



GIVZEY CASE STUDY _____

WILLIAM & MARY SECURED \$500,000 IN JUST THREE MONTHS WITH GIVZEY

William & Mary's partnership with Givzey has strengthened the university's fundraising efforts.

Learn how W&M secured \$500,000 in three month's time with fundraising's first gift agreement & retention platform.



ABOUT OUR PARTNERSHIP

For eight years in a row, William & Mary has remained the No. 1 public university in the U.S. for annual undergraduate alumni giving and is recognized globally as a leading teaching, learning, and research university.

This case study shows the process and results of retention, revenue, and pipeline generation from using Givzey's Gift Agreement & Retention Platform to secure multi-year gifts from giving at all levels.





THE CHALLENGE

To enhance the support of its people, places, and programs, the university is committed to advancing innovative solutions that secure fundraising growth.

In doing so, W&M had been looking for ways to make multi-year giving more accessible to donors at all levels – a strategy that previously could not extend to mid-level donors due to manual processes.





THE SOLUTION

W&M found Givzey's Gift Agreement & Retention Platform as the solution to unlock and scale its multi-year giving strategy broadly, with a particular focus on mid-level donors.

Givzey onboarded W&M's frontline fundraisers in a single day, as they were working on the final couple weeks of their fiscal year-end push. In just three months, the W&M team used Givzey to bring a multi-year giving strategy to fundraising programs where it's been too difficult to tackle before.

"Givzey has empowered us to open new doors and scale multi-year giving opportunities broadly across leadership and annual giving, board members, and each of our fundraising units."



MATTHEW T. LAMBERT

Vice President for University Advancement
William & Mary





In three months with Givzey, W&M used the platform in the following ways:

- **Fiscal Year-End**

W&M taught frontline fundraisers how to use Givzey to secure gift commitments at the end of the fiscal year and set up multi-year agreements with donors.

- **Boards**

W&M is using Givzey with boards across campus to secure multi-year gifts for the length of each board member's tenure.

- **Major Gifts**

W&M uses Givzey with major gift donors to secure annual gifts and keep one-to-one donor touchpoints focused on building relationships and developing deeper connections with the university.

- **Athletics**

W&M Athletics uses Givzey in solicitations of new donors and re-solicitations of current donors to turn one-time gifts into multi-year gifts.

"What I love most about Givzey is that W&M can now apply our multi-year giving strategy to giving at all levels. Onboarding took less than an hour and we immediately used Givzey in our fiscal year-end push. We've applied the Gift Agreement Platform to W&M Athletics, board member commitments, and for major gifts - and we're still finding more ways to use it."



MEGHAN PALOMBO

Associate Vice President for Annual Giving & Philanthropic Engagement
William & Mary



"Givzey has helped me hit my fundraising goals and it's super simple to use, even while I'm in conversations with my donors. What's really amazing is that the more I use Givzey, the more I'm setting myself up for success next year, while still bringing in revenue this year."



JAMES FREY

Assistant Athletics Director, Advancement
William & Mary





THE RESULTS

In the first three months with Givzey, William & Mary secured \$500,000 of donor commitments using Givzey's Gift Agreement Platform. For a platform that took only an hour to onboard the team, it has helped fundraisers secure multi-year commitments with an average gift size of \$2,500. To date, the largest gift has been \$105,000.

WILLIAM & MARY'S FIRST 3 MONTHS WITH GIVZEY

LARGEST GIFT.....**\$105,000**

AVERAGE GIFT SIZE.....**\$2,500**

ONBOARDING TIME.....**1 HOUR**

\$500,000

TOTAL GIVING SECURED WITH GIVZEY





William & Mary Secured \$500,000 in Just Three Months with Givzey

CASE STUDY

W&M has proven again that they are advancement pioneers by investing in innovation that fuels fundraising growth. To learn more about Givzey's Gift Agreement Platform and see how these results can translate to your organization, schedule a demo today by visiting:

[GIVZEY.COM/DEMO](https://www.givzey.com/demo)



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