy Science student with a $500 annual scholarship. Tom, his mother, and his siblings return to the campus often to learn about the new recipients of the scholarship honoring his father. Tom and Barbara make annual gifts in support of this fund. They always make their contributions via credit card in the month of December.

Tom's Goal:

Tom is proud of his families' legacy at Illinois. He enjoys meeting new scholarship recipients and he enjoys bonding with his siblings over this common philanthropic pursuit. He is also proud of the College of ACES at Illinois and brags to his coworkers about his connections to the University and the continuing work the University does in the field of agriculture. Tom wants to continue his family's legacy at Illinois and he wants to be recognized in a meaningful way for these contributions.

Tom's Task:

It is December 31 at 9 am. Tom goes online to make a gift to the University of Illinois which he designates as follows:

- John H. (Jack) Scholarship Endowment Fund $1,000

Tom enters the following contact information:

Thomas and Barbara
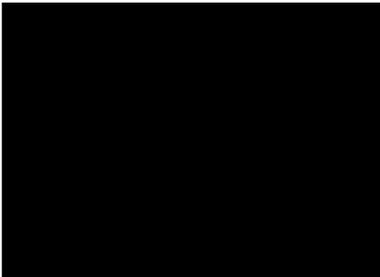
Business:
Syngenta
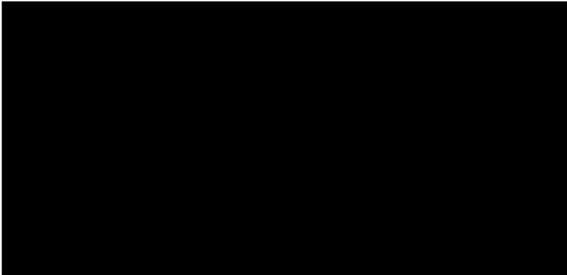
Collin and Meagan

Fig A.2 - Collin

Collin and Meagan are new parents in their early thirties. They live in the greater Atlanta area where Collin works for United Distributors as a salesman. Neither members of the household have degrees to Illinois, nor have they ever made a gift to Illinois or attended an Illinois event.

Meagan was a close friend of Courtney Kellogg Wojcik and her family. The two friends shared the same dance instructor as young children, where their families met and began a tradition of shared backyard barbeques. At age 36, Courtney Kellogg Wojcik, ('00 Dance) lost her battle with cancer. A fund was established in her memory in the College of Fine and Applied Arts to benefit an outstanding undergraduate dance student.

Meagan's Goal:

At the funeral, Courtney's family asked that in lieu of flowers, all gifts be directed to a scholarship to honor her legacy. Meagan wants to remember her dear friend

Collin's Task:

It is July 12 at 9:30 am. Collin is at work. He goes online to the University of Illinois website make a gift to the University of Illinois and designates his gift to the following fund:

- Courtney B. Kellogg Memorial Scholarship for Undergraduates in Dance Fund $100

He enters the following contact information:
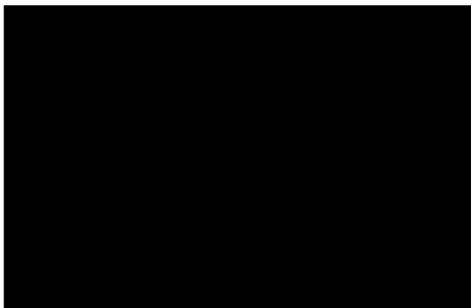
Stephen and Christine

Persona:

Fig A.3 - Christine

Stephen handles the technical aspects of philanthropic contributions in his household, but the couple gives to Illinois because Christine is an alumna. In their mid-forties, the couple lives in Atlanta, Georgia. They do not like receiving emails from the University. Christine works as an Associate Professor in the School of Mathematics at the Georgia Institute for Technology. Stephen works for Google and with the Association for Computing Machinery. The couple has never been seen by a prospect manager or received any type of personal attention.

Christine began her career at Illinois as a biology major but switched her major her sophomore year to studying math, though she never lost her love for biology. She went on to gain a Ph.D. in mathematics from Berkeley before completing a post doc at Wisconsin in computational biology, and another in bioinformatics at the University of British Columbia. At Illinois, Christine was involved in a broad range of activities, including the Campus Honors Program and Japan House. She enjoys supporting her various interests and is also a member of the Alumni Association. The couple has given about $3,600 to Christine's interests across the University over the last several years (since 2011). They always make their gifts online using a credit card.

Christine's Goal:

Christine is proud to be an alum of the University of Illinois. She regards her "time in the corn fields" as some of the most formative moments in her life. Illinois allowed her the freedom to study both biology and mathematics. She felt personally mentored by the Campus Honors Program and will never forget the tea ceremony she participated in at Japan House. She feels Illinois nurtured both her mind and her soul. She gives back to Illinois out of a sense of pride and responsibility.

Stephen's Task:

It is December 31 at 9 am. Stephen goes online to make a gift to the University of Illinois to the following designations:

- Campus Honors $200
- Japan House Annual Fund $100
- Department of Mathematics Elizabeth R. Bennett Scholarship $100
- Alumni Association $100

Stephen indicates Google will match his gift.

He enters the following contact information:

Stephen and Christine

Janet and Jerry

Fig A.4 – Janet and Jerry

Persona:

Janet and Jerry met at the University of Illinois. They graduated with their bachelor's degrees in 1977, he with a degree in Engineering and she with a degree in Business. While at Illinois, Janet participated in Greek life and is a sister of the Alpha Kappa Alpha sorority. Since graduation, Jerry has served as an Illini Union Board member. They live in La Grange. Janet works as an Assistant Vice President for Chicago based Duff and Phelps Corporation while Jerry works for Steris Corp. as a Director of Engineering and Facilities.

For the last several years, the couple has waited until virtually the last minute to renew their support, preferring to make their gifts on December 31. They've given about $14,000 over the last sixteen years. While they give to both the College of Business and the College of Engineering, their giving favors the college of the individual making the transaction, which is usually Janet.

Janet and Jerry's Goals:

Janet and Jerry love the University. They are both proud of their degrees. They are both work-a-holics and credit Illinois with helping them land jobs they love. They intend to continue their philanthropic legacy at Illinois. In the last several year's Jerry has had a kidney transplant. During his recovery, they were approached by a major gift officer at the University but they declined to move forward with a major gift at the time. Janet and Jerry intend to give significantly to the University of Illinois, but at this moment they are content to give at a leadership level.

Janet's Task:

It is December 31 at 11 pm. Janet Dzwierynski goes online to make a gift to the University of Illinois to the following designations:

- College of Business Scholarship Fund $500
- Engineering at Illinois Fund $500

She enters the following contact information:

Janet and Jerry

Raymond and Faye

Fig A.5 – Ray
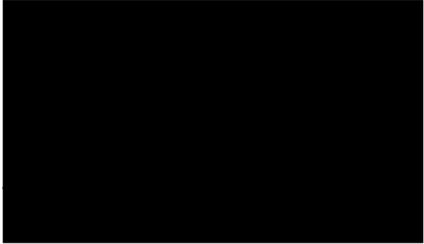
Persona:

In their early sixties, the Ray and Faye live in New Canaan Connecticut where Ray works as the Executive Vice President, Chief Administrative Officer, General Counsel and Secretary of Odyssey Logistics and Technology Corporation.

Ray simultaneously earned a JD and an MBA from Illinois, graduating in the late '70s. The couple has proven to be loyal donors and have given to Illinois nearly $80,000 over the last 30 years. They are life members of the Alumni Association. In 2001, they made their first gift of $1,000 and began to attract the attention of major gift officers. Since that time, they have always made their gifts in the last week of the calendar year with a credit card online. They give loyally to both the Law School Annual Fund and the College of Business Annual Fund.

Ray's Goal:

Ray loves the University of Illinois. He is the first to cheer ILL when he meets his buddies for game watch parties. His degrees hang proudly in his office. He credits the University with his career success and connections. Because of his income bracket, it makes sense for him to give substantially before the close of the tax year – but he can think of no place better than the University of Illinois.

Ray's Task:

On December 30, Development Officer Chris called Ray to finalize plans for the Maier's first major gift. While they had been in conversation for at least one year prior to this commitment, this phone call solidified the Maier's $100,000 pledge and the College of Law followed up with an email pledge agreement the same day.

It is December 31 at 9 am. Ray goes online to make a gift to the University of Illinois to the following designations:

- College of Business Annual Fund $500
- College of Law Annual Fund $25,000

He entered the following contact information:

Raymond
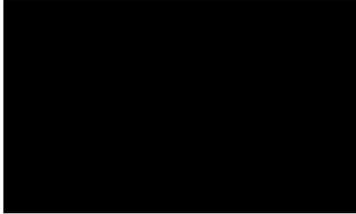
Appendix B: Website Screenshots

This appendix briefly outlines the process of making a gift on the website giving.illinois.edu as of the spring of 2017. This website url is published on all annual giving materials and is the site from which most donors begin the online giving process.

Fig B.1 – Selection page. The initial selection page allows donors to select a fund(s) and amount(s) before moving on to information collection and payment processing. This page was within the scope of our ability to implement changes and saw a drastic redesign.

Gift Details

Please complete the form below and click Process Gift to complete the transaction.

Fund Name	Amount	
Illinois Promise	$ 10.00	Click to remove this fund
	$ 0	

Total: $10.00

Your gift will be processed by:

The University of Illinois Foundation • Harker Hall • 1305 West Green Street, Urbana, IL 61801

(217) 244-2708 • CashDesk@uif.uillinois.edu • UIF Privacy Pledge

Donor Information

Corporate Gift: ☐ *Check here if gift is from a company*

*First Name:

*State: ▼

*Last Name:

*Zip:

*Address:

*Phone:

*Email: (lowercase only)

*City:

Country: United States ▼

Business Information

☐ *Check here if you would like to share your business information*

Payment Information

○ I want to give a single $10.00 gift

○ I want to divide this $10.00 gift among two or more payments

○ I want to give a $10.00 gift on a recurring basis

*Billing Address
☐ Check here if same as above

Tribute Information

☐ *This gift is a tribute*

Additional Gift Information

Spouse/Life Partner Information
This person is my ○ Spouse ○ Life Partner
Name:

Matching Gift Information
My company will match my gift: ☐

Additional Instructions
Is this gift on behalf of someone else, paying toward a commitment, or do you have other instructions for processing your gift?
○ Yes ○ No

250 character limit

Why I gave today?
Would you like to share with us why you chose to give today? ○ Yes ○ No

250 character limit

Additional Information

☐ Please send information on giving through planned giving methods such as bequests, charitable trusts, charitable gift annuities, and life estates.

Your credit card will be charged by Blackbaud Payment Services on behalf of the University of Illinois Foundation.

PROCESS GIFT

Fig B.2 – Information collection page. This page and all subsequent pages are managed by the University of Illinois Foundation and is designed in keeping with the requirements of their payment processing

University of Illinois Foundation

Amount: **$10.00** total

Email:
Phone:
Country:
Address:

City:
State & ZIP:

Name on card:
Card number:

VISA AMERICAN EXPRESS DISCOVER MasterCard

Expiration: month ▼ year ▼ CSC:

Cancel **Complete payment**

Your gift will be processed by:
The University of Illinois Foundation • Harker Hall • 1305 West Green Street Urbana, IL 61801
(217) 244-2706 • CashDesk@uif.uillinois.edu • UIF Privacy Pledge

Fig B.3 – Payment processing page. This page represents the third distinct visual design/branding donors see as they make their way through the payment process. Address data from the prior page is prefilled on this page so donors do not have to retype this information.

Additional Information

Thank you for your gift. Your credit card will be charged by Blackbaud Payment Services on behalf of the University of Illinois Foundation. Your gift will be processed and a receipt will be mailed to you at the address listed below.

Name:
Address:
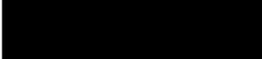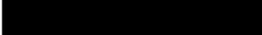
Phone:
Email:
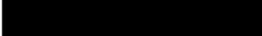
All additional information which you provided, including write-in designations, has been saved and will be used to update your record and process your gift accurately and completely.

Gift Details

Fund Name	Amount
Illinois Promise Fund	$10.00

Your gift will be processed by:
The University of Illinois Foundation • Harker Hall • 1305 West Green Street Urbana, IL 61801
217.244.2706 • CashDesk@uif.uillinois.edu

Information about the President's Council and Chancellor's Circle, the University's donor recognition programs, is available online.

Fig B.4 – Final page. After a donor makes a gift they receive this digital acknowledgment of their gift. This page does not constitute a receipt, which is then both mailed and emailed to the donor.

University of Illinois Foundation
Online Giving

Thank you for your gift.

Your credit card will be charged by Blackbaud Payment Services on behalf of the University of Illinois Foundation. Your gift will be processed by the University of Illinois Foundation and a receipt will be mailed to you at the address listed below. Please keep this email as a confirmation of your gift until your receipt is received in the mail.

Your employer may have a matching gift program that could multiply the value of your gift. For more information, consult your human resources or benefits office.

All additional information which you provided, including write-in designations, has been saved and will be used to update your record and process your gift accurately and completely.

If you have any questions, please contact Cash Desk at CashDesk@uif.uillinois.edu or (217) 244-2706.

Address

Name:
Address:

Phone:
Email:

Gift Details

Fund Name	Gift Amount
Illinois Promise Fund	$10.00

Information about the President's Council and Chancellor's Circle, the University's donor recognition programs, is available underline.

Fig B.5 – Digital Receipt. This digital receipt is emailed to donors as soon as their gift has been processed.