

Harnessing data to strategise for digital endowment reporting

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Abstract

Digital endowment reporting is becoming an industry standard in higher education and philanthropy. NC State implemented a digital endowment reporting platform by leveraging efficient project planning and management, a strategic communication schedule and in-depth data analyses for informed decision making. Through the topics explored within, readers can expect to have a better understanding of the preparation needed for a successful digital transition and explore the role data-driven conclusions play in guiding a project of this nature to a rewarding conclusion. A willingness to adapt to issues as they arose to maintain flexibility and a commitment to working cohesively as a team were common threads throughout the project. This paper will detail NC State's experiences and provide suggestions for how the steps that were taken apply more generally to digital endowment reporting as a whole.

Keywords

Data, digital communications, digital endowment reporting, endowment reporting, reporting

INTRODUCTION AND OBJECTIVES

In today's increasingly technological society, institutional advancement and philanthropic organisations should be prepared to engage with their constituents in myriad ways. Digital reporting provides an opportunity to expedite communications with donors and to provide tailored, customised communications that donors can access at any time and from anywhere. In light of current events such as the COVID-19 pandemic, harnessing technology to deliver communications has never been more important, but it is not without its challenges. Key elements in pivoting from paper to digital communications include developing robust project plans and strategies from the project's onset, considering key stakeholders and their communication preferences, data collection and clean up and determining mechanisms for analytics and measuring success. This paper strives to provide baseline considerations for launching digital reporting initiatives such as endowment reporting and utilising engagement analytics to make data-driven decisions.

Metrics

Metrics for measuring the results of paper endowment reports, such as gift dollars generated from solicitations enclosed with the reports and donors' questions and feedback can be difficult to quantify because they are several steps removed from the reporting process. Donors and report recipients may be compelled to contribute in response to their reports but may not utilise the enclosed solicitation envelopes and may direct their questions to their relationship managers or respective colleges instead of the central reporting office, if one exists. These factors make it difficult to gather comprehensive feedback.

Digital endowment reporting presents an opportunity to utilise additional metrics, such as e-mail open rates and digital report views, which are more reliable indicators of endowment information reaching its intended target. However, the lack of comparative data such as national digital reporting open rates or comparable open rates for paper reports makes it difficult to establish baseline targets or measures of success in year one and, more importantly, to develop data-driven

strategies for moving forward. While the lack of industry-wide metrics may present an initial barrier, it also provides an opportunity for an institution to consider what types of personalised metrics provide the most value at the onset of a digital endowment reporting project and the chance to implement standards tailored for the unique landscape of each institution undertaking such a project. Suggestions for possible metrics are discussed in greater detail in the section on Visualisation, Tools and Reports.

Partnerships and project planning

Collaboration with key partners from the onset of a digital initiative and ensuring that teams have the capacity for the project are crucial to success. Cross-training has been a major focus in the industry; however, the amount of training and expertise required for extensive cross-training can dilute the end product or overwhelm employees. If organisational structures and budgets allow, institutions should consider creating subject matter experts in specific areas, including digital reporting. NC State's Office of Donor Services utilised project planning software to analyse staff's workloads and restructured duties accordingly. This shift allowed two staff members to focus nearly 75 per cent of their efforts on digital reporting in year one, including both the standard processes for data review and analysis and the project planning and implementation necessary for the digital reporting launch.

Partners in converting from paper to digital reporting may include the following offices or their equivalents:

- **Donor services** for analysing existing processes and opportunities for

improvement; developing and implementing a project plan, including conducting a strengths, weaknesses, opportunities and threats (SWOT) analysis and identifying risks, constraints, assumptions and stakeholders; and developing communication plans for internal and external stakeholders, including partners and constituents.

- **Donor relations and stewardship** for developing communications and messaging in accordance with the institution's branding guidelines.
- **Gifts and records management** for collecting and maintaining constituents' information, including contact information.
- **Information management and services** for designing the data input and output system from the institution's database for use by the digital reporting software.
- **Communications** for designing collateral in accordance with the institution's branding guidelines.
- **Security and compliance** for protecting the organisation's information technology infrastructure, data and operations; safeguarding the privacy of the institution's community; and maintaining compliance with applicable laws and regulations.
- **Finance and administration** for approving project-related budgets, expenditures and contracts.
- **Accounting and investments** for producing fund-specific financial data and explaining investment policies and performance.
- **Advancement leadership** for overall guidance, review and approval.

Early, clear and frequent communication regarding the roles and responsibilities of each office and the status of their contributions is key to successful implementation.

Communications should consider partners' preferred communication styles, frequency and necessary level of detail. At NC State, those partners 'in the weeds' had access to detailed updates on demand (such as real-time access to the project planning software) and received bi-weekly check-in e-mails (Figure 1) to ensure the project stayed on track,

whereas leadership received periodic, high-level updates with increasing frequency as the project launch drew nearer.

Whether to utilise existing software or to build something in-house is an important consideration. Few digital reporting softwares exist and in-house products seem an attractive option for developing custom reports that communicate

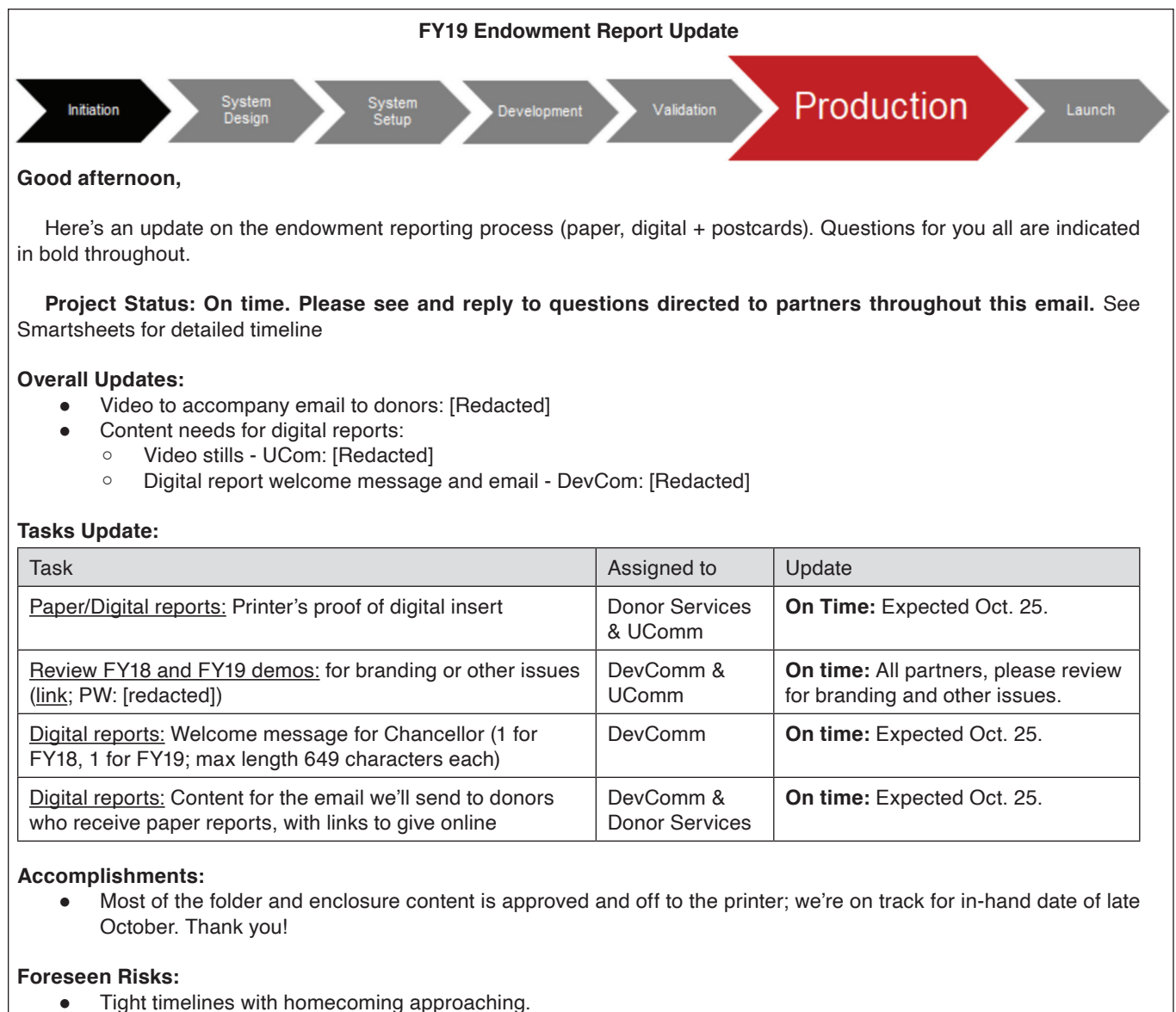


FIGURE 1 A sample of NC State's bi-weekly update to project participants who were 'in the weeds' and had action items due

directly with existing datasets. However, an in-house product also requires a great deal of staff time and budget that were not congruent with NC State's one-year timeframe. For this reason, NC State partnered with an existing software company to utilise its platform in accordance with the broad project plan pictured below (Figure 2).

Stakeholder input and communication plan

Digital reporting presents an exciting opportunity for innovation, but changes may not be welcomed by all constituents. Barriers may include visual impairments, access to or understanding of technology and the ease with which reports can be disbursed by recipients within a

Digital Endowment Reporting Project Plan							
	Initiation	System Design	System Setup	Development	System Validation	Push to Production	Content Population Launch
Timeline	January 1 - May 1	May 2 - May 31	June 3 - June 28	July 1 - July 31	August 1 - August 16	August 19 - August 30	September 3 - November 15
Stakeholders	- Donor Services (DS) -Colleges -University Communications (UCom) -Development Communications (DevCom) -Technology Compliance -Advancement -Information Services (AIS) -Information Technology (IT) -Foundations Accounting & Investments (FAI) -Finance and Administration (FA)	-DS -Colleges -UCom -DevCom -AIS -IT -FAI	-DS -Colleges -UCom -DevCom -AIS -IT -FAI	-DS -Colleges -UCom -DevCom -AIS -IT -FAI	-DS -Colleges -UCom -DevCom -AIS -IT -FAI	-DS -Colleges -UCom -DevCom -AIS -IT -FAI	-DS -Colleges -UCom -DevCom IS -IT -FAI -Mail Services
Tasks	Endowment report workflow analysis; prior fiscal year (FY) project wrapup; project charter; pain point analysis; preliminary data cleanup; industry benchmarking; content needs; reporting needs	Prelim data; cleanup; reporting needs; content development; financial updates; donor outreach design	Data cleanup; reporting needs; content; financial updates	Donor outreach; data cleanup; reporting needs; content; financial updates; beneficiary data collection	FY data pull and cleanup; financial updates; content; donor outreach data cleanup; reporting needs; beneficiary data cleanup	Beneficiary data cleanup; FY data pull and cleanup; financial update; content; reporting needs; specialised reports; report templates	Financials received/questions reviewed; volunteer training; college/units review draft reports; final data review and upload; reports delivered
Key: DevCom: Development Communications/Stewardship DS: Donor Services FA: Finance and Administration FAI: Foundations Accounting and Investments AIS: Advancement Information Systems IT: Information Technology UCom: University Communications							

FIGURE 2 A sample high-level project plan from NC State

corporation or group of donors. Institutions should communicate early and clearly with constituents and present an opportunity for feedback. NC State's communication plan for the launch of digital endowment reporting was as follows:

- **Fall 2018:** Fiscal year 2018 reports included a brief note that future reports would be delivered digitally in the future. No additional details were available at this time, as the digital initiative formally began after FY18 reports were delivered.
- **Spring 2019:** Data appends were conducted to ensure donors' information was as up to date as possible.
- **Summer 2020:** Constituents received postcards and e-mail communications formally announcing the digital initiative. All constituents with e-mail addresses were to be opted into digital reports; constituents had the opportunity to update their information or to opt out of digital reports completely.

Institutions should also consider ways to help donors adapt to the new and digital reporting system and highlight the benefits to their constituents. NC State's approach for helping donors adapt was to deliver two reports to donors in the inaugural digital reporting year: the report for the most recent fiscal year, which was new information for the donors, and the previous fiscal year's report. The hope was that since donors had received paper reports in fiscal year 2018, seeing data that was familiar to them in the new format would help to orient them to the digital platform. Reception of this approach was not something NC State tracked on a large scale, but seemed, anecdotally, to be appreciated by donors. Additionally,

as NC State continues to launch digital reports each fiscal year, data from FY18 on will continue to be available to donors through the digital reporting platform. Donors will have a single source to view their endowment report data at any time, which should mitigate ad-hoc requests for duplicate report copies and allow donors to assess their endowments' performance over time.

TRAINING RESOURCES

To ease the stress on all parties involved in the transition to digital reporting, institutions should have a communication plan in place for addressing common questions from both internal and external constituents. One potential solution is to prepare advance guidance and instruction in an easily consumable format; options could include a website with instructional screenshots and/or a video tutorial. A key goal of the guidance should be to explain the solutions to anticipated frequently asked questions in a manner that is straightforward and prevents, as much as possible, frustration from constituents with limited technological knowledge. To gather the common questions staff should be prepared to explain, an institution may look at patterns in questions about paper reports that may translate to digital reports, survey development staff who frequently interact with donors to seek the commonly asked questions from their perspectives or ask the staff to test the software, and, if utilising an existing software, ask what questions other clients in the same industry receive from their constituents.

It should be noted that while training resources are one potential tool in an institution's arsenal, they may not receive wide-spread usage. NC State authored a number of training materials

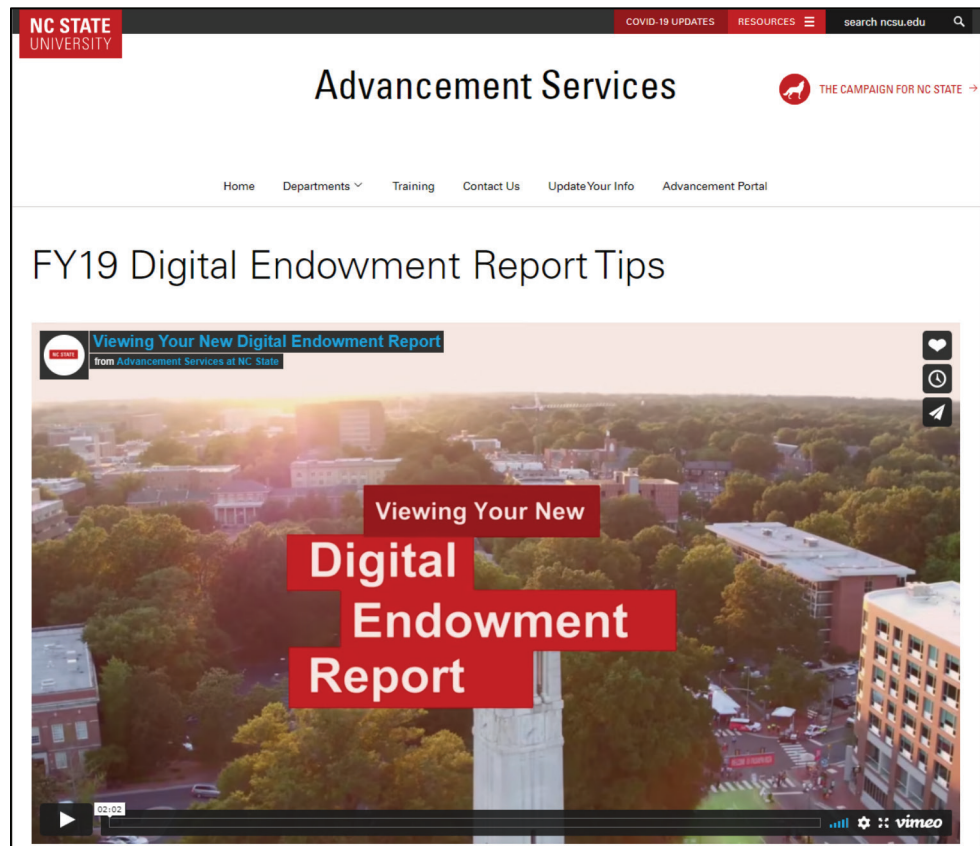


FIGURE 3 NC State's webpage for donors with guidance for accessing digital reports

and guides for a variety of audiences. Development officers received a set of instructional videos that served two purposes. The first was to guide them through the standard internal data review process with considerations for changes necessitated by the switch to digital reporting. The second was to guide relationship managers through the new digital system so that they could assist donors with their questions. NC State also constructed a web page (Figure 3) for donors that contained step by step instructions for accessing their reports as well as the solutions to frequently encountered problems with logging into the reporting platform; the web page included guided

screenshots, written text and instructional videos.

NC State's donor-facing web page was included in the digital report e-mails that were sent to recipients but internal tracking metrics revealed that a small percentage of donors, approximately seven per cent, actually clicked on the link. In most cases, it seemed as though constituents were either able to log into the platform without issue or needed live guidance from an NC State team member; few constituents utilised the training resource to look for solutions on their own. Institutions should be strategic in their communication plans and in assessing the best way to utilise finite resources to address constituents'

questions and concerns when launching digital reporting.

Data Cleanup

An institution's existing data and organisational structures used for paper reporting may not translate seamlessly to the digital reporting process. To prepare for the large undertaking of delivering digital reports (and perhaps additionally continuing to send some quantity of paper reports depending on donors' preferences and the availability of digital contact information such as e-mail addresses), constituent and fund data relating to endowment reporting must be carefully scrutinised. Efficient data processing and integrity checks, always core components of a successful endowment reporting cycle, become even more crucial. In preparation for a digital transition, donors' e-mail addresses stored in an institution's database should be given extra scrutiny with emphasis placed on ensuring that constituent e-mail data is both accurate and up to date. Accurate e-mail addresses not only maximise the chance of reaching as many constituents as possible with digital reports, but also help mitigate the risk of mis-delivering sensitive information about endowed funds.

One effective method of increasing accuracy in donor contact information is to ask for confirmation from donors themselves. NC State coupled this request for report recipients to confirm or update their e-mail addresses with an initial announcement of the digital system during the summer of 2019. Institutions should utilise cross-departmental collaboration to gather as much fresh data as possible from data vendors and to cross-reference the data to ensure that new or updated e-mail addresses

were added appropriately for endowment report recipients. NC State's team conducted additional checks to validate e-mail addresses amongst pairs of spouses and to analyse e-mail addresses from data vendors that seemed nonsensical, such as an e-mail address that includes a first and last name that does not match the donor's name. NC State found these validations helped to identify and plan around potential problem areas caused by incorrect or duplicate addresses.

In addition to e-mail addresses, institutions should be mindful of how other biographical data, such as donors' names, will appear on the reports and solutions for automating the information. NC State focused on managing the greeting names that would appear on the digital reports with an equal amount of caution. In certain circumstances, NC State needed to override the default greeting names for donor couples to switch the order in which spouses' names appeared for donor relations purposes. In the past, such changes occurred manually when staff reviewed each paper report, but digital reporting involved uploading biographical data and fund data to the reporting software separately. The switch to digital reporting and corresponding risk of missing such edits when looking at the pieces of data separately presented an opportunity for a new and more automated strategy. NC State used an extensive set of spreadsheet functions to validate donors' greeting names and build overrides directly into the customer relationship management (CRM) system, ensuring that the data extracted from the CRM would be accurate and valid before they were uploaded to the digital endowment reporting system.

A third pillar of the data clean-up process involves adapting historically recorded data to meet new character

length restrictions within the digital reporting system. In previous years, any sort of data formatting issue was handled by NC State on a case by case basis when it was encountered within the draft reports by manually altering the layout of the report in a Word document. However, in the digital reporting system, all data had to adhere to character and formatting requirements before it was able to be uploaded and displayed in individual reports. NC State utilised a specially designed spreadsheet tab attached to each data upload file that automatically checked character length requirements to identify where historical data was not currently in line with platform standards. From there, data such as fund names, fund purpose summaries and donor names were strategically edited within the CRM to ensure streamlined upload processes moving forward.

While the process of cleaning and validating data can at times be tedious, the effort invested in ensuring the accuracy of the information presented to constituents will pay out over the long term. Ensuring that basic information is correct from the project onset frees up time that would have been spent on correcting mistakes and making apologies down the road for more effective use on the overall strategy of the project. This is especially true during the implementation of an entirely new digital system, but institutions should also be mindful of strategically addressing changes to data from year to year, including changes in donors' marital statuses and changes to fund names and purposes. For example, the digital reporting software that NC State uses only permits one name to be associated with a fund within the system; therefore, historical fund names and summaries are not captured on donors' past reports within the digital reporting

platform. To mitigate questions, NC State added a note to indicate the effective date of the fund name and summary within the reports.

Visualisations, tools and reports

Since digital endowment reporting is a somewhat recent advancement in the field with few benchmarks available for what constitutes a successful digital reporting cycle, an important aim of a digital reporting project is to cast a wide net and maintain flexibility in the analysis of the project's effectiveness. To lay as firm a foundation as possible for comparisons in future years, any available data points surrounding the digital reports should be collected. The data NC State harvested ranged from view and access data from the digital reports themselves to e-mail click and open information, and even a manual log of donor feedback calls. The overarching goal of the data gathering process should be to measure anything and everything that could be measured in order to begin to formalise a knowledge base of what could be expected in the future while ensuring that the first years' worth of digital reports reaches as many constituents as possible.

One of the main analytical tools that was designed for NC State's project was an open rate and access request dashboard (Figure 4) that was shared with leadership to provide a generalised indicator of progress and success. A dashboard provides easy to digest visualisations of how the project evolves over time to higher-level leadership that may be less familiar with the day to day operations of the project. NC State found this tool instrumental in deciding how and when to roll out additional communication pushes to serve as reminders for constituents that had

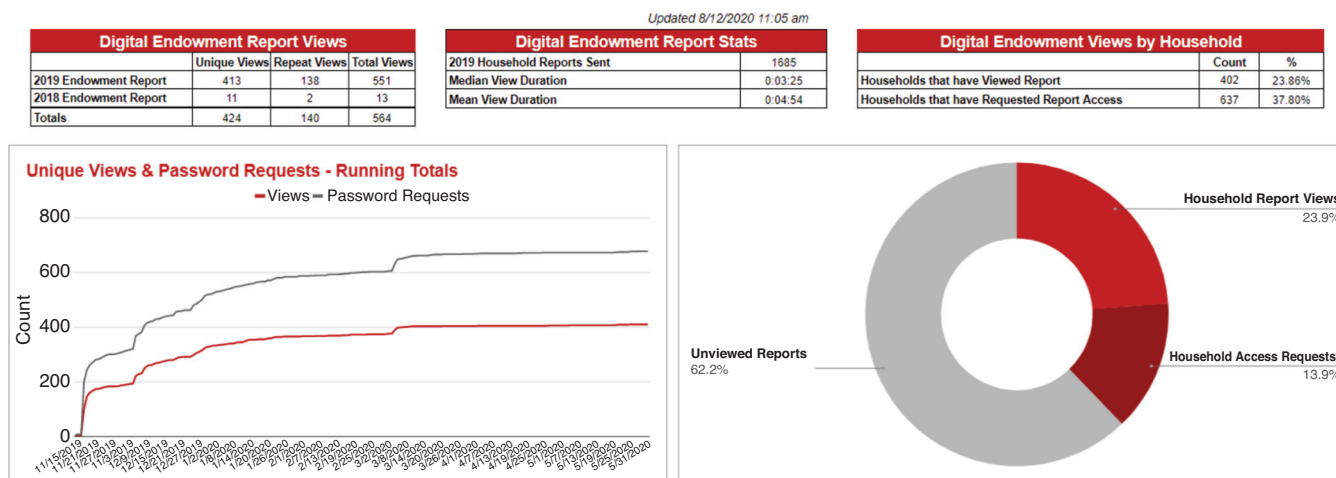


FIGURE 4 NC State's sample digital reporting dashboard

*Note: Some report views are unable to be tracked due to ad-block software, Digital privacy requests, on camp IP addresses, etc. Access requests are a good approximation of additional report views that may be untracked.

not yet accessed their reports. NC State set randomised passcodes for all donor accounts and required donors to request new, confidential passcodes from the digital reporting platform; access requests were defined as donors requesting a new passcode upon first accessing their digital reports. Due to the nature of modern ad-blocking tools¹, not every digital report view was able to be tracked by the reporting platform. To combat this blind spot in the data, access requests were tracked as an estimator of those views that could not be tracked. The conclusion that these access requests could be treated as untracked views was confirmed both empirically through communication with constituents that had accessed their reports and statistically through the nearly 1:1 correlation between tracked views and access requests.

Once reporting activity slows in the months following an initial launch, there is a logical pause in the process which provides an opportunity to take a deeper dive into the data that has been gathered up to that point. NC State chose to analyse several points of interest including

how engagement rates differed between NC State's colleges and foundations, donors' age ranges, donors' lifetime giving levels and the dollar amounts and types of funds that were being reported on (Figure 5). To measure engagement rates some example metrics as defined by NC State are detailed below:

- **Donor e-mail open rate:** The percentage of report recipients who opened the e-mail that was sent to them. Note that in fiscal year 2019, NC State's digital reports were also sent to the spouses of those recipients who previously received paper reports jointly, nearly doubling the number of reports sent. For counting purposes, these spouses are now included as report recipients.
- **Donor e-mail click rate:** The percentage of report recipients who clicked on a link included in the e-mail that was sent to them.
- **Donor or spouse e-mail open rate:** The percentage of report recipients who either opened the e-mail sent to them or whose spouse opened their

Digital Endowment Reporting Engagement				
Donor Age	Number of Digital Recipients	Donor or Spouse Opened at Least One Email	Donor or Spouse Clicked at Least One Email	Donor or Spouse Interacted with Digital Report
Below 50	163	87.1%	41.7%	47.2%
50-59	256	85.2%	40.2%	45.3%
60-69	376	83.0%	42.6%	48.7%
70-79	374	84.2%	48.4%	46.3%
80+	220	72.3%	37.3%	37.3%

FIGURE 5 NC State's digital endowment reporting engagement statistics

e-mail. Since most spouses received identical information in their reports, and in the past had received reports as a couple, this is a good estimation of what percentage of endowment reports reached their intended audience.

- **Donor or spouse e-mail click rate:** The percentage of report recipients who either clicked on something in the e-mail they received or whose spouse clicked on something in the e-mail they received.
- **Donor or spouse interacted with digital report:** The percentage of report recipients who requested an access code or logged into their digital report themselves or whose spouse requested an access code or logged into their digital report.

One particular trend that stood out in NC State's data, as demonstrated in Figure 5, were the sustained levels of engagement throughout the recipients' age spectrum, with no major drop-offs until age 80. Engagement trends based on endowed funds dollar amounts also yielded some interesting conclusions. Exact fund numbers are unable to be shared due to privacy concerns, but the donors for endowed funds between US\$500,000

and US\$1,000,000 showed some of the highest engagement levels for any data segment. To ensure the maximum value is extracted from engagement data, key stakeholders and partners should be consulted to determine what questions are of particular interest to an organisation undertaking such a project.

Communication plans for digital reporting initiatives should be flexible and rely heavily on data-driven decision making. At NC State, engagement rates using two different e-mail distribution tools were compared to assess the value of each. An e-mail distribution browser extension called YAMM² (Yet Another Mail Merge) had a higher success rate in terms of e-mail open and click rates compared to the platform used for the initial report launch, iModules, which has since been renamed Anthology³. The increased success rate through YAMM most likely comes from its ability to avoid e-mail spam filters and its increased flexibility in terms of how the e-mail sender's name appears to the recipient, as NC State found that donors were more likely to engage with an e-mail coming from a named staff member rather than a generic organisational name. Additionally, due to iModules' usage as a

Digital Endowment Reporting Delivery Mechanisms					
Platform	Reports Sent	Donor Email Open Rate	Donor Email Click Rate	Donor or Spouse Email Open Rate	Donor or Spouse Email Click Rate
YAMM	1,971	52.2%	19.8%	60.0%	25.7%
iModules	1,986	50.6%	11.9%	57.8%	15.5%

FIGURE 6 Comparison data from NC State's digital endowment reporting delivery mechanisms

university-wide communications platform, there were certain report recipients that had system-wide restrictions which precluded them from being contacted. YAMM was able to reach these report recipients, which included corporations, estate records and report recipients who had opted out of previous NC State e-mail communications but indicated that they still wished to receive endowment reports.

Because of its higher engagement metrics (Figure 6) and ease of use, NC State utilised YAMM for follow up reminders for donors that had not interacted with their reports. Additionally, a paper letter was also sent to donors that had not viewed their report yet, which provided a variety of communication methods while giving less digitally inclined report recipients a chance to engage with their reports. Immediately following the e-mail reminder and paper letter communication pushes, report access requests increased by 39.4 per cent and 34.8 per cent respectively. Preliminary returns from fiscal year 2020 also speak to YAMM's success rate, with nearly 25 per cent of households accessing their 2020 digital reports after a single communication push, compared to 38 per cent of households accessing their reports in 2019 after three communication pushes.

A key takeaway from the data analysis surrounding a project of this sort is that the tools and visualisations used and even

the analysis itself need to be driven by questions that arise during the process. Instead of trying to anticipate specific needs in advance of the project, NC State found success in gauging stakeholder responses post-launch and using these newfound insights to design tools and reports that would best serve all involved and answer the questions that would not have been asked without getting a sense of the direction the project was headed.

CONCLUSIONS AND IMPLICATIONS

NC State's digital endowment reporting project continues to serve as an important testing ground for the development of best practices and strategies to be used in future years. Keeping the components that worked well with more time to implement an organised structure will provide a strong foundation for the future of the project. The adaptive communications plan utilised throughout the process proved to be successful on multiple fronts and should be expanded going forward.

A core takeaway from the project's analysis is that report recipients should have numerous chances through a variety of channels to confirm both their contact information and their preferred method of report delivery before the reporting process begins. Such a strategy helps to raise awareness of the existence of the reports and gathers up to date

donor information that both ensures that reports are delivered to the appropriate recipients and can also be utilised for philanthropic purposes outside of the scope of the project.

Similarly, digital reports should be delivered through several staggered reminder e-mails sent to donors throughout the targeted reporting window; at NC State, it was clear that a single communication was not nearly enough to gather the attention of all constituents. These reminders could come as frequently as every week and should be geared towards making sure all recipients are at least aware their reports are ready to be viewed. There were significant improvements in the engagement rates following each of NC State's communications pushes during the endowment reporting process without pushback about over saturating donors' inboxes. Planning these successive pushes ahead of time will greatly help with organisational efforts and ensure that all messaging is cohesive and consistent.

While it may sound counterintuitive, utilising paper reminders is another core element of the success NC State experienced. The plain paper letter sent to recipients resulted in by far the highest number of e-mail address corrections and a correlated spike in engagement rates. Institutions could also consider sending a physical letter at the onset of the reporting window with a few more communications interspersed throughout the

following weeks to provide more opportunities for corrections and also ensuring that less e-mail-savvy donors receive the same number of contact points.

In summation, digital reporting offers numerous opportunities for tailored, customised communications, but successful implementation requires the careful development of a thorough project plan. Key considerations include buy-in and resource allocations from partners, consideration for constituents' preferences and developing metrics and deploying data analysis tools such as visualisations and reports. With the launch of its digital reporting process, NC State has taken an exciting first step forward into digital delivery, one that will heavily inform and influence the way the medium is utilised and deployed in the future.

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