

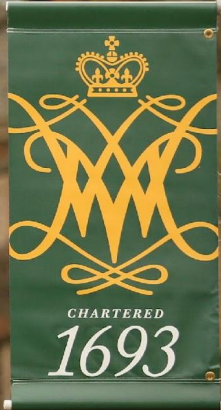
From Vision to Implementation

Building a High-Performing DGO Team within Annual Giving

Meghan Dauler Palombo, Associate Vice President

Today's Agenda

- Overview of key opportunities
- Execution strategies for implementation
- Insights and cadence samples
- Key takeaways



A little bit about me...

- Graduated from Cazenovia College
- Joined William & Mary in 2018
- Earned my M.B.A. from W&M in 2023
- 15+ years in advancement
- Passionate about annual giving – and animals!



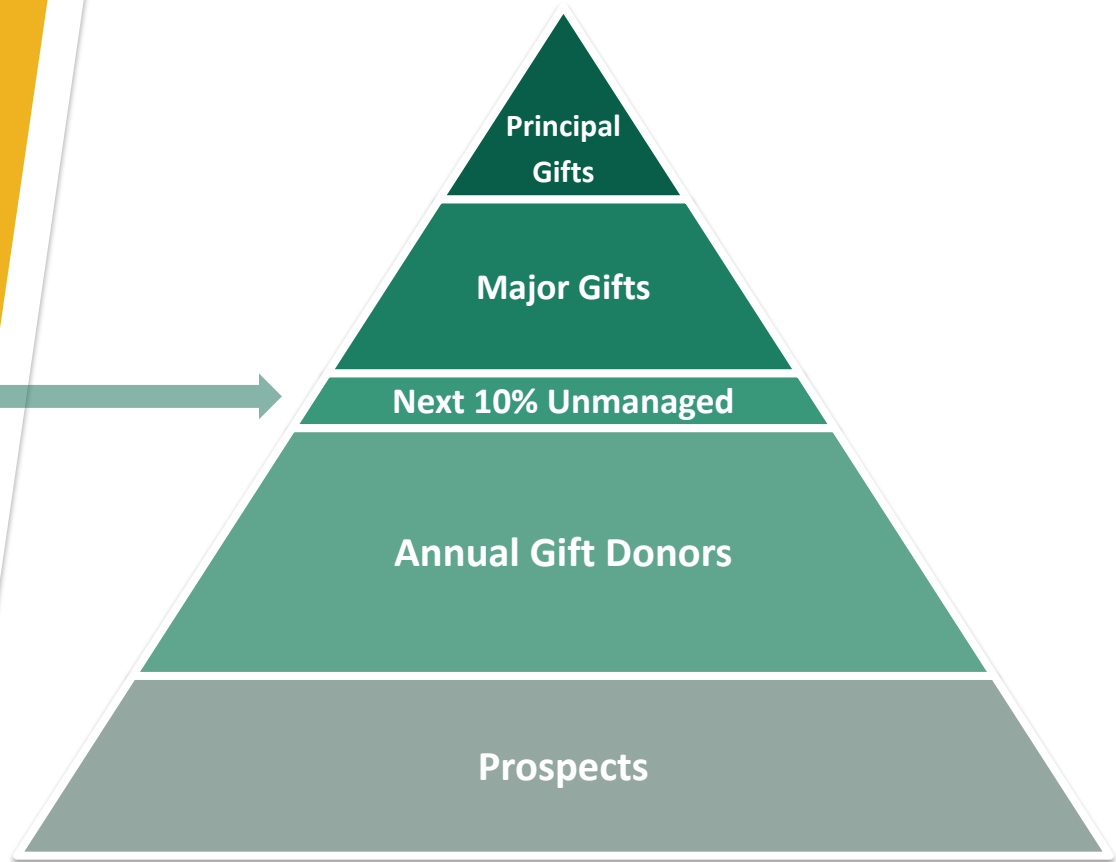
A little about W&M...

- Williamsburg, VA
- Founded in 1693
- Student population:
 - 71% undergraduate
 - 29% graduate
- Advancement size: 250+
 - Including Careers, Communications, Marketing



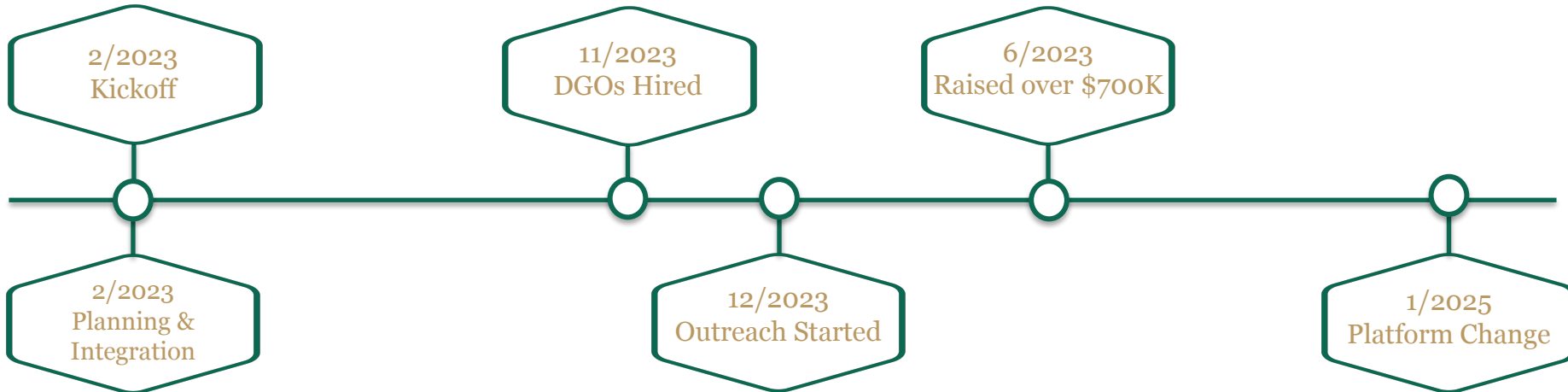
The Opportunity

- Meaningful Engagement
- Pipeline Development
- 1:1 Relationships



Idea to Execution

- Business need
 - Closing the gap between AG & MG
- Internal buy-in
 - SVP, AVP, internal teams
- In-house or vendor supported
 - We went with a vendor-supported model
- Implementation & Timeline



Building Out the Program

- Hiring the team

- Portfolio Creation

- SOPs & Documentation

- Partnerships within Advancement

“The Digital & Leadership Annual Giving team cultivates impactful relationships, provides excellent stewardship, and consistently exceeds outreach, visit, solicitation, and fundraising goals.

Through partnerships across University Advancement, the team successfully engages donors and strengthens their connections with William & Mary.”

DGOs at W&M



1,000 Household
Portfolio



150 Visits
(phone, Zoom, in person)



600 Solicitations
150 Substantive

Sample FY Strategies by Month

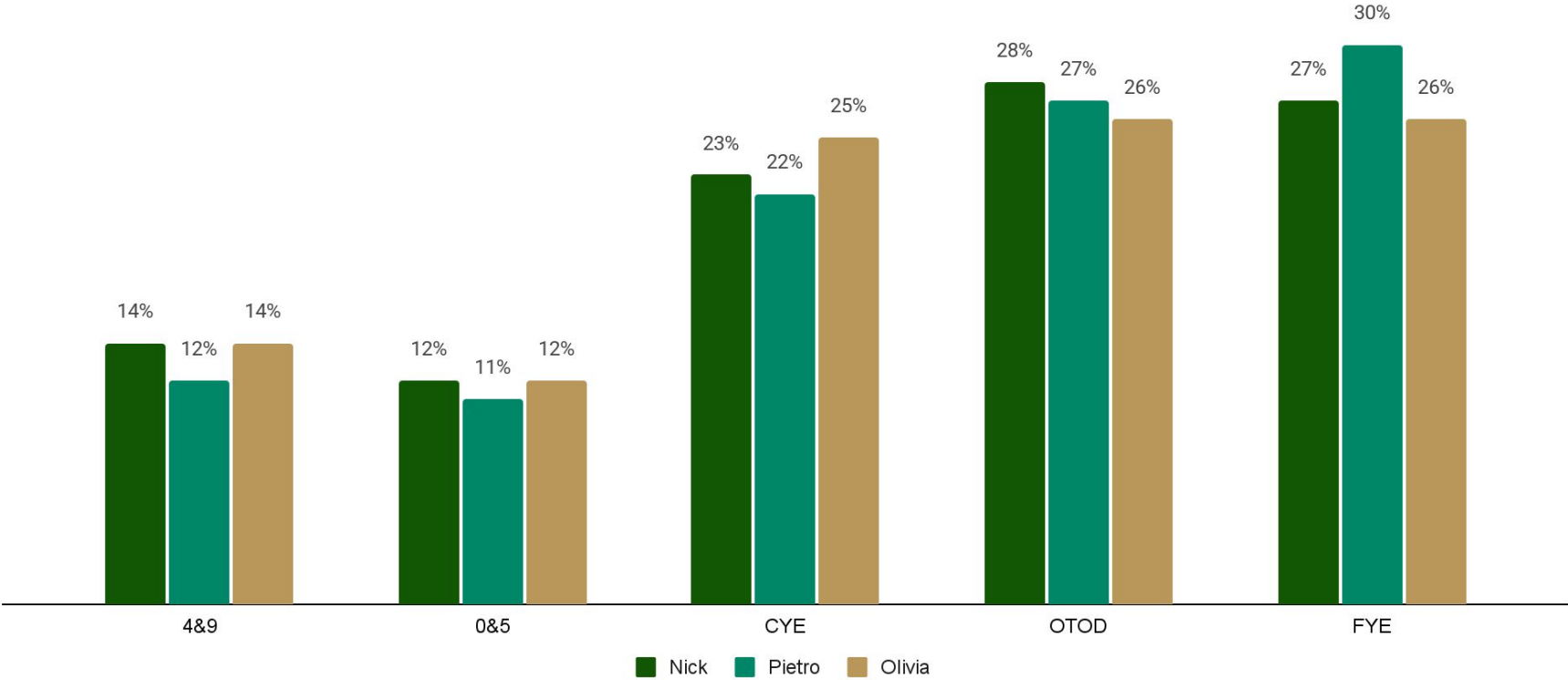
July-August

- Prospect Management Review
 - Data Analysis from prior FY
 - Removal of disqualifications
 - Additions to portfolio
- Cadence Review
 - Adjust as needed

September-October

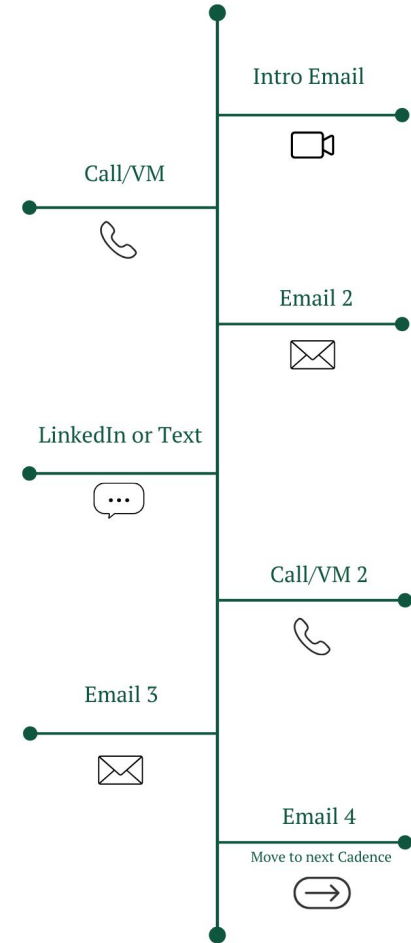
- Donor Segment Focus
 - Donors in 4&9 reunion years
 - Donors in 0&5 reunion years
- Collaboration with Reunion Team
 - Review donors in cycles
 - Refine messaging and build cadences

FY25 Portfolio Segment Focus



A Cadence-Based Approach

- Partially-automated, personalized 1:1 outreach
 - Categorized Cadences (qualification, stewardship, solicitation)
 - Customizable email templates
 - 25 video introductions per week (5/day)
 - 20-40 tasks per day (phone, email, LinkedIn, text)



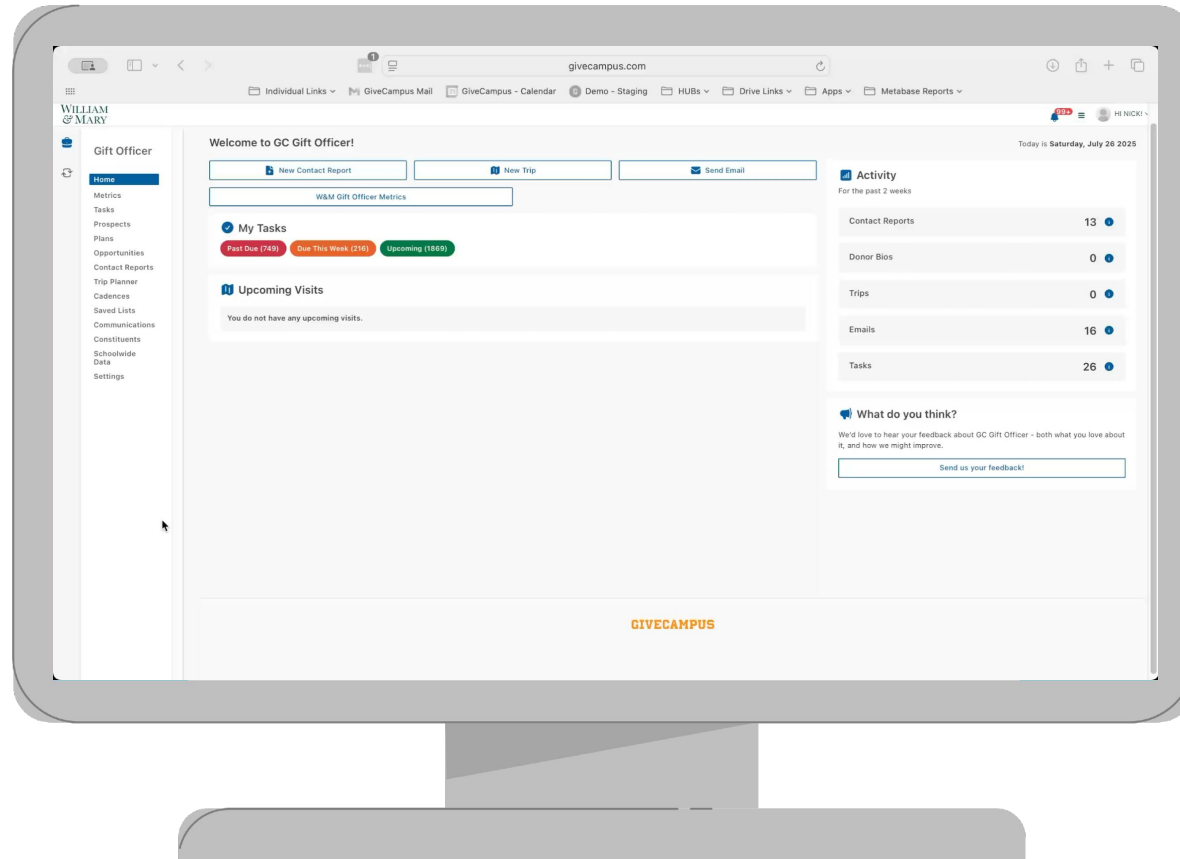
DGO Qualification Introduction Steps

The screenshot displays the GiveCampus web application interface. The browser address bar shows 'givecampus.com'. The user is logged in as 'HI NICKI'. The main content area is titled 'DGO: Qualification Introduction' and includes a description: 'Introductory cadence designed to gauge donor's interest in meeting with a DGO and to bring them to a place where a solicitation is appropriate for them. This is not someone we have spoken with yet. This cadence combines the original Qualification and Regular Engagement cadences.'

The 'Cadence Steps' section is active, showing a table of steps. The table has columns for Outreach Type, Title, Constituents in Step, Due Day, and Step. An 'Add Step' button is visible in the top right of the table area.

Outreach Type	Title	Constituents in Step	Due Day	Step
Social Media Outreach	Donor Research & LinkedIn Follow (Research multiple data points about donor. Education, location, relationships, career, etc.)	0	1	1
Other	Make video	0	1	2
Send Email	Email Intro & Video (Personalized introduction with video highlighting relevant research points, solicit a meeting)	0	1	3
Call Prospect	Call/Voicemail (Follow-up on personalized email. Provide context on outreach)	9	5	4
Send Email	Email (Send email in regards to previous step if the donor did not answer)	8	5	5
Other	LinkedIn message, text, or call (Short 15-20 message referencing donor interests, relationship, and information)	12	10	6
Call Prospect	Call/Voicemail (Check-in call attempting to establish relationship with the donor.)	8	15	7
Send Email	Email (Follow-up email based on previous step.)	4	15	8
Send Email	Email (Follow-up on previous outreach. Last attempt to start a conversation before moving into a cultivation cadence.)	15	20	9
Other	Log bulk "Attempted" interaction up to this point & assess university schedule for solicitation dates (Summarize outreach that took place during introductory cadences.)	15	20	10
Send Email	Email (Continued effort to start a conversation based on information from donor conducted in introductory cadence.)	15	30	11

DGO Stewardship Cadence Example



DGO Workflow Through Cadence Steps

Ola Koza-Reinders's Portfolio

My Tasks

Launch Task Manager

Search Task Titles

Postpone Selected Tasks Filter Tasks New Task

<input type="checkbox"/>	Task Type	Task Title	Constituent	Connected to	Due Date	
<input type="checkbox"/>	Other	DGO: Stewardship - Step 4: Email (Provide information specific to their gift impact and/or something of donor interest or quarterly update email. Solicit a meeting.)	Luciana Aguilera	Cadence	Aug 01, 2025	
<input type="checkbox"/>	Other	DGO: Stewardship - Step 4: Email (Provide information specific to their gift impact and/or something of donor interest or quarterly update email. Solicit a meeting.)	Nicole Jibrine	Cadence	Aug 01, 2025	
<input type="checkbox"/>	Other	DGO: Stewardship - Step 4: Email (Provide information specific to their gift impact and/or something of donor interest or quarterly update email. Solicit a meeting.)	Donna Sheridan	Cadence	Aug 01, 2025	

Our Partnership with GiveCampus



2016



VMS

Started with GiveCampus with their Volunteer Management System (VMS)

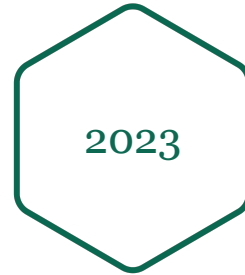


2021



SF and GFs

Added Social Fundraising and Giving Forms



2023



Design Partner

Became a design partner for GC Gift Officer and added unlimited giving forms



2025



DGO Transition

Transition DGO team to GC GO

Since transitioning the DGO team in January 2025, we've seen increased data flow, insights in communications in donors, and transparency across all of advancement

DGO Team Metrics

Constituent Interactions

Constituents contacted: **2,728**

Constituents met: **110**

Number of meetings: **96**

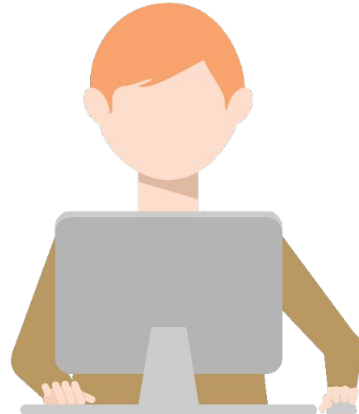


Communications

Emails sent: **5,003**

Email thread open rate: **74%**

Email thread reply rate: **8%**



Activities

Contact reports: **3,881**

Donor bios generated: **272**

Tasks completed: **9,285**



Cadences

Constituents in cadence: **2,540**

Constituents completed: **1,140**

Cadence steps completed: **9,250**



Success Story

- \$25K given last FY through exclusive email communication
- Created new expendable fund & pledged annual gift increase to \$10K
- Previous visit attempts unsuccessful



Success Story

- \$150K Endowment + \$10K Expendable
- First meeting via phone for one hour
- Joint MGO/DGO Proposal



Success Story

- \$137K Planned Gift + \$16K Annual Gifts
- Leveraged in-person events, such as the 50th Reunion
- Continuous engagement & in-person meetings



Results (11/1/23-6/30/25)

\$3,156,105 Raised

1,300+
Solicitations

17K+
Activities

600+
Visits

Takeaways

- ✓ Build relationships & transparency with key stakeholders

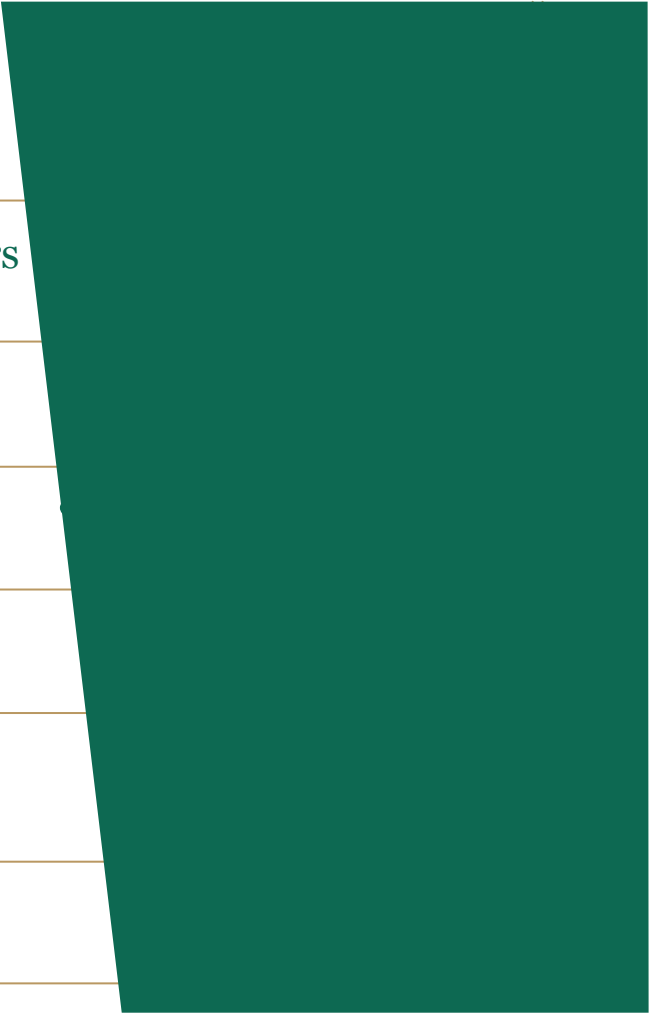
 - ✓ Identify your top unassigned donors

 - ✓ Implement cadence structures for outreach

 - ✓ Personalize the donor's experience

 - ✓ Continue to evolve your approach

 - ✓ Document everything!

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Questions?

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