



Building Lasting Connections: Strategies for Creating and Sustaining Donor Loyalty Programs

Angela Bartosik, Marquette University

Claire Dinét, Georgetown University

Emily Pagenkopf, Marquette University

Benefits of a Donor Loyalty Program

- Helps increase donor retention and dollars raised
- More cost effective to focus on retained donors than acquire new donors
- Opportunity to build relationships

Sources: About Loyalty Supporter Loyalty Study, Classy Report – Why America Gives 2022, AFP Global (Feb. Q3 Report 2024) and AFP Donor Loyalty Benchmarking Study



Goal: create a stewardship communication strategy based on donor behaviors

Launched first-time donor program in 2018

Nattie and the students she serves are proud to welcome you to the Marquette family of donors!

Because of you, we are learning to Be The Difference on our campus and throughout the world.

Thank you!



Nattie, MUPD community outreach dog; Photo credit: Matthew Serafin



YOUR FIRST GIFT
TO MARQUETTE
UNIVERSITY

DESERVES
11,000
THANKS!



TIME TO RISE
THE MARQUETTE PROMISE TO BE THE DIFFERENCE

OVER 11,000
students are enrolled at
Marquette this year,
and we're all happy to
welcome you to the
Marquette family of donors!

Thank you for your gift to
Marquette and for joining our
generous family of supporters.

You are the difference!

Learn more about giving in
action at Marquette:
timetorise.marquette.edu/impact-stories

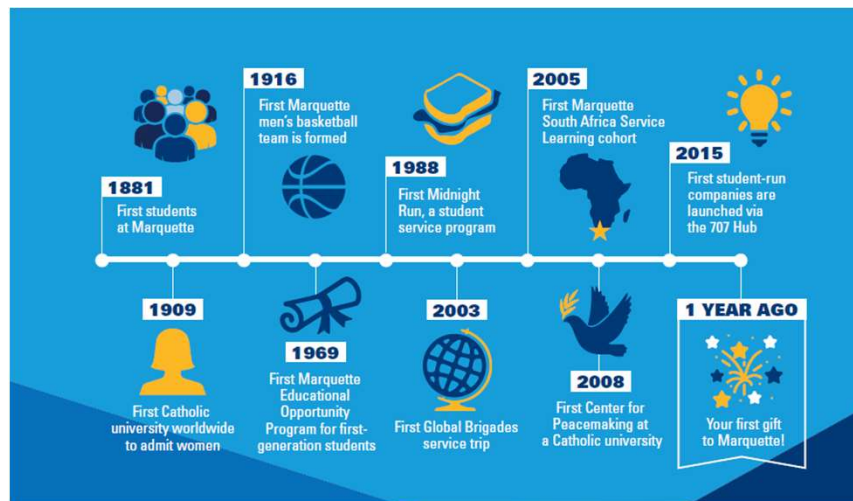
 **MARQUETTE**
UNIVERSITY
University Advancement
Zilber Hall
1250 West Wisconsin Avenue
P.O. Box 1881
Milwaukee, Wisconsin 53201 - 1881

**BE THE
DIFFERENCE.**

Sustainable growth

Adding one new element to the program each
 year

First Anniversary card added in 2019



One year ago, you chose to help us write our next chapter.

We look forward to another century of history-making achievements made possible by your generosity.

Thank you!

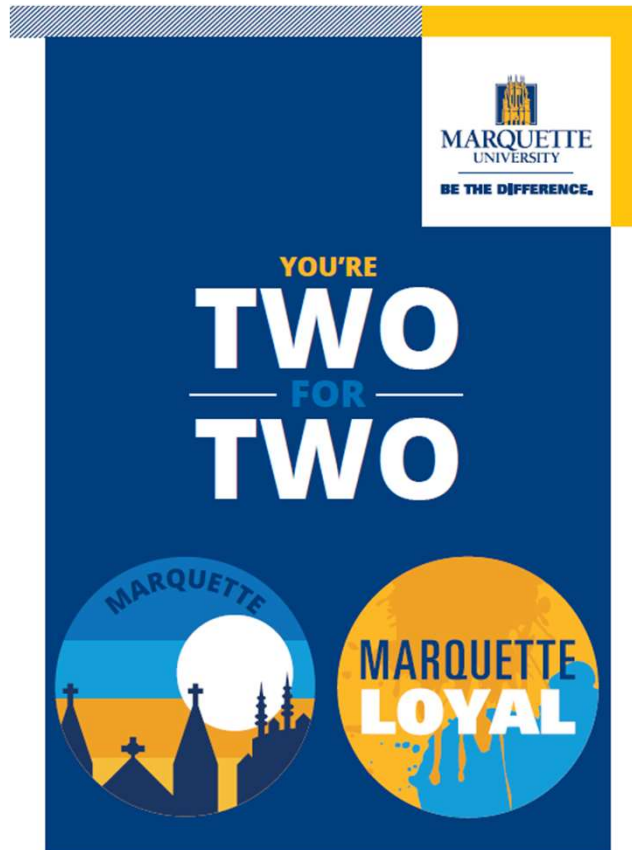


Consecutive donor mailing added to the first-time donor program in 2020

enclosed a small unexpected token (stickers, pins)

encourages the habit of giving

introduced “Marquette Loyal” branding



We are *doubly* grateful for your back-to-back gifts.

Thank you for supporting Marquette two years in a row.

Scan the code to stick with us another year!



mu.edu/marquette-loyal



MARQUETTE LOYAL

Recognize
annual support

Increase **donor
retention** and
participation

Consistently
**recognize and
reward**
consecutive giving
– creating a **habit**
of giving

Goal:

retain consecutive donor giving for three years, after which donors are more likely to continue their annual support.



Marquette *Loyal*

Being the Difference for [Years Given] years.

- Annual letter sent to donors who have given for 3+ cumulative years with a specific call-out of their years of giving
- Tracked in our database
- Adjust as needed based on donor feedback
- Loyalty data readily available to front-line fundraisers (database and Power BI tools) so that they can leverage this knowledge in their outreach to donors and prospects

[Formal combined addressee]
[Address 1, 2, 3]
[City], [State] [Zip]

Dear [Primary Salutation],

We write today to extend resounding thanks for your [Years Given] years of loyal giving!

It takes special and dedicated individuals with consistent passion for this university to make a difference across multiple years. You have stepped up to do exactly that. Your belief in Marquette is especially meaningful as we continue the legacy of late university president Michael Lovell and celebrate the incredible success of the *Time to Rise* campaign he believed in so greatly.

We have so loved seeing how the impact of our own long-term support has grown over the years, and we are excited that you share in that experience as a loyal Marquette donor. Consistent annual giving like yours is one of the most powerful ways to champion our Marquette community and our students' bright futures, particularly through scholarship. Students like Radhika, Jade and Justice are able to experience a transformational Marquette education because of your gifts.

Thank you for keeping Marquette in your giving priorities — and thoughts — each year. Your decision to continue paying it forward shines as an example of Marquette's mission and values brought to life. We cheer your leadership and commitment, and we hope to be recognizing your Marquette loyalty well into the future.

In gratitude,

Chuck & Karen Swoboda

Chuck, Eng '89, and
Karen, Eng '90, Swoboda
Time to Rise National Campaign Co-chairs

Scott & Mary Ellen Stanek

Scott, Arts '77, Dent '82, and
Mary Ellen, Arts '78, Stanek
Time to Rise National Campaign Co-chairs

For questions, please contact Emily Pagenkopf at (414) 288-6092 or emily.pagenkopf@marquette.edu.

Dedication. Faithfulness. Loyalty.
We are Marquette Forever.



**BE THE
DIFFERENCE.**

Thank you
for being *Marquette Loyal*!

Scan the code to visit
Marquette Loyal
online and share your
Marquette story using
#MarquetteLoyal.



“
I realized that this was not just another university. It was a family, a community. It is the reason I have loved my experience so much and appreciate your support to allow me to be here.”
— Radhika
Education student

“
Without you all, I wouldn't be here today. I do not think words can truly show my gratitude for the help you have given me in receiving my college education at Marquette. You lifted an incredibly heavy weight off my shoulders and I thank you so very much for doing so.”
— Jade
Arts and Sciences student

“
Being at Marquette has helped me cultivate a love for God, a love for people, and a love for creation. We've been blessed to be a blessing. That is the case with alumni and benefactors like you who sow seeds of generosity for students like me.”
— Justice
Communication student

6,100+
Loyal Donors
Undergraduate alumni who
have given the last 3 years

4,500+
Have given
in at least
20 YEARS

350+
Have given in 40 or more years,
including 5 donors at 45+ years! That's
nearly a third of Marquette's history.



Continue to add targeted communications to new segments, such as **student donors**



Together, We're Drawing the BLUEprint for Tomorrow.

Over the past year, you were one of the many students who stepped up—making a gift that directly impacted your campus community.

Because of your generosity, classmates facing financial challenges received scholarships and students struggling to access healthy, affordable food found support.

You've shown what it truly means to be a person for and with others. Your support is helping shape a transformative Marquette experience for today's students and for those yet to come.

We Are Marquette!

Please accept the enclosed sticker of Blue, our favorite dog on campus, as a token of our appreciation for you. Show us how you use it by tagging @MarquetteU on social media.



Holiday communication to monthly recurring givers

A special thank you to some of our most loyal donors



Merry Christmas and Happy Holidays!

It is a blessing to feel the warmth of our alumni, parents and friends' generosity each year. Thank you! Your ongoing support advances our mission, expands our impact, and nurtures our students' academic opportunities.

Best wishes for a healthy and joy-filled 2025!



*If you have any questions about your gift,
please contact carly.noble@marquette.edu.*



**BE THE
DIFFERENCE.**

First-Time Donor Postcard



The entire Marquette student family *welcomes you* as a Marquette donor!

Thank you for your gift and your support of our Marquette experience and our bright futures.

You are the difference!

MARQUETTE
UNIVERSITY
 University Advancement
 Zilber Hall
 1250 West Wisconsin Avenue
 P.O. Box 1881
 Milwaukee, Wisconsin 53201 - 1881

BE THE DIFFERENCE.



Read about how philanthropy like yours and gifts to The Annual Fund are impacting Marquette every day.
give.marquette.edu/impact-stories



First Anniversary Postcard

One year ago, you chose to help us write our next chapter.

We look forward to history-making (and future-making!) achievements made possible by your generosity.

Thank you!



Read about how philanthropy like yours is impacting Marquette every day.
give.marquette.edu/impact-stories

 **MARQUETTE**
UNIVERSITY
University Advancement
Zilber Hall
1250 West Wisconsin Avenue
P.O. Box 1881
Milwaukee, Wisconsin 53201 - 1881

BE THE DIFFERENCE.


Key Takeaways

- **Focus on goals**
 - The objective of a consecutive giving stewardship program is to recognize loyal donors for their annual support, thereby increasing **donor retention and participation**.
 - By consistently **recognizing and rewarding** consecutive giving, this donor behavior is encouraged and inspires future giving.
 - The ultimate goal of the program is to retain consecutive donor giving for three years, after which donors are more likely to continue their annual support. Create a **habit** of giving.
- **Create something that is sustainable** over the long term with the resources that you have.
- **Track your work** and make sure it is captured in your database so that others can leverage the power of this information in their own work.

Beyond Stewardship

- “Ugly Betty” solicitation mailing
 - Highlights donor’s loyalty in recent years and encourages their continued support





Be The Difference for Marquette Students.




Scan here with your phone's camera.

ApplePay, PayPal, and Venmo accepted!

RECENT FISCAL YEARS OF GIVING:

FY 2021	FY 2022	FY 2023	FY 2024	FY 2025
				



Make your gift online at mu.edu/give-back or call 833.684.0455.

ENCLOSED IS MY GIFT OF:

☐ \$35 ☐ \$75 ☐ \$150 Other: \$ _____

PLEASE DESIGNATE MY GIFT TO:

☐ Marquette Fund – Greatest Need (2083) \$ _____

☐ College of Business Scholarship (2670A) \$ _____

☐ Other _____ \$ _____

27602224

PAYMENT OPTIONS:

☐ My check, payable to Marquette University, is enclosed.

☐ Please charge my gift to:


☐ Mastercard ☐ Visa ☐ American Express ☐ Discover

Card number _____

Expiration date _____

Signature _____

You may also make your gift online at mu.edu/give-back.



MARQUETTE
UNIVERSITY

BE THE DIFFERENCE.

Beyond Stewardship

- Fiscal year-end solicitation postcard
 - A reminder to loyal donors who have not yet made their fiscal year gift



You're on a streak!

You have been a loyal and generous donor to Marquette for several years in a row. Reliable support from donors like you allows Marquette to plan for the future, knowing there are resources available to provide experiential learning opportunities, programming to ensure student success, and the scholarship needed to help students afford this transformative experience.

Renew your gift before June 30 to remain Marquette Loyal!



Beyond Stewardship

- Give Marquette Day email
 - An opportunity to thank loyal donors and make an additional ask

GIVE MARQUETTE DAY

We're inspired by the incredible impact YOU make on Marquette

As a valued member of the Marquette community and a loyal donor, we want to extend our heartfelt thanks for your ongoing support. Your generosity has already had a tremendous impact, and we're deeply grateful.

Give Marquette Day is another opportunity to pay-it-forward and unite alumni, parents, students, faculty, staff, and friends in support of Marquette's bright future. Will you join us today?

Yes!

Beyond Stewardship

- Marquette Magazine ad
 - Thank loyal donors and promote Marquette Loyal to a broader audience
 - Another opportunity to renew support



Dedication. Faithfulness. Loyalty.
WE ARE MARQUETTE FOREVER.

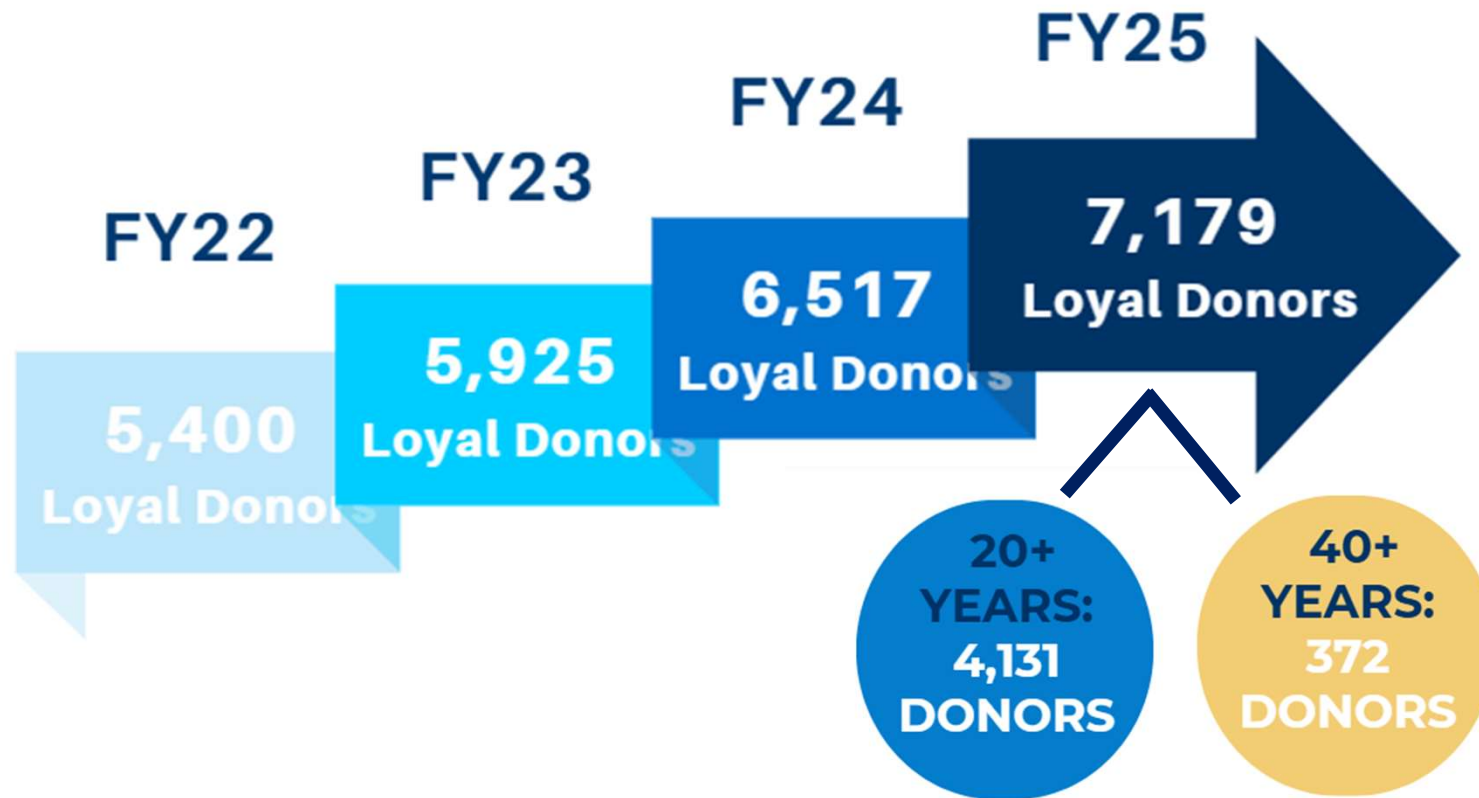


**BE THE
DIFFERENCE.**

Scan the code to
become part of
Marquette Loyal online.



Marquette Loyal Results



The Georgetown Loyalty Society

- Since 2009, **alumni** from all campuses who give to any area of the university for **two or more consecutive years** are recognized as members.
- ~**19,000** members annually
- In FY24 **78%** of alumni donors were members (*FY23: 78%, FY22: 75%, FY21:69%*)
- Mission: **Raise awareness** about the impact of alumni, philanthropic support, **solicit** the renewal of gifts, and **provide recognition** to its members.
- An important **retention** tool!

LOYALTY SOCIETY BENEFITS			
BENEFITS	CHARTER MEMBER (2-4 YEARS)	MILESTONE MEMBER (5-19 YEARS)	LIFETIME MEMBER (20+ YEARS)
DIGITAL BENEFITS	🐾	🐾	🐾
RECOGNITION AND GIVEAWAYS AT ALUMNI EVENTS	🐾	🐾	🐾
EXCLUSIVE ANNUAL BENEFITS PACKAGE			
Membership Card	🐾	🐾	🐾
Address Labels	🐾	🐾	🐾
Notepad		🐾	🐾
Silver pin (at first 5 years)		🐾	
Gold Pin (at first 20 years)			🐾
IMPACT COMMUNICATIONS			
Annual Impact Report	🐾	🐾	🐾
eNewsletter	🐾	🐾	🐾
Special Thank You Message from a Current Hoya		🐾	🐾

A New Landscape For Loyalty

Survey Insights

Finding	Insight	Action
Members didn't know they were members	Lack of awareness, visibility, and clarity	Clarify and amplify brand
Recognition tied to in-person events but alumni wanted more	Value felt limited, transactional	Create more accessible ways for members to engage and be recognized

**first sent Spring 2023, received 600+ responses*

A Marketing-First Strategy

Initiative		Impact
01	Developed distinct brand visuals & voice	Clear, recognizable identity Easy to apply to current marketing
02	Created year-round marketing calendar (asks, awareness, engagement, stewardship)	Boosted engagement: CTR increased from .6 to .7% to 2% up to 15%
03	Segmented by member lifecycle stage	Enabled a more personalized experience, internal partnership tool

Example: Annual Benefits Package



LOYALTY SOCIETY BENEFITS			
BENEFITS	CHARTER MEMBER (2-4 YEARS)	MILESTONE MEMBER (5-10 YEARS)	LIFETIME MEMBER (20+ YEARS)
DIGITAL BENEFITS	★	★	★
RECOGNITION AND GIVEAWAYS AT ALUMNI EVENTS	★	★	★
EXCLUSIVE ANNUAL BENEFITS PACKAGE			
Membership Card	★	★	★
Address Labels	★	★	★
Notebook		★	★
Silver Pin (at first 5 years)		★	
Gold Pin (at first 20 years)			★
IMPACT COMMUNICATIONS			
Annual Impact Report	★	★	★
eNewsletter	★	★	★
Special Thank You Message from a Current Hoya		★	★



LAPEL PIN
 Silver - Milestone Member
 Gold - Lifetime Member



PERSONALIZED ADDRESS LABELS
 Printed with your name and address



STICKY NOTES



Example: Annual Benefits Package Opt Out Emails

Every year, we recognize our Loyalty Society members with a benefits package with items like a Loyalty Society notepad, personalized address labels, and more. [We'd like to provide you with the option to opt out of receiving your benefits package later this fall, if you'd prefer not to receive it.](#) Opting out will help us direct additional resources to support students. **Please note: your response is needed by July 14 in order to remove you from the mailing list.**

Skip My Benefits Package

Opting out of your benefits package does not affect your membership status, and you remain eligible for all other benefits, including [event access](#), [special discounts](#), and [more](#).

If you do not opt out, you will receive the package as usual, but we want to be sure your benefits package reaches you and your address labels are correct. If you've had any recent address updates, please complete this [Personal Information Update](#) form.

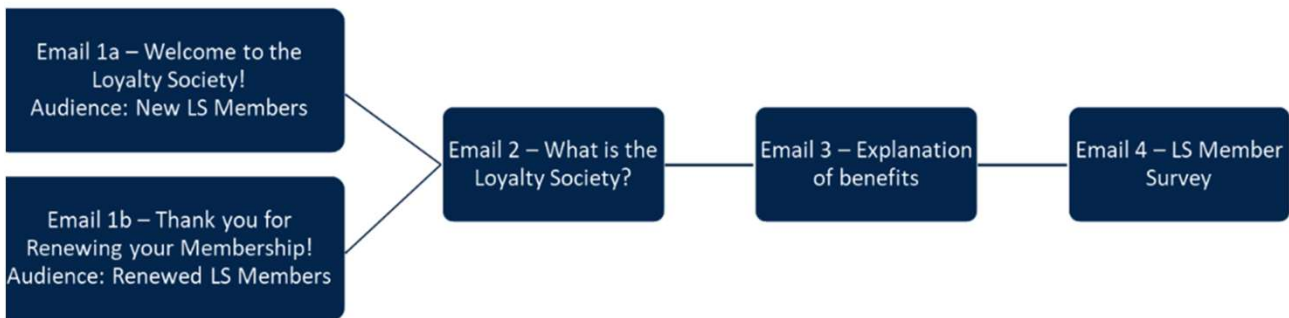
Earlier this summer, you opted out of receiving your Loyalty Society benefits package to help us save on materials and costs, making a difference for Georgetown, our students, and the environment. **We are so grateful for your thoughtfulness as we enter a new academic year.**

Loyal donors like you, who have made a gift to Georgetown for two or more consecutive fiscal years (July 1-June 30), provide consistent support that enables us to offer the very best resources to our students. **Your continued support as a Loyalty Society member is vital**—not only to the success of *Called to Be: The Campaign for Georgetown*, but also to our students as a new academic year begins.

[Will you make an even bigger impact by renewing your membership with a gift today?](#)

RENEW TODAY

Example: Automated Cultivation Email Series



Sarah,

Your Loyalty Society membership ensures that Georgetown can be the university it is called to be—one that offers opportunities for the world's brightest and most talented students, giving the world its strongest citizens and most creative thinkers—like Daniella Passariello (F'23).

"I am so grateful to scholarship donors for giving me the opportunity to come to Georgetown and fulfill my goals. As a first-generation, low-income student, this scholarship means a lot to me and my family. When I was a senior, I started to feel even more emotional about the moment I would finally be able to cross the graduation stage and hold that diploma for my family. That moment was only a reality thanks to you. Thank you!"

LOYALTY SOCIETY BENEFITS			
BENEFITS	CHARTER MEMBER (2-4 YEARS)	MILESTONE MEMBER (5-19 YEARS)	LIFETIME MEMBER (20+ YEARS)
DIGITAL BENEFITS			
RECOGNITION & GIVEAWAYS AT ALUMNI EVENTS			
EXCLUSIVE ANNUAL BENEFITS PACKAGE			
Membership Card			
Address Labels			
Notepad			
Silver Pin (at first 5 years)			
Gold Pin (at first 20 years)			
IMPACT COMMUNICATIONS			
Annual Impact Report			
eNewsletter			
Special Thank You Message from a Current Hoya			

DOWNLOAD YOUR DIGITAL BENEFITS

Our Buyback Program



- Currently can do so during online gift checkout, at events, and on-off requests
- Internally managed by Annual Giving Data team, not transactional
- About 400 requests over the past two fiscal years



This gift is part of a Loyalty Society buyback program.

Please list each of the fiscal years (July 1 – June 30) you would like to buy back at \$25.00/year (e.g., "2012, 2004, 1996"). You can only buy back fiscal years during which you have not made a gift.

Buyback years

- Leveraging in the future: A new segment utilized during membership renewal series, pre-benefits package and a one-off campaign.

Questions?

Angela Bartosik - angela.bartosik@marquette.edu

Claire Dinét - cd1189@georgetown.edu

Emily Pagenkopf - emily.pagenkopf@marquette.edu