



Annual Giving as a Career with Jake Strang
Season 1, Episode 9

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Transcript

Speaker 1:

Welcome to Asking for Good a podcast for people who want to make a difference. Hear stories from seasoned nonprofit professionals and volunteers on how to begin or further a career in making the world a better place.

Speaker 2:

Hello, I'm Katie Pooser, a career fundraiser committed to making the nonprofit sector better. Jake Strang is the Assistant Vice Chancellor for Alumni Annual Giving at the University of Pittsburgh. In this role, he'd lead the comprehensive annual giving program that engages alumni, constituents and secure sustainable funds for pit's highest priorities. Jake has 15 years of experience and higher education development. Prior to Pitt, he held leadership roles at the Tepper School of Business at Carnegie Mellon University, Columbia University in the city of New York, and the University of South Carolina. With r and l a fundraising consultancy, he has experienced leading annual giving, direct marketing reunions, volunteers, class gift campaigns, giving days frontline fundraising, digital strategies, engagement centers, and leadership societies. In addition, he has also led alumni engagement efforts, including newsletters, social media events, webinars, and alumni magazines. Jake holds a bachelor's degree from the University of South Carolina in marketing and management, and a master's degree from Columbia University in nonprofit management. Jake, we are happy to have you here. Welcome.

Speaker 3:

Thanks, Katie. I'm thrilled to be here and get to have this conversation with you.

Speaker 2:

You know, Jake, you're really at this nexus of what people think of when they think about nonprofit fundraising. Your career has always been in the area of annual giving, in the university setting. Will you share with us how your first gig in a call center that you took so many years ago set you on this notable career path?

Speaker 3:

Absolutely. You know, I think it's, it's definitely an interesting path to get into in a career, to be in extremely rewarding. But one of the things that I've heard a lot just throughout working with different fundraisers is that no one aspires to be a fundraiser right out of the gate. And I'm not quite sure that's

the truth, because right now we are really very much an industry that has a lot of different folks coming into it. But for me personally, I wasn't that person that said I wanna be a fundraiser out of the gate. I had studied abroad as an undergrad in Italy and came back with a little bit of debt and needed a position or some sort of a job that would help me to pay that off. So I ended up taking a job as a Carolina caller at the University of South Carolina, which allowed me essentially to lay by the pool most days and then actually go into work at night and make fundraising calls asking for annual giving at the university.

Speaker 3:

So I was there making the phone calls, found that I really enjoyed the work, really enjoyed connecting with alumni and hearing their stories and why they like to give back to the university that I was already a part of. Ended up being promoted into a supervisor role and then becoming the manager of the call center with r and I after I graduated. And so at that point, I had been at South Carolina for two years after graduating, was looking for a change, and they offered me a position at Columbia University in New York City. Of course, Brain to South Carolina. Got to New York City, was an experience all of its own. But I went up to Columbia and worked with them for about a year through r and I and then was hired internally at Columbia to take on more of a traditional annual giving role, focusing on direct marketing and different digital strategies.

Speaker 3:

So that was really kind of my first taste of getting into a lot of annual giving outside of just what I had already learned in the call center and had the opportunity to again, move up, begin managing a team and, and really be a part of what's now known as giving days and running that first university Giving day at Columbia University. Fast forward a few more years, and I think everybody hits their New York expiration date, and it was time to move out of New York and be a little bit closer to family. And so through networking, through a benchmarking group I was a part of, I knew my predecessor at the Tepper School of Business where I took on the job of director of alumni engagement and annual giving. And so it was a hybrid role that allowed me to do alumni marketing efforts and alumni engagement while still doing the annual giving craft that I had already been working so passionately on.

Speaker 3:

And I wanted to be school based because I'd always been universitywide. And so it provided a different skill set. While I was there, there was a position at the University of Pittsburgh right down the road from Carnegie Mellon that allowed me to really look at building a comprehensive annual giving program and expanding on what was already there. There was a new leader in place, and so I spoke with the recruiter about the position and I knew that it was a stretch for me, but she had said to me that she thought I was my first fall candidate. And so I was really happy to, to hear that and to be able to come over to Pitt as the assistant vice Chancellor for Alumni Annual Giving. And so that's where I'm at today. My current role is one where I oversee all the annual giving for about 342,000 alumni. All of our parents, our friends of the university, our faculty, our staff and I partner with our regional campuses with athletics and also with our Grateful Patients programs at U P M C. So it was a really interesting opportunity to kind of create my own organizational structure put some best practices in place, and then see what we could do at pit.

Speaker 2:

I love that you went for a role that you thought was a little bit out of your comfort zone, a little bit of a stretch, and lo and behold, you secured the role and are obviously succeeding in it. So I really appreciate

that and want our listeners to hear that you don't have to have every box checked off in the qualifications to put your name in the ring. Go for it.

Speaker 3:

You know, it was quite the interview experience and I I just really got a good got a good vibe from just the team and the leadership that was there. I had known through some other friends in the industry that had worked with our new senior vice chancellor at another institution and had nothing but great things to say. And so I think it's one of those times where you look at it and you say, Hey, you know, this might not be the right role right now, but it's always good to make those connections and begin that networking because you never know what's gonna happen in the future.

Speaker 2:

I'm thinking about another part of your story here that help me tell this story. <Laugh>, the reference that you put down in the final elements of this with the person who said, I referred you to this job.

Speaker 3:

Yeah, it was a, it was a nationwide search for the position which is extremely flattering to be a part of that with so many other talented individuals. And so I've been very, very fortunate in my career that I have had some of the best mentors and just thought leaders that I've been able to learn from. And so when I approached one of my former supervisors and asked if she would be a reference for me she came back and said, Of course, I actually referred you for the position. And so it's one of those moments where I think that, you know, you just get all the feels, you start to really kind of realize how important networking is and also just being grateful for being, for surrounding yourself with amazing people. So if Chloe Demer listens to this, then obviously she's the person I'm talking about who's a deputy vice president at Columbia and still one of the best people that I've ever had the opportunity to work

Speaker 2:

For. Wonderful story. And another place where we meet great people, especially in your career path, are in these engagement centers or call centers. And I really appreciate an observation that you made, and that was that the call center is full of diverse students talking to donors, and as you get into more professional fundraising, you start to see less and less diversity. Why don't you talk to me a little bit about how your organization is responding to that lack of diversity?

Speaker 3:

You know, I think it is important, and as we talk about call centers, it's, it's interesting because it's, it's where I got my start, but I think that it's such a vital part of the development process and it teaches so many great skills like negotiation and the ability to take rejection when you're making those cold calls and really reaching out to alums. But being at a university, it's already a very diverse setting and you're able to, you know, bring in so many different thoughts and perspectives and different individuals as you're going through this and working in the call center that it creates for such a fun environment of just so many different people. I mean, I even think about the students being different from South Carolina to Columbia and just the difference in geographic settings, but also where everyone comes from. You know, I think that D I B initiatives are something that is very much at the forefront of what every institution higher ed or not, should really be focused on right now.

Speaker 3:

Our donor bases are aging, and I think that we need to be focused on the fact that different donor bases have had different experiences. And so for us knowing that our alums come from many different generations and different places, we have to be ready as fundraisers to meet them where they're at. And so that's really one of the things that I think as we build those relationships is important at pit. We're taking it, you know, very seriously. I serve on a D E I B interviewing hiring committee, and so that's one of the things that we're really focused on is recruiting diverse talent pools and working through what that means to ensure that we have different thought perspectives and different experiences to really harness the power of our alumni community. And so in addition to that, we've also hired some new positions that focus on working with our alums that maybe come from identity groups or affinity networks and those volunteers we're also looking into how do we, you know, find the initiatives that are where people care about our newest HR person.

Speaker 3:

You know, his title's a little bit different. It's it's diversity talent and HR solutions. And I think that that's completely different than anywhere I've ever worked that didn't actually even put diversity into that title to make it such a priority. So that's something that's very, very important internally while we try and find those initiatives that are meaningful to our alumni and our donors externally through the way that our, you know, director of development for D E I B is helping to engage those populations and find different initiatives that are meaningful for them for their philanthropy and their engagement.

Speaker 2:

That's a really critical element, how the organization structures itself to be responsive to the needs of the time. It's a real indicator as to whether or not the organization is future forward looking or if they're married to their way, way of working. I appreciate that you've made annual giving a career. So many people see annual giving as this springboard jumping off point to go into other types of fundraising. I'd love to hear you talk a little bit more about why annual giving is its own career now, or why it's a far more viable career than it used to

Speaker 3:

Be. You are right that a lot of folks see annual giving as being kind of this entry point into what we do and that maybe you become an annual giving officer or you start working in direct marketing or call centers to inch your way up into another area like corporate or major or planned giving or principal giving. And I just don't see it that way anymore. Annual giving has evolved so much and the pandemic has only made it even more important to our organizations. I talk all the time about a lot of our fundraisers had to be taught how to use different technology that the annual giving team is using on a regular basis, whether it's through Zoom or whether it's through video platforms and you know, text messaging platforms. All of these outreach that we do from a distance all of a sudden became so important.

Speaker 3:

The other thing about annual giving is that we're, we're in a revolutionary point where the sophistication is just skyrocketing. You know, in my role I'm expected to be a digital strategist. I'm expected to know the database and understand how to look for trends and do analysis. If you don't know what a v lookup is in Excel, highly recommend that you do that. It's my favorite formula and I swear that everyone on my team maybe didn't know how to do it coming in they do now. But, you know, we have to be email experts, we have to be good writers, we have to understand and price out

different vendors. And so annual giving is just very diverse in the work that you do, and that doesn't even come into the frontline aspect of it. You know, one of the things that I like to do is talk about all of our major gift donors and where they got started.

Speaker 3:

The classic example I think that a lot of folks use is actually Bloomberg from Johns Hopkins because Johns Hopkins still has his first donation certificate that tracks his first \$5 gift that was made within two years of him graduating. And now obviously we all know that Michael Bloomberg has given millions of dollars to Johns Hopkins and it's one of his favorite philanthropic priorities. But it all starts somewhere and it all starts by teaching that philanthropic culture when they're at our institution so that that way they graduate and they make that first \$100 gift and then they get a letter that tells them that they should give 150 and then they get a phone call from a student caller or from maybe it's a annual giving gift officer that asks them to give 500 and then maybe 500 becomes 5,000. And so I think that it's incredibly important that we recognize that it's gotta start somewhere and we are the ones that are acquiring the next generation of donors so that that way they can be moved up the pipeline. And that's very, very critical. In addition to that, most traditional programs focus on unrestricted giving. And while the trends may be showing that folks like to know where their money's going, we still need those unrestricted dollars to keep the lights on and to make sure that, you know, our students have the resources to travel abroad or are learning from the best textbooks or doing all of those things that maybe we can't put a price tag to, but our leaders are allocating the resources responsibly.

Speaker 2:

I love that story of a \$5 gift turns into naming a building later because that's what I see over and over again, especially working with our planned giving donor population where loyalty begets loyalty, loyalty begets further interest and confidence and trust in the organization. And that's happening in these annual gifts, these once per year donations, these monthly donations. Well, we're heading into the end of year giving season when most people are making those once per year gifts. Do you see any difference in the way your end of the year campaigns are managed today than five or 10 years ago? And dare you even project into the future five or 10 years ahead?

Speaker 3:

Absolutely. you know, when I started doing annual giving, our end of year campaigns may have been that we've sent a direct mail appeal and then we would send a couple follow up emails. You know, that traditional methods still works and especially in, you know, different shops that maybe don't have the resources of having a large team, but digital is the name and that's where we're at right now. It's placing ads and getting them out there the same way that, you know, our for profit, I don't wanna say competitors, but competitors and colleagues are doing. And so when I talk about having to be in the digital space and understanding what it means for a website visitor to be retargeted because they visited a website, that's where we need to be with a level of sophistication to get folks to know that inboxes are getting more and more full.

Speaker 3:

And so as we see that, you know, we get hundreds of emails every day and we maybe read five of 'em, how do we make sure that we're the priority? And that's not just for end of calendar year when we're looking at tax options, it's also even on a Giving Tuesday when every nonprofit out there is, we know there are more and more nonprofits today is also trying to get your donors to get to their area. So we've

gotta be creative in thinking about it. We've gotta think about if we're sending videos or if we're doing text messages if we're doing the phone calls, if our gift officers are helping us to retain those that gave at this point last year. Those sorts of things I think are very, very different than maybe what we were doing five or 10 years ago. And I think that with the rising costs of postage, with the rising costs of paper and the shortages that Covid 19 pandemic has created, we're gonna need to turn more digital and we're gonna need to find more ways to be personalized at scale and do outreach in that way.

Speaker 3:

And so I do think that things are changing and they're only gonna continue to get more sophisticated.

Speaker 2:

I couldn't agree more. And for those not in the middle of this work, you may not know this, but there is still a paper shortage in September of 2022. There's a paper shortage and all of these direct mail catalogs, anything like that, that uses that medium to reach people, they're having to think differently about how to do it. We've been talking on mass about fundraising, about different strategies, about ways to connect to people. Given your 15 year plus history in fundraising, can you tell me about a memorable gift that you've secured?

Speaker 3:

First of all, 15 years still feels like a long time. Even though when you enjoy the work that you're doing, time does fly. I think that it's, it's tough when you're an annual giving to always think about one particular gift. Major gift fundraisers focus on that one gift, which is great because it's large and it's so impactful in annual giving. We may not be focused on a 5 million gift, it may be a \$100 gift that we found, you know, from somebody who had never given before and that they really wanted to be a part of something and we connected them with the right area. And so, I mean, I have stories about being on the phone and talking to different parents or alumni or friends and then talking to them about specific initiatives that maybe don't have to do with where they graduated from, but it's something that I enjoyed personally and really kind of bringing it back to that human aspect and then actually seeing a donor go, You know what, that's really cool, I think I want to give there.

Speaker 3:

And so I think that that's really kind of the difference is that while a lot of major gift fundraisers are out for that one gift that they have, the great story about, I have hundreds of gifts, thousands of gifts that have come in, we're really kind of looking at how do we create that individual conversation, that feeling that means something to that donor and creating the content that's very compelling. You know, one of the things that's really was meaningful for me personally was at the beginning of the pandemic, having the ability to tell two different, very focused stories. I was fortunate that, again, leadership at PIT allowed me to kind of go in whatever direction we thought would be the most successful while still coming off in a caring way PIT is known for our vaccine research. And so obviously that spoke to itself.

Speaker 3:

My boss makes a joke that we're contractually obligated to Stite that Jonas Sal solved the polio pandemic at Pit with a vaccine. And so obviously that was one story, but being able to tell the stories about student emergency assistance funds and, you know, students that were having trouble making rent because they couldn't go to work or having trouble putting food on the table, and the ability to actually bring it back to that individual and tell their story so that that way they could get a grant specific

to what was happening at that point was really, really meaningful. And we saw a lot of our donors really come through as being passionate about helping at that moment when everyone needed. So that's one of the things that I think without going into one specific story, it's that ability to create the compelling content that changes a donor's mind and gets them to give where we need it the most, when we need it the most.

Speaker 2:

Those gifts and aggregate change the world. They change the way pit could respond to emergencies. They changed the way students experience the university. And it's easy to think as a donor, you know, oh, my \$25 isn't gonna matter, right?

Speaker 3:

But your

Speaker 2:

\$25

Speaker 3:

Matched with hundreds of other donors giving \$25 adds up quickly, and it does make a difference. I think a lot of folks are still set on the fact that annual giving is about rate rankings especially within higher education. And yes, it contributes into that, but at the same time, we need to be meeting our donors where they're at and giving them a reason to give that they're passionate about, not just because of the, the rankings that are put out by different publications.

Speaker 2:

That's a great point. I also think that the number of annual fund donors that an institution has parallels a vote of confidence for the organization. Being able to tell this prospective students, being able to tell other supporters, being able to tell the Board of Regents or even foundations or other types of funders that we have, a really large group of people supporting us is really important for nonprofits of every size.

Speaker 3:

Absolutely. And you know, I like the way that you frame that, Katie, because one of the things that we talk about a lot, especially in higher ed with these rankings is the participation rate. And the issue is, is that we are graduating thousands and thousands and thousands of new alumni every year. And so as morbid as this may sound, not that many are leaving our solicitable donor base every year. And so it's tough for us to increase participation rates, but we are able to increase the amount of donors that are coming in and those donors are the ones that are having an impact. And so yes, our base is getting larger, but at the same time we're bringing, we're more focused on bringing in more people and more new donors and then bringing back those that have lapsed than we are on actually increasing the participation rate. Because the participation rate, as I've mentioned, is getting harder and harder, you know, as that base number continues to grow.

Speaker 2:

When we talk about bringing new donors on board, I was really excited to hear about a couple of positions that you've recently created and hired for, and I wanna hear about those positions a little bit.

But more broadly, as a hiring manager, as a leader of a department, trying to think about the best ways to grow, what are you looking for when you are hiring candidates?

Speaker 3:

There's a number of different things. Experience is great, but I think that when we also talk about the IB and you know, how are we diversifying our talent pools, we also have to look at applicable skills. And so the positions that you're referencing are called donor experience officers, and you know, we've recently onboarded two of 'em. They're more digital focused fundraisers that are focused really on engagement through nontraditional means and moving folks up the pipeline. For me personally, being that we've already talked about my call center background, I'm gonna say that a former call center student is still one of my favorite people to hire. And the reason is, is that they've learned those hard skills of negotiation. They understand rejection, they understand the mission, and they're bought into it and it's a hard job. So if you can get through that and come out and still enjoy this work, then I know that you're gonna be passionate about what you're asking for money for every day.

Speaker 3:

The other thing is, is that I want somebody that is data savvy and smart from that perspective, but I also want somebody that's personable. If you can't get through an interview with me and have a conversation I mean, we're fundraisers like we can talk to a wall. And so that's very, very important that we have somebody that has that ability. Not necessarily an extrovert, but somebody that can carry an intelligent conversation about what they're actively trying to get you to support is very, very important. Door to door sales, you know, is another place where I think that if their sales experience there, it can be transitioned into fundraising. If you've worked in other areas of fundraising and you know, maybe you've been writing grants for a while and you want to try doing more face to face, these are all different areas that I think that we need to be thinking about and unlikely one that I'm gonna toss out, there are folks that are a little bit more centered on being from like the arts because I find that folks that are, are typically coming from an arts background, be it what they studied or, you know, being a part of something like a performing art shows that they have this depth and they have this energy and they have the ability to be animated and be out there and put themselves out there for what they believe in.

Speaker 3:

Those are all very, very important skills that I look for when I'm interviewing.

Speaker 2:

Thank you. I'm sure our listeners are taking notes on that section. When you talk about people who are part of the arts, it really resonated with me, especially when I think about the importance of having interests and hobbies outside of work. What do you do to retain a well-rounded personality and a well-balanced life? Are you reading any good books? Are you, are you competing in triathlons? What's your bake offs? What's your, what, what do you do to to keep yourself well-rounded?

Speaker 3:

I am not competing in triathlons, let me tell you that. So I appreciate that you think I would be, you have to have a life outside of work and the work life balance is extremely important. Family's very important to me. Being around my friends, having the ability to enjoy nice meal, you know, being in fundraising, plenty of glasses of wine <laugh>, all of those things I think are very, very important to making sure that we're, you know, engaged outside of work and inside of work. Now, I think inside of work though,

definitely reading and keeping up on what's happening is very, very important. There's a number of different books that I think are amazing that are outright now and that I've recently finished reading one's called Future Philanthropy with Ryan G. Bernard he also just spoke at a conference that I was at recently, really enjoyed his book, One that was given to me by actually Chloe, who I mentioned earlier, that I recommend to all of our communications staff and our annual giving staff.

Speaker 3:

I call it the Annual Giving Bible, and that's how to Write Successful Fundraising Appeals by Mel Warrick. What's funny about this one is that there are different generations of that book and it still has the core principles of how to do successful appeals, even though it's been out for a while. One of the books that I had to read when I was in grad school at Columbia was the Chief Development Officer by Ron Scher. And that's a very basic book. It's very good for folks that are just getting into the industry and in kind of letting you know what you're looking towards being a development leader. So I mean, those are a few of 'em more inspirational. I recently read Thirst, which is one of my all time favorite books. It's about Charity, Water, you know, their founder and him coming from a life of partying in New York City to developing this amazing nonprofit that's so inspirational and has some of the most beautiful photography.

Speaker 2:

I heard him speak at a conference 15 or 20 years ago and he said, If you have good content, they will use it. And that has stuck with me forever. And he was talking about how s Fifth Avenue used their content of dirty drinking water and water buckets that people used. I'm sure that book is full of other great one liners, but whenever I think of Scott Harrison, I think of if you have good content, they will use it.

Speaker 3:

It's a book that I think is the way that it's written. It's obviously a true story and there are moments when you wanna laugh and there are moments when you wanna cry. It's fantastic. The other piece that I'll share too that's a little bit more non-traditional is I think that you have to look for inspiration in everything that you do towards your work. I have an amazing colleague and he talks about everything from commercials that come on while he was watching TV that inspire him to go into a bookstore and just looking at the art on the covers and thinking about how can we turn that into an appeal or, you know, what's really making me feel a certain way based on what I've just watched.

Speaker 2:

Excellent examples and excellent reading list will be sure to share those in this show Note. Any final thoughts or parting words for our listeners?

Speaker 3:

It's such an exciting time to be in our industry right now, and things are changing so rapidly and so having the ability to connect yourself to an institution or an organization that you believe in is so essential. If you're gonna get into fundraising, you need to believe in what you're selling. The other thing is, is you cannot put a price on good leadership. And as I've said before, I am extremely fortunate that I have worked for some of the best in the industry. And I continue to think that if you don't have the right team in place, if you don't have confidence in your supervisor and they don't have confidence in you, it may not be the right place. And so always keep that in mind that you wanna believe in what you're,

what you're doing, but you also wanna enjoy the people that you're doing it with. Always follow good leaders and really look for those organizations that mean the most to you.

Speaker 2:

Thank you, Jake. This has been a wonderful conversation and I'm even more inspired than when we started, so I really appreciate your time.

Speaker 3:

Absolutely. Thank you Katie.

Speaker 2:

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