 **LEARNING OUTCOME**

### After participating...

...you will be able to develop personalized impact reports for your donors.

**ai** ACADEMIC IMPRESSIONS 2

## AGENDA

- OSU
  - Environment
  - Results
- Strategic plan
- Production
- Effective delivery tactics
- Setting realistic goals considering time, staff, and budget
- Extendable impact reports



## POLL

**For whom do you currently  
produce customized  
impact reports?**

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## OSU'S ENVIRONMENT



### SIGNIFICANT INVESTMENT: WHY?



- Completed \$1B Branding Success Capital Campaign
- 100,000 donors/40,000 first time donors
- 270+ \$1M+ donors
- Not communicating enough impact to donors at all levels



## OFFICE OF DONOR RELATIONS

- Reports up to VP of Development Services
- Donor Relations / Stewardship and Compliance / Special Events
- Day-to-day programs managed by AVP of Donor Relations/ 17 FTE



## OFFICE OF DONOR RELATIONS

- Donor Programs
- Scholarship Administration
- Top Donor Engagement Plans
- Donor Communications
- Special Events
- Gift Agreements
- Donor Fund Auditing
- Impact Reporting & Annual Endowment Reports
- Acknowledgement writing for Foundation and University Presidents



## COLLEGE-BASED CONSTITUENT RELATIONS ASSOCIATES

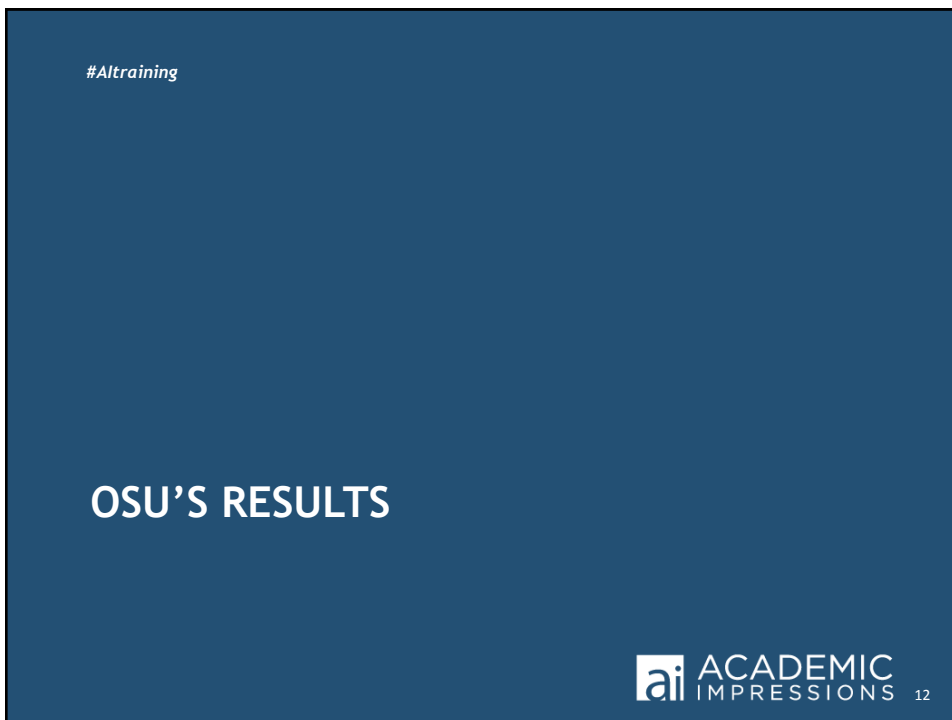
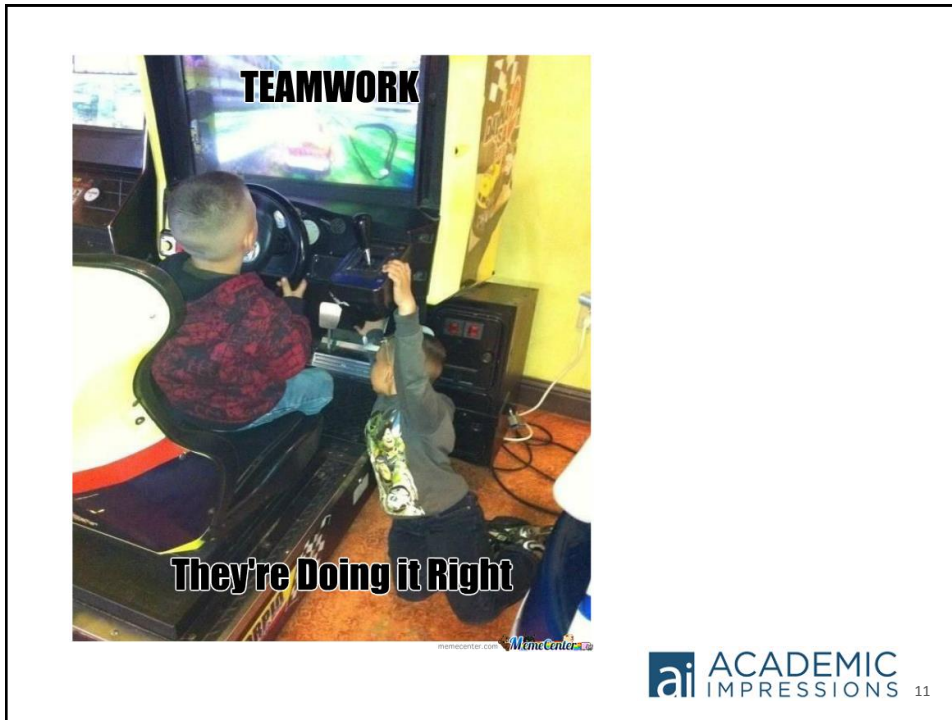
- Report to Team Lead Development Officer in each college
  - 8 FTE positions
  - Focus on donor relations/stewardship tasks and projects unique to their college; varies in each position
  - Aid in communication regarding impact reporting and annual endowment reports



## COLLEGE-BASED CONSTITUENT RELATIONS ASSOCIATES

- Report to Team Lead Development Officer in each college
  - Acknowledgement writing for DO & Dean
  - Special events
  - Individual engagement plans for college VIP donors







## RESOURCE

### Generic impact report for individual

(names redacted)

## DONOR FEEDBACK

**“I am at a loss for words. I have never seen a more personalized, or a more touching means of expressing a thank you. It is humbling. At the same time, it causes me to swell with pride.”**

**“When I read the scholars comments, I remembered why I started the scholarship program.”**

## DONOR FEEDBACK

“This is an impressive document, and we commend you on **this fine tool to quantify the support and to also humanize the impact** with statements from the students who have benefitted.”

“When he saw the picture of his father, he welled up. I have never seen this man emotional.” - **Foundation President**

- Nearly 25% request additional copies



## RESULTS BY THE NUMBERS

### NUMBER OF REPORTS

32

### NUMBER OF DONORS

53 individuals  
6 organizations

### GIFTS GIVEN W/IN 6 MO.

\$18 million

### LARGEST COMMITMENT

\$12.6 million





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## STRATEGIC PLAN



### OUR PLAN

#### GOALS

- Report to donors the positive impact of their comprehensive giving
- Demonstrate their donations are being used according to their intent
- Express our gratitude for their continued support of OSU
- Inspire them to continue giving



## ■ IDENTIFYING THE RIGHT DONORS

- Recipients selected by Director of Donor Engagement as part of overall personal engagement plan
- Also requested through Leadership Gifts Team when discussing top donor strategies

## ■ IDENTIFYING THE RIGHT DONORS

- Very top tier individual donors with multifaceted giving
  - Fills a need for holistic impact reporting
  - More variety for content
  - Translates better in visual elements such as pie chart
  - Works better for donors with realized giving, not just large estate/planned gifts

## IDENTIFYING THE RIGHT DONORS

- Guiding Questions:
  - If we do this, will it “move the needle” in our relationship with the donor?
  - How can we use this report strategically?



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IMPRESSIONS 21

## IDENTIFYING THE RIGHT DONORS

- General Rules:
  - Presentation of report utilized at platform/entrance for other strategic conversation
    - Repairing relationship
    - Next leadership gift
    - Vet giving area interests
    - Volunteer request

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IMPRESSIONS 22

## IDENTIFYING THE RIGHT DONORS

- Work with relationship manager to determine:
  - Best timing
  - Focus of content
  - Key players
  - Ultimate delivery/presentation



## IDENTIFYING THE RIGHT DONORS

- Request made from Donor Engagement to Stewardship
  - 2-3 per month
  - Requested/scheduled 6 months/semester at a time
  - Reflected in annual business plans for both areas

## ■ IDENTIFYING THE RIGHT DONORS

- Also completed for top tier corporations and foundations
  - Content and style varies
  - Less narrative content and more statistical data

## ■ GETTING BUY-IN: THE HARDEST PART!

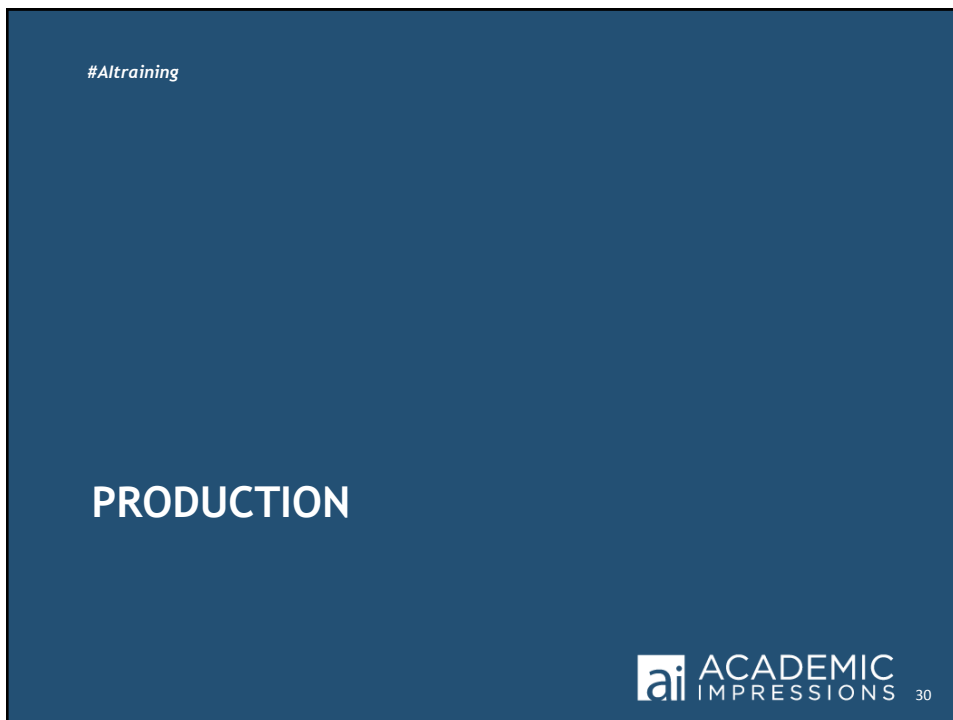
- Both Foundation and University Presidents enjoy delivering the report and highly support the process
  - Reason to get a meeting
  - Ice Breaker
  - Simply and visually demonstrates total impact
  - Giving totals often surprise donor and can lead to significant cultivation conversations - “What’s Next?”

## ■ GETTING BUY-IN: THE HARDEST PART!

- Development Officers see value in report, but have been less involved in process - working to improve

“Nothing is more obstinate than a fashionable consensus.”

- Margaret Thatcher



## ■ KEY PARTNERSHIPS

- Comprehensive reporting cannot happen without
  - Internal collaboration (IT, accounting, marketing, development staff, leadership, etc.)
  - External collaboration (deans, faculty members, scholarship coordinators, students, etc.)

## ■ COLLABORATION TECHNIQUES



- Be proactive
  - Create a shared vision
  - Give realistic deadlines
- Communicate at all costs
- Err on the side of inclusion
- Remember your role





## RESOURCE

### Impact Report Outline

**Impact Report Title: "Paying it Forward: The DONOR Story"**

Page 1 – Letter from University President Burns Hargis

- Reference the DONOR's OSU story and how their generosity is making the stories of others possible. Include how their scholarship fund and generous gifts to our athletic program have provided resources to advance the university.
- Photo of the President

Page 2 – Giving Generously

- Summarize the importance of the DONOR's academic and athletic gifts
- Include comprehensive giving total
- Include a timeline of their notable gifts, highlighting major gifts throughout the years and providing pictures of various initiatives funded. (GIA video board, photo of the DONOR with scholarship recipients, etc.)



### INFORMATION GATHERING

- Research, research, research
  - Answer every question
  - Make sure it adds up
  - Ask for help
- Gather both qualitative and quantitative information to convey impact



## QUALITATIVE INFORMATION



- Humanize the impact
- Interview different kinds of people:
  - Faculty
  - Students
  - Former scholars
  - Campus leaders
  - Fellow donors

## QUALITATIVE INFORMATION



- Keys for the interview:
  - Have a conversation
  - Ask open-ended questions
    - How has your education impacted your life?
    - What are your long-term goals?
    - What does it mean to you to have someone invest in your future?



## RESOURCE

### Interview Questions

#### Scholarship Recipients

- Why did you choose to study (discipline) at OSU?
- How has your scholarship helped to improve your educational experience?
- What are your goals for the future and how do you think your education will help prepare you?
- What does it mean to you to have support from others as you work toward your goals?
- Is there anything you'd like to say to the donor?

#### Former Recipients

- What are you doing today and how are you using the education you gained at Oklahoma State?
- Why did you choose to come to Oklahoma State?
- What did it mean to you to receive a scholarship during your time at OSU?
- Would you ever consider giving back to help students like donors helped you?
- What are your long-term goals?
- Is there anything you'd like to say to the donor?

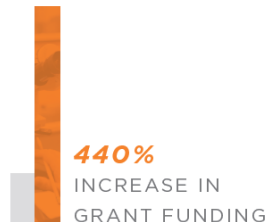


### QUANTITATIVE INFORMATION

#### IMPACT BY THE NUMBERS

**\$332,500**

IN SCHOLARSHIPS AWARDED TO **31 STUDENTS**

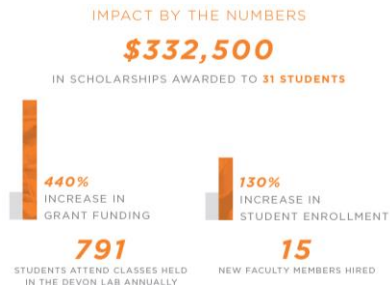


**791**  
STUDENTS ATTEND CLASSES HELD  
IN THE DEVON LAB ANNUALLY

**15**  
NEW FACULTY MEMBERS HIRED



## QUANTITATIVE INFORMATION



- Explore what stats help demonstrate impact
- Communicate with internal partners to find out what you already have
- Reach out to external partners to gather missing information

## INFORMATION SYNTHESIS

- Synthesize with the donor in mind
  - Focus on their passion areas
  - Revisit initial outlines/plans to ensure they still make sense
- Be realistic about your real estate
  - Prioritize information based on what will be most meaningful to include
- Organize excess information that could potentially be repurposed

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## EFFECTIVE DELIVERY TACTICS



### ■ IT'S DONE! ... NOW WHAT?!?


- Director of Donor Engagement collaborates with Leadership Gifts Teams, Development Officers and Foundation Leadership to now determine delivery timing and method
- Should be an extension of original goal



■

**IT'S DONE!  
... NOW  
WHAT?!?**


- General Rules:
  - Foundation President, University President or Dean
    - Development Officer can staff to discuss report specifics
  - Must be delivered in person - NEVER mailed

The logo for Academic Impressions, featuring a blue square with the letters 'ai' in white, followed by the words 'ACADEMIC' and 'IMPRESSIONS' in blue, with a small '43' to the right.

■

**IT'S DONE!  
... NOW  
WHAT?!?**

- General Rules:
  - Presentation of report utilized at platform/entrance for other strategic conversation (as established at beginning of process)
    - Repairing relationship
    - Next leadership gift
    - Vet giving area interests
    - Volunteer request

The logo for Academic Impressions, featuring a blue square with the letters 'ai' in white, followed by the words 'ACADEMIC' and 'IMPRESSIONS' in blue, with a small '44' to the right.



## ■ DETERMINE PRIORITIES

- Impact reports are a tool for engagement
  - Examine the engagement level of your donors and current efforts already taking place
  - Do you have any gaps that need to be filled?
  - Would impact reporting be an effective way to do this?
- Where do impact reports rank in terms of importance?



## ■ CONSIDER LIMITATIONS

### EACH REPORT:

- 30-40 hours to produce
- 6-8 weeks to develop
- involves 8-10 internal staff
- involves 8-12 interviews
- printed in-house at minimal cost





## ■ CONSIDER LIMITATIONS

- Estimate the amount of time and resources you could devote to impact reporting
- Start discussions with key partners to evaluate obstacles that may arise

## ■ DEVISE A PLAN

- Put an implementation plan together
- Include:
  - Overarching goals for the program
  - Steps to be taken before impact reporting can begin
  - Individuals who will be impacted by or will own a piece of the reporting process
  - Timeline for implementation



## RESOURCE

### Sample Implementation Plan

| Task   | Goals for Accomplishing the Task   | Anticipated Completion | Actual Completion |
|--|--|------------------------|-------------------|
| Research impact reporting occurring at other universities.   | 1. Review ADRP listserv history on impact reporting.<br>2. Do an online search for philanthropic impact reporting.<br>3. Identify and contact peer universities to discover if comprehensive impact reporting is done there and how. (OU, Stanford, UC San Diego & TU)   | 1/11/13                | 1/14/13           |
| Create a menu of possibilities/rough outline of what we'd like to include.   | 1. Gather all information found during research.<br>2. Put together a "menu" of things that can be included in the reports. This will include things that have been done at other universities and ideas that came up during research.<br>3. Based on institutional knowledge, make a rough draft of what Compliance and Stewardship would like to see in the report.  | 1/14/13                | 1/22/12           |
| Organize a task force* to review samples and discuss possibilities, content and formatting. Schedule a preliminary group meeting and follow up meetings as necessary with individuals. | 1. Review departments who will be involved in the process and identify members to include in the task force. *Ken Sigmon (Dev.), David Loyless (Dev.), Diane Crane (Dev.), Paige Eubanks-Barrow (DR), Michal Shaw (C&S), Abby Fox (C&S), Jennifer Kinnard (Marketing), Ciudette Pippin (Accounting), Chris Campbell (Research) and Charles Cameron (IT).<br>2. Schedule the preliminary meeting and create an agenda for it.<br>3. Attend the meeting, taking notes and making action items. | 1/22/13                | 1/28/13           |

## OUR PLAN

### GOALS

- Report to donors the positive impact of their comprehensive giving
- Demonstrate their donations are being used according to their intent
- Express our gratitude for their continued support of OSU
- Inspire them to continue giving

## OUR PLAN

### PRODUCTION

- Produce no more than 2 to 3 impact reports per month
- Limit frequency of impact reporting to once every 3 to 5 years per donor

## OUR PLAN

### TIMELINE

- January 2013 - Best practices research began
- February 2013 - Task force formed/planning began
- March 2013 - Test reports developed
- April 2013 - Impact reporting process finalized/approved
- May 2013 - Impact reporting process shared with internal/external partners
- July 2013 - Production began

## ■ YOUR PLAN

### CUSTOMIZATION

- Create your plan to serve your needs
- You may choose to:
  - Do project-based reporting rather than donor-based
  - Focus on a specific timeframe rather than comprehensive giving
  - Use reports to communicate to certain groups



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## EXTENDABLE IMPACT REPORTS



## WHAT'S NEXT

- Expanding impact reports beyond individuals to a greater audience
  - Corporate partners
  - Leadership annual donors
  - Dean's/College associates



## RESOURCE

### 2015's generic giving report



## RESOURCE

### **Generic impact report for corporation**



## RESOURCE

### **Generic impact report for project**

(cover letter)



## RESOURCE

### Generic impact report for project



## TAKEAWAYS

### All this info! Where do I start?

- Analyze your gaps and where you can have the most ROI
- Create plan with internal partners and get leadership buy-in
- Set expectations - what, how many, when
- Track results - both qualitative & quantitative
- Be flexible - change as you go!



## QUESTIONS



## RESOURCE

- Sample Impact Report Implementation Plan
- Sample Impact Report Interview Questions
- Sample Impact Report Outline
- 2015's Generic Giving Report
- Generic Impact Reports for
  - Corporation
  - Individual (2)
  - Project (+ cover letter)





## EVALUATION

# Thank you!

Please remember to complete the event evaluation.  
Your comments will help us continually improve the  
quality of our programs.

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