REFINING YOUR IMPACT REPORTING PROCESS

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ACADEMIC IMPRESSIONS

LEARNING OUTCOME

After participating…

…you will be able to strategically implement an impact reporting process.

ACADEMIC IMPRESSIONS 2

AGENDA

- Improving your impact reports
- Strategizing for your impact reporting process
- Tracking/ROI metrics

ACADEMIC IMPRESSIONS 3

POLL

If you had to evaluate your own program, how would you score your current reporting initiatives?

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IMPROVING YOUR IMPACT REPORTS

ACADEMIC IMPRESSIONS 5

MAP IT OUT

Credit: Seattle Children's Hospital

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PRIMARY REPORT TYPES

- Endowment Reports
- Broad-Base Impact Reports
- Individual Impact Reports

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ENDOWED FUND REPORTS

- Annual investment performance piece
- Technical, but can still relay impact
- Should be used as strategic annual touch point
- Streamline as much as possible
- Incorporate technology

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COMPONENTS

- Introduction/cover letter
- Overall endowment performance
- Fund specific performance numbers
- Letter, report, bio from beneficiary
- Definitions/glossary
- Survey
- FAQ's

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ACADEMIC IMPRESSIONS 10

- Pre-printed four-color shell
- More information in a visually stimulating format
- Data downloads from the database
- Simplified the old process of personalized letters—no salutations!

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BROAD-BASED IMPACT REPORTS

- Sent to groups of donors with similar giving interests or patterns
- High-level messaging
- Partner with colleges/units to pair down and customize message
- Fills the gaps, provides widespread ROI

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LOW HANGING FRUIT

Identify areas of greatest need and underserved donor populations.

Planned Giving Donors

Unrestricted Endowments

Organizational Volunteers

Annual Unrestricted Gifts

Centers / Programs / Research Funds

Group Gifts

Bricks & Mortar / Named Spaces

Scholarships / Fellowships

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CONTENT & DESIGN

- Define purpose, audience, goals and timing
- Communicate to stakeholders
- Find content experts
- Highlight stories that make direct connection to financial gifts
- Use faculty, staff, students as messengers
- Don't be afraid of technology
- Light text, visually compelling images

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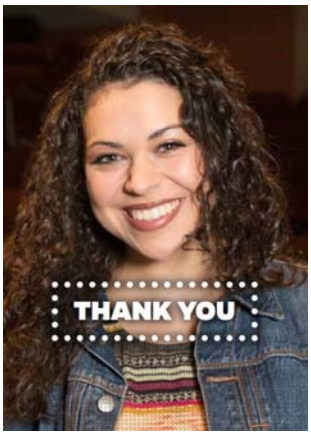
SAMPLE:
SCHOLARSHIP AUDIO CARD



Audio Card Email Follow-Up

15

Scholarship donors like you open a world of possibilities to University of Florida students.

Thank you.

PRESS FOR SPECIAL MESSAGE FROM ALEXANDRA

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16

SAMPLE: NAMED SPACES

ACADEMIC IMPRESSIONS 17

ACADEMIC IMPRESSIONS 18

SAMPLE: UNRESTRICTED FUND

ACADEMIC IMPRESSIONS 19

INDIVIDUAL IMPACT REPORTS

ACADEMIC IMPRESSIONS 20

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 your organization
- Inspire them to continue giving

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WHY? TO WHAT END?

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

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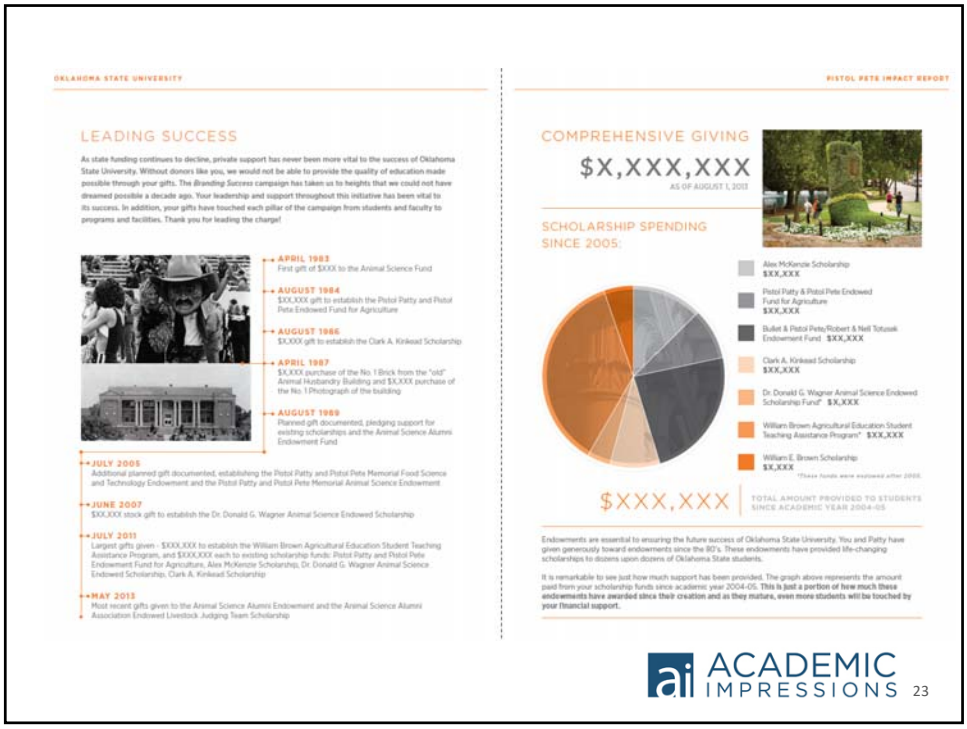

OKLAHOMA STATE UNIVERSITY

LEADING SUCCESS

As state funding continues to decline, private support has never been more vital to the success of Oklahoma State University. Without donors like you, we would not be able to provide the quality of education made possible through your gifts. The *Branding Success* campaign has taken us to heights that we could not have dreamed possible a decade ago. Your leadership and support throughout this initiative has been vital to its success. In addition, your gifts have touched each pillar of the campaign from students and faculty to programs and facilities. Thank you for leading the charge!

APRIL 1983
First gift of $XXX to the Animal Science Fund

AUGUST 1984
$XX,XXX gift to establish the Pistol Patty and Pistol Pete Endowed Fund for Agriculture

AUGUST 1986
$X,XXX gift to establish the Clark A. Kinkead Scholarship

APRIL 1987
$X,XXX purchase of the No. 1 Brick from the "old" Animal Husbandry Building and $X,XXX purchase of the No. 1 Photograph of the building

AUGUST 1989
Planned gift documented, pledging support for existing scholarships and the Animal Science Alumni Endowment Fund

JULY 2005
Additional planned gift documented, establishing the Pistol Patty and Pistol Pete Memorial Food Science and Technology Endowment and the Pistol Patty and Pistol Pete Memorial Animal Science Endowment

JUNE 2007
$XX,XXX stock gift to establish the Dr. Donald G. Wagner Animal Science Endowed Scholarship

JULY 2011
Largest gifts given - $XXX,XXX to establish the William Brown Agricultural Education Student Teaching Assistance Program, and $XXX,XXX each to existing scholarship funds: Pistol Patty and Pistol Pete Endowment Fund for Agriculture, Alex McKenzie Scholarship, Dr. Donald G. Wagner Animal Science Endowed Scholarship, Clark A. Kinkead Scholarship

MAY 2013
Most recent gifts given to the Animal Science Alumni Endowment and the Animal Science Alumni Association Endowed Livestock Judging Team Scholarship

PISTOL PETE IMPACT REPORT

COMPREHENSIVE GIVING

$X,XXX,XXX

AS OF AUGUST 1, 2013

SCHOLARSHIP SPENDING SINCE 2005:

- Alex McKenzie Scholarship **$XX,XXX**
- Pistol Patty & Pistol Pete Endowed Fund for Agriculture **$XX,XXX**
- Bullet & Pistol Pete/Robert & Nell Totusek Endowment Fund **$XX,XXX**
- Clark A. Kinkead Scholarship **$XX,XXX**
- Dr. Donald G. Wagner Animal Science Endowed Scholarship Fund* **$X,XXX**
- William Brown Agricultural Education Student Teaching Assistance Program* **$XX,XXX**
- William E. Brown Scholarship **$X,XXX**

*These funds were endowed after 2005.

$XXX,XXX TOTAL AMOUNT PROVIDED TO STUDENTS SINCE ACADEMIC YEAR 2004-05

Endowments are essential to ensuring the future success of Oklahoma State University. You and Patty have given generously toward endowments since the 80's. These endowments have provided life-changing scholarships to dozens upon dozens of Oklahoma State students.

It is remarkable to see just how much support has been provided. The graph above represents the amount paid from your scholarship funds since academic year 2004-05. **This is just a portion of how much these endowments have awarded since their creation and as they mature, even more students will be touched by your financial support.**

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OKLAHOMA STATE UNIVERSITY

INVESTING IN THE FUTURE, CHANGING LIVES

Students are the heart of OSU. Each semester we welcome fresh faces who have come to better themselves and gain the skills needed to be successful in life. However, students often face many barriers that keep them from pursuing their dream to attend college. Key among them are financial limitations that can prove to be insurmountable for some of our most dedicated students. You and Patty had a soft spot for these individuals and your scholarships reflect this. Your contributions have been the difference maker in many lives and they will continue to provide vital aid to the students who need it most.

"The generosity of Pistol Pete is helping me to begin my college career **focused on being a student and not questioning how I will pay for my higher education.**"

| **OSU Student,** William S., Brown Scholarship Recipient, Agricultural Education Major, Orlando, OK

"**The Alex McKenzie scholarship helped lessen the burden of the cost of getting a great education from OSU.** This also allowed me to further my studies beyond a B.S. degree and remain at OSU to get my M.S. in meat science under Dr. J. Brad Morgan. My time at OSU allowed me to create a great knowledge base and network of friends and colleagues in the field of food/meat science. This network led me to interview with Marel and land a great job with them. My opportunities with Marel have been endless and have allowed me to travel all over the U.S. and world working side-by-side with customers from many different regions.

I was raised with the saying 'do unto others as you want done to yourself.' The generosity of Mr. and Mrs. Pistol Pete has driven me to do the same for the younger classes and generations to come in the OSU Animal Science Department."

| **OSU Graduate,** 2009 Animal Science Graduate and Food Technologist/Research Technologist at Marel Meat Processing in Des Moines, IA

PISTOL PETE IMPACT REPORT

"**The Pistol Patty and Pistol Pete Scholarship is enabling me to work my way toward graduating debt-free.** This allows me to thrive within Oklahoma State University with no worries regarding future monetary issues."

| **OSU Student,** Pistol Patty and Pistol Pete Scholarship Recipient, Animal Science Major, Edmond, OK

"As an out-of-state student from Arkansas pursuing dual degrees, my tuition was costly. Having grown up raising and showing sheep across the country, the Animal Science Department was a perfect fit. Upon graduation, **I was humbled to leave school without any student debt, which gave me a huge start as a business owner in what society was calling a drowning economy. I'm so grateful for receiving a paid education that ultimately shaped my career.**

What I majored in at OSU is exactly what I do everyday. The professors in CASNR fully prepared me for my dream job – advertising for purebred livestock producers across the world. Outside of the classroom, my extensive training on the Meats and Livestock Judging Teams prepared me for life situations and encounters. **I am eternally grateful to those who had an impact on me receiving my secondary education. Someday my husband and I, too, hope to give back to students, so that they might receive the education of their dreams."**

| **OSU Graduate,** 2012 Animal Science and Agricultural Communications Graduate and Founder of Rural-Route Creations, a one-stop livestock marketing agency

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POTENTIAL REPORT COMPONENTS

- Photos of donors
- Photos of beneficiaries
- Student/faculty/staff/grateful patient quotes
- Quotes from leadership or key campus partner
- Stats
- Timeline of gifts
- List of substantial volunteerism/leadership roles
- Pie chart of lifetime giving
- Gift milestones
- List of lifetime scholarship recipients
- Maps

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BOOKS, VIDEOS & MORE

ADVANCING THE COWBOY NATION:
THE LANCASTER LEGACY

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STRATEGIZING FOR YOUR IMPACT REPORTING PROCESS

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BEFORE YOU BEGIN

- Create implementation plan including:
  - 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

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YOUR PLAN: ONE SIZE DOES NOT FIT ALL

- Create your plan to serve your needs
- Scaleable:
  - 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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CONSIDER YOUR 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
- Reflect in annual business planning

Endowment Reporting:
6 weeks – 3 months
1-4 staff members

Broad-Based Reporting:
4-6 weeks
1-3 staff members

Individual Impact Reports:
6-8 weeks
8-10 staff

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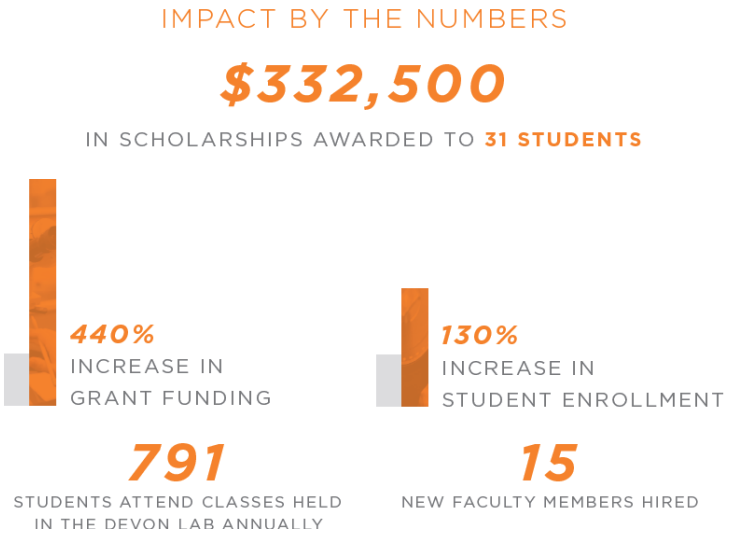
QUANTITATIVE INFORMATION – DON'T BE AFRAID!



It doesn't have to be elaborate

repurpose the information
you already have!

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TIERING YOUR EFFORTS

$5,000 ≠ $1M

TIERING = SUSTAINABILITY

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POLL

Are you, today, spending as much time on a report for a $10,000 donor as you are on a $1M donor?

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PRIORITIZING BY AUDIENCE

How?

- By donor
- By giving amount
- By prospect rating
- By number of investments
- By propensity to give again
- By reporting relationship (2nd or 3rd party)

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PRIORITIZING BY BUDGET

How?

- By delivery method (technology vs. print)
- By staff hours
- By ROI

ADD
+ THE GOOD
SUBTRACT
− THE BAD

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PRIORITIZING BY STAFF

How?

- By skill set
- By time available
- By ROI

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TRACKING / ROI METRICS

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BIG 3

Team's Success

vs.

Donor's Success

vs.

Organization's Success

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TEAM (PROCESS) METRICS

- Quality
- Efficiency
- Timeline
- Collaboration
- Internal buy-in
- Quantity

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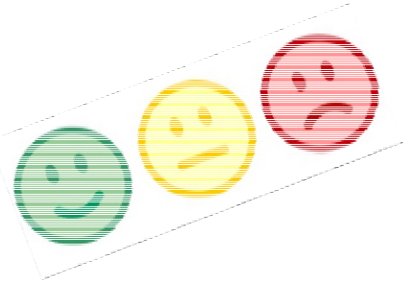
DONOR (ENGAGEMENT) METRICS



- Completed surveys
- Overall satisfaction rate (tracking year over year)
- Open/read/click through rates
- Requests for copies

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ORGANIZATION (FUNDRAISING) METRICS

- Retention Rates
- Pledge fulfillment rate
- Donor pipeline management

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SAMPLES

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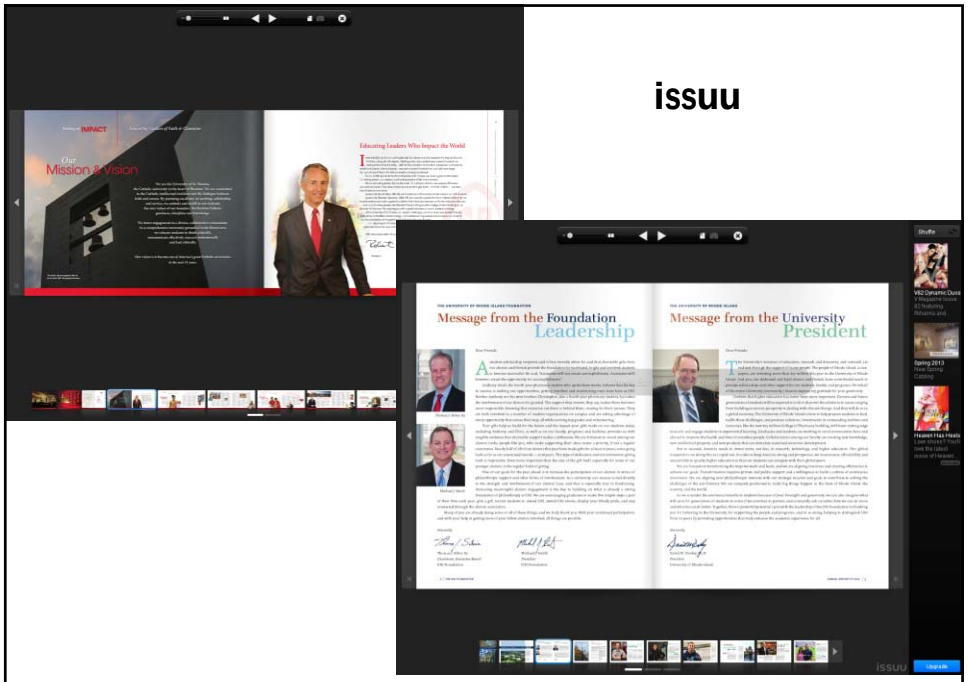
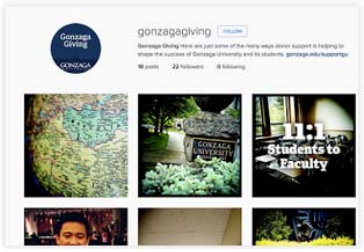

issuu
Our Mission & Vision
Message from the Foundation Leadership
Message from the University President

45

DONOR IMPACT AT A GLANCE.
$13 MILLION FOR UNDERGRADUATE NEED-BASED SCHOLARSHIPS
39,000 DONORS
3/4 NEARLY 75% OF ALL GIFTS WERE LESS THAN $1,000
YOU MADE A DIFFERENCE
50% ABOUT 50% OF FACULTY & STAFF GAVE BACK TO UT
52 PROJECTS RECEIVED FUNDING THROUGH VOLstarter
Big ORANGE GIVE CAMPAIGN RAISED $766,330
899 GRADUATING SENIORS MADE A GIFT TO UT
4,000 NEW DONORS

46

Instagram



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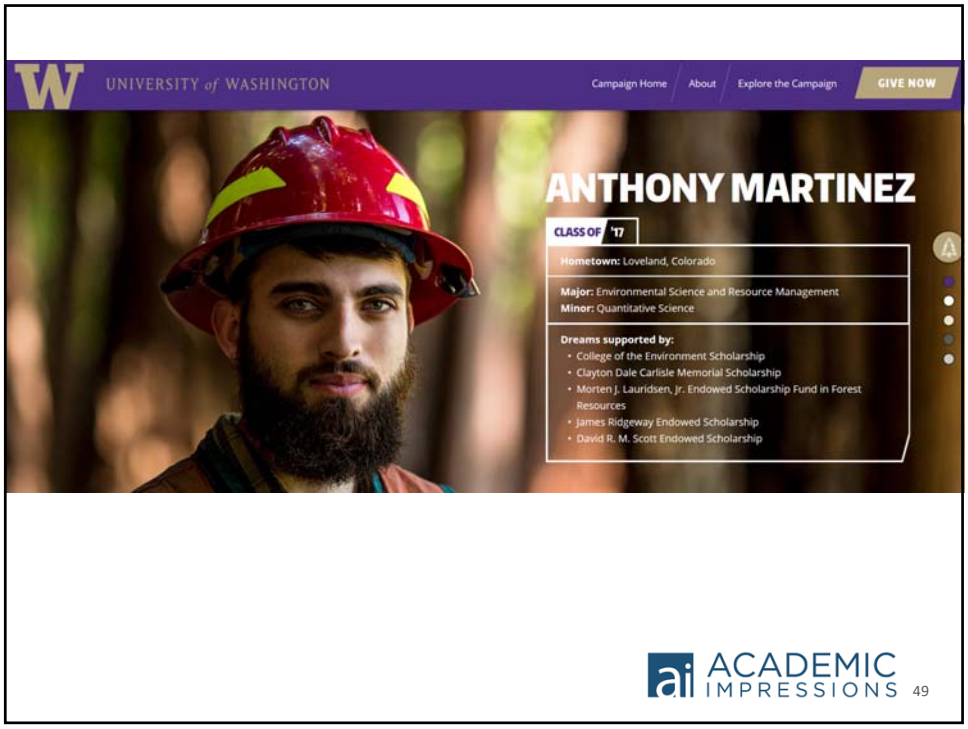
ACADEMIC IMPRESSIONS 48



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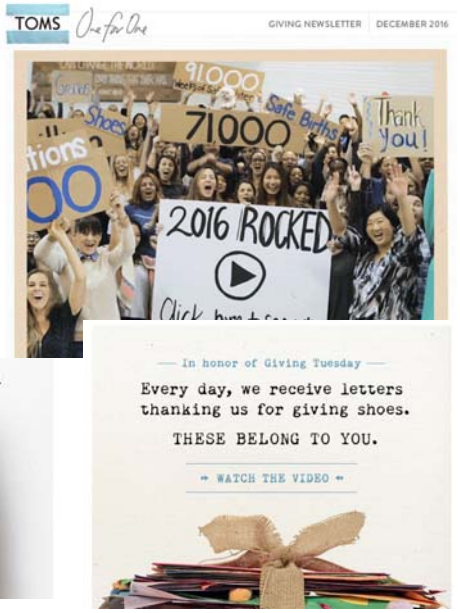
LOOK AT THE FOR-PROFIT WORLD!



TAKEAWAYS

- Build a strategic plan based on resources
- Track your successes analytically and anecdotally
- Go deep, not broad
- Not all donors are created equal
- Art AND Science!

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QUESTIONS

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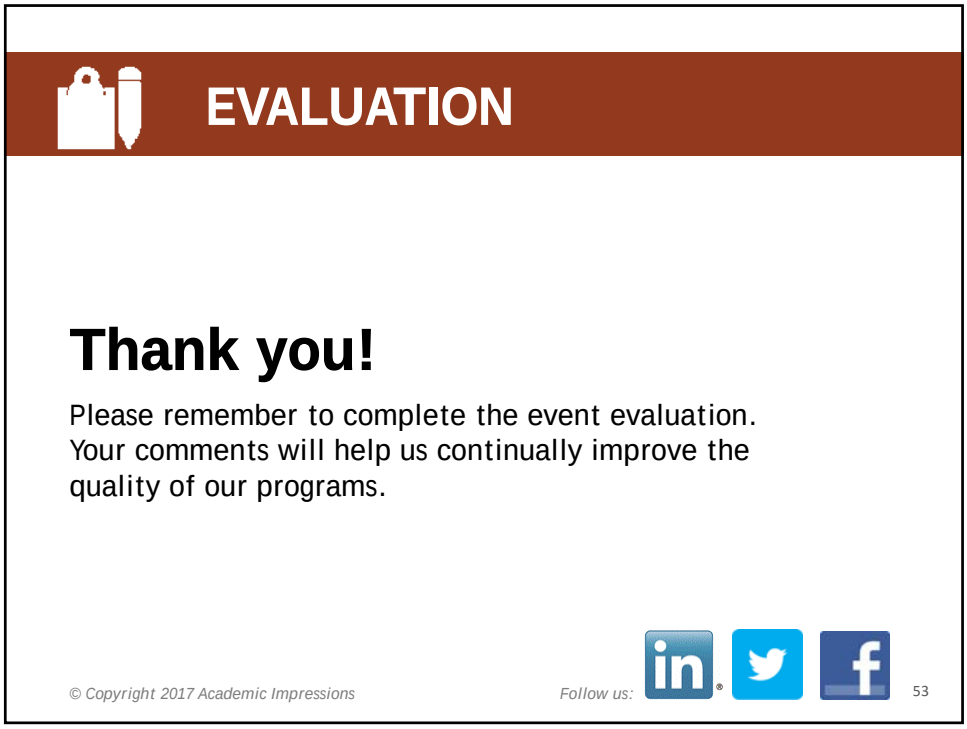
EVALUATION
Thank you!
Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.
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53