

## Engagement and Fundraising – Notes

**We first asked each attendee to introduce themselves and to bring forth topics and questions that they wanted to discuss. Here are their answers:**

### Dartmouth

- Travel program is under the Advancement umbrella, which also covers development
- regional events
- quantifying and justifying the program

### American Jewish World Service

- Travel program is under fundraising department
- How to track travelers
- Is there an ask during the trip?

### Lehigh

- How else to leverage travel as fundraising opportunity
- Donor-centric trips

### U.S. Naval Academy

- Donor travel

### Commonwealth Club of California

- How to measure success of travel program as fundraising tool
- A lot of proving of yourself

### Utah State University

- Travel program is primarily a tool for engagement but foresee it will have Development role in the future

### American Museum of Natural History

- Transitioning to Development

### Wildlife Conservation Society

- New travel program – primary goal to keep donors and trustees engaged

### World Wildlife Fund

- now housed in Development
- staff don't understand how hard it is to manage a Travel program

### Grounds for Sculpture

- new Travel program – primary purpose of fundraising and networking
- Is there an ask during the trip?

- How to reach younger demographic

#### University of Delaware

- New travel program
- Not in Development
- What is the real metrics we're being measured by?

#### Santa Barbara Museum

- Travel program moved into Development this past year

→ Multiple people mentioned the importance of using data to be able to measure, track, and justify programs.

### **Presentation about Metropolitan Museum and University of Chicago Travel Programs – see other documents**

#### **After the presentation, we opened the floor for discussion and here are some of the notes:**

- Important to keep track of anecdotal data; particularly of stories about travelers giving to the organization and show the long-term relationship and how travel contributes to it.
- Giving is harder to track, but it's essential that participation in the travel program is tracked in donor database as part of their cultivation
- Many travel programs are moving under the arm of development
- Is there an ask during the trip?
  - Thank you note afterwards with a soft ask was more successful than official letter from Development Office afterwards
- Welcome letters given to travelers with soft ask to join membership
- High level donor trip was very successful – only invited donors who have given a minimum of \$50K – trip to Cuba with President