

HOW TO STREAMLINE YOUR REPORTING EFFORTS AND MAXIMIZE YOUR RESOURCES

Presented by:

Tulane University & Mythos

INTRODUCTIONS



Amanda Roques
Tulane University

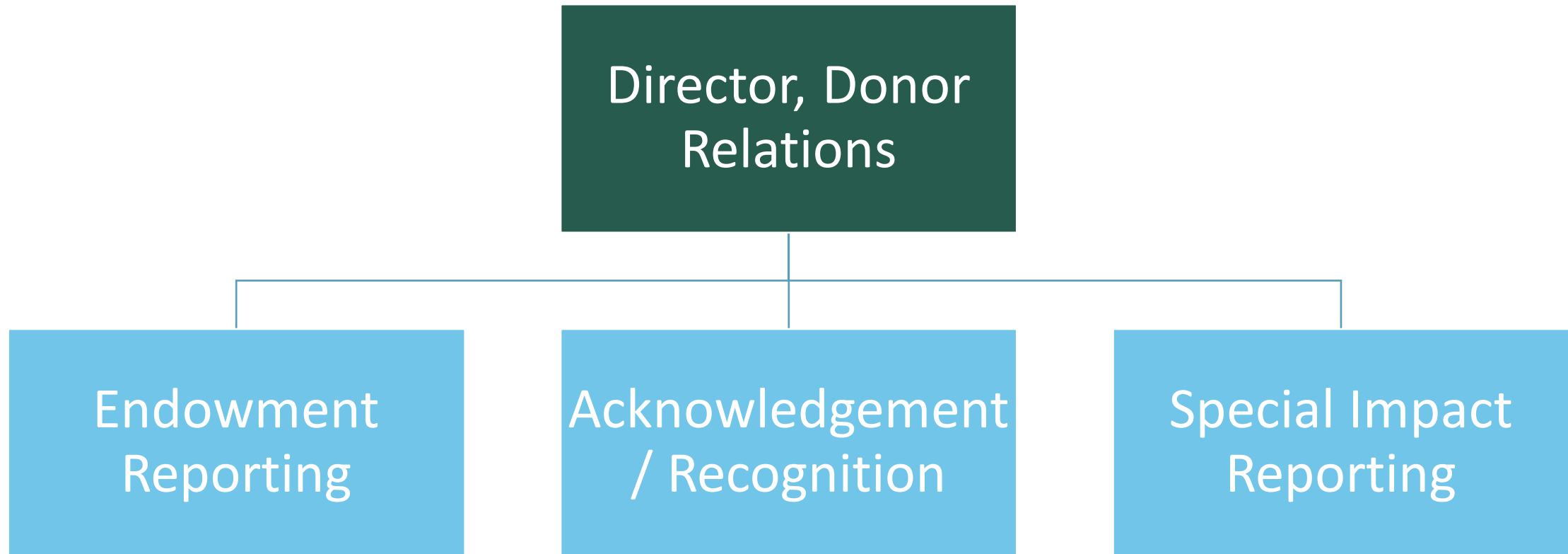


Robb Hoffheins
Mythos

SESSION OVERVIEW

- **What will be covered**
 - Tulane's reporting journey
 - Reporting Challenges
 - Successes
 - Where we are today
- **Learning Objectives**
 - Streamline workflow for efficiency
 - Structure for success
 - Focus resources on most engaged donors
- **Mythos Overview**
- **Q&A Session**

ORGANIZATIONAL STRUCTURE



REPORTING TEAM

Amanda + 3 FTEs

- **Stewardship Report Writer**
 - Non-scholarship report requests
 - Edits student bios
- **Program Support**
 - Presentation Resolution fulfillment
 - New endowment data entry
 - Project management
- **Donor Relations Officer**
 - Donor-funded scholarship selection
 - Student notification
 - Student profile requests & follow-up

WHERE WE STARTED

REPORTING SNAPSHOT

- **Criteria**

- Endowed Funds (any level)
- Current-Use Funds over \$50k (must be requested by RM)

- **Prior to 2010**

- Individual letters to donors with scholarships, chairs, professorships
- No impact – only beneficiary info and market value

- **2010-2021**

- Fund impact reports to every donor/representative
- Financials, EVP or Presidential message, benefactor snapshot

STRUGGLES

Workflow Dynamics

- Very manual process
- Various systems
- Spreadsheets
- Inflexible templates

Limitations & Issues

- Human error
- Tracking: donors & fund reports
- Training on 5 different systems
- Template limitations

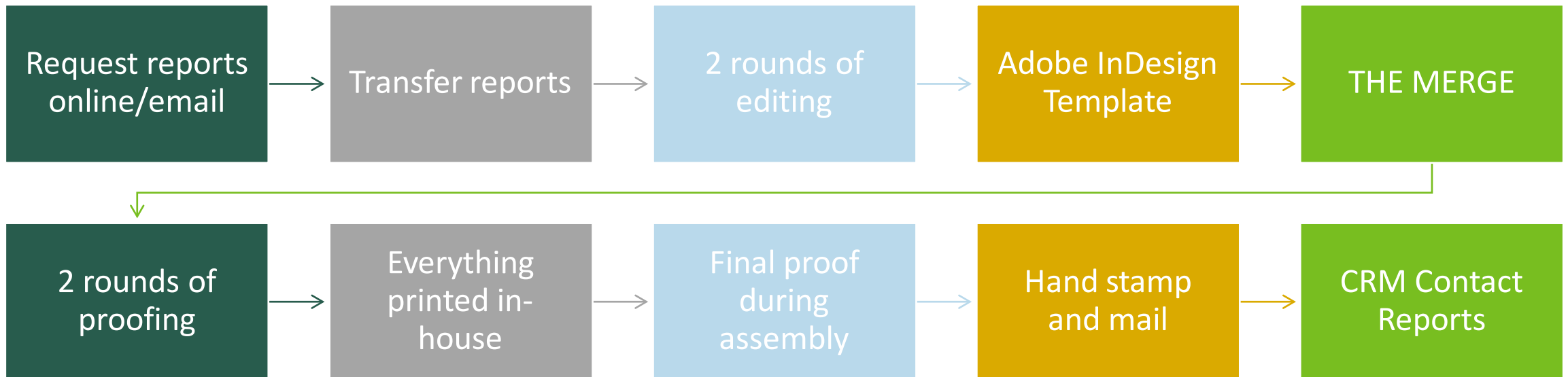
Format & Volume

- Printed reports in-house
- All personalized impact narratives
- 5-6% per year increase in # reports

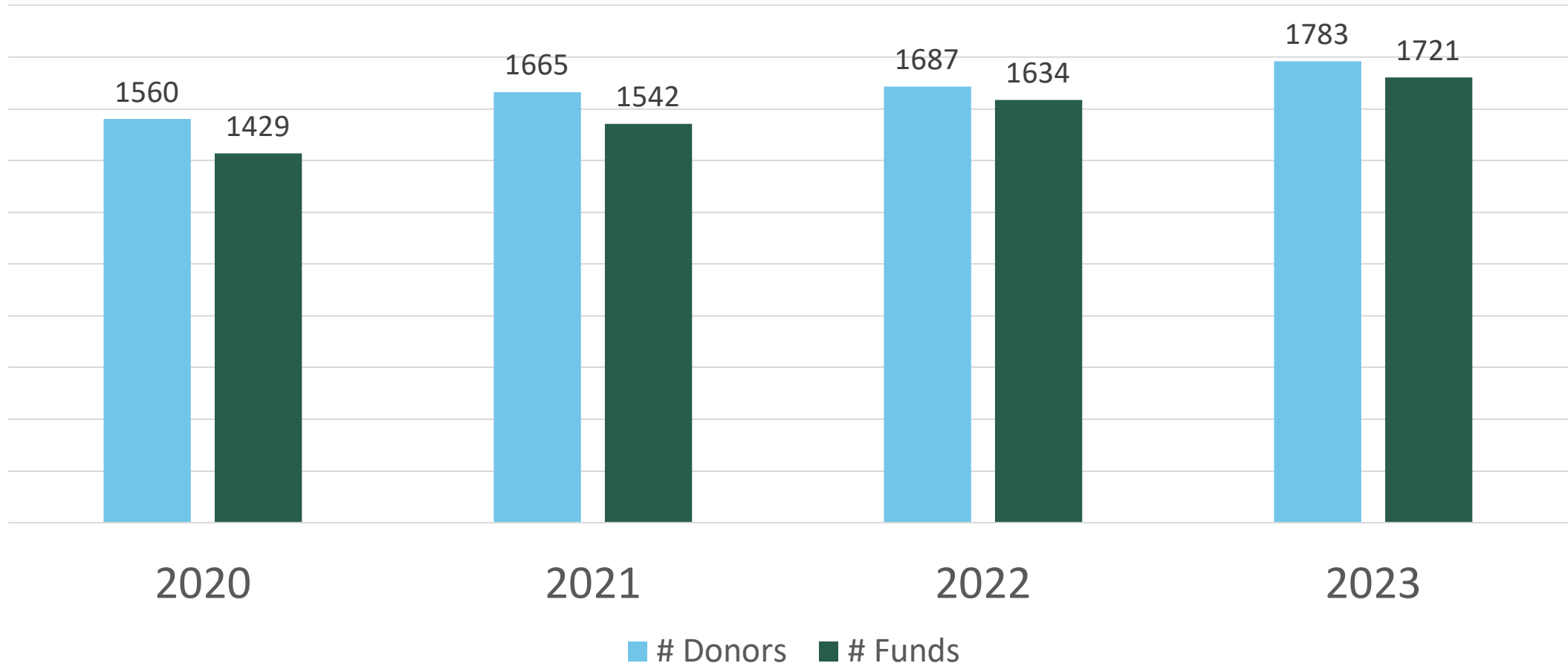
Resources Required

- 3 FTEs + full team during production
- Paper, folders, postage, editing tools
- Expensive use of skilled staff time

OLD WORKFLOW



DONORS AND FUNDS



REVIEW, REVISE, RESET

OUR PLAN

- Streamline workflow
- Send digital stewardship reports, if possible
- Tier reporting
- Better communication to internal partners
- Outsource work to vendors

DISCOVERY AND ADOPTION

- **What we were looking for:**
 - Streamline content collection
 - Easy editing process
 - Manage workflow in one place
 - Report production
- **One Stop Shop!**



WHERE WE ARE TODAY

SURVEYS

- **Multiple Surveys**

- Faculty + Staff - non-scholarship funds
- Student - scholarships
- Additional surveys for Day of Gratitude, cohorts, etc.

- **Tracking responses**

- **Email Manager**

Survey Response → Story Editor

STORY EDITOR

Useful tools:

- Customizable Status and Assignments
- Tags (very helpful!)
- Profile Information
- Media (photos + documents)

DONOR REPORTS

- **Upload information one time**
 - Surveys
 - Donor Reports
- **Templates set for us**
- **Review and approve instantly**
- **Invite stakeholders to review reports**
- **Workflow tools:**
 - Customizable statuses
 - Assignments
 - Notes
 - Edit raw data
 - Regenerate
 - Export

STRUCTURE FOR SUCCESS

- Be Realistic
- Start small
- Leadership buy-in
- Stop making promises
- Update survey prompts & give character limits
- Work with AIS team
 - Communication preferences field
 - New reports for Mythos uploads
- Focus resources on most engaged donors
 - Tiered donor reports
 - Efforts on top tier donors

TIERING BENEFITS

- Necessary to continue reporting at same level
- No additional resources
- Reduce number of impact reports
- Tailor reports to top-level donors

TIERING CRITERIA & COMPONENTS

Tier A 20%

- Presidential/Principal donors or managed by EVP, must be assigned, high giving level, active solicitation
- Fund Specific impact reports

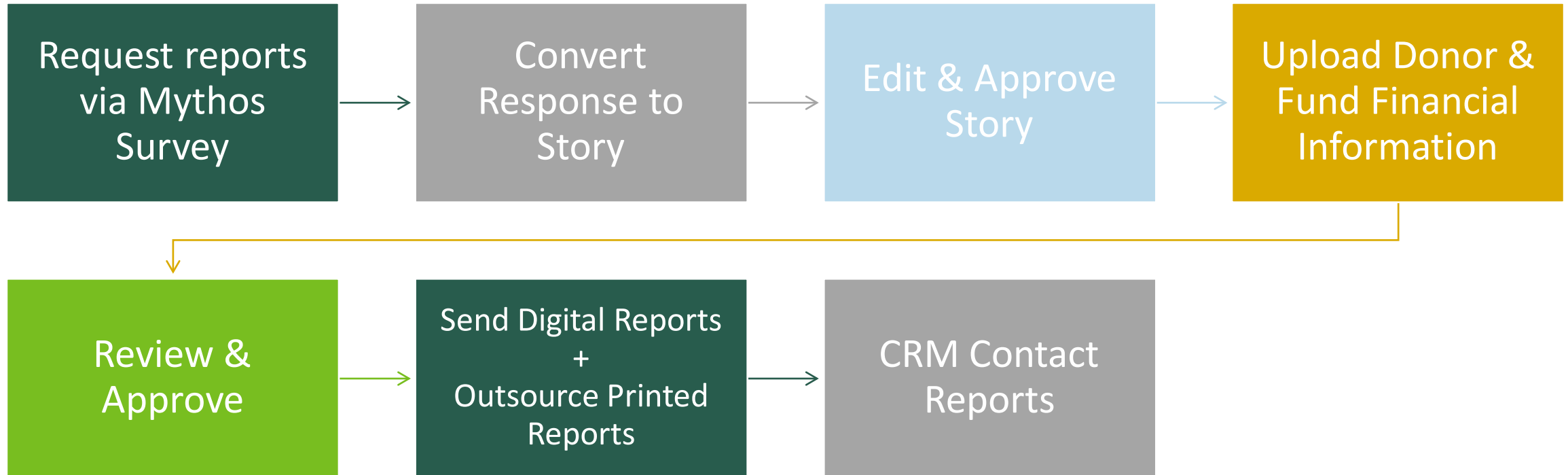
Tier B 50%

- Default tier, moderate giving level
- Area of Giving Impact Narrative

Tier C 30%

- Not assigned, little-to-no giving, not engaged
- University-wide impact statement

NEW WORKFLOW



TAKEAWAYS

- Review current processes
- Start small
- Less is more
- Communication
- Report delivery method
- Tiering
- Find a vendor that can help!

CONTACT INFORMATION



Amanda Roques

Tulane University

aroques@tulane.edu



Robb Hoffheins

Mythos

robb@mythosplatform.com

Q&A