

The University at Buffalo Escalates Philanthropic Support and Alumni Engagement With EverTrue



WHO

The University at Buffalo (UB) is a public research institution in the State University of New York (SUNY) system. The UB advancement office manages over 370,000 records in their database, Elucian Advance.

CHALLENGE

Across the advancement office, UB sought a more efficient way to capitalize on information from their database—and from external sources—to improve alumni management, prospect identification, and fundraising results. In addition, while UB has done a great job of building an alumni community on social media, the team had no way to understand and measure those efforts through a fundraising and development lens.

WHY EVERTRUE

To UB, the EverTrue Platform was unique because it provided tailored, easy-to-use solutions for every part of their office—from alumni relations, to prospect research, to development.

EverTrue was also the only platform that would help them segment and harness their in-house data with social media engagement data, LinkedIn data, and other external sources to better engage alumni, identify high-capacity prospects, and increase frontline efficiency on the road.

RESULTS

- A million-dollar bequest from a previously unknown prospect who was identified in EverTrue
- 28 new prospects identified per month
- 140,000+ tracked Facebook engagements

Amplifying Alumni Engagement Efforts

As the director of digital communications in UB's Office of Donor and Alumni Communications, Joseph DiDomizio plans and executes marketing campaigns to engage alumni and donors. Before having access to EverTrue, however, Joseph found it challenging to target his marketing outreach and to demonstrate the ROI of his social media efforts across the organization.

Now, with EverTrue, Joseph can surface all of the work he's done on social media as well as tie it to fundraising dollars. In total, EverTrue has tracked **140,000+ engagements** across **10,000+ posts** on UB's various Facebook pages—giving Joseph and his colleagues a valuable combination of affinity and capacity indicators in one platform.



This image displays mock data

Joseph also emphasized how easy it is to pull an alumni list in EverTrue. Whether his team is sending out a mailing or planning an event, he can search for alumni by affinity, social engagement, location, and more to create targeted outreach lists. This was especially helpful, he said, when they were planning a recent Houston event.

"We ran EverTrue searches to find engaged and unengaged alumni in Houston. The outreach after targeting these folks was successful," Joseph said. **"We beat our goal for unengaged attendees to the event,** which grew in attendance for the first time in the event's history."

EverTrue helps us show the results of our social media efforts and makes the data easy to access and understand across all divisions. There isn't a marketing project that I don't use EverTrue to assist with.



Joseph DiDomizio
Director of Digital Communications, Office of Donor and Alumni Communications at University at Buffalo

Powering Prospect Research and Identification

Beyond the alumni relations realm, EverTrue has brought an extra level of intelligence and efficiency to the efforts of the prospect development team.

Kathleen Pagkos, associate director of prospect development and analytics, called EverTrue a "futuristic" way of searching for prospects compared to their database. Prospect identification has never been faster or easier.

"We each have a goal of five newly identified major gift prospects per month. Before EverTrue, it was always a scramble at the end of the month to meet that goal," she said. "Now we're able to set up segments in EverTrue and **let the prospects come to us.**"

Kathleen's Favorite Saved Segment:

- Unassigned
- Engaged on Facebook
- Lives in a wealthy neighborhood
- Last gift in the last year

With the ability to filter constituents by capacity and Facebook engagement, Kathleen and her team have been able to find great prospects who are raising their hands—but for whatever reason had not been on their radar in the past. They've also been using EverTrue's LinkedIn filters to generate lists of prospects who work at matching gift companies.

Thinking outside of the box has paid off. Kathleen has already seen an uptick in prospect identification (she recently **identified over 2x her monthly goal**), helping researchers provide a better, more strategic service to gift officers.

Prospect identification has become much more efficient thanks to EverTrue. We can sit back and let all of these great prospects get emailed to us on a weekly basis.

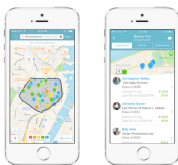


Kathleen Pagkos
Associate Director of Prospect Development and Analytics, University at Buffalo

Helping Gift Officers Plan Trips and Raise More

Even UB's frontline gift officers have found value in EverTrue for discovering new prospects and building a portfolio. Gift Officer Richard Ridenour—who is responsible for uncovering and engaging major donors in Boston, Chicago, and New Jersey—told us that he uses the EverTrue mobile app to search for visits in his assigned territories.

"I've found EverTrue to be **more accessible** and **easier to navigate** than our database," Richard said. "For a recent trip to New Jersey, I used EverTrue to create a list of unassigned donors to reach out to. That way I didn't have to ask our research group for a new or refreshed list."



These images display mock data

In addition to saving him time when prospecting, EverTrue helps Richard prioritize his trip outreach. If he has a list of 100 prospects and four are engaged with UB on Facebook, he'll reach out to those four people first. He knows that they've been thinking about UB and may be more receptive to hearing from their alma mater.

The results of this strategy have been impressive. After finding a prospect who was engaged on Facebook but not on their original list, Richard reached out and learned that the prospect was in the middle of redoing his estate. Richard went out to meet with him, which led the prospect to make a million-dollar bequest for a named professorship.

Hear the story from Richard himself:



Using EverTrue's Facebook data, I was able to find a prospect who did not originally show up on our list. I met with him, and months later I've closed a million-dollar bequest.



Richard Ridenour
Gift Officer, University at Buffalo

As UB works to bring alumni closer to the university and to increase philanthropic support, every division of the advancement office is excited about making the most of EverTrue to achieve their goals. EverTrue has already helped them collaborate across departmental lines and start new conversations with alumni—and they look forward to continuing to uncover new ways of using the platform in the coming year.