

Trends and Best Practices in Impact Reporting

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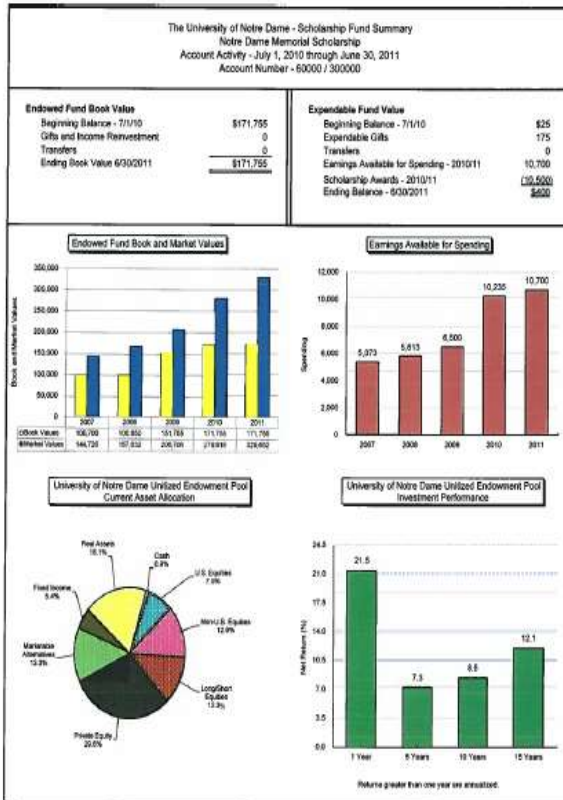
May 10, 2017

University of Notre Dame

- Independent, national Catholic research University located near South Bend, Indiana
- 8,000+ undergraduate students; 3,000+ graduate students
- ~115,000 annual donors
- \$10.4 billion endowment (comprised of ~6,000 individual endowments)
- 13 full-time stewardship team members



Impact Reporting at Notre Dame: A History



- Endowments only (3,000)
- Criteria: book value of \$100,000 (non-financial aid funds) or \$50,000 (financial aid funds)
- 12 report types
 - Scholarships (pooled and regular)
 - Graduate, business, and law fellowships
 - Athletic grants-in-aid
 - Endowed professorships
 - Endowments for Excellence
 - Hesburgh and Law Libraries
 - Donor advised funds
 - Suspense funds
- Financials heavy

Benchmarking Analysis and Focus Groups

U.S. News and World Report: Top 20 Universities (2012)

Brown University
Cal Tech
Columbia University
Cornell University
Dartmouth University
Duke University
Emory University
Harvard University
Johns Hopkins University
MIT

Northwestern University
University of Pennsylvania
Princeton University
Rice University
Stanford University
University of Chicago
Vanderbilt University
Yale University
Washington University

Benchmarking Analysis and Focus Groups

18 schools provide both quantitative and qualitative information.

- **7** included fund purpose statements
- **2** shared a separate glossary of terms
- **13** shared general endowment performance information
- **18** shared market value; **7** shared a 3-5 year history of market value
- **9** shared book value; **4** shared gift value; **5** shared neither number
- **16** shared endowment distribution, but only **1** – Notre Dame – shared actual spending information
- **4** shared cumulative impact details
- **13** shared student profiles for financial aid recipients

Benchmarking Analysis and Focus Groups

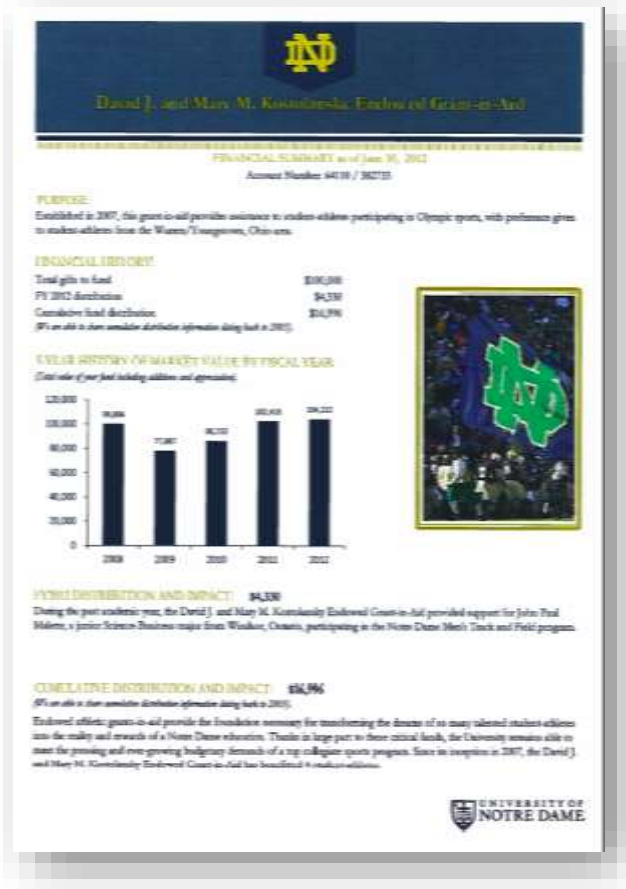
Focus Groups:

- Key administrators
- Donors
- Budgeting
- Investments
- Deans
- Fundraisers
- Senior leadership
- Financial aid

Key Questions:

- How are reports branded?
- Are reports inviting?
- What data is most important to donors?
- What information is most important to University leadership?
- Do reports effectively convey impact?

Benchmarking Analysis and Focus Groups



Results: Impact-Based

- Purpose statements
- Gift (vs. book) value
- Continue to share five-year history of market value
- Cumulative distribution and impact
- Incorporate narrative impact statements into the body of the reports
- University brand standards and images
- Eliminated separate glossary

How to produce these, how to produce more of these, and how to produce them faster?

Suppliers

- OIT/DIS
- Bruce Harris
- Field fundraisers
- Donor Services
- Letter signatories
- Staff writers
- Office of Investments
- Financial Aid
- Athletics
- Business School
- Graduate School
- Law School
- Endowed Professors
- Budget Administrators
- Librarians
- Procurement
- Accounting and Financial Services

Inputs

- New fund reports, approved by primary solicitor
- Address downloads
- Signatory approval
- Advance
- Banner
- University spend rate
- Financial and endowed account data
- Student recipient data
- Annual impact information
- Cumulative impact information
- Mailing and paper supplies
- Endowment brochures

Process

Outputs

- Financial/impact reports
- Signed letters

Customers

- University benefactors
- Field fundraisers
- University officials
- University budget administrators

Retrieve new fund information and integrate into existing tracking charts

Draft and generate letters to accompany reports

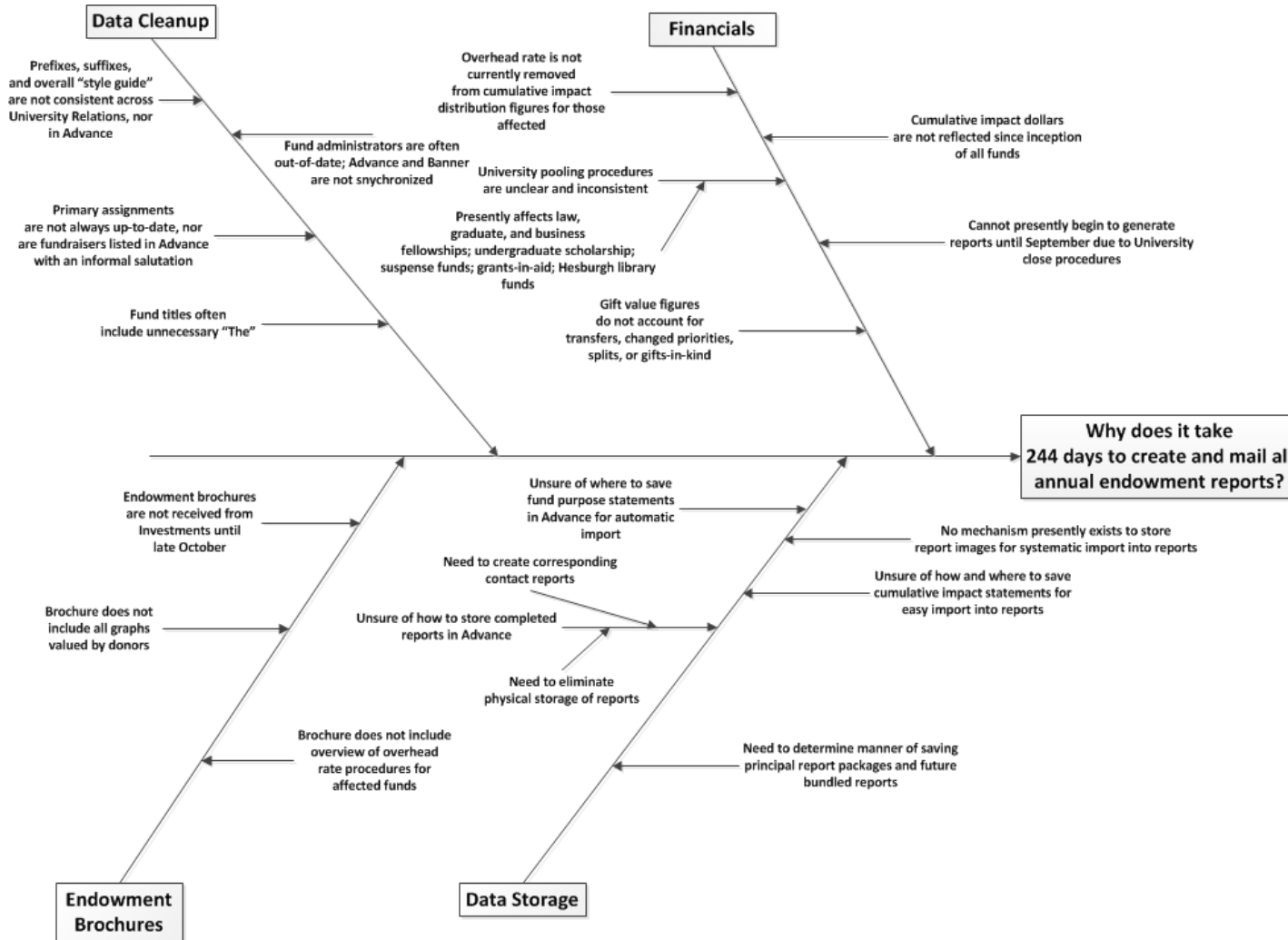
Generate financial/impact reports

Collate and review reports and letters in tandem

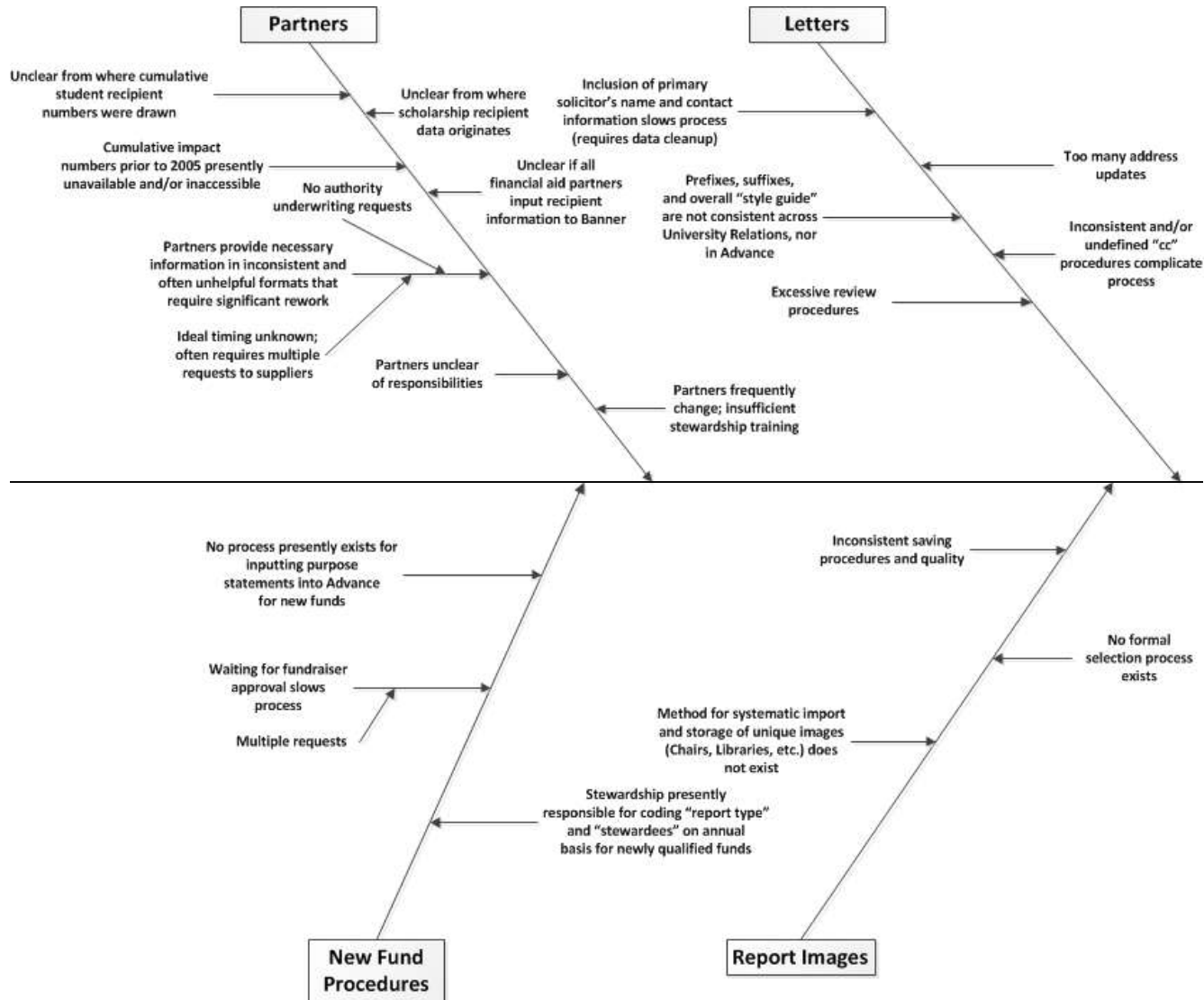
Assemble mailing packets

Mail

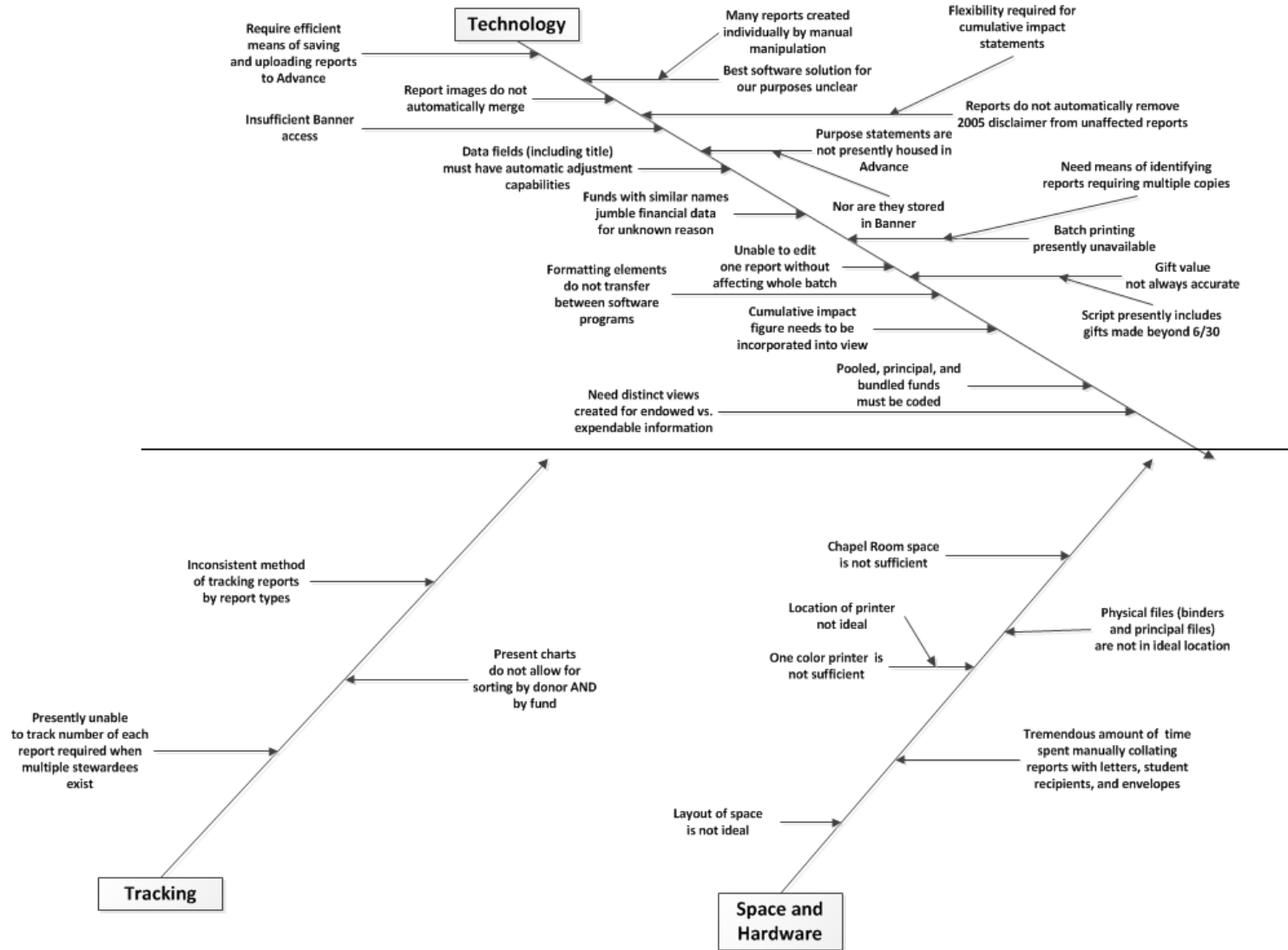
Root Cause Analysis



Root Cause Analysis



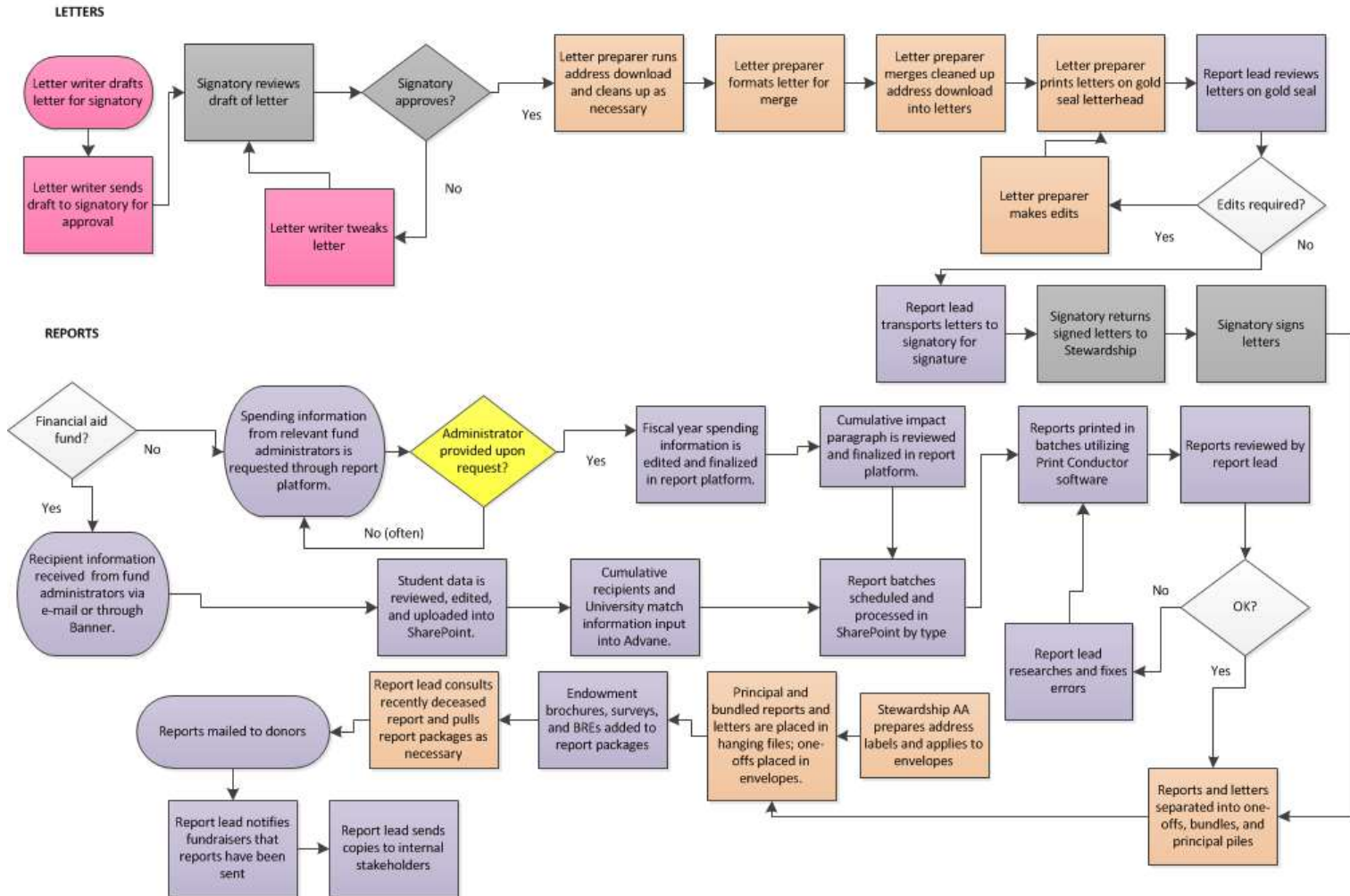
Root Cause Analysis



Root Cause Analysis and Improvement Solutions

Root Cause	Improvement Solutions	Impact
Technology	<ul style="list-style-type: none"> • Use SharePoint to create reports • Utilize AdvanceWeb to store data: purpose statements, images, communication names, cumulative impact numbers, match information • DIS serves as primary support • Improved interface with Banner • Reporting platform created 	<ul style="list-style-type: none"> • Data integrity • Ease of use; everyone on team able to run reports • No reliance on outside consultant • Flexibility to alter reports as necessary • Student recipient information largely able to be imported automatically • Enhanced communication with fund administrators and time saved with tracking
Partners	<ul style="list-style-type: none"> • Reporting platform • Banner interface for scholarship data 	<ul style="list-style-type: none"> • Impact statements centrally stored and tracked • More efficient relationship with fund administrators
Financials	<ul style="list-style-type: none"> • Cleaned up gift values in partnership with Donor Services • Coded pooled funds • Partnered effectively with Controller's Office to determine definitive answer on overhead rate 	<ul style="list-style-type: none"> • Consistent reporting to donors • Enhanced partnership with Donor Services, the Controller's Office, Accounting
Storage	<ul style="list-style-type: none"> • Eliminated binders • Decision to store purpose statements, fund names, cumulative numbers, matching gifts, and images in AdvanceWeb • Storage of reports in SharePoint • Storage of fiscal year and cumulative impact statements in reporting platform • Future enhancement includes linking AdvanceWeb to the reports in SharePoint (January 2014) 	<ul style="list-style-type: none"> • Enhanced fundraiser accessibility to reports • Office of Stewardship Programs has ability to create reports in-house and maintain control
Data Cleanup	<ul style="list-style-type: none"> • Addition of communication name • Decision to use stewardship representative when no primary solicitor assigned (or unique situation) • Decision to use addresses as they appear in AdvanceWeb (USPS standards) 	<ul style="list-style-type: none"> • Stewardship can now own the name of the fund for reports • Significant data cleanup

Process Map (Revised)



Non-Endowed Impact Reporting

- Historically, prioritized for principal donors (i.e., top 200 cumulative donors)
 - Capital gift reporting
 - Expendable/current use reporting

CAMPUS CROSSROADS KEY INFORMATION

ARCHITECT	The SUAM Collaborative
CO-DESIGNER	RATIO Architects
CONSULTANTS	Workshop Architects and HOK
CONSTRUCTION MANAGER	Barton Malow Co.
SQUARE FOOTAGE	838,000 gross square feet
FEATURES	<p>DUNCAN STUDENT CENTER</p> <ul style="list-style-type: none"> • Student meeting rooms, graduate and undergraduate student lounges, three restaurants, and student organization space • New recreational sports facilities • Career Services center, with interview, advising, and training space for both undergraduate and graduate programs • A 500-seat University bathroom <p>MUSIC BUILDING</p> <ul style="list-style-type: none"> • Academic space for the Department of Music • Recital and rehearsal halls • Music library, relocated from Hesburgh Library • Frank Leahy Gate • Club/lounge for games day and year-round use <p>CORBETT FAMILY HALL</p> <ul style="list-style-type: none"> • Anthropology and psychology labs, offices, a flexible club/classroom space • Digital media center with 2,000-square-foot teaching, and research facilities <p>STADIUM ENHANCEMENTS</p> <ul style="list-style-type: none"> • Premium seating and hospitality areas in the stadium • A re-imagined grand entrance to the stadium • New scoreboard over the south side of the stadium • Improved connectivity • Updated concession and restroom facilities



CAPITAL PROJECT UPDATE

DUNCAN STUDENT CENTER

- Brick and stone veneer installation has begun. Prior to the start of installation, a spray-on air vapor barrier was applied to the exterior of the facility.
- Temporary provisions are currently under construction on the seventh and ninth levels of the Duncan Student Center in preparation for the 2016 home Notre Dame football season. These areas will host NBC, broadcasters, home and visiting team coaches, the stadium public address announcer, and security and game management officials.
- On average, nearly 650 tradespeople and supervisors are on site each weekday.
- Progress has been made on the eighth floor which will support the first floor.
- Magnificent views are apparent from within the building.
- Details for the interior spaces to be housed within the building are being finalized.
- The Campus Construction Office is on target to complete construction of the Duncan Student Center by the end of 2016.



Duncan Student Center construction site as viewed in late June 2015.

Dear Sally,

From Commencement to Welcome Weekend, summertime at Notre Dame bears many similarities to the academic year. Campus bustles with alumni, participants in youth camps, and other visitors from across the world. Groundbreaking research efforts continue in our labs, learning and pedagogues develop in our classrooms, and a vibrant community life permeates our residence halls.

This summer, there is also a definite energy and excitement in the air as the construction crews are busily working to complete the many capital projects currently underway. I am greatly appreciative of the role you are playing to enhance the campus, helping us to fulfill Father Sorin's vision for the University to become a force for good in the world.

The Duncan Student Center will benefit not only today's students, faculty, and staff, but also will have an impact on the Notre Dame community far into the future. Without your leadership and outstanding generosity, the University's physical structures could not match and support the strength of its mission, tradition, and educational programs. Thank you for your continued dedication.

Yours in Notre Dame,

John F. Affleck-Groves
Executive Vice President

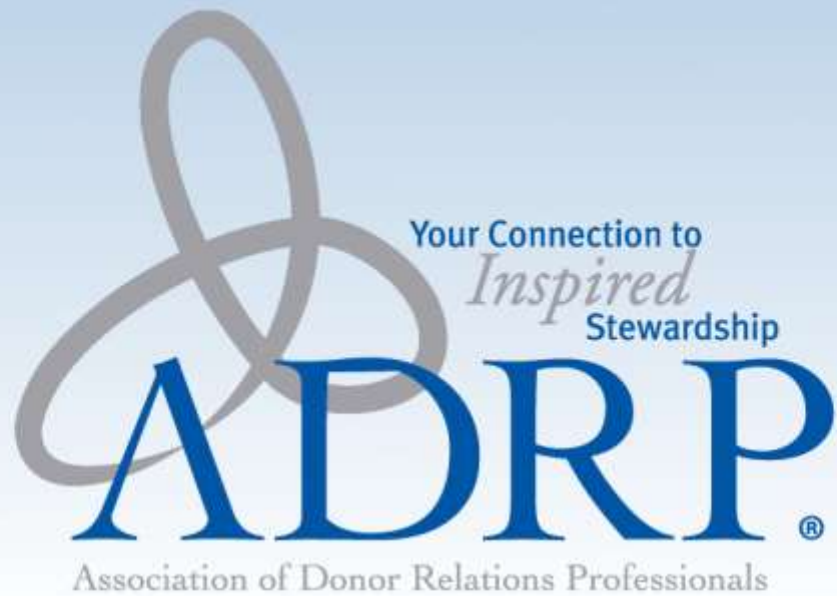
UNIVERSITY OF NOTRE DAME CAPITAL PROJECT UPDATE DUNCAN STUDENT CENTER

Summer 2015

Your Connection to
Inspired
Stewardship

Future state

- Division of labor to promote holistic understanding and alignment with University's structure
- Year-round, proactive activity
- Formalized compliance function
- Surplus and deficit analysis of all restricted funds in partnership with the University's Fiduciary Committee
- Restriction review and front-end involvement in gift agreements
- Continued education and training of fund administrators



Your Connection to

Inspired

Stewardship

ADRP®

Association of Donor Relations Professionals