



San Francisco State University

We Make Great Things Happen

Appeal Code Requests: Easily Track & Improve Your Fundraising ROI

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Annual Giving

The Agenda

- Introduction
- Appeal Codes
- Annual Giving
- How does an Appeal Code Increase ROI?
- How to Request an Appeal Code
- Contact Us



Introduction

University Advancement is responsible for creating awareness and generating support for SF State's academic, research and public service missions. Our strategic goals are to instill well-deserved pride in University accomplishments, strengthen awareness and support among the University's key stakeholders, and build a culture of philanthropy and support for SF State. We accomplish this through strategic efforts that incorporate communications, government and community relations, development, alumni relations, athletics and advancement services.

Appeal Codes

What are they and why are they important?

An appeal code is used to track solicitations or “appeals” for fundraising. They are made up of alpha-numeric characters. These codes are specific to the solicitation or fundraising event or purpose that it was created for. **An appeal code is required for every broad-based solicitation.**

Appeal code **type** descriptions are as follows:

- Event
- General Letter
- Email
- Newsletter/Magazine/Report to Contributors
- Personalized letter
- Telephone

Appeal Codes

continued

Appeal codes are generally grouped to track what type of appeal they are part of. They will be entered into the University's Advance donor/alumni database. When a donor makes a gift associated with this appeal code, it will be associated with donor's entity record and trackable through reporting.

Generally the codes generally fall into these **categories**:

Annual Fund Letter

Alumni Relations

Annual Fund Telemarketing

Campaign Appeal

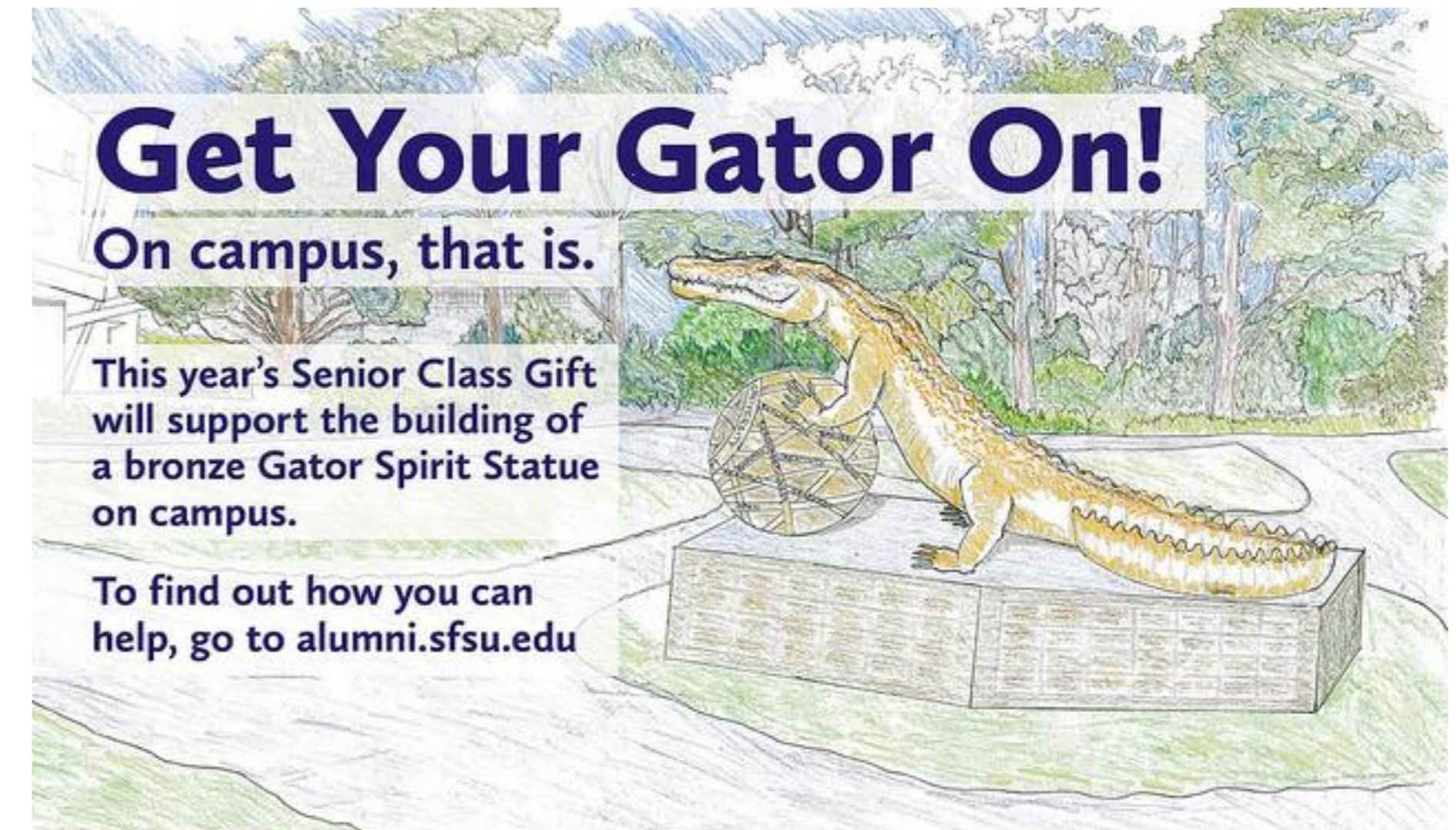
President's Circle Appeal

Faculty/Staff Appeal

Newsletter/Magazine/Report to Contributors

Special Project Appeal/Other

Stewardship



Appeal Codes

Don't duplicate efforts!

Another important aspect of Appeal code generation is to alert Alumni Relations and Gift Processing that your solicitation is scheduled and when it will be released. **This helps avoid overlap in outreach to alumni and prospective donors.** Too many email or solicitations at the same time contributes to donor fatigue.

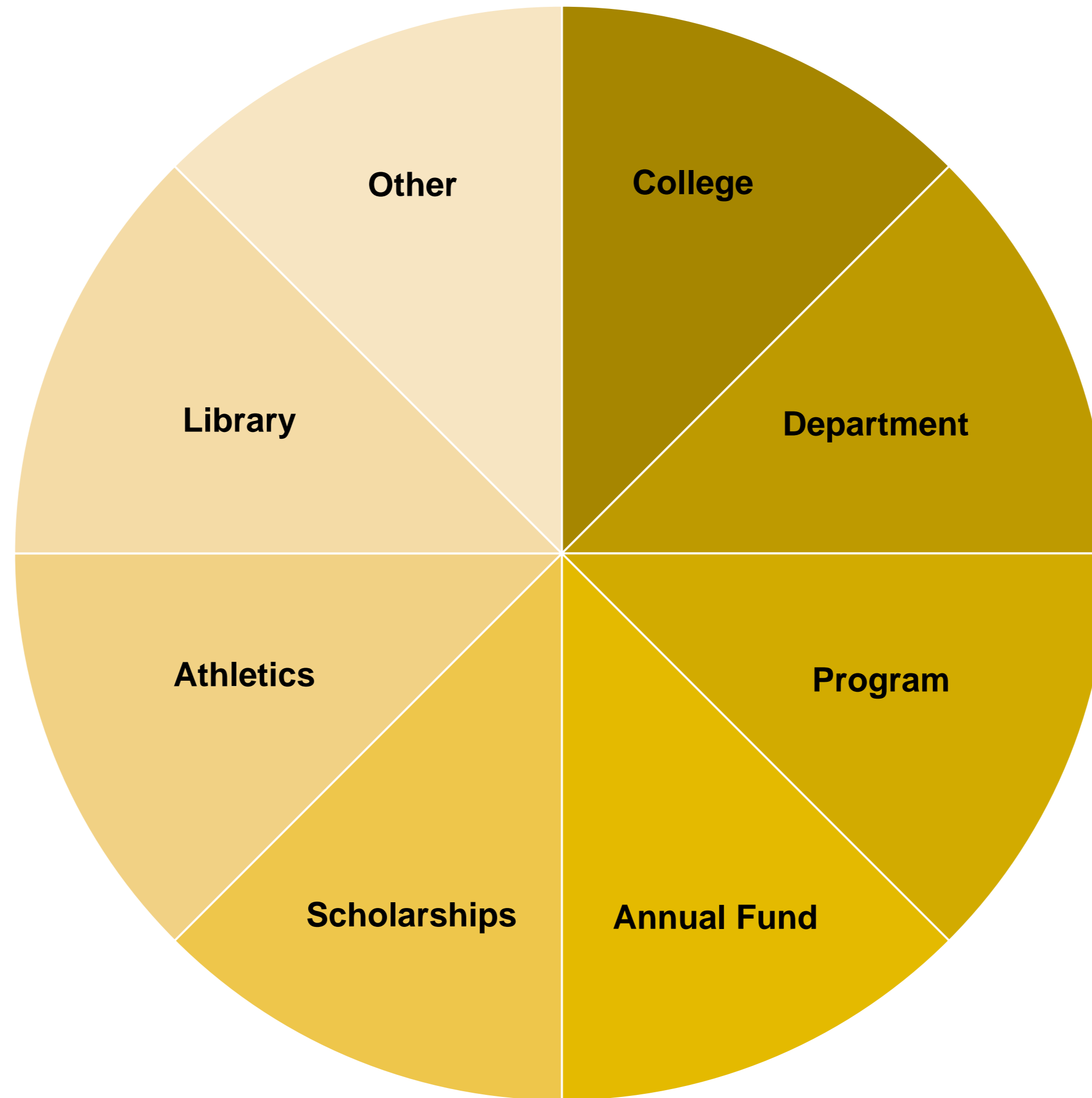
Donor fatigue results in people opting-out of email, deleting correspondence, complaints of unprofessionalism and lack of internal organizational communication.

Benefits of timing can lead to increased awareness of special projects and fundraising that might otherwise be overlooked. Gift processing will also be aware that donations should be coming in and we'll be able to ensure they are booked and tracked properly in our database. This will assist in generating effective reports if needed.

People will also sometimes question if it is a legitimate SF State solicitation or a scam. Don't end up in the recycling bin!

Giving Tuesday 2015: Two electronic appeals went out on the same day to overlapping donors who received both emails. By creating an appeal code, we can suppress donors so they only receive solicitations based on their preferences.

Annual Giving by Category



Annual Giving

How do appeal codes relate to Annual Giving?

Annual Giving is the yearly act of providing either a restricted or unrestricted gift to the University, usually in response to an organized appeal. Some examples of Annual Giving are Senior Class Gift, Annual Fund Mailing Campaign, Student Call Center program, electronic email appeals, Founder's Day Challenge, Giving Tuesday and Graduate Scholarship Appeal.

Annual Fund is an annually occurring fundraising program that seeks unrestricted gifts for current-year operations.

Annual Gift totals are tracked so it is important to capture the source of as many of our donations as possible. SF State's numbers are tracked and provided to CSU Chancellor's Office as part of an annual report for all 23 campuses.

San Francisco State University defines Annual Giving gifts which may be counted toward annual gift totals as:

- Any gift that is President Circle level and below (\$5,000 and below). The only exception would be if we receive a gift at \$5,000 and above that has an associated appeal code.

Sample Appeal Codes

Code format:

The code must be at least 5 alphanumeric characters in length (maximum 15). A date at the end of the code is strongly recommended for easy reference, i.e. XXX16 (suggest to use current fiscal year). Recommend to include an abbreviation for college or department as needed. Examples:

- **EFA16 – Email for Fall Appeal (Annual Fund)**
- **SCG16 – Senior Class Gift of 2016 (HOPE FUND)**
- **TVIOM16: Friends of TVI and O&M Year-End Appeal**
- **AMED16 – AMED Studies Year-End Appeal**
- **PHIL16 - Philosophy Department outreach to MA Alumni**

Appeal Codes and Return on Investment (ROI)

Most Universities do not have an unlimited marketing or fundraising budget. This results in the need to examine the effectiveness of each fundraising solicitation to see if that type of solicitation was successful or should be avoided in the future.

Appeal codes can help you track of results based on the following:


- Number of donations & average amount of donation (if solicitation was not a set amount)
- Who responded to solicitation – alumni, friends, faculty, staff, etc.
- What method of donation i.e. cash, check, credit card
- Was the content effective?
- Inbound marketing (email marketing or web based contact) vs. outbound marketing (direct mail or outbound calling/telephone)
- Timeline of donations – period of most activity to least activity
- Cost of solicitation vs. funds raised – did you cover your original investment?

Solicitation Samples

Email Ask (EFA16) - <http://p0.vresp.com/Z8FSZs>

When the donor clicks on the Make a Gift link, it will take them to this form which has the appeal code embedded in the URL for tracking purposes:

https://www.applyweb.com/public/contribute?s=sfudonat&SFUDONAT-PAYMENT_PLAN=YES&SFUDONAT-REPEAT_PAYMENT=NO_END&SFUDONAT-APPEAL=EFA16




HELP THE NEXT GENERATION OF GATORS REACH THEIR GOALS

Click here to make a gift today.

Dear SF State Alumni, Friends, and Family,

On Monday, August 24, 2015, SF State welcomed back to campus 30,000 students, including the Class of 2019. It was a special day as freshmen moved into the dorms, seniors prepared for their last year of academics and juniors and sophomores planned their academic journey.

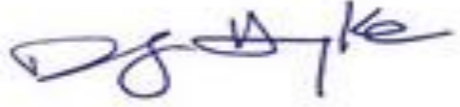


Just like you, they hope to pursue their personal and professional goals.

Please [make a gift](#) as SF State continues to develop our next generation of leaders and innovators.


Thank you.

Sincerely,




Doug Hupke, MA '92
Director, Alumni Association

P.S. Are you on a tight budget? Setting up a recurring gift allows you to make a significant contribution and impact through smaller monthly installments of \$10 or more. You can make this or any other kind of gift using our secure and simple [online giving form](#) today!



SAN FRANCISCO STATE UNIVERSITY



Solicitation Samples

Letter – AFF16 (Annual Fund Gift)

That's why I want to extend my gratitude for everything you've helped us achieve this past year. I also want to ask you to renew your critical support for the current year. Please send a gift today of \$63, \$75, \$100, or more to the 2015-2016 SF State Annual Fund.

When you renew without delay, you'll help make a real difference to so many. You see, almost a third of our freshmen are the first in their families to attend college – and nearly two-thirds of our students receive some form of financial aid. Including a number of scholarships awarded by the SF State Annual Fund.

Yes, I want to renew my Annual Fund gift for 2015-2016 so more hardworking SF State students can lead, create, and innovate!

Enclosed is my tax-deductible gift to help ease the path for those eager to follow in my footsteps: \$63 \$75 \$100 \$_____

Please use my Annual Fund gift where the need is greatest. Other: _____

My gift is in Honor / Memory (circle one) of a Classmate/Family Member/Professor/ (circle one), or Class Year _____

This is a joint gift with _____

Please charge my gift to Visa MasterCard AMEX

Card Number: _____ Exp. Date: _____ Security Code: _____

Signature: _____ Security code is required for charge approval.

If it's more convenient, you can make your gift online at develop.sfsu.edu/makeagift

A check is enclosed payable to "University Corp. SF State."

I enclosed \$_____ now, and intend to contribute \$_____ which I will complete by ____/____ 20____.

I want to multiply the value of my gift! I am eligible for matching gifts from my or my spouse's employer specified below: _____

When you acknowledge my/our gift in SF State publications, please use:

Preferred name (Joint) _____ I wish to remain anonymous.

Mail to: San Francisco State University, Office of University Development, 1600 Holloway Avenue, San Francisco, CA 94132-4028

9999999

AFF16

Mr. Tom



How to Request an Appeal Code

Introducing the new and improved Online Appeal Code Request Form!

You will be required to log in using your SF State credentials.

[appeal-code-request](#)

Please complete the form according to the instructions and hit “submit”

- Please note that these forms are for campus SF State employees and we prefer to be given campus email, phone, etc. so we know that it originated from a legitimate source.
- We may need to verify departmental approval if we do not recognize the requestor/project
- If you have questions or need any help completing the form, please contact Irina Krasnitskaya at irinak@sfsu.edu or ext. 8-6571.

Email Confirmation Sample

You will receive a confirmation email to the email address you provided and we will send you the code via email.



Fri 3/25/2016 9:04 AM

drupal@sites.sfsu.edu on behalf of Caroline Johansson <cjoh@sfsu.edu>

Appeal Code request

To: Caroline Johansson

i You forwarded this message on 3/25/2016 9:02 AM.
We removed extra line breaks from this message.

Submitted on Friday, March 25, 2016 - 09:03 Submitted by user: Caroline Johansson

Submitted values are:

User name: Caroline Johansson

User email: cjoh@sfsu.edu

Submission ID: 11

Appeal Type: Annual Fund Letter

Submission Number:

Preferred Code: ANNFUNDTTEST16

Solicitation Type: General Letter

Preferred Fund: 47766

Title for Solicitation: TEST for Advancement Services Training Expected Solicitation Start Date: Fri, 04/01/2016 Expected Solicitation End Date: Fri, 04/15/2016 Your Name: Caroline Johansson Your Campus Email Address: cjoh@sfsu.edu Your SF State ID: 915,771,368 Your Campus Telephone Number: 405-3820 Your Campus Address: 154A ADM Building Your Department or College: Advancement Services

The results of this submission may be viewed at:

<https://sites7.sfsu.edu/advservices/node/31/submission/51>

Report Request Form

[Advancement Services & Operations Home](#)

[Resources & Publications](#)

[Presentations](#)

[Policy](#)

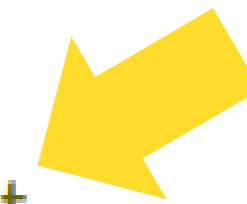
[Forms](#)

[Staff Directory](#)

Appeal Code Request submitted

Thank you for submitting a request for an Appeal Code.

Next step: Please complete and submit a **Report Request Form** (also known as a Report Level Count Request Form).



Uploading Appeal Codes in Advance Database

Appeal codes only work if they are trackable through our Advance database. The appeal code needs to be attached to the entity record (the record of the people you are soliciting) which should exist in our Advance database.

If you have your own data file, please send it in Excel format to Hao Binh Khuu, IT/Database Analyst, at Haok@sfsu.edu and ext. 8-3977.

Advancement Services is able to provide lists of alumni and donors from our database that will meet the criteria you set forth. If you are in need of a list from our database, please request a Report Request Form after submitting your Appeal code.

[Report-Label-Count_Request_Form.pdf](#)

Our Forms page is located at: advservices.sfsu.edu/content/forms

Reporting on Appeal Code Response

1-2 months after your appeal (or when your solicitation is completed) you may request a report on the response to the appeal through the same Report Label Request Form.

Under the Report Information section, you will check “Appeal” and then provide the Appeal Code on the line marked “Other: _____”

Please then complete the Gift Information and we can run reports on who donated, how much they donated, when they donated, etc. so you can track trends.

We will be able to provide the data for you to extrapolate your ROI and donor information.

The donors will also be listed on the Monthly College Reports.

If you need help with this step, please let us know. We are happy to help!

Questions? Contact Us

Caroline Johansson
Director of Advancement Services



Advancement Services

San Francisco State University
1600 Holloway Avenue, ADM 154
San Francisco, CA 94132



Phone

(415)405-3820



Email / Website

cjoh@sfsu.edu
advservices.sfsu.edu/home

Questions? Contact Us

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