

EQUIPPING FRONTLINE FUNDRAISERS WITH BETTER REPORTING

A Case Study from Purdue University



Challenge:

Prior to implementing the Reeher Platform, Purdue was searching for a solution to equip frontline fundraisers with accurate, timely reporting. Despite the time-consuming work done by prospect management to compile and present information, the final reports had limitations – they weren't self-service and were often out of date by the time they were used. Due to these challenges, annual portfolio reviews were one of the only times gift officers got to see their portfolios broken down in detail. It was very difficult to use data in daily tasks such as updating prospect lists, planning travel, or presenting updated information to executives.

On the annual giving side, the team's processes and results were not transparent. They needed to request additional reporting to dissect how an appeal performed or obtain counts for mailings or appeal segmentation. The lack of accessibility made it challenging to leverage data to measure and improve performance.



Solution:

Purdue decided to implement the Reeher Platform to help increase their reporting capabilities and facilitate a gift officer self-service model for travel, prospecting lists, and other reporting. "From the perspective of increased capabilities vs. cost, the Reeher Platform gave us the most benefit" says Jay Kahn, Senior Associate Vice President for Advancement and Corporate and Foundation Relations. Several Reeher Platform tools were instrumental in helping Purdue transition to the self-service model they wanted.

Reeher's Targeter enables Purdue's gift officers to pull their own travel and prospecting lists. Before Reeher, gift officers would need to work with a prospect researcher to develop lists – it was challenging to get updated information or change their visit plans while on the go.

Today, gift officers use Targeter to run the queries they need. The search takes minutes and can be run from any device. The Platform is updated nightly so officers can be confident they are accessing to up-to-date information. With the Targeter mobile app they were able to drastically reduce their reliance on researchers and the prospect development team during travel.



Background Info:

PURDUE
RESEARCH FOUNDATION

- ▶ **Public research university located in West Lafayette, IN**
- ▶ **Founded in 1896 as a land grant university**
- ▶ **Member of the Big 10 Conference**
- ▶ **200 undergraduate majors**
- ▶ **4th largest international student population of any U.S. university**
- ▶ **More than 400,000 alumni**

Reeher's portfolio management tools have made it possible for officers to actively manage their own portfolios. Now officers have the ability to see things like "days since last contact" or "proposal age" in real time and without the help of a researcher or manager. Portfolio visualization has been a powerful way for Purdue to better manage gift officers' longer-term pipelines and plan for the results they need in the future.

The Reeher Platform helped Purdue's annual giving program better measure and present its impact to the many campus stakeholders it serves. Annual giving creates and sends appeals on behalf of, or in partnership with Purdue's different colleges. With the Reeher Platform, the team is able to instantly pull appeal performance metrics such as participation rates and ROI.

The Platform also offered the team new tools to study and track gift band migration, making it possible to do the in-depth research they had wanted to do previously.



Results:

Implementing the Reeher Platform resulted in a self-service policy for the front office, proactive innovation from prospect development, improved executive reporting, and more active portfolio and proposal management.

Front office staff have increased their productivity and effectiveness by being able to do more discovery work themselves. The reduction in research requests has freed up time for the prospect development team to do strategic work with a bigger impact on the entire organization.

For example, every Friday, the team dedicates time to proactive research to help position officers in front of the right new people. Freeing up prospect researchers to be able to focus on more strategic projects has contributed to an increase in dollars and improved team morale.

Over the course of 2017, the team at Purdue:

- ✔ Created 2,500 new relationships
- ✔ Increased their first-time donors over \$10K
- ✔ Saw a 12% increase in proposals
- ✔ Increased commitments by 19%
- ✔ Decreased the amount of time from first visit to first major gift by 16%



Future:

Purdue has several plans underway to build on the successes that they've seen so far.

Purdue's data indicates that when proposal management is done correctly, proposals come to fruition faster. They'll be using the proposal tools in Reeher as the basis of a formal proposal strategy and documentation system designed to help officers secure donations.

Management is using the information and tools available in the Reeher Platform to help distinguish between effectively and ineffectively managed portfolios. They have introduced core competencies in addition to standard metrics as part of their management and review process for gift officers.

Providing gift officers with training on best practices and expectations will help them continue to meet their goals and be even more efficient and successful fundraisers.

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