Creating Personalized Impact Reports | 02.24.16
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Leftover Questions

Q: How do you determine when a donor receives a comprehensive report? After they have given a certain amount?
Ans: There is no set “point” at which a donor receives a report. The decision to create the report is based on whether we feel the piece could play an important role in the relationship at that time – i.e., would it serve a much needed purpose (some of those goals we discussed in the program and listed on slide 44). We are at this time limiting the individual impact reports to those donors in our Leadership Gifts portfolio, so those who have given $1M+ and we address whether an impact report is needed for them when we talk about the overall cultivation/solicitation/engagement strategy. But again, it’s a very soft approach based on relationship goals and not dollar amounts.

Q: Do you include a listing of all the "touchpoints" or invitations made to the donor?
Ans: We do not include a listing of ALL touch points to these donors in the reports as it would be too much information (especially for this level of donor who have connections all throughout campus at all levels), but we do hit on the high level contributions outside of their financial giving such as volunteerism, boards, Dean’s level associates programs, student mentoring, OSU honors such as Hall of Fame inductions, etc. This information is often included in a section we call Notable OSU Honors and Service. If you look at the individual sample report in the packet (the redacted version), on page 10 you can this section for this donor. Sometimes this section is very lengthy and contains all levels of service from sitting on a small committee all the way up to acting as a Regent. It’s dependent on what we know is important and has been personally fulfilling to the donor.

Q: Do you build out your strategic plan of who to deliver to on an annual basis?
Ans: Our goal is to have approximately 6-12 months of reports planned out (roughly) at a time. This has been huge challenge for us as this requires the buy-in and collaboration of the Leadership Gifts Team and the multiple development officers who manage these donors to actually sit and set out their short and long-term cultivation/solicitation/engagement strategies and plan these well ahead of time in conjunction with our team. We are making strides in this area, but we are often still faced with short-turnaround requests and erratic scheduling. But as the structure and program around the top donors is improving all the time (we are currently completely revamping the top donor program), we are getting more assistance from the DO’s in planning ahead and working to schedule at least 6 months ahead. Given that these are for complex donors with complex relationships, delivered by our Leadership with challenging schedules and priorities, we often feel we are dealing with moving targets! But in the end, the result is worth it.