An Annual Fund Strategy Utilizing Peer-to-Peer Messaging and the Utilization, Support, and Stewardship of our Volunteers in Partnership with the Staff

Alumni Volunteer Summit, September 18-20, 2015
Compiled by Walt Galloway ’69, Development Committee Member

The following information was compiled as an overview of the discussions, research, and findings that have led to our current commitment to create a stronger partnership with our volunteers for the support and success of Oberlin College’s fundraising success through the annual fund.

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Supplemental Reading:


Best Practices in Alumni Giving - Implications for Oberlin, Steven Roth '77

September 29, 2007

Objective
- Understand how to positively impact alumni participation
  - Primary market research
  - Data analysis
  - Secondary research
  - Best practice/peer research

Goal
- Create a plan to steadily increase Oberlin alumni participation

Oberlin Participation Rates

Note late 80s over 50% participation rates.

- Question: What could Oberlin do for you that would encourage you to give on a more consistent basis?
- Majority of responses fell into three areas
  - Need for stronger, personal connection to Oberlin
  - Need to know where money is going/being spent
  - Raise awareness of participation issue
- Need for stronger, personal connection to Oberlin (Illustrative quotes):
  - "Want something different, more personal"
  - "Having people contact him who he knew would be appealing, as opposed to the institution"
  - "Easier to say no to college than a former friend."
  - "More emphasis on historic causes of Oberlin and remembering its great past accomplishments"
  - "More alumni events where she lives"
  - "Disconnected physically and emotionally from Oberlin"
"Doesn’t know if there are alumni groups in his area"
- Helpful when letters are sent from peers. Specify programs/departments and things that are specific to alumni interest"
- "Make asks more personal"
- "Would give more if encouraged at alumni functions"
- "More likely to give if asked by a friend"
  - Need to know where money is going/being spent (illustrative quotes):
    - "Wonders where her money goes. Need to be more transparent to giver"
    - "If he knew what school was doing and knew money was going towards goals he thought were important may want to give more"
    - "More information on specific funds and programs and where money is going"
    - "Put a face on what you are giving to. Wants to know money is helping someone"
    - "Matching incentives from wealthy alums"
  - Raise awareness of participation issue (illustrative quotes):
    - "Wasn’t aware of participation gifts helping"
    - "When she gives she thinks to give to the endowment, doesn’t think $3 would really help"
    - "Be more specific about when alumni should give and continue to make it clear that amount doesn’t matter"
    - "Clear description of our targets for every year"
    - "Make it trivially easy to allow alumni to give a few dollars"
    - "Emphasize percentage of giving more."

Recommended Next Steps
  - **Develop a strong volunteer base**
    - Recruit class agents and associate agents
    - Meet face to face with agents annually
    - Bring all volunteers to campus annually
    - Honor campus volunteer efforts
  - **Give alumni control of annual fund**
    - Re-name fund
    - Create independent alumni Board of Directors
  - **Focus on participation**
    - Set participation goals per class
    - Develop continuous giving recognition program
    - Develop communication plan
  - **Develop plan for young alumni**
    - Educate undergraduates
    - Find/appoint a young leadership team
    - Stress participation
  - **Start small and build on success**
    - Start with selected reunion milestones
    - Focus on seniors and first five years out
    - Revise program for two year givers and LYBUNTS
    - Consider matching challenges
    - Develop a measurement plan
Excerpts from Williams College and Carleton College Annual Fund Websites

Williams College – Excerpts from web page for Head Agents (italics provided by Walt Galloway ’69)

Agent Team Management:

Focus on engagement
Focus first on forging and deepening your classmates’ connection to the College, as a gift to Williams is a tangible sign of that connection. Send friendly messages to classmates with Williams updates, or work with your Class President and Secretary to make sure the class is kept informed of what’s happening on campus and what’s going on within your class, wherever you may be.

Group communication
Over-communicate to agents as a group, using the agent listserv for your class. From November through January, send an email every 7-10 days with an update on your class performance, based on the results you see on your online reports. These group messages sent via the listserv are also a great venue to publicly recognize and thank individual agents for the work they do.

Class coverage
Ensure everyone in the class is assigned to an agent s/he knows. Recruit new agents every couple of years to maintain depth and breadth. (Not sure how to recruit new Associate Agents? Look to have one or two from every first year entry, every varsity sport, every a cappella group, etc. Track classmates’ consecutive giving, ask your Alumni Fund Development Officer for your class’s engagement scores, and look to social media for which classmates are doing independent fundraising for other non-profits.) Most Associate Agents need only commit a couple of hours in total (depending on the number of classmates assigned to them), but really great conversations with classmates can extend the time commitment.

Agents’ lists
At the end of the fund, work with your agents to refine their lists for the following year, and take this time to recruit new agents if needed. Do it now, while the information is fresh, rather than waiting until the fall.

Carleton College – Excerpts from Volunteer Roles and Responsibilities web page (italics provided by Walt Galloway)

Volunteers play an essential role in the success of Carleton’s Alumni Annual Fund, providing personal, responsive, engaging connections to classmates and to the College. Each class has a system of Class Agents and Assistant Class Agents who solicit gifts to the AAF, and who thank classmates for all that their gifts make possible for new generations of Carls.

AAF Board of Directors – The Board of Directors represents the full range of Carleton Alumni eras, and provides leadership for our Alumni Annual Fund volunteers. The Board guides and informs Alumni Annual Fund strategy and efforts, and members support and coach class agents and other volunteers.
• **Serve as a connection point and source of information** about the College for donors to the AAF and fellow volunteers.
• Provide leadership for donors and volunteers by making an early commitment to the Alumni Annual Fund (a gift or a pledge).
• Act as mentors and coaches to Class Agents, Assistant Agents, Reunion Gift Committee Chairs and other volunteers.
• Attend two meetings per year and participate in monthly board conference calls to help the AAF plan and execute effective strategies for growth, stay connected with volunteers and donors, and achieve dollar and participation goals.
• Assist with identification, recruitment, training, and mentoring of new volunteers.
• **Solicit leadership gifts to the Alumni Annual Fund.**

**Class Agents** – Each class has one or more Class Agents who lead their class fundraising team of Assistant Class Agents and facilitate communication between Assistant Agents and Carleton staff.

• Provide leadership for donors and volunteers by making an early commitment to the Alumni Annual Fund (a gift or a pledge).
• **Lead class volunteers in setting goals for dollars and participation in each year's class gift.**
• Contact assigned classmates and solicit gifts to the AAF. Answer questions, provide updates on what's new at Carleton, and thank classmates for their gifts.
• Serve as advocates and ambassadors for giving to Carleton among classmates and other alumni.
• **Work with Carleton staff to provide Assistant Class Agents with the information, coaching, and connections they need to serve as ambassadors and advocates for the AAF,** and to solicit and thank their assigned classmates.
• Work with Assistant Class Agents to help the class team stay on track, connected, and motivated in their solicitations and stewardship of classmates throughout the year.
• Plan for leadership development among Assistant Class Agents, and work with staff to recruit new volunteers, especially in preparation for reunion years.
• Keep in touch with Carleton staff throughout the year. Provide updates and feedback about progress of solicitations, news and questions from classmates, and overall needs of the team.
Miscellaneous Information

2014 Oberlin College Donor Survey

Survey Highlights:

1. Alumni prefer hearing from classmates
2. Alumni prefer student stories, faculty projects, and knowing how gift makes a difference
3. Non-donors give to organizations that “need the money more than Oberlin does”
4. Non-donors are not necessarily disengaged

Consistents – hearing from classmates most effective, though a few said personal visits from staff had impacted their giving. “Show me the beef”, more transparency, “demonstrate wise use of funds,” more personal asks better, not too many asks

CASE “Class Exodus” Article (full article included as supplemental reading)

• Alumni participation a priority – fresh approach: not “give back” but gift impact small as well as large
• E.g. for young alums for their gifts together “put another way, that’s about 8 scholarships, 9 research grants, and three student groups”
• Restricted giving good because of transparency – use data to focus on specific interests vs. force feed
• Donor-centric
• Celebrate consistent support
• Strong professional development / career serves
• Embrace social media

CASE “Learning to Lose Control” Article (full article included as supplemental reading)

• Whole thing good
• Disintermediation – to take advantage we need to accept we’ve lost control
• For instance, the content of institutional home pages sometimes reflects a unit’s ability to influence more than the need to provide easy access to useful information

John Donaldson ’60, 3/28/15 email to Reconfigure Class Agent Program Subcommittee

• Jamie, thank you for providing this survey of college websites; it is a help and stimulates my thinking. I am afraid that I have a problem with all the statements. It comes down to agreeing on what the purpose of the program should be. For the most part the college statements focus on fund raising and most all relate to annual funds. I agree that fund raising is a major objective, but I think it should be embedded in a broader scale program. The program should have as its purpose to develop and maintain interest in and awareness of the college and the alumni community.

Development Committee Retreat Notes, 2/1/2015

Goal: In three years we have formed a strong partnership in doing what we do for the support of the college and con.
• Collaborative, egalitarian development of all strategies for annual fund communications and dissemination
Clear and simple methods for agents and their staff to know who, how often, what results of touches
- Simple concepts of contact ID based on personal touches with contacts by classmates in close decades
- Shared responsibility and action in developing agendas, plans, concepts for activities of Development Committee
- Transparency

From the Oberlin College Archives: 1934 or 1935 page about new Alumni Fund
- We have no quota in dollars but we wish to be able to point with pride at the percentage of members... it is important that everyone give something.
- Put oberlin in your budget for what you can afford to give.

Excerpts from a Development Committee Call on March 8, 2011
Quotes from Amherst College:
We don't have widespread metrics but there are several things we do watch:

Whenever an assignee makes a gift, the Associate receives an email notification; that also includes their percentage to date and a list of their remaining non-donors.

We also work individually with Class Agents and while obviously being up in dollars and class participation is an indicator of success, it can be more complex than that as we know, so those numbers are only one part of supporting and evaluating Agents: Are they responsive to us, do they do a complete job touching base with their Associates to confirm yearly assignments and do they support/motivate their Associates throughout the year, do they work to recruit new Associates as needed, do they personalize our class appeals and return them in a timely fashion, do they lead a clean-up crew in June, OR have they done none or only some of the above? Perhaps we’ve had to step in to perform those functions? That would merit a conversation about whether or not volunteering is right for them.

Quotes from Carleton College:
We have reports that track how many assignments each agent has, and the progress on those years to date in both number of donors and amount of money compared to the total ask amounts. These show all agents in a class so that the lead can see how people are doing and nudge those who need to step up their work.

Quotes from Williams College:
Currently, we do not use any type of evaluation metrics for our class agents other than:
1.) If they have made their own gift
2.) # of LYBUNts they still have on their list

Some ideas summarized around that time by Rick Pender, then chair of the committee:
Committee member Walt Galloway has shared with me some ideas and suggestions about that class agent program that he's gleaned from conversations with other agents. I've summarized his ideas here for further consideration:

- Ask staff to gather information from peer schools (especially Carleton) as to how agents are evaluated.
- Have decade chairs contact agents annually to renew their commitment and remind them of their responsibilities.
• Expect agents to report on each contact (e.g., contacted/failed to reach; details of pledge or expected result)
• Provide deeper staff prioritization of selected contacts, communicated through lead agents
• Define process to involve decade chairs and lead agents in LYBUNT follow-up

Content for development committee meeting during Alumni Council Weekend as well as conference calls:
• Refine processes of orienting new agents (perhaps create a short "checklist" for staff and lead agent to use in conversations with potential new agent)
• Discuss how the projections are decided and provide priorities (such as LYBUNTS) for decade chairs to communicate to lead agents
• Report results of contacts by student callers (and issues they are hearing)
• Refine nature of reports to decade chairs, lead agents and class agents on class members
• Explore methods and measures to evaluate efficacy of class agents

Presentation to the Development & Alumni Affairs Committee of the Board of Trustees, October 10, 2014 by Danielle Young, Executive Director of the Oberlin Alumni Association

Oberlin Annual Fund Strategy
We need to partner with our volunteers through the agent program to reach out to their classmates for solicitations and to update them on the life of the college and importance of supporting our students and faculty.

Oberlin Annual Fund volunteers help strengthen the long-term connection that alumni have with each other, the college, and the conservatory. The Alumni Association and OAF were started by alumni who took responsibility for the continued success of Oberlin College and we want to build on that tradition.

To increase participation and revenue, we need to utilize, support, and steward our volunteer advocates and partners.
Need for Consistent Class Agent Communication
Supplement communication with regular updates like those sent to volunteers in the Alumni Recruitment Network by Josh Levy in Admissions:

Dear Walt,

Greetings from the Alumni Recruiting Network. Below you'll find the April update. Please enjoy.

Josh Levy '94
Director, Alumni Recruiting Network

Jennifer Harris-Roush
Administrative Assistant, Alumni Recruiting Network

News from the Admissions Office

• We did it -- we have finished our review of the 7400+ applications received this year and electronic notification of the decisions was sent out on March 26. For those students admitted to the Class of 2019, paper decisions were mailed a couple of days later. At the end of the day, we admitted 25% of the applicants this year, a selectivity record for Oberlin.
• All Roads Lead to Oberlin -- the on-campus admitted student programming -- will be held of April 10, 13, 17, 20, and 24 this year.
• We are hosting a series of admitted student receptions in Boston, New York, Princeton, Philadelphia, Washington DC, Cleveland, Chicago, Denver, Seattle, Portland, San Francisco, and Los Angeles. If you live in one of these areas, you'll be receiving invitations (both paper and electronic) -- please consider attending to speak with students and parents. These events can make a difference in whether a student chooses to enroll at Oberlin or not.
• Last month you read about our late February Junior Visit Program. We held another one in early March. Between the two programs, 123 students visited campus. The feedback was overwhelmingly positive.
  o 96% said their interest in Oberlin increased because of the visit
  o 98% said they would recommend Oberlin to friends
92% rated the overall itinerary as excellent or good

**News from Campus**

- Marian Wright Edelman, founder and President of the *Children's Defense Fund*, has been announced as the 2015 Commencement speaker.
- Stephen Hartke has been named Professor and Chair of Music Composition in the Conservatory. Hartke won a Grammy Award in 2013 for his composition *Meanwhile*, a piece that was commissioned for and performed by the Oberlin-bred new music ensemble *eighth blackbird*.
- After noticing a lack of diversity (in almost every sense of the word) in science fiction and fantasy literature, *Kate Diamond '17* created *All Our Worlds: A Database of Diversity Fantastic Fiction*, a searchable database of fiction with characters exhibiting diverse traits such as gender, race, sexuality, and ability. Diamond also worked with the library staff to acquire 100 works of science fiction and fantasy.
- In the "tell us something we didn't know" category, College Magazine rated Oberlin College as the #1 vegan friendly college campus in the United States.

**Obies in the News**

- Anna Julia Cooper was born in 1858 in North Carolina to an enslaved woman and her white owner. She earned both a BA and MA from Oberlin before moving to Washington DC and leading the first public high school for African-American students there, Washington Colored High school (eventually renamed Paul Laurence Dunbar High School). At the age of 66, she became just the fourth African-American woman in the US to earn a PhD and in 2009 the United States Postal Service honored her with a stamp bearing her likeness. You can learn more about her from this NPR story.
- In this month's Punch Brothers story, we learn about Chris Thile's mandolin. According to the article in the Conservatory Magazine, the mandolin (which was purchased for $200,000) was made by Lloyd Loar, an Obie from 1903 to 1905.
Things we learned from the 2014 Donor Survey

*Concern across the groups – skyrocketing costs of education

Stats from Consistent Givers:

85 percent of alumni said they were very likely to make a gift to Oberlin College. (1,092 alumni respondents)

16 percent of alumni said they were very unlikely to make a gift to Oberlin College. (2 alumni respondents)

48.9 percent of alumni said that premiums had no impact on their decision to give. (618 alumni respondents)

Consistent Donor comments:

Of the consistent donors who responded to the survey, many pointed out that they gave each year, regardless of how many direct mail or email pieces were sent out. Some survey respondents even called the frequent solicitations “annoying.” Others commented that they didn’t like the college “wasting” money on solicitations, when they are going to contribute no matter what they are sent.

Consistent donors also commented that they wanted to see more transparency. For example, how were past gifts used? Or, “demonstrate the wise use of donated funds.” Another respondent commented: “Report to all donors on how the funds raised are actually used. Emphasize that much of the funds raised go toward scholarships.” In a nutshell – show how funds are used and follow up with donors.

Consistent donors stated that it was most effective to hear from classmates, although a few did say that personal visits from Development Staff had impacted their giving.

Stats from Recent Givers:

45.70 percent of alumni said they were very likely to make a gift to Oberlin College. (494 alumni respondents)

2.5 percent of alumni said they were very unlikely to make a gift to Oberlin College (28 alumni respondents)

32.9 percent of alumni said that premiums had no impact on their decision to give. (355 alumni respondents)

Recent Donor comments:

This group also felt that too many reminders to give were a turn off. However, those who made additional comments pointed out that: “The more specific the request, the more I am likely to respond. Library materials, instruments, specific student needs would get a better response than asking for money without telling me what it is for.”

Also of note: I’d like to receive more targeted fundraising information. For instance, if I want to donate funds to individual departments or student groups, I’d like to be able to sign up to “follow” those or receive a single condensed email with the targeted information that is of interest to me.

This group also said that they felt more transparency about the use of donated funds would boost giving averages.

Recent Givers seemed to feel that the more personal the ask, the better – although a younger alum pointed out that telling “cool” stories about “stuff” done as undergrads was a turn off.
Stats from Prior Givers:

9.73 percent of alumni said they were very likely to make a gift to Oberlin College. (22 alumni respondents)

10.18 percent of alumni said they were very unlikely to make a gift to Oberlin College (23 alumni respondents)

52.4 percent of alumni said that premiums had no impact on their decision to give. (119 alumni respondents)

Prior Giver Comments:

Many commenters cited financial difficulties or limited financial means as a reason for not making a gift. Others said that hearing about “rock star” alumni and big donors put them off of making what felt like a “meager” gift.

Call for transparency and “seeing” where donations go, same as the other donor groups.

Request for more local alumni events and networking opportunities.

*It seems this group perceives Oberlin as a well-off institution not in need of alumni help, but also said that the more personal asks were better.

Stats from Never Givers:

13.8 percent of alumni said they were very likely to make a gift to Oberlin College. (14 alumni respondents)

14.8 percent of alumni said they were very unlikely to make a gift to Oberlin College (15 alumni respondents)

25 percent of alumni said that premiums had no impact on their decision to give. (25 alumni respondents)

Never Giver Comments:

Don’t have a lot of money at this time; don’t feel financially secure; paying for grad school; paying off student loans; lack of disposable income.

One respondent suggested waiting a decade before soliciting young alumni, and cited student loan debt as his main reason for not giving.

Positive feedback: “Letters with content jogging memories of time on campus are effective. I appreciated the thank you post card after I made my gift. That is why I will give again.”

Call for transparency and honesty.

This group did not indicate a preference for how they wished to be contacted, or by whom they preferred to be contacted.
<table>
<thead>
<tr>
<th>Challenges that prevent us from realizing our vision.</th>
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<tr>
<td><strong>ONE SIZE DOES NOT FIT ALL</strong></td>
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<td>Keeping volunteers engaged across generations</td>
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<td>Eras and groups (like Latinos) feel disconnected</td>
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<td>Overall declining incomes and increased economic inequality</td>
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<td>Alumni who are not online can’t engage with new technologies</td>
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<td>Alumni body vast—personal contact with all is difficult</td>
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<td>New volunteer roles may alienate some existing volunteers</td>
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**Practical Vision for the Oberlin Annual Fund and Agent Program**
February 7, 2015

What must be in place for a true partnership between alumni volunteers and staff to generate maximum fundraising success on behalf of Oberlin College?

<table>
<thead>
<tr>
<th>VIBRANT INTERCONNECTIONS ACROSS CONSTITUENCIES</th>
<th>EMPOWERMENT THROUGH ROLE DEFINITION</th>
<th>COLLABORATIVE LEADERSHIP</th>
<th>ALL CONTRIBUTIONS (TIME, TALENT, TREASURE) VALUED</th>
<th>DYNAMIC TOOLS AND TRAINING</th>
<th>PERSONALIZED HUMAN CONTACT</th>
<th>CLEAR AND COORDINATED COMMUNICATION</th>
<th>OPEN AND HONEST COMMUNICATION</th>
<th>HEALTHY ROTATION AND RECRUITMENT OF VOLUNTEERS</th>
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<tr>
<td><em>Build stronger relationships between staff, agents, and alumni</em></td>
<td><em>Clearly defined roles that empower volunteers (starting with lead agents)</em></td>
<td><em>More live, guided meetings and sessions like this one</em></td>
<td><em>Improve volunteer stewardship</em></td>
<td><em>Implement efficient and maintainable tools</em></td>
<td><em>Individualized and customized contact</em></td>
<td><em>Consistency of messaging across volunteers</em></td>
<td><em>Transparency</em></td>
<td><em>Build undergraduate relationship program that feeds volunteer base</em></td>
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<td><em>Excitement, involvement, and interaction</em></td>
<td><em>Class agents take more active role</em></td>
<td><em>Collaborative &amp; egalitarian processes</em></td>
<td><em>Integration/partnership with other volunteers and engagement efforts</em></td>
<td><em>Agent efforts ongoing through year, not &quot;now is time to make contacts&quot;</em></td>
<td><em>Improved communication and networking with &amp; for class agents</em></td>
<td><em>Coordinated promotion for major stories, including social media</em></td>
<td><em>Trust and mutual respect</em></td>
<td><em>Develop undergraduate philanthropy program</em></td>
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<td><em>Committee and staff cooperating seamlessly</em></td>
<td><em>Agent engagement beyond the ask</em></td>
<td><em>Regular communication between agents and staff</em></td>
<td><em>Stewardship of annual fund donors</em></td>
<td><em>Better trained and supported volunteer network</em></td>
<td><em>Messaging personalized and enhancing alumni-to-alumni relationships</em></td>
<td><em>Frequent communication and information for agents and alumni</em></td>
<td><em>Mutual respect between volunteers and staff</em></td>
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<td><em>Better engagement of agents and alumni</em></td>
<td><em>Clear understanding of staff roles</em></td>
<td><em>More time for brainstorming and strategizing</em></td>
<td><em>High-level of staff support for agents</em></td>
<td><em>More communication and education with &amp; for class agents</em></td>
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<td><em>Improved communication and information for agents and alumni</em></td>
<td><em>Fulfill donor needs for transparency</em></td>
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<td><em>Stronger connection with faculty</em></td>
<td><em>Agents at all levels included in process &amp; communication</em></td>
<td><em>Meeting focus on strategy, not reporting out</em></td>
<td><em>Donors feel very valued, especially first-time and consistent donors</em></td>
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<td><em>Mindful of generational differences</em></td>
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<td><em>Culture of philanthropy across constituencies (alumni, faculty, students)</em></td>
<td><em>Staff and volunteers have clear roles</em></td>
<td><em>Solicitation plan clarified and determined with Dev. Committee</em></td>
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<td><em>Boost annual fund presence on campus</em></td>
<td><em>Three lead agents per class (1 Con)</em></td>
<td><em>Set goals and ownership</em></td>
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<td><em>Communication: donors &amp; staff &amp; volunteers</em></td>
<td><em>Class agents &quot;survey&quot; disengaged alumni and reach out</em></td>
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### STRATEGIC DIRECTIONS

February 7, 2015

What innovative practical actions will deal with the challenges and move us toward our practical vision?

<table>
<thead>
<tr>
<th>Prioritize Peer-to-Peer Relationships &amp; Messaging</th>
<th>Prioritize Peer-to-Peer Relationships &amp; Messaging (Cont.)</th>
<th>Revamp Committee Organization and Purpose</th>
<th>Reconfigure Agent Program</th>
<th>Tailor and Refresh Message Content</th>
<th>Build Collaborations Across Campus</th>
<th>Collect and Disseminate into and Answers</th>
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<tr>
<td>- Personalize communication — if someone has an issue, find out why</td>
<td>- Leverage alumni relationships with each other</td>
<td>- Make Development Committee key strategic body</td>
<td>- Gather and make information about individual staff and volunteer expertise available</td>
<td>- Give to Oberlin students, not &quot;Oberlin College&quot; message</td>
<td>- Faculty and staff take a role in educating students about philanthropy</td>
<td>- Be myth-busters in our personal contacts and general messages</td>
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<td>- Ask close contacts what &quot;fits&quot; for them</td>
<td>- Increase number of alumni-to-alumni messages annually</td>
<td>- Development Committee on campus 2x a year and build relationships (bonding)</td>
<td>- Rewrite the agent handbook to effectuate the new roles</td>
<td>- Coordinate &amp; strategize messages — focus on content</td>
<td>- Partner alumni, students, faculty on fundraising efforts</td>
<td>- Brainstorming myths &amp; beliefs cross-generationally</td>
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<td>- Have actual one-on-one conversations about involvement</td>
<td>- Peer-to-peer training/buddy system (e.g., new technology)</td>
<td>- Focus on recruiting three lead class agents per class (male, female, Con)</td>
<td>- Change tactics — regularly to stay fresh</td>
<td>- Identify alumni beliefs/concerns &amp; develop specific strategies to address</td>
<td>- Use crowdfunding to cut across constituencies</td>
<td>- Oberlin answers and Snopes page</td>
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<td>- Strengthen stewardship through special recognition of donors and volunteers</td>
<td>- Engage volunteers on visions &amp; challenges we are experiencing</td>
<td>- Agents help recruit agents</td>
<td>- Use what we have/produce more effectively</td>
<td>- Recognize one-size-fits-all is just a part of life</td>
<td>- Educating campus communities to grow culture of philanthropy</td>
<td>- Eliminate one-off answers; make available online (for staff, agents, alumni)</td>
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<tr>
<td>- Connect alumni across generations with Oberlin today</td>
<td>- Stop all communication with alumni who don’t give and restart relationship building</td>
<td>- Define class agent role for new era empowering volunteers</td>
<td>- Tech isn’t the only tool in our possession</td>
<td>- Highlight time, talent &amp; treasure of alumni</td>
<td>- Core group of members of faculty, alumni, and staff develop messaging</td>
<td>- An alumni feedback/complaint box online</td>
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<tr>
<td>- Scale back staff messages; scale up classmates messages</td>
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<td></td>
<td>- Make data-informed decisions and test strategies before rollout</td>
<td>- Run a controversial story in the magazine or send one out from development / OAF</td>
<td>- Identify assumptions and brainstorm solutions</td>
<td>- Release M. Frandsen finance report with explanations</td>
</tr>
<tr>
<td>- Only personal, peer contact with disengaged alumni (no more e-blasts)</td>
<td></td>
<td></td>
<td>- Well defined format for volunteers to communicate</td>
<td></td>
<td>- Establish partnerships within campus community (what the OAF can do for you)</td>
<td>- Show how donations are used — infographics</td>
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<td>- Renewed focus on the diversity of the class agent pool so more sensitive to differences in peer-to-peer communication</td>
<td></td>
<td>- Add in a campus-wide communication coordinator</td>
<td>- Address issues as they come; be transparent to dispel myths</td>
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The world of advancement is facing a crisis—in numbers. In 1980, 18 percent of college and university alumni gave to their alma mater, according to the Council for Aid to Education. By 2013, that number had been cut in half to less than 9 percent—a record low and a culmination of a trend that has persisted for more than two decades. Some shrug off the decline as a new reality—a problem too far along to fix. Others ask, what’s the big deal? After all, in this era of big campaigns and mega-gifts, colleges and universities have raised more money even though fewer alumni are giving. But the implications of this trend cannot be ignored.

Alumni participation rates can have a major impact on institutional reputation. U.S. News & World Report considers undergraduate alumni participation rates a barometer of alumni satisfaction and factors them into its rankings. No matter how you feel about rankings, they are a big deal. Rankings create reputation, reputation affects enrollment, and enrollment affects tuition revenue.

But it's bigger than that. Substantial participation allows us to build a broad base of support and expand the pipeline for major gifts and future campaigns. Mega-gifts may have helped educational institutions raise more money over the past several decades, but relying on them isn't a stable model. What if the pipeline dries up? And while a large group of supportive alumni can influence the direction of their school and its effect on the world, putting the future of our institutions in the hands of a relative few is not in our best interest.

It's time to ask some new questions and set better goals for our institutions. It's time to examine what is and isn't working in our advancement practices and to look at how we can provide the best service to our alumni base.

Why Participation Rates Are Falling

As colleges and universities increase their student population, they’re also producing more alumni. This means that many institutions need to add more donors each year just to maintain the same levels of alumni participation.
This makes it difficult to keep up the pace, but it also distracts us from the real problem: Alumni today (especially young alumni) have different attitudes and needs. The world has changed, and so have the ways and reasons alumni relate to their institutions. Unfortunately, we in advancement haven’t adapted.

Historically, the value offered to alumni has run along two tracks. First, alumni (as students) received an experience that taught them how to think, helped them form lifelong relationships, and prepared them to live and succeed after graduation. For many, this included job training. Back when the cost of this experience was relatively low, alumni felt like they had gotten a deal and were more willing to give back after they graduated. Imagine going to a restaurant and getting a delicious meal, wonderful service, and a great glass of wine—all for less than 20 bucks! You’d probably be inclined to leave a big tip, right? More important—from the restaurant’s point of view—you’d be likely to eat there again.

In the last decade, the price index for U.S. college tuition rates grew by nearly 80 percent—almost twice as fast as growth in medical care and more than twice as fast as the overall consumer price index, according to U.S. Labor Department statistics. Although tuition increases have slowed recently, data from the College Board suggests that federal aid has not kept up with rising costs, resulting in students and families paying more out-of-pocket expenses. A regular patron of a restaurant might not be so inclined to leave a tip if prices go up but the food quality remains the same.

On the second track, colleges and universities have offered value in the form of connectivity. Alumni associations and alumni relations programs were uniquely positioned to connect alumni through class reunions, regional chapters, alumni magazines, and alumni directories. They also connected alumni to personal and professional development opportunities through events, trips, and networking programs.

But in recent years, things have changed a lot. Tuition and fees have risen at an alarming rate. Many graduates are burdened with debt and don’t think they owe anything more. Few alumni understand why higher education has gotten so expensive—and few institutions have adequately explained that phenomenon.

Alumni are like the iconic old lady in the 1984 Wendy’s commercial who asked, “Where’s the beef?” It is a valid question.

**Update Messages and Tools for a New Generation**

To effectively serve our alumni, we need to examine what is no longer working:

- We have relied too long on traditional tools. Contact rates for student phonathons, once the lifeblood of many annual giving programs, have plummeted as the world moves further online and mobile phones become more prevalent: Less than 58 percent of annual donors in 2012 came from mail appeals or phonathon programs, according to the Annual Giving Network. The remaining 42 percent arrived through online channels and other sources.

- We haven’t updated our terminology. Too many annual giving programs still appeal for “unrestricted” gifts and use slogans like “give back.” Well, consider those terms for a second. “Unrestricted” simply doesn’t resonate anymore: The CAE reports that the percentage of total private support to unrestricted current operations has been cut in half at private and public institutions since 1984. And how can we expect alumni to give back when they haven’t finished paying the original bill?

- Alumni no longer need us to stay connected. Before social media, colleges and universities were the gatekeepers to alumni information and networks. Today, online platforms like Facebook and LinkedIn are far more likely to have current information on our alumni than our own increasingly archaic databases. If I want to find an old classmate, I go to Facebook. If I need to develop my business or career, LinkedIn can open doors through peer connections and networking groups. I have options— lots of them. Good for me, maybe bad for my alma mater.
In a fast-moving world of likes and hashtags, the old benefits alone are no longer working. We need to find new services and develop new strategies. We need to rethink our role so that it involves a little more investment and a little less control.

**Avoid the Crisis**

Despite the overall decline nationally, some institutions have successfully increased their alumni giving rates in recent years. How did they do it? By following these steps:

**Make alumni participation a priority.** Increasing the number of gifts doesn’t happen on its own; it takes an effort. Virginia’s Christopher Newport University, which has doubled its participation rate in the past five years, has put this goal front and center in its campaign case statement and directed resources to support student and young alumni engagement. Successful universities also focus on student giving—Mount St. Mary’s University, a small Catholic institution in Maryland, nearly tripled its senior class gift participation rate over a four-year period. This played a huge role in helping the university increase its overall alumni participation rate from 17 percent to 24 percent in just a few years.

**Take a fresh and data-driven approach to annual giving.** Don’t include stale clichés like “give back” in your appeals. Tell stories about gift impact (and not just the impact of big gifts) and translate those into tangible ideas. On its website, Stanford University in California tells young alumni what their gifts added up to, allowing them to quantify their contributions: “Put another way, that’s about eight scholarships, nine research grants, and three student groups.” These institutions recognize the importance of restricted giving as a way of fulfilling special interests and providing transparency to donors. The University of California, San Diego, credits much of its success to ditching an organization-centric model in favor of a donor-centric model. The institution uses data to focus on donors’ specific interests, rather than trying to force-feed what the university may want alumni to support.

**Celebrate consistent support.** Encourage, recognize, and reward donor loyalty, and tell alumni (especially younger alumni) that consistent giving is just as important as major giving. The Oak Leaf Society has helped Vanderbilt University in Tennessee increase alumni participation by recognizing donors who make gifts of any amount, to any area of the university, for two or more consecutive fiscal years. At Dartmouth College in New Hampshire, you can only be a member of the Harold C. Ripley ’29 Society if you make a gift, of any amount, every year after graduation.

**Support professional development.** Colleges and universities today need to provide lifelong career development for alumni-online and offline. Virginia’s James Madison University, which has increased its alumni participation rate every year for the past five years, credits some of its success to the goodwill created by career programs and services. The University of Chicago has done substantial work to develop affinity groups that benefit alumni professionally and personally.

**Embrace social media.** Successful institutions are thinking outside of their own databases, and becoming more interested in determining how to add value to existing networks than being gatekeepers to information. Several years ago, my team at Boston University started a LinkedIn group to help alumni network and seek career advice. One problem: A self-starting alumnus had already created an alumni group a few years earlier. Our BU-based group struggled to grow because alumni assumed that his group—which was significantly larger—was the official one. His group, however, soon became overrun with spam, irrelevant content, and members who had no affiliation with the university because (despite all good intentions) he lacked the resources to maintain the group.

What resulted were two competing groups, neither of which was effective. Picture two gardens side by side, one overrun with weeds and preventing the other from getting sunlight and nutrients. The situation was confusing to our alumni and made it difficult for
either group to serve the needs of the network. After some negotiation, we reached an agreement with the alumni and are now combining both groups. Did this require us to rethink our role? Absolutely. But we're creating a better space where our alumni will find unique value from their affiliation with the university.

**Value in Numbers**

Prior to graduation, Boston University's president has been known to ask seniors to think of their diploma as if it were a stock certificate. As the quality of the institution grows, so does the value of their degree. If we expect alumni to invest in our institutions, we need to offer that value long after they graduate.

Higher education in the United States is a treasure. If we continue down the current path, the future won't be as bright. Our institutions and alumni will lose something if we rely on mega-gifts to support advancement efforts. Beholden to a relative few, our schools will give up flexibility and autonomy. Our alumni will give up something just as important: their voice.

If alumni support continues its decline, those voices run the risk of going unheard.

**About the Author**

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As disruption transforms advancement, we need to redefine our roles and give audiences some ownership

By Andrew Gossen

dis-in-ter-me-di-a-tion (dis' in' ter me'dē ā'shen) n.
The elimination of an intermediary in a transaction between two parties

Is technology making the advancement profession obsolete? That's the fear, as alumni and other audiences find new ways to connect, network, and give—increasingly without our involvement. To understand the problem, and to address this challenge proactively instead of reactively, we need to understand the concept of disintermediation: a reduction in the use of intermediaries. The middlemen. Us.

Our roles as the essential interfaces between our institutions and their various external audiences—and the practices that have served alumni relations, communications and marketing, and development professionals well for so long—are becoming more unstable in the face of disruption brought by Internet-based technologies. It's not that we haven't been paying attention. Advancement shops have recognized the opportunities in emerging technologies and platforms and have incorporated some, particularly social media channels, into their work. So why is there a constant undertone of worry among advancement professionals that the world is leaving us behind? The answer lies in the way we have understood the implications of these technologies. Since computers were introduced to the workplace, advancement professionals have focused on how technology can help us improve what we already do. But we haven't fully considered the possibility that disruptive technologies might make our jobs unnecessary.

New models for new needs

The term disintermediation emerged from the world of banking in the late 1980s, when consumers could begin to invest directly in securities rather than leave their money in savings accounts. In the late 1990s, as e-commerce developed and the first dot-com bubble grew, people adopted the term to explain the Internet's disruption of the business world.

For many established industries, the impact has been seismic. Travel agents rapidly lost

http://www.case.org/Publications_and_Products/2014/October_2014/Learning_to_Lose_Control.htm?printFriendly=printFriendly
ground to websites such as Expedia. Video rental stores closed as Netflix attracted more customers. Independent bookstores battle against Amazon.com. In each case, Internet-based businesses offered convenience, increased selection, and lower prices, while brick-and-mortar companies struggled to compete. These traditional businesses didn't do anything stupid or irresponsible. Despite offering services that had benefitted customers and been profitable in the past, the digital revolution created new business models that wiped out operations unable to adapt to customers' changing needs.

So how does disintermediation relate to your work? Advancement professionals are intermediaries. I'm one. You are too, no matter your rank or job title. The advancement disciplines are support functions—they support educational institutions but are not directly involved in the core mission of educating students. We don't grant credits or degrees; we work with alumni on behalf of their alma mater. We don't conduct research; we collect stories about the discoveries occurring on our campuses and communicate them to drive support for the institution. We don't teach; we raise the money that makes instruction more effective and increase access to resources for a broader range of students. As intermediaries, we're in danger of disintermediation.

Don't freak out. It's been a factor in advancement shops for at least a decade. If you haven't been affected yet, your time is coming. But looking back at what's already changed helps us understand what's taking place and determine how to respond.

**Advancement disrupted**

Communicators were the first to encounter disintermediation with the advent of blogs. Before that, communicators had the mandate and infrastructure to tell an institution's story, making it easier to control the message and protect the brand. But when blogs emerged in the 1990s, anyone interested in an institution could tell a piece of its story. (In fact, the person widely credited with being the first blogger was a freshman at Swarthmore College. In January 1994, he posted some recommended links and commented on an ice storm that hit the Pennsylvania campus.) It turned out that plenty of people wanted to share their opinions and criticisms of colleges and universities. Search forums like College Prowler and College Confidential cropped up. Social media spread like a virus. The communicators' near monopoly on the message disappeared.

Digital disruption struck alumni relations around 2007—a year after Twitter debuted, Facebook opened to the public, and LinkedIn launched public profiles. In retrospect, it's clear that the discipline had misunderstood its value proposition. We used to think alumni interacted with us because they loved their alma mater and enjoyed our programming, such as class reunions and faculty speaker series. But the real reason was much simpler: We controlled the database. If graduates wanted to find a lost classmate or organize a happy hour, they needed someone who could access alumni information. No large-scale alumni activity could occur without our involvement, so we generally knew where and when they were gathering.

Once Facebook and LinkedIn arrived, alumni no longer needed our help to find each other. They could organize around whatever interest they deemed important—and market and manage events—without our knowledge or permission. Alumni could connect on social media faster than if they worked through us, sharing positive and valuable experiences with fellow graduates. Since these activities weren't happening through our channels and structures or on our terms, they were invisible to us. Alumni came together on their own and eliminated the middlemen.

Fundraising was relatively insulated from digital disruption until recently, due to a variety of factors: the demographics of major and principal gifts donors, who tend to be older and less likely to communicate electronically; the business model of individual giving, which relies on building relationships; and the challenges of raising money online, even a decade into the social media revolution. The rising popularity of crowdfunding, however, is changing all of this.

Crowdfunding looks for many small gifts from a large number of donors. Most of this
activity occurs through online third-party platforms such as Indiegogo and Kickstarter, 
which provide a forum for storytelling as well as processing donations. They're designed 
so that project owners, donors, and fans can share their ventures across social media 
channels. Today, more than 500 crowdfunding platforms exist worldwide. The 
crowdfunding research and advisory firm Massolution estimated that these online 
platforms would raise more than $5 billion in 2013.

Crowdfunding is disruptive to development because it democratizes fundraising. Your 
institution's fundraising priorities, business processes, and solicitation strategies are 
irrelevant on a third-party platform. People and groups are free to raise large amounts of 
money for their causes and concerns, some of which touch your institution. So 
 fundraisers can now count themselves among the disintermediated.

If an institution's bottom line depends on an accurate accounting of dollars raised, then 
fundraising that occurs at the institution without development's knowledge is a real 
problem. Sure, we could try to forbid people from using third-party crowdfunding 
platforms, but good luck monitoring and enforcing that. Besides, trying to police the 
activity of smart, entrepreneurial students, faculty members, and volunteers is a terrible 
strategy for cultivating and retaining donors.

Dealing with change

Much of our work used to depend on control—something almost impossible to assert in a 
digitally networked world. So what should advancement professionals do? Our 
institutions still need us to engage and mobilize audiences to support their mission. How 
do we accomplish this when we can no longer rely on the practices that served us so 
well?

First, don't panic. Disintermediation isn't fatal unless you refuse to evolve. It presents 
many challenges—and just as many opportunities. To take advantage of them, we need 
to accept that we've lost control. Only then do we stop wasting energy trying to keep 
things the way they were and start focusing on the way things could be.

Next, we need to add value to our audiences' experiences. This is how intermediaries 
stay relevant. But understanding what our audiences need requires us to listen as though 
our lives depend on it. In advancement, we tend to be much better at telling than 
listening.

Finally, we need to learn from our constituents, colleagues, and peers. Fundraisers 
confronting disintermediation can learn from the communicators, marketers, and alumni 
officers who have already endured the experience. Their support can help the 
development office understand this dynamic and encourage fundraisers to focus on new 
opportunities rather than their fear and uncertainty.

This means we need to, yes, break down our silos—another challenge for advancement 
professionals, who often hold strong convictions about what their job is or isn't. The long-
standing focus on what each discipline controls—tools, data, priorities, programs—
produces audience experiences that reflect these issues rather than what our 
constituents need and want. For instance, the content on institutional home pages 
sometimes reflects a unit's ability to influence more than the need to provide easy access 
to useful information. This approach is unacceptable in the face of disintermediation. Our 
audiences have other options. They don't care if they're interacting with communications, 
marketing, alumni affairs, or development. They don't see a distinction—they're simply 
interacting with the institution. We need to focus on what people want out of the time they 
give us. If the old practices, processes, and perspectives that separated the disciplines 
no longer work effectively, there's no reason to maintain those dividing lines.

What you can gain from losing control

At Cornell University, the Division of Alumni Affairs and Development confronted 
disintermediation head-on in August 2013. We wanted to see what would happen if we
relaxed our desire to control the solicitation effort, focused on adding value, and worked across advancement silos on a pilot crowdfunding project. We hoped the experiment would help us better understand how crowdfunding could complement our existing fundraising programs.

One early project involved the university’s LGBT Resource Center, which sought to raise money for a campus LGBTQ leadership academy, a program that would educate students to be leaders in the lesbian, gay, bisexual, and transgender movement beyond our New York institution. We recognized that potential crowdfunding donors like to learn about specific projects online; give to projects or causes that are personally meaningful; respond to peer-to-peer solicitation; desire direct connection to the people involved with and benefiting from the project; and want evidence regarding the effect of their gifts. We could add value by providing a platform to raise funds for a program that would make a difference in the lives of students and encourage people to engage with supporters and those who would benefit from it. So we made two radical decisions.

First, our 15 volunteers—mostly active members of Cornell’s Gay and Lesbian Alumni Association—would handle the project’s storytelling. This countered the development communicators’ instincts to control institutional messages, but we reminded ourselves that potential donors want to connect with the project and the people involved, not the university. For our experiment to succeed, we had to work differently. Accepting that we couldn’t and shouldn’t control the content empowered the volunteers to carry out an ambitious plan for the 30-day campaign. They updated the project’s crowdfunding page daily. In addition to regular messages about progress toward the $15,000 goal, volunteers posted interesting and relevant information to educate and engage viewers in creative ways, such as covering the history of Cornell’s LGBT movement, sharing examples of campus events and activism, featuring student stories and campus resources, and promoting Cornell’s first LGBT reunion. The collage of content was every bit as good as I could imagine our professional staff producing, but it was more effective because it came from volunteers with a passion for the project. Donors sought this kind of connection to the cause and community they wanted to help.

Second, we abandoned conventional fundraising best practices by ceding control over the solicitation process. Our crowdfunding platform enables volunteers to solicit their personal networks via email and social media. Under this model, we have no idea who will be asked to contribute because the requests aren’t linked to our databases. Contributors clicked through to the volunteers’ personal fundraising page, which shared their perspectives on the project and why they got involved. This approach differs radically from the standard operation for electronic solicitations, in which email lists are carefully approved, scrubbed, and fine-tuned.

Loosening our grip was a significant advantage. The volunteers knew who in their networks would be interested in funding a specific project far better than we would have, and potential donors were far more receptive to a pitch from a friend than they likely would have been from an institutional fundraiser. People put their networks to work for us. Traditionally, we’ve asked alumni for their time, talent, and treasure. Now we can ask them for their networks as well. But this only works if we remember that the networks are theirs, and we trust their advocacy efforts on the institution’s behalf.

Our approach paid off. The project reached its $15,000 goal one week early. We suggested increasing the target to $25,000, but the volunteers concluded that doing so would feel like a bait-and-switch maneuver and make people wonder about their tactics. They decided instead to pivot from a financial objective to a donor participation goal and shifted the final week’s messages accordingly. At the campaign’s conclusion, the project raised an additional $3,105 and engaged 230 supporters. Once you start trusting the volunteers, you need to continue down that path.

We added value by setting the stage for a conversation, then getting out of the way. By
giving volunteers access to a platform that integrated with our payment and gift-processing systems, we saved them paperwork headaches. The service we offered kept us in the loop, which doesn’t often happen when people launch crowdfunding projects without letting you know.

Ceding control and empowering volunteers made this success possible. It couldn’t have happened without Cornell’s crowdfunding project team working across silos to push for such experimentation; the communicators’ support for not only letting the volunteers tell their own stories but also their willingness to reassure internal skeptics about this approach; the decades of relationship-building work of alumni relations staff; annual fund staff members’ receptiveness to a project they could have viewed as competition; and the efforts of the advancement services and donor relations teams to make the database and tax receipt issues work with the fundraising platform.

In the end, our crowdfunding experiment funded seven campus projects—raising more than $110,000 from approximately 1,300 donations—and answered the initial participation questions we set out to investigate. The dollars raised by crowdfunding aren’t likely to disrupt business as usual, but the perspectives and approaches needed to crowdfund effectively are. You can decide that this is too much of a headache to deal with, but doing so opens you up to the very real possibility of disintermediation.

Let the experiments begin

Disintermediation will not make advancement irrelevant overnight. As professionals, we continue to engage external audiences and deliver the support our institutions need. But digital disruption is eroding our degree of control, which many of our core practices and perspectives still depend upon.

Disruption will continue and accelerate. The advancement profession needs to accept this new reality. Since we no longer dictate the terms of engagement with our audiences, we need to experiment with ways to remain relevant. There’s lots of opportunities in this networked world. With the right mindset, your advancement team can take advantage of them.

—Special thanks to Sarah Raazler, senior information resource specialist at the CASE InfoCenter, for her research assistance.

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Andrew Gossen is senior director of social media strategy for the Division of Alumni Affairs and Development at Cornell University in New York.

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