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ASSOCIATION OF
DONOR RELATIONS
PROFESSIONALS

BUILDING
RELATIONSHIPS
FOR GOOD

™

What We Wish We'd Known Before Going Digital

Jenna Antenucci, Director of Stewardship and Donor Relations

Kate Frinton, Assistant Director, Stewardship Donor Relations
Siena University

With Remy Erkel, Overture

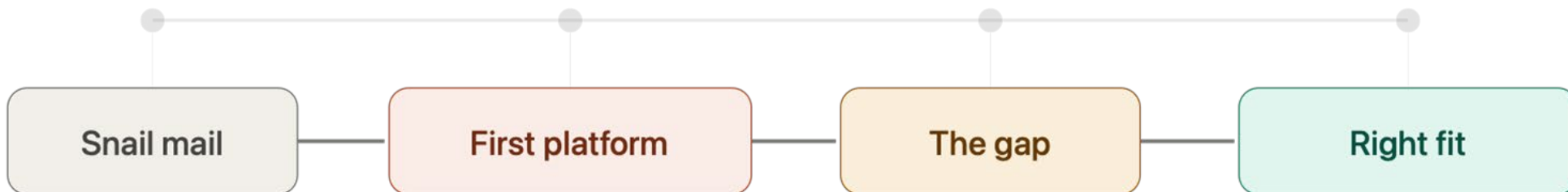
Meet the team

- Jenna Antenucci — Director of Stewardship and Donor Relations, Siena University
- Kate Frinton — Assistant Director, Stewardship Donor Relations, Siena University
- Remy Erkel — Client Success, Overture



Our Journey

- Four ways of doing stewardship reporting since 2020



The Print Era

- Reports created in-house
- Donor data merged into a PDF template via Access
- Cover letters printed, matched to reports, collated, stuffed, and mailed by hand
- Printed Internally
- End product looked like letterhead.

Why We Went Digital

- Cost and labor
- Broader shift to digital, accelerated by COVID
- More personalization

First Digital Platform

- Selected based on cost and a strong sales pitch
- One-size-fits-all templates
- Frequent product updates that changed our workflow
- Limited support
- Had to submit reports on their schedule
- Ultimately, their demo didn't match the product



The Dominick J. Agostino Memorial Scholarship

The Dominick J. Agostino Memorial Scholarship, established by his wife, Pat and his children Mary Beth and Ryan to honor the memory of Dom Agostino '68, is awarded annually to an incoming freshman. Preference is given to a resident student who is able to live at Siena because of this award.

Fund Data	
Balance 5/31/23	\$0
+Net Gifts Received	\$0
+Total Investment Return	\$0
Expended for Designated Purposes	\$0
Other Transfers	\$0
Balance 5/31/24	\$0



Takeaway #1: What to know before you decide

- Can I edit individual reports?
- What happens when my data changes after reports are generated?
- What does ongoing support look like after onboarding?
- How are product updates communicated?
- Can I send on my own timeline?



The Gap

- Contract with first platform ended, no new platform in place
- Manually generated PDFs using Access
- No photos, limited personalization
- Two months of dedicated work for two people



Scholarship Financial Report 2023-24*

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Endowment Financial Summary	
Balance 5/31/23	\$0
+Net Gifts Recieved	\$0
+Total Investment Return	\$0
-Awards	\$0
Balance 5/31/24	\$0
2024-25 Scholars Report will be forthcoming	



Takeaway #2: The Silver Lining

- Used our bad experience to make the case to leadership
- Quantified the time cost of manually creating and sending reports
- Side-by-side comparison



Finding the Right Fit

- Shopped three vendors with different pricing models
- Knew what we wanted: creative, collaborative, expression of brand
- Total cost of ownership, not sticker price

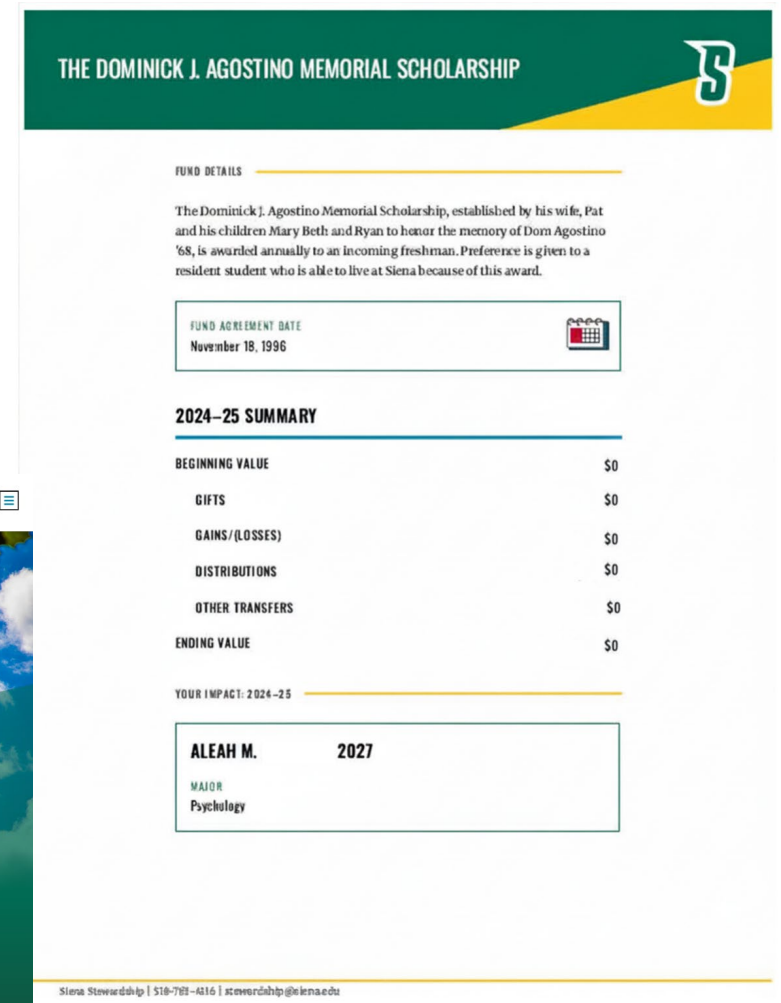
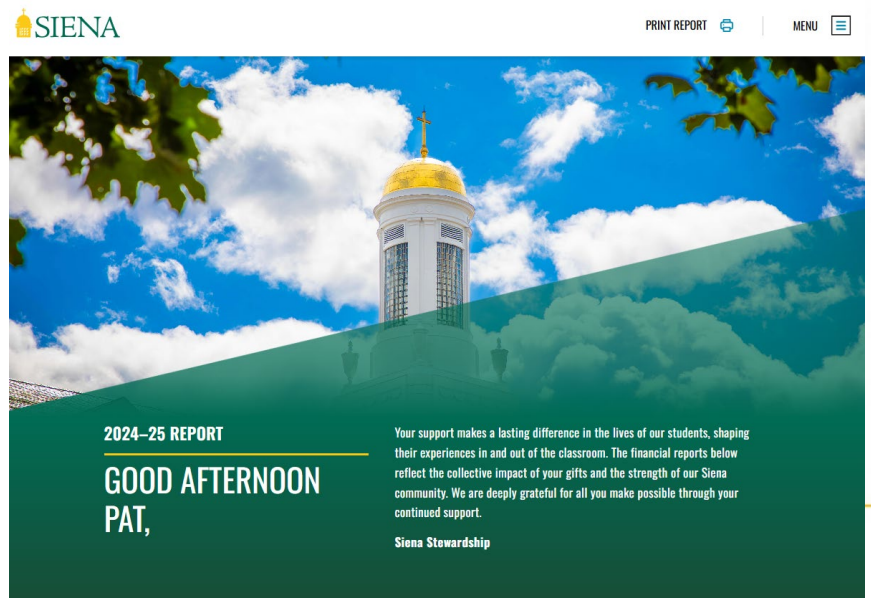


A Donor's Perspective

- "Clearly they don't need my money. I found it obnoxious." — A Siena donor, on an elaborate print stewardship booklet from another institution
- We want a high-quality donor experience, but in an environmentally cost-effective way

What The Right Fit Looks Like for Us

- Personalized, photo-rich reports
- 100s of reports generated in one week
- Data changes flow into existing reports
- Reports can be updated at any time
- Combine spring financials and scholar updates
- Maintained quality at scale



What We'd Tell Ourselves Before We Started

- Don't let sticker price scare you away from the right tool
- The right software tool helped us do more with less
- Consider your goals, and ask the right questions - what does your team actually need from a stewardship platform?
- Evaluate the level of support available
- Build your case to leadership with data
- Use your community of peers (ADRP!)

Questions?



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