

# Managing Donor Relations Using a Continuum Model

Oregon State University Honors College  
HERU 2019



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Honors College

# Why Create a Donor Continuum?\*

- Mechanism to plan and prioritize a comprehensive portfolio of development activities
- Framework to facilitate and individualize stakeholder engagement at multiple levels
- Structure to guide investment in development efforts
- Enabler for increasing scale of engagement activities

# Donor Continuum Process Map



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# Donor Continuum Structure

- Five stages
  - Discovery – Little knowledge and/or previous engagement
  - Interest – Indicates desire to learn more about program and/or opportunities
  - Engagement – Takes part in event or activity
  - Participation – Donor and/or active participant in program development
  - Ownership – College board membership and/or program host or designer
- Engagement activities and outreach are designed to transition donors along the continuum



# OSU Honors College Context

- OSU Honors College is 24 years old
- About 1,800 total HC graduates since first class (of one) in 1996
- Diverse set of initiatives needed to grow base of stakeholders beyond Honors College alumni
  - Family members
  - Other OSU alumni
  - Faculty and staff
  - Corporate and community leaders



# Discovery



Receive HC emails

Receive HC print  
materials

Receive HC event and  
meeting invitation(s)

Receive HC social  
media request



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# Discovery

Discovery → Interest

Receive HC emails

Receive HC print materials

Receive HC event and meeting invitation(s)

Receive HC social media request

# Interest

## Attend Event(s)

- **Networking event**
- **Portal event**
- **Industry event**
- **Parent & family event**

Meet with HC staff or volunteer

Respond to survey

Follow HC social media



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Interest

Interest → Engagement

Attend Event(s)

- Networking event
- Portal event
- Industry event
- Parent & family event

Meet with HC staff or volunteer

Respond to survey

Follow HC social media

Engagement

Connect with students and faculty

- Honors course guest
- Book club
- Dean and Friends
- Alumni coffee
- Service opportunity

Volunteer at HC activities

- Recruitment event
- Portal event
- Parent & family event



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Engagement

Engagement →  
Participation

Participation

Connect with students  
and faculty

- Honors course guest
- Book club
- Dean and Friends
- Alumni coffee
- Service opportunity

Volunteer at HC activities

- Recruitment event
- Portal event
- Parent & family event

Host HC event

Host student intern

Host professional  
development activity

Mentor student(s)

Lead HC course

Contribute to philanthropic  
efforts



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## Participation

Participation →  
Ownership

Host HC event

Host student intern

Host professional  
development activity

Mentor student(s)

Lead HC course

Contribute to  
philanthropic efforts

## Ownership

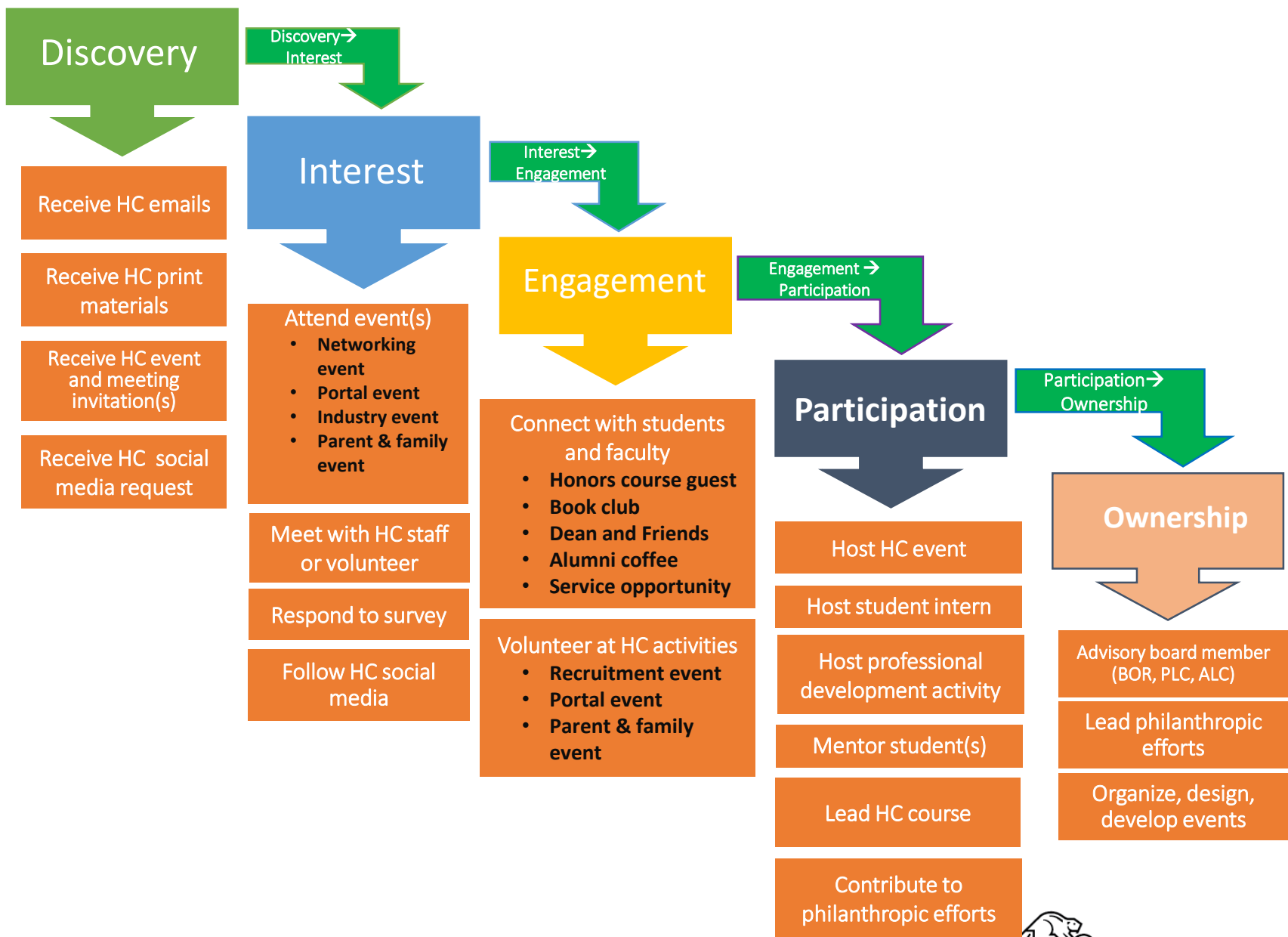
Advisory board member  
(BOR, PLC, ALC)

Lead philanthropic  
efforts

Organize, design,  
develop events



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# Donor Continuum Action Matrix



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# Stakeholders

- Alumni of college/program
- Local business/industry stakeholders
- Parents/families/guardians
- Alumni of OSU
- Other stakeholders with aligned vision



# Translating Donor Continuum into Action

Stage / Target Audience	Discovery Activities	Owners and Status Discovery Activities	Engagement Activities	Owners and Status Engagement Activities
<b>College and Program Alumni</b>	<p>HC hosts a State of the College webinar for honors alumni</p> <ul style="list-style-type: none"> <li>Record the event and post online for others to view</li> <li>Post agenda before webinar</li> </ul>	<p>Toni and Kevin Scheduled for 2/22/19</p>	<p>HC invites alumni as speakers to key HC events</p> <ul style="list-style-type: none"> <li>Offer a variety of events for a variety of interests</li> <li>Survey alumni to see what is best option</li> </ul>	<p>Tara and Ben Mason Kick off alumni lunches at the HC. We have invited a handful of alumni to talk with students over lunch to supplement Dean and Friend events</p>
<b>Local business/industry</b>	<p>HC volunteers attend civic and business events</p> <ul style="list-style-type: none"> <li>Lunch meeting of City Club</li> <li>Dinners with talks</li> <li>After events be sure to follow up</li> </ul>	<p>Mary, Carol, and Paul Toni and Kellie work on script and target events</p>	<p>HC invites business leaders to a special reception in conjunction with the thesis fair that includes HC students, HC faculty, and staff</p> <ul style="list-style-type: none"> <li>Send preview of topics and flyers in advance</li> <li>Provide students guides to help navigate the fair</li> </ul>	<p>Tara, Kevin, Alicia, and Carol Use one event for both of these purposes...Thesis road show with posters and lightening talks tentatively planned for June 2019</p>
<b>Parents</b>	<p>HC hosts State of the College webinar for parents</p> <ul style="list-style-type: none"> <li>Webinar specific invites</li> <li>Educate on needs</li> </ul>	<p>Toni, Kevin, and Tara Scheduled for 2/22/19</p>	<p>HC invites parents and area high school counselors to informal networking/mixer events hosted by HC volunteers</p> <ul style="list-style-type: none"> <li>Events with active involvement may draw more parents</li> <li>Have opening testimonial by host: why they support HC</li> </ul>	



# Example #1

Stage Target Audience	Discovery Activities	Owners and Status Discovery Activities
<b>College and Program Alumni</b>	HC hosts a State of the College webinar for honors alumni <ul style="list-style-type: none"><li>Record the event and post online for others to view</li><li>Post agenda before webinar</li></ul>	Toni and Kevin Scheduled for 2/22/19



# Example #2

Stage / Target Audience	Engagement Activities	Owners and Status Engagement Activities
<p><b>Existing Oregon State University donors and OSU alumni</b></p>	<p>HC hosts regional events for OSU alumni and donors</p> <ul style="list-style-type: none"> <li>• Pilot event that highlights Larry Kirkland and Vancouver waterfront project.</li> <li>• Have opening testimonial by host: why they support HC</li> <li>• Clarify next step options for more involvement and connectivity between events</li> </ul>	<p>Paul and Mary (Kirkland event), Andy and Joe (Boston receptions) Julius (Houston receptions) Eric (Houston receptions &amp; Portland reception) Adam (Bay Area reception)</p>





# Tracking Activities and Engagement

- Salesforce CRM developed to follow students through entire lifecycle (admit, current student, alum)
- Expanded to include Honors College friends and supporters
- Tracks contact information, donor type, stage of donor commitment, relationships, activities, and engagement history
- Allows for assignment of task items





[Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Gifts \[5\]](#) | [UHC Event Invitations \[0\]](#) | [Student History \[1\]](#)

### Student Detail

[Edit](#) [Delete](#) [Clone](#)

Title		Student Record Type	Alumnus <a href="#">[Change]</a>
Name	[REDACTED]	Student Owner	Ben Wessel <a href="#">[Change]</a>
Middle Name	[REDACTED]	Advance ID	10 [REDACTED]
Gender	[REDACTED]	Linkedin	[REDACTED]
Deceased	<input type="checkbox"/>	Engagement Email 1	[REDACTED]
Birthdate	3/16/1900	Engagement Email 2	
Employment Information	[REDACTED]		
Company	[REDACTED]		
Do Not Call	<input type="checkbox"/>		
Email Opt Out	<input checked="" type="checkbox"/>		
Do Not Mail	<input type="checkbox"/>		
Major Market	Tier 1 Los Angeles Metro		
OSU Graduation Year	2000		
Honors Program Alum	<input type="checkbox"/>		

### ▼ Giving and Development

Donor Type **Annual Giving**

Stage of Donor Commitment **Participation**

### ▼ Alumni Info

College Name	<a href="#">College of Liberal Arts</a>	OSU Graduation Date	9/3/1999
Primary Major 1	[REDACTED]	UHC Status	Graduate
Primary Major 2	[REDACTED]	UHC Stop Term	200000
Thesis Project	[REDACTED]	UHC Departure Type	UHC Graduate
Student ID	[REDACTED]		

### ▼ Address Information

Mailing Address [REDACTED]

Address Last Updated 2013-05-09T00:00:00

Beckenham



Show 10 entries Search:

Full Name	Family	FamilyMember Name
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]

Showing 1 to 2 of 2 entries First Previous 1 Next Last

[Edit](#) [Delete](#) [Clone](#)

### Open Activities

[New Task](#) [New Event](#)

[Open Activities Help](#) ?

Action	Subject	Assigned To	Due Date	Activity	Completed Date
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">Stewardship</a>	<a href="#">Kevin Stoller</a>	6/30/2019	Web update	

### Activity History

[Log a Call](#) [Mail Merge](#) [Send an Email](#) [View All](#)

[Activity History Help](#) ?

Action	Subject	Assigned To	Due Date	Activity	Completed Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Contact report</a>	<a href="#">Toni Doolen</a>	8/4/2018	Summer send-off 2018	8/4/2018

### Gifts

[New Gift](#)

[Gifts Help](#) ?

Action	Gift Name	Date	Amount	Allocation Number	Thank You Assignment	Thank You Sent Date
<a href="#">Edit</a>   <a href="#">Del</a>	[REDACTED]		[REDACTED]			
<a href="#">Edit</a>   <a href="#">Del</a>	[REDACTED]	9/25/2017	[REDACTED]	[REDACTED]		
<a href="#">Edit</a>   <a href="#">Del</a>	[REDACTED]	9/1/2016	[REDACTED]	[REDACTED]	<a href="#">Honors Student</a>	9/23/2016
<a href="#">Edit</a>   <a href="#">Del</a>	[REDACTED]	10/2/2015	[REDACTED]	[REDACTED]		
<a href="#">Edit</a>   <a href="#">Del</a>	[REDACTED]	9/25/2017	[REDACTED]	[REDACTED]		

### UHC Event Invitations

[New UHC Event Invitation](#)

[UHC Event Invitations Help](#) ?

Action	UHC Event Invitation: Invitation Name	UHC Event Name	Status	RSVP
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">BOR membership</a> [REDACTED]	<a href="#">BOR membership</a>	Accepted	Yes
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">PLC 2019</a> [REDACTED]	<a href="#">PLC 2019</a>	Accepted	Yes
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">2019 State of the college webinar</a> [REDACTED]	<a href="#">2019 State of the college webinar</a>	Attended	Yes



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# Acknowledgement

The donor continuum process map and action matrix were developed by extending upon the concepts shared in training sessions provided by Advancement Resources

<https://www.advancementresources.org/>



# Questions/Conversation

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