

Session DESCRIPTION...

The traditional model of printed impact reports is becoming increasingly more challenging to execute. Between remote work and donors wary of print materials due to COVID-19, now is the time to make the leap to digital reports. But, how do you make the case to leadership? How do you inform donors of your change in practice? What is the best way to implement a new process? Learn from the team at the Indiana University Foundation about their partnership with Overture and how they worked to effectively make the case, how they smoothly transitioned to a digital solution, and how their donors are reacting to a custom digital stewardship report.

MAKING THE CASE FOR **DIGITAL IMPACT REPORTS**

Session SPEAKERS...

- > **INDIANA UNIVERSITY FOUNDATION**
Beth Hailer, Senior Director of Donor Engagement
Ann Bunjan, Manager of Stewardship
- > **OVRTURE**
Chris Snavelly, Managing Partner

Today, we will discuss how THE IU FOUNDATION...

- ① IDENTIFIED CRITICAL REQUIREMENTS
- ② DELIVERED DIGITAL IMPACT REPORTS
- ③ MODERNIZED FOR THE LONG TERM
- ④ MEASURED SUCCESS



OUR CHALLENGE

Our record-breaking *For All*
campaign + the **pandemic** were
our catalysts for change...

Sought to remove PAIN POINTS...

- ① HIGH EFFORT + HIGH COST
- ② LIMITED PERSONALIZATION
- ③ LIMITED METRICS/ANALYTICS
- ④ FOCUS ON ACCURACY; NOT IMPACT

Our leadership understood the
need to combine a tradition of
excellence with innovation...

PURCHASING PROCESS

We evaluated available options BASED ON...

- ① SECURITY + DATA INTEGRITY
- ② EASE OF USE
- ③ FLEXIBILITY FOR FUTURE GROWTH
- ④ DONOR EXPERIENCE
- ⑤ PARTNERSHIP

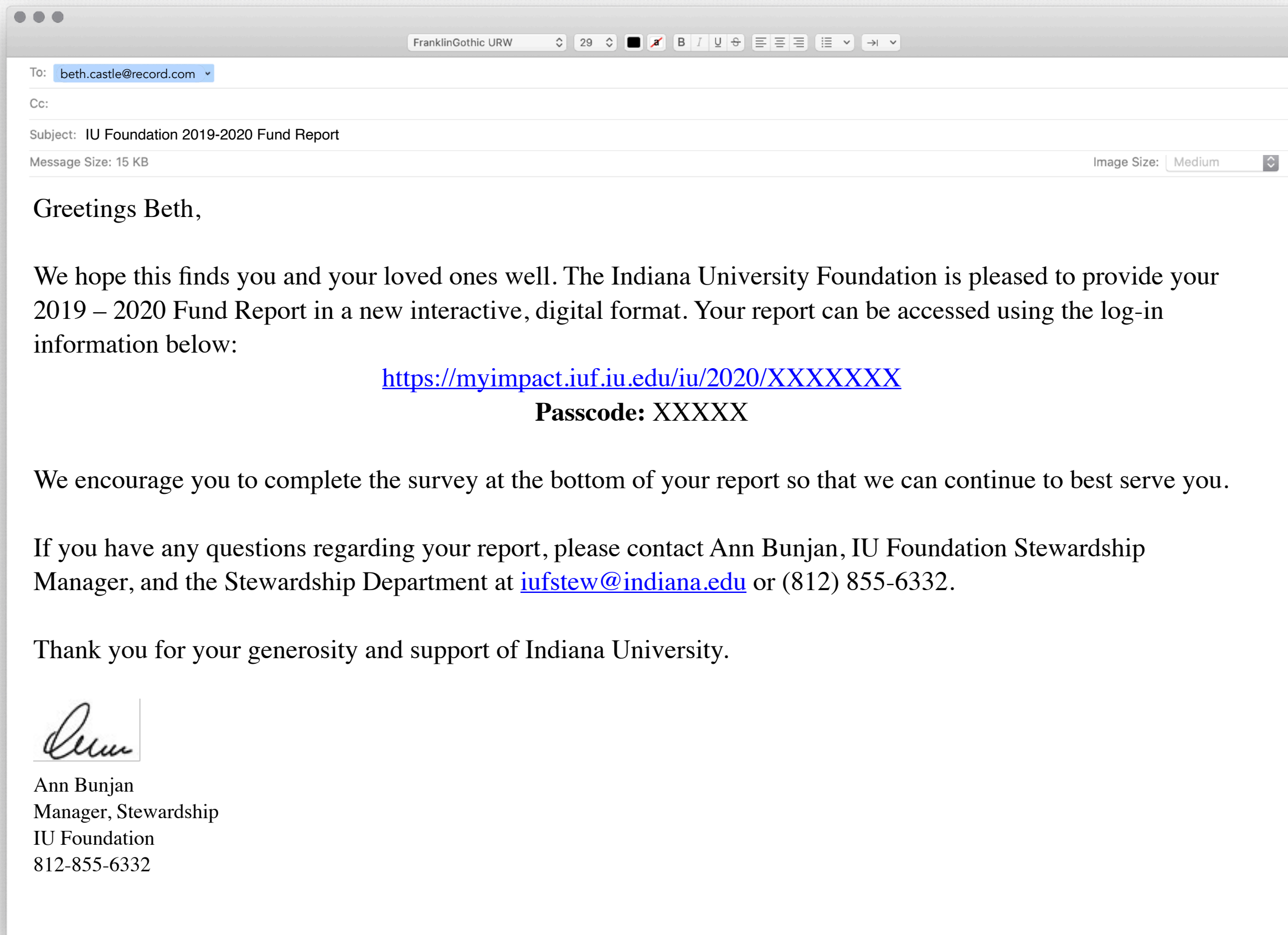
In August 2020, we elected to PARTNER with...

[ovrture][®]



SAMPLE REPORT

On **October 12**
we distributed **2,227**
Digital Impact Reports...



To: beth.castle@record.com

Cc:

Subject: IU Foundation 2019-2020 Fund Report

Message Size: 15 KB

Image Size: Medium

Greetings Beth,

We hope this finds you and your loved ones well. The Indiana University Foundation is pleased to provide your 2019 – 2020 Fund Report in a new interactive, digital format. Your report can be accessed using the log-in information below:

<https://myimpact.iuf.iu.edu/iu/2020/XXXXXXXX>

Passcode: XXXXX

We encourage you to complete the survey at the bottom of your report so that we can continue to best serve you.

If you have any questions regarding your report, please contact Ann Bunjan, IU Foundation Stewardship Manager, and the Stewardship Department at iufstew@indiana.edu or (812) 855-6332.

Thank you for your generosity and support of Indiana University.

Ann Bunjan
Manager, Stewardship
IU Foundation
812-855-6332



Welcome Annette Bunjan

Please enter the 5-digit code.

[Forgot passcode?](#)

> Authenticate

Having trouble logging in? Please call [\(812\) 855-8311](tel:812-855-8311) or email ufstew@indiana.edu.

[Privacy & Security](#)

8:00

myimpact.iuf.iu.edu



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Indiana University Test Scholarship



For the Benefit of Indiana University

Invested Fund *	Spendable Fund **	Balance
Market Value - July 1, 2019 \$300,000.00 Gifts \$20,000.00 Other Income \$100.00 Transfers \$500.00 Distribution to Spendable Fund \$(13,500.00) Change in Market Value \$12,000.00 Market Value - June 30, 2020 \$319,100.00	Beginning Balance - July 1, 2019 \$7,000.00 Gifts \$1,000.00 Distribution from Invested Fund \$13,500.00 Transfers \$(500.00) Authorized Expenditures \$(14,500.00) Aggregate Gain/(Loss) \$750.00 Ending Balance - July 30, 2020 \$7,250.00	Total Beginning Balance: \$307,000.00 Total Ending Balance: \$326,350.00

* To accommodate external manager reporting, market values are priced a month in arrears and will not correlate to fiscal year end investment performance.

** The Spendable Fund 'Aggregate Gain/(Loss)' represents investment results of spendable income or gifts invested in the Pooled Long Term Fund (PLTF). The Spendable Fund 'Ending Balance' includes \$500.00 which is invested in the PLTF.

Fund Impact

Ann Bunjan
Fall 2019 | Spring 2020

Stephanie McClure
Fall 2019 | Spring 2020

Zack Edwards
Fall 2019 | Spring 2020

Jane Doe
Fall 2019

John Doe
Spring 2020

IMPLEMENTATION PROCESS

We had to move (really) **fast!**

ON-BOARDING PROCESS: GREEN-LIGHT TO LAUNCH

1	2	3	4	5	6
INITIATION	DESIGN	CODING	VALIDATION	CONTENT	LAUNCH
<i>Engage internal audiences; obtain required direction.</i>	<i>Design the look and feel of the system; design data schema.</i>	<i>Align the design to the platform.</i>	<i>Ensure the design has been aligned to platform.</i>	<i>Place pre-curated content on the system for launch.</i>	<i>Bring the system live; train; launch.</i>
1/2WEEK	1/2WEEK	3WEEKS	1WEEK	1/2WEEK	1/2WEEK

6 Weeks!

We discovered BOTTLENECKS around...

- ① DATA MAPPING + EXPORT
- ② WORKING FROM HOME
- ③ TRAINING/SYSTEM FLUENCY
- ④ WHO GETS PAPER? WHO GETS DIGITAL?

DISTRIBUTION PLAN

Our DISTRIBUTION PLAN involved...

- ① OUTLOOK-BASED EMAIL DISTRIBUTION
- ② PAPER REPORTS TO 978 DONORS
- ③ INCLUDED A FEEDBACK SURVEY IN EACH
- ④ TRACKING DONOR PREFERENCES
- ⑤ FOLLOW-UP TOUCHPOINTS



RESULTS

FILTER REPORTS ANALYTICS

User(s): ALL Users
Fiscal Year: ALL Fiscal Years
Brand: ALL Brands

FILTER RESULTS	Value	% of Total
Records:	3173	-
FY Reports Built:	3173	100%
FY Reports Snapshots:	767	-

WE HAVE DATA!

Single Opens:	425	63%
Multiple Opens:	255	38%
Untracked Opens:	7	1%
Mobile Opens:	154	23%
Desktop Opens:	556	82%

ENGAGEMENT	Value	% of Total
View Duration (Median):	00:02:55	-
View Duration (Mean):	00:12:03	-
View Duration (>1 minute):	588	86%
View Duration (>5 minute):	280	41%
View Duration (>10 minute):	172	25%

Our RESULTS...

- ① 32% OPENED AFTER FIRST MAILING*
- ② 38% OPENED MULTIPLE TIMES
- ③ AVERAGE SESSION WAS 2.5 MINUTES
- ④ 25% HAD SESSIONS > 10 MINUTES
- ⑤ 15 DONORS REQUESTED PRINTED REPORT

Our SURVEY RESULTS...

Which of the following improvements would you like to see on your report in the future, if any? (choose all that apply)

Statement/Phrase	Top-2 Box Response (%)
The information was easy to understand	85%
The digital report was user-friendly	84%
The digital format was appreciated	80%
The information met my needs	70%

Our SURVEY RESULTS...

Which of the following improvements would you like to see on your report in the future, if any? (choose all that apply)

Potential Improvement	(%) Response
None; I received sufficient information	52%
The financial performance of my account(s) over time	24%
More information about the impact of my gift(s)	22%
More personalization (ex. fund description, photographs)	10%
More informational/ instructional materials	6%

“Our donor relations team has launched some **great innovations**”

- CEO Emeritus

“I highly encourage **sharing this move forward with our colleagues as inspiration for other innovations** around donor engagement. Nice Job!”

- Chief of Staff and VP, Strategic Initiatives

“I am blown away by this report and the impact of our gifts over the course of this mutual love affair we have with IU. **Tremendous improvement and achievement!**
Hail to old IU!”

- Our Most Loving Critic/Board Member

“I was pleasantly surprised how **concise and well organized** the report was to navigate. I marked that I wanted more history of the fund, but that was only 1 fund. Well Done!”

- Anonymous Donor

“Appreciate the digital format.
Saves killing a bunch of trees and
having postage, paper and printing
costs. **Woo Hoo!!**”

- Anonymous Donor

QUESTIONS & ANSWERS

AD
RP

THANK YOU!

 **INDIANA UNIVERSITY
FOUNDATION**



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