


**REFINING YOUR IMPACT REPORTING  
PROCESS**

*#AItraining*



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**ai ACADEMIC  
IMPRESSIONS**

 **LEARNING OUTCOME**


**After participating...**


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

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**AGENDA**

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

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IMPRESSIONS 3

 **POLL**

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

 **ACADEMIC**  
IMPRESSIONS 4

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## IMPROVING YOUR IMPACT REPORTS



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### MAP IT OUT



Credit: Seattle Children's Hospital



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## PRIMARY REPORT TYPES

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



## 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

## COMPONENTS

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






- 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!



**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



## 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

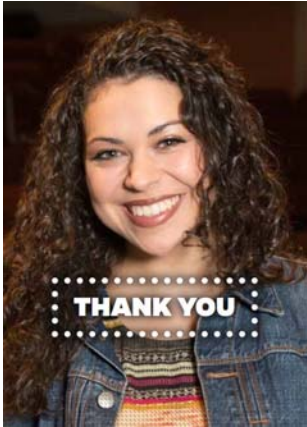


## CONTENT & DESIGN


- 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



**SAMPLE:**  
**SCHOLARSHIP AUDIO CARD**



**Audio Card Email Follow-Up**



**Ariel Reich**  
Scholarship recipient and  
College of the Arts, School of Theatre & Dance student

**UF** UNIVERSITY OF FLORIDA

**TO EACH OF YOU WHO SUPPORTS SCHOLARSHIP...**

Your scholarship gift helps University of Florida students, like Ariel Reich, realize their full academic potential. We hope you will enjoy this message from Ariel highlighting the profound impact of your generosity.

Thank you for expanding the mission of the University of Florida further than ever before — providing resources to educate students who will accomplish great things in their fields.

**UF**

University of Florida Foundation, Inc.  
1024 N. University Ave., Gainesville, FL 32610

Real name  
The message has been sent to the University of Florida Foundation, Inc. or  
original@universityofflorida.edu

To unsubscribe, send a blank email to:  
Unsubscribe@universityofflorida.edu

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**Alexandra Hawkins**  
Scholarship recipient and Gator Band member

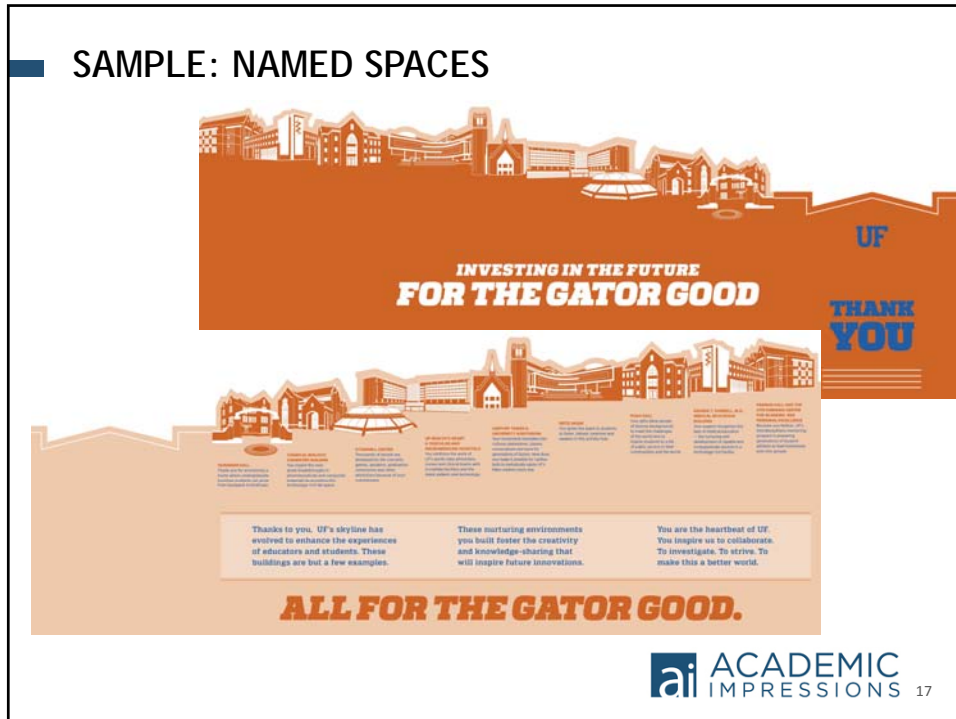
Scholarship donors like you open a world of possibilities to University of Florida students.

Thank you.

**PRESS FOR SPECIAL MESSAGE FROM ALEXANDRA**

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SAMPLE: UNRESTRICTED FUND

**UNIVERSITY OF FLORIDA**  
**College of Liberal Arts and Sciences**

**MESSAGE FROM THE DEAN**  
Dear students, faculty, and staff, it is my honor to be the Dean of the College of Liberal Arts and Sciences. I am proud to lead a community of scholars, researchers, and students who are committed to excellence in teaching, research, and service. I am excited to see the many ways you are contributing to the success of our college and the University of Florida.

**100%**  
of University of Florida freshmen will take a class in the College of Liberal Arts and Sciences.

**SUCCESS IN LIBERAL ARTS AND SCIENCES**  
"The College of Liberal Arts and Sciences has provided the resources for me to explore my interests and passions. I have been able to take courses that have challenged me and helped me grow as a person. I am grateful for the support of the faculty and staff who have helped me along the way." — Sarah, Student

**Gator Generosity**  
I have so many great memories of UF that I will never forget. The liberal arts and sciences have been a huge part of my education and I am so grateful for the support of the faculty and staff who have helped me along the way. I am excited to see the many ways you are contributing to the success of our college and the University of Florida." — Sarah, Student

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INDIVIDUAL IMPACT REPORTS



## 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



## 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




**OKLAHOMA STATE UNIVERSITY**


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## 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 \$1000 to the Animal Science Fund
- AUGUST 1984**  
\$100,000 gift to establish the Pistol Patty and Pistol Pete Endowed Fund for Agriculture
- AUGUST 1986**  
\$1,000 gift to establish the Clark A. Kirkwood Scholarship
- APRIL 1987**  
\$1,000 purchase of the No. 1 Brick from the "old" Animal Husbandry Building and \$1,000 purchase of the No. 1 Photograph of the building
- AUGUST 1989**  
Planned gift documented, providing 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**  
\$10,000 stock gift to establish the Dr. Donald G. Wagner Animal Science Endowed Scholarship
- JULY 2011**  
Largest gifts given - \$100,000 to establish the William Brown Agricultural Education Student Teaching Assistance Program, and \$100,000 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. Kirkwood 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**


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## COMPREHENSIVE GIVING

**\$X,XXX,XXX**  
AS OF AUGUST 1, 2013



### SCHOLARSHIP SPENDING SINCE 2005:




- Alex McKenzie Scholarship \$10,000
- Pistol Patty & Pistol Pete Endowed Fund for Agriculture \$100,000
- Bulet & Pistol Pete/Robert & Nell Totusik Endowment Fund \$100,000
- Clark A. Kirkwood Scholarship \$10,000
- Dr. Donald G. Wagner Animal Science Endowed Scholarship Fund \$10,000
- William Brown Agricultural Education Student Teaching Assistance Program\* \$100,000
- William E. Brown Scholarship \$1,000

\*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.



**OKLAHOMA STATE UNIVERSITY**

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## 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. Blair 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 Mariel and land a great job with them. My opportunities with Mariel 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 related 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 Mariel Meat Processing in Des Moines, IA**

**PISTOL PETE IMPACT REPORT**

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"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 learn 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 enjoyed 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**





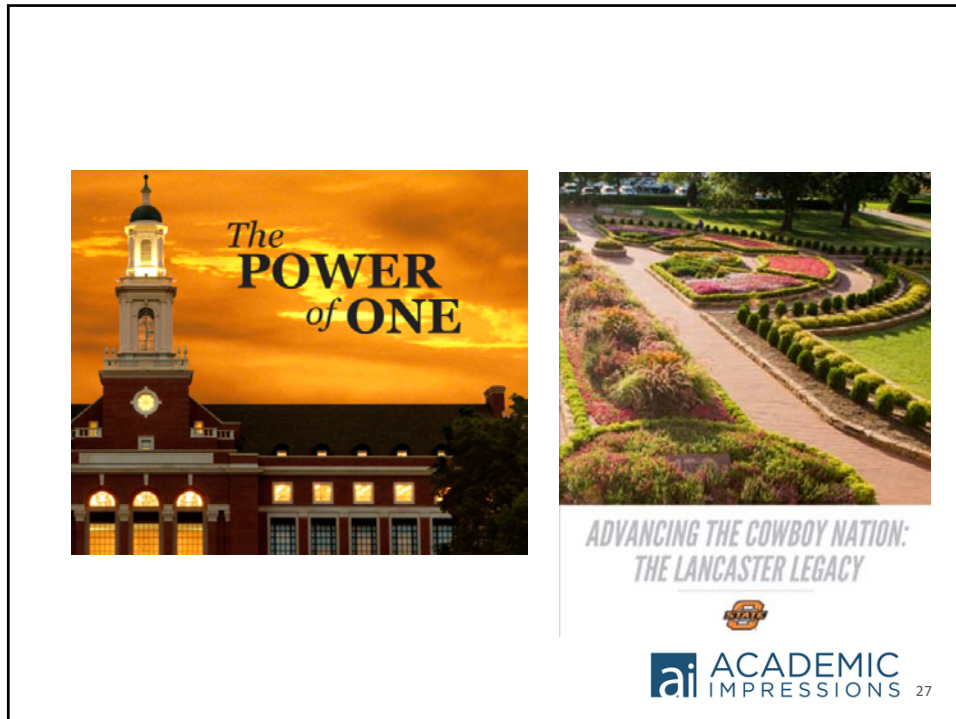
## POTENTIAL REPORT COMPONENTS

- 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



## BOOKS, VIDEOS & MORE





## 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

## YOUR PLAN: ONE SIZE DOES NOT FIT ALL

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

## 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



<p>Endowment Reporting: 6 weeks - 3 months 1-4 staff members</p> 	<p>Broad-Based Reporting: 4-6 weeks 1-3 staff members</p> 	<p>Individual Impact Reports: 6-8 weeks 8-10 staff</p> 
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## QUANTITATIVE INFORMATION - DON'T BE AFRAID!

IMPACT BY THE NUMBERS

**\$332,500**  
IN SCHOLARSHIPS AWARDED TO **31 STUDENTS**

 <p><b>440%</b> INCREASE IN GRANT FUNDING</p>	 <p><b>130%</b> INCREASE IN STUDENT ENROLLMENT</p>
<p><b>791</b> STUDENTS ATTEND CLASSES HELD IN THE DEVON LAB ANNUALLY</p>	<p><b>15</b> NEW FACULTY MEMBERS HIRED</p>



It doesn't have to be elaborate



repurpose the information you already have!




**TIERING YOUR EFFORTS**

$\$5,000 \neq \$1M$


TIERING = SUSTAINABILITY





**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 (2<sup>nd</sup> or 3<sup>rd</sup> 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



### ■ BIG 3

Team's Success

vs.


Donor's Success

vs.

Organization's Success



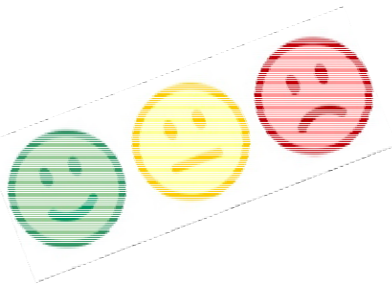
**TEAM (PROCESS)  
METRICS**



- 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

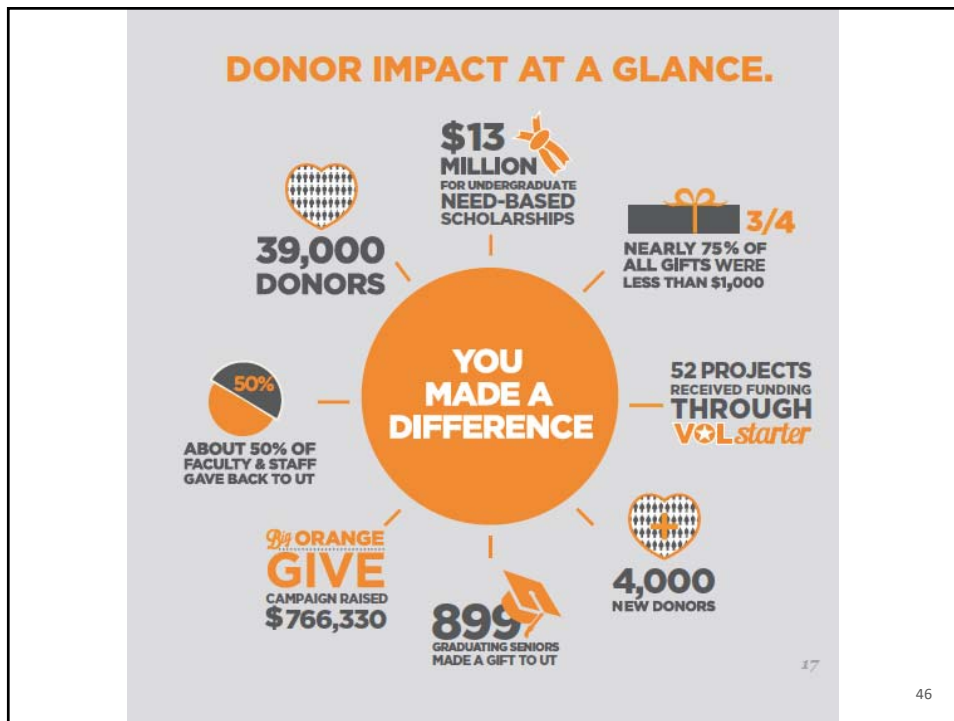
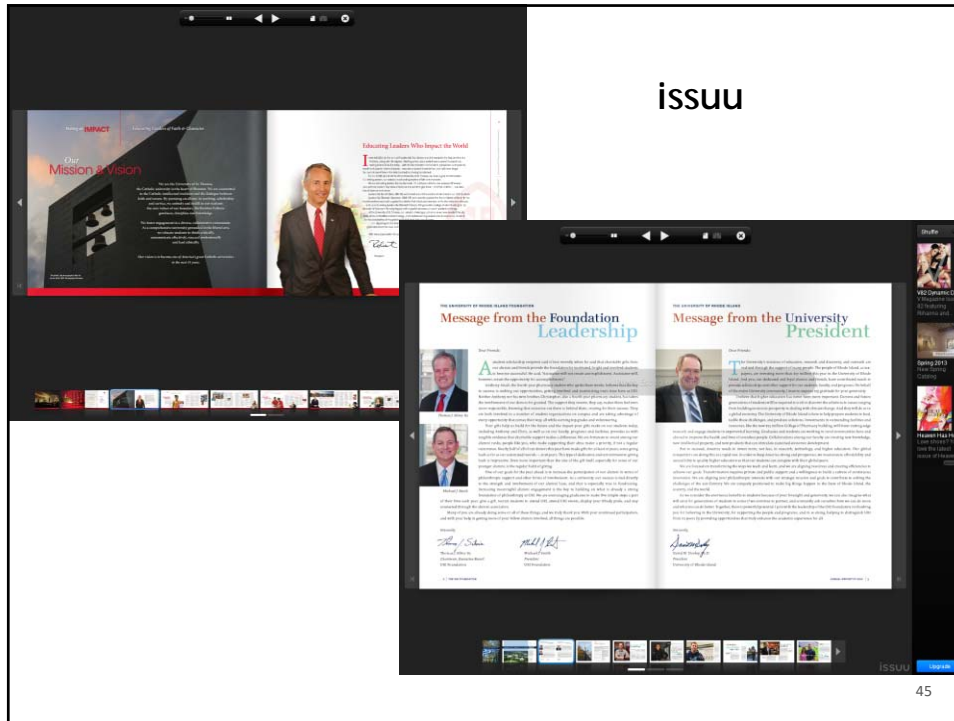


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**SAMPLES**

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ANNUAL IMPACT REPORT  
2014-15

UNFOLD THE FUTURE  
**TOGETHER**

Thank you for supporting Gonzaga University. Here are just some of the many ways donor support is helping to shape the success of our university. To learn more, go to [instagram.com/gonzagagiving/](https://www.instagram.com/gonzagagiving/).

## Instagram

gonzagagiving

22 posts 22 followers 0 following

gonzagagiving Your support exceeded the 2014-15 goal to sponsor 500 Zags with \$2,500 scholarships and gives more students access to a premier Jesuit education. For more than 127 years, students have been able to attend Gonzaga University because of the generosity of others. Gonzaga maintains this commitment through the Zag Scholarship Promise.

Log in to like or comment.

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## Donor Impact | Whitworth University

Introduction Luke Gianina Brodrick Kathryn Eagen Samson Stephanie

We at Whitworth **thank you** for your support.

**Luke** | Biochemistry, Premed

As a soon-to-be graduating senior, I look back at my Whitworth experience and stand in awe of the journey that has brought me to this point. As a senior in high school, I didn't know of Whitworth until I received a Dean's Priority Application in the mail. [More...](#)

**Gianina** | Cross-Cultural Studies

I know I've always been different. I am a Japanese and Filipino girl living in the United States. I've learned to embrace the differences in all three cultures. I've even learned to adapt, and to integrate the conflicting ideologies. I am so grateful for my parents, who have exposed me to these different aspects of life. Growing up, I have been encouraged to think outside the box and to have an open mind. [More...](#)

**Brodrick** | Biology

I am not just a student, nor am I just a football player. I am a student-athlete dedicated to both academics and athletics. I want to be an All-American just as much as I want to be accepted to medical school. [More...](#)

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The screenshot shows a campaign page for Anthony Martinez, a student at the University of Washington. The page features a large photo of him wearing a red hard hat. The header includes the University of Washington logo and navigation links: "Campaign Home", "About", "Explore the Campaign", and a "GIVE NOW" button. The main content area displays his name, "ANTHONY MARTINEZ", and his class year, "CLASS OF '17". Below this, it lists his hometown as Loveland, Colorado, his major as Environmental Science and Resource Management, and his minor as Quantitative Science. A section titled "Dreams supported by:" lists several scholarships, including the College of the Environment Scholarship, Clayton Dale Carlisle Memorial Scholarship, Morten J. Lauridsen, Jr. Endowed Scholarship Fund in Forest Resources, James Ridgeway Endowed Scholarship, and David R. M. Scott Endowed Scholarship. The footer of the page features the Academic Impressions logo and the number 49.

The screenshot shows a giving newsletter from TOMS One for One, dated December 2016. The main headline reads "LOOK AT THE FOR-PROFIT WORLD!". Below the headline, there is a section with the TOMS logo and the tagline "YOUR PURCHASES HELP IMPROVE LIVES. One for One SEE HOW!". The newsletter lists three achievements: "Visited 3 continents", "Walked approx. 1,274 miles", and "Helped a friend move in the rain". To the right of the text is a photo of a group of people celebrating, holding signs that say "91000", "71000", "Safe Births", "Thank You!", and "2016 ROCKED". Below the photo is a video player with a play button icon and the text "Click here to watch the video". At the bottom of the newsletter, there is a section titled "In honor of Giving Tuesday" with the text "Every day, we receive letters thanking us for giving shoes. THESE BELONG TO YOU." and a "WATCH THE VIDEO" button. The footer of the newsletter features a photo of a pair of red shoes.



## 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!



## QUESTIONS



## 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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