Harnessing Data to Transform Gift Planning: A Strategic Approach

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Believe it. The Campaign for Oregon State University

About Us

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About OSUF Gift Planning

5

frontline fundraisers

$62.5M

in planned gift commitments for FY25

70

donor and spouse must be age 70 by end of campaign for counting

$70M

in total gift planning impact for FY25

Today's Focus

- Data-driven strategies for gift planning
- Cross-team collaboration
- Practical applications for pipeline, cultivation & stewardship

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Gift Planning Data & Collaboration

How data and cross-department partnerships strengthen our work

Why Data Matters

TURNING DONOR ACTIVITY INTO INSIGHTS THAT SHAPE FUTURE FUNDRAISING SUCCESS

Gift Planning Needs:

- Anticipating future donors
- Honoring intent & stewarding effectively
- Building sustainable fundraising campaigns

Cross-Department Collaboration

INNOVATIVE SOLUTIONS THROUGH SHARED PERSPECTIVES

Collaboration Benefits:

- Partnerships between Gift Planning and Advancement Services spark innovative solutions
- Shared expertise maximizes data, strengthens GP capture, and grows the pipeline

Gift Planning Data Projects

A close look at the projects we have implemented

Project 1: Involvement Coding

Why Was Change Needed?

- Using one-size-fits-all code for tracking all engagement with the Gift Planning office
- Coding not effective without additional nuance

Project Objectives:

- Track multiple interactions across time
- Ability to differentiate methods of engagement
- More complete record of a constituent's engagement with our office

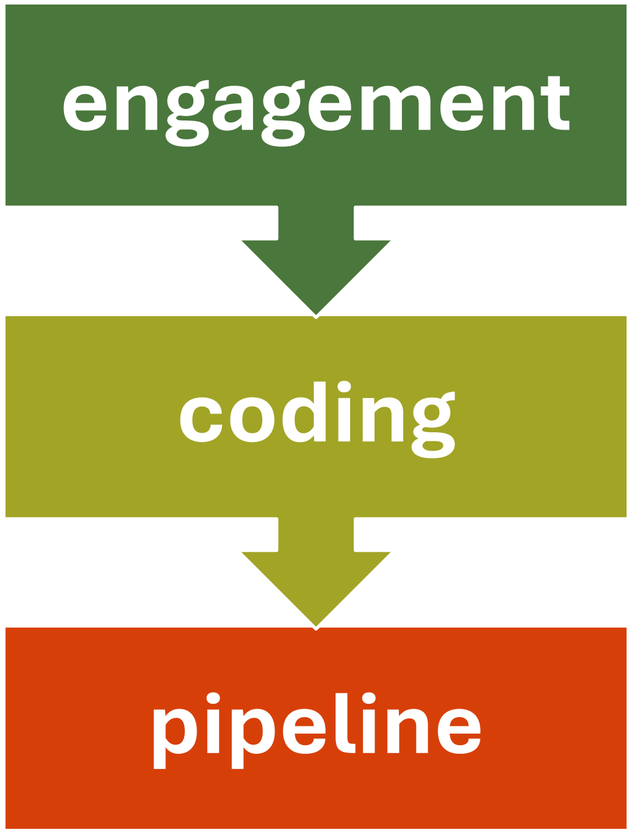
Project 1: Involvement Coding

Project Result

- New coding structure that captures individual interactions with GP Office within four main categories of possible involvement

Why it Matters:

- Tracks responses (marketing, info requests, referrals)
- Informs segmented marketing lists
- Provides triage for pipeline development



Involvement Coding

GP DATA SOURCES & CODING CATEGORIES

Marketing Response

- Method – virtual or hardcopy
- Info requests by topic-Life income, Retirement, etc.

Proactive Response

- Method – virtual or hardcopy
- Source – Gift form, webpage, direct outreach, etc.
- Info request vs. Have included

Involvement Coding

GP DATA SOURCES & CODING CATEGORIES

Survey Response

- Method – virtual
- Source – which survey
- Info request vs. have included vs. would consider

Dev Officer Referral

- Method – referred
- Source – referral or unit meeting
- Interest in Gift Planning

Involvement Coding

Activity ↑	Sub-Category	Participation Type	Start Date
OSUF-Gift Planning Legacy Plus-DO Referral	GP Referal-Interest in Gift Planning	Referred	12/18/2024
OSUF-Gift Planning Legacy Plus-Marketing Response	GP General Estate Marketing - Request Info	Responded	1/1/2016
OSUF-Gift Planning Legacy Plus-Marketing Response	GP Life Income Marketing-Request Info	Virtual Response	5/21/2021
OSUF-Gift Planning Legacy Plus-Proactive Response	GP Donor Initiated-Request Info	Virtual Participation	8/1/2019
OSUF-Gift Planning Legacy Plus-Proactive Response	GP Gift Form-Have Included	Virtual Participation	10/8/2023
OSUF-Gift Planning Legacy Plus-Survey Response	GP BCI Survey-Would Consider	Virtual Response	3/14/2017

Project 2:
Donor Pipeline

Why Was Change Needed?

- No cohesive understanding/definition of the GP potential donor pool
- Outdated 20-year-old scoring model

Project Objectives:

- Improve GP Score with relevant data
- Define donor pool to strengthen pipeline & resource advocacy

Project 2:
Donor Pipeline

Project Result:

- Defined pool and central resource for potential GP donors
- Customized scoring model using updated data sources

Why it Matters:

- Strengthens pipeline development
- More effective donor identification
- Draws from involvement coding & other GP data
- Helps quantify scope of GP pool for leadership

Gift Planning Pool

DEFINED POOL OF POTENTIAL GIFT PLANNING DONORS USED FOR QUALIFICATION, FORECASTING, AND CAMPAIGN PLANNING

Criteria:

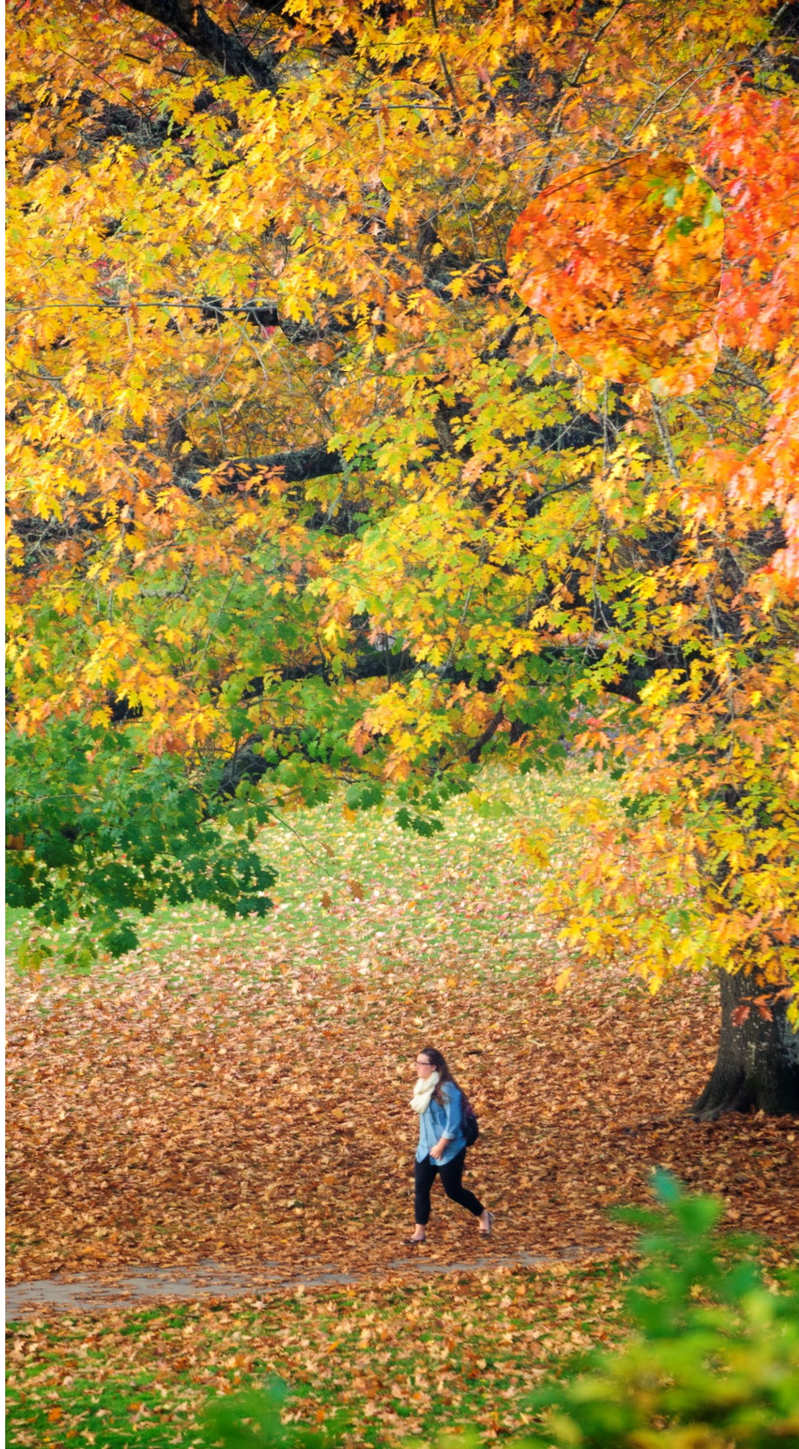
- Legacy Society Member
- Currently in Gift Planning Portfolio
- Involvement Coding
- “Planned Gift Details” Records

Gift Planning Score

LEVERAGING GP INVOLVEMENT CODING, AND OTHER KEY INDICATORS TO REVAMP OUR “GP SCORE”

Key Factors:

- Frequency of engagement with GP Office (marketing, proactive responses)
- Years of giving to OSU
- Contact Reports from GP Staff
- Age
- Presence of children
- IRA/QCD giving



Project 3: Planned Gift Details

Why Was Change Needed?

- Conservative BEP counting left some gifts unbooked
- No system to capture details on unbooked gifts

Project Objectives:

- Create a tracking system to record information on unbooked planned gifts
- Rediscover and leverage existing data

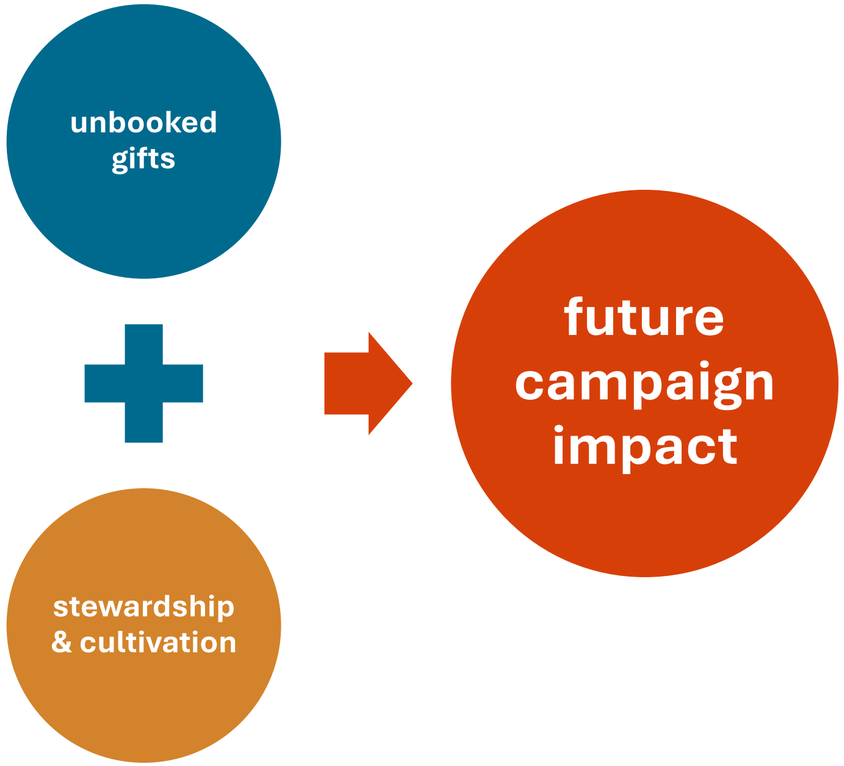
Project 3:
Planned Gift Details

Project Result:

Tracking system built in CRM to record unbooked planned gifts

Why it Matters:

- Reduces institutional risk
- Strengthens stewardship & cultivation
- Ensures donor intent is honored
- Quantifies future GP potential for campaigns
- Improves operational efficiency

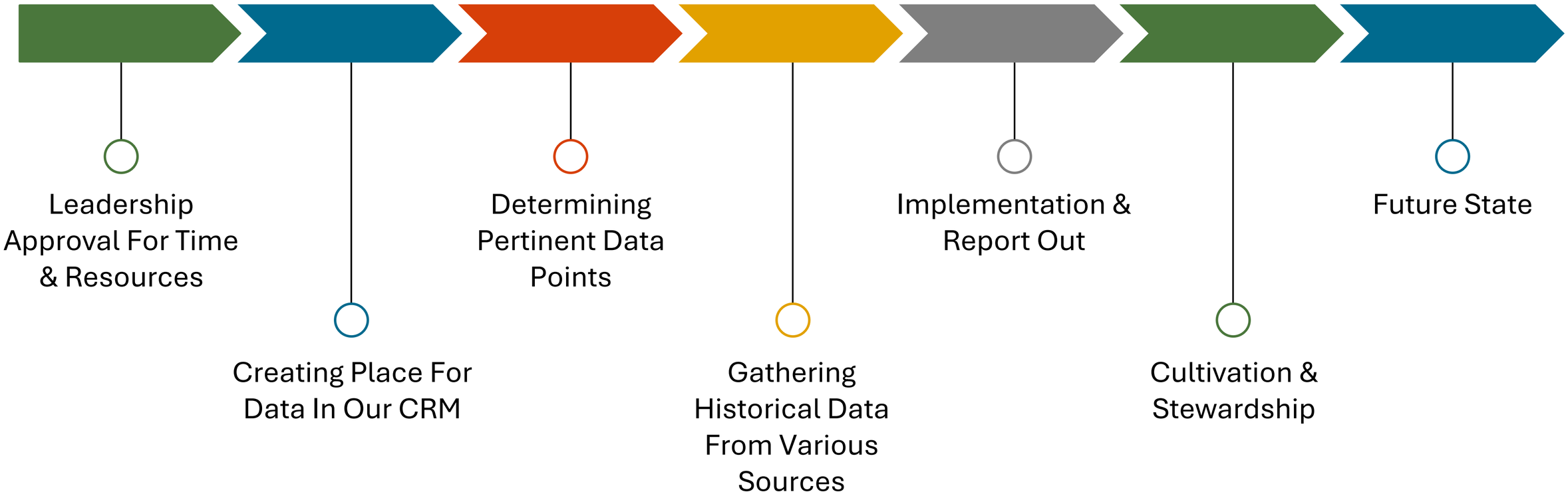


Planned Gift Details Record

Name	Beaver, Benny_BEP	Booked Gift	☐
Stage of Gift Conversation	Holding	Bookable in Future	Yes
Asset Type	Bequest Expectancy Pledge	Signed SOI	☑
Total Gift Amount	$50,000.00	Date of Signed SOI	9/8/2023
Approximate Gift Amount	☐	Reason For Not Booking	Too young to count
Proposal	----------	Omit from GP Pool	☐
Birth Year Youngest Donor	1965		
Description	Gift will be split between College of Liberal Arts and Athletics		

College Or Unit	Existing Designation	Amount ↑
College of Liberal Arts	History Department Unrestricted Fund	$25,000.00
Athletics	Baseball Program Fund	$25,000.00

Project Timeline



Unbooked Gifts Data Capture

POTENTIAL UNBOOKED PLANNED GIFTS

$263 million

identified in first round of historical data capture

109 (23%)

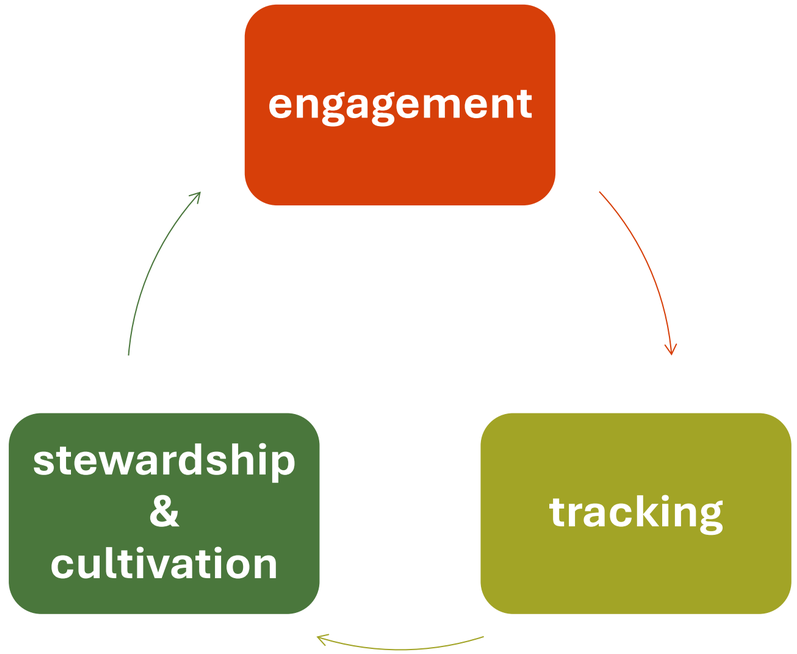
of this total have signed SOIs

Bringing it Together

**FROM FIRST INTERACTION TO FUTURE CAMPAIGN:
A CONTINUOUS PIPELINE JOURNEY**

Gift Planning Outcomes:

- Involvement Coding = capture activity
- GP Pool & Score = organize & prioritize
- Planned Gift Details = steward, cultivate & plan ahead



Lessons Learned & Key Takeaways

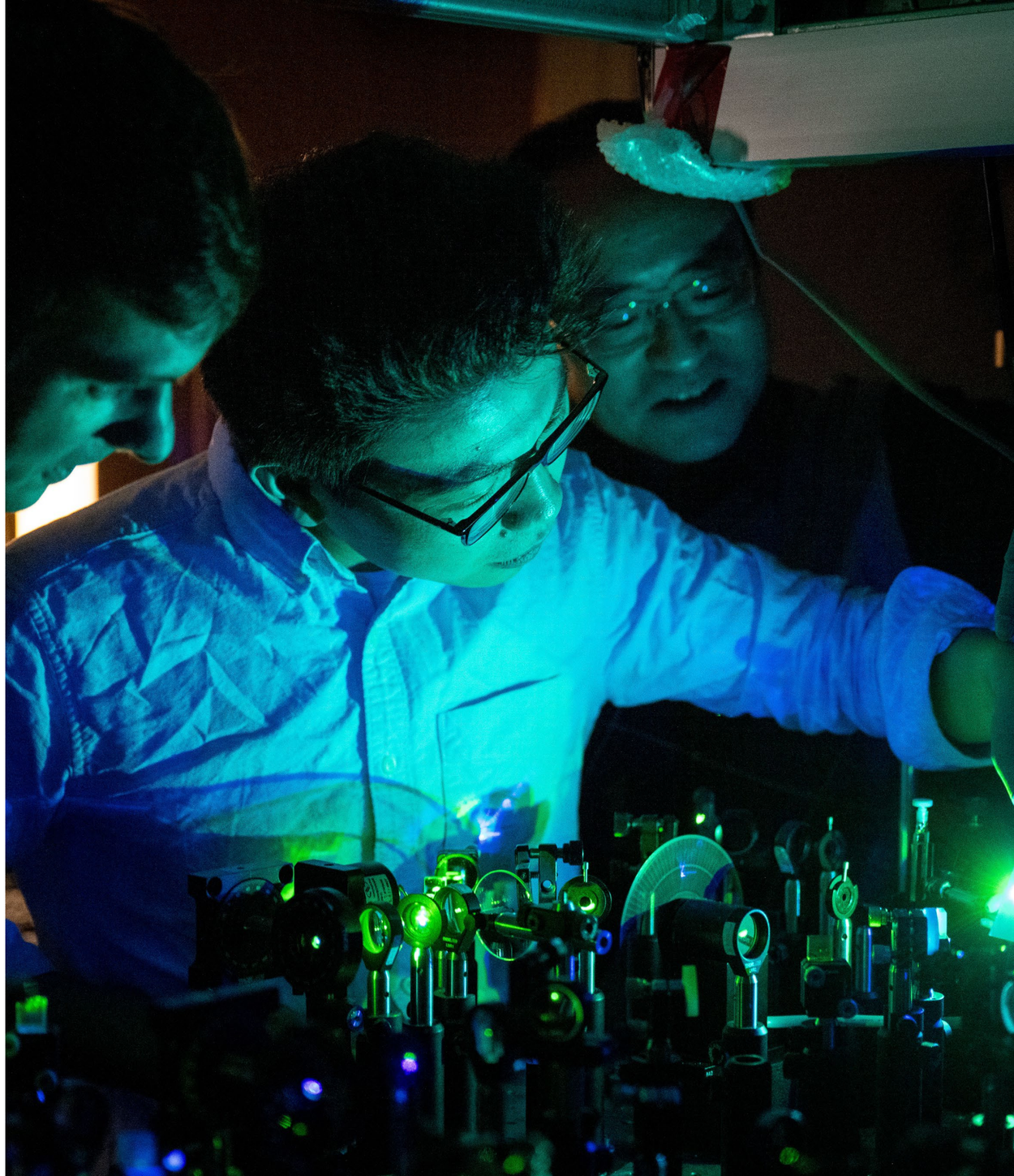
Looking at the big picture and how it can apply to you

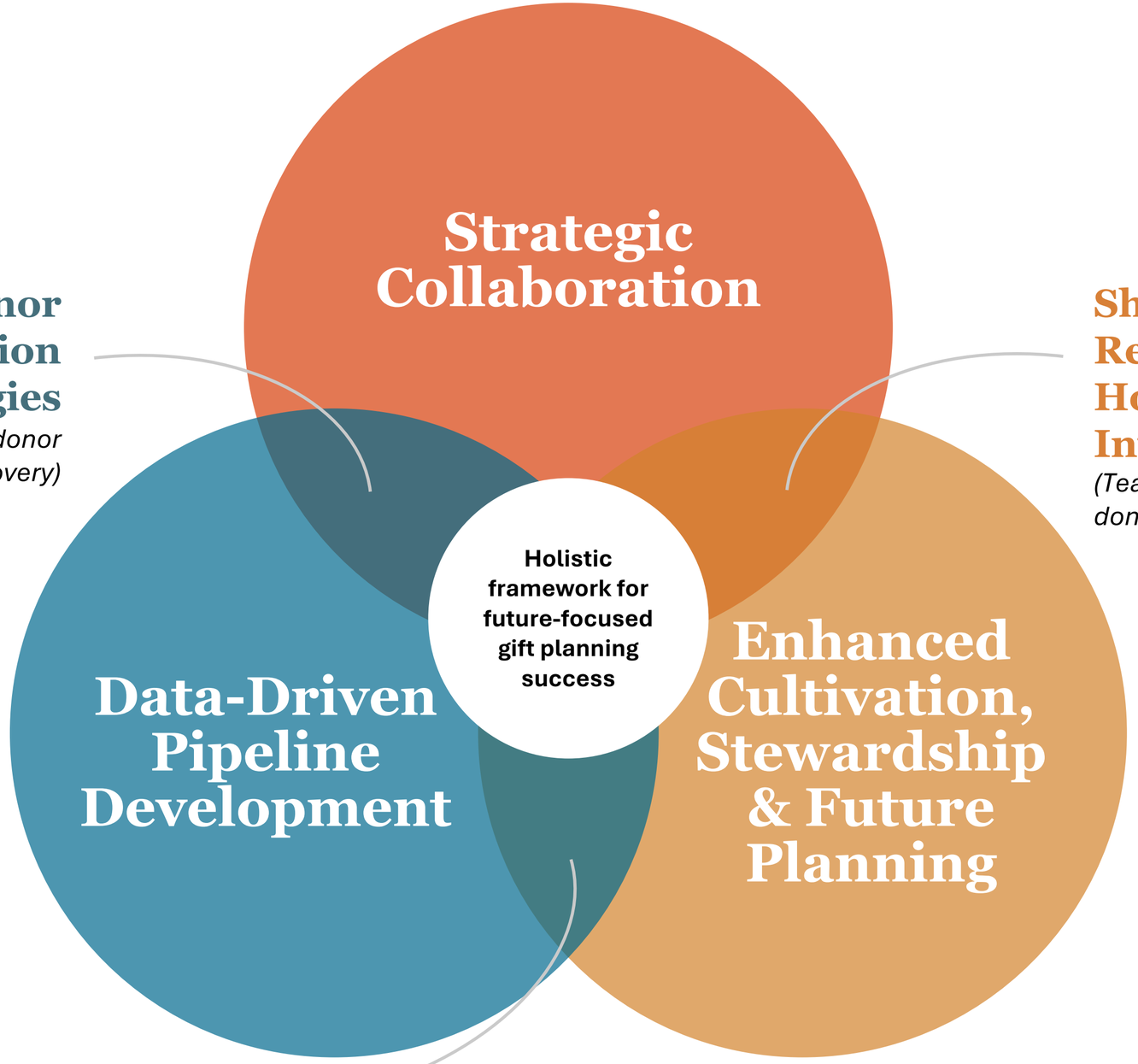
Things We've Learned

- Drive efficiencies through **clear prioritization**
- **Upgrade** some systems, **build** others as needed
- **Reassess regularly** to keep processes fresh
- Success depends on **timing and leadership buy-in**

Key Takeaways

- **Collaboration** fuels innovation
- Data transforms **pipeline development** and is crucial for **advocating** for your team
- **Stewardship & cultivation** today drives campaign success tomorrow





Innovative Donor Identification Strategies

(Teams + data = smarter donor discovery)

Shared Responsibility For Honoring Donor Intent

(Teams aligning on engaging these donors)

Quantifying Long-term Fundraising Potential

(Analytics ensures unbooked gifts feed campaign goals)

Applying These Ideas Beyond OSU

EVERY SHOP HAS UNIQUE CHALLENGES — BUT THE PRINCIPLES STAY THE SAME

Steps You Can Take:

- Define what matters & capture it consistently
- Review how constituents engage with your office
- Repurpose existing data in new ways
- Partner with peers & leadership
- Assess challenges, test small solutions, and scale

questions &
discussion

thank you!

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