



FEATURE:

Improving efficiency in advancement through technology

Facing changing demographics, Oregon State University Foundation takes action

As a separate 501(c)(3) that supports Oregon State University (OSU) programs, Oregon State University Foundation (OSUF) raises and stewards funds that are instrumental in transforming the student learning experience at OSU. Support from the foundation has helped the university grow from a well-respected land grant college into an internationally recognized public research university.

Now, as the last wave of the millennials prepares to graduate, OSUF is focusing on the next generation and shifting its approach. Facing a smaller pool of enrollments—and future donors—the foundation is testing new ways to target these constituents more effectively, with the level of engagement and personalization they expect and prefer.

As institutional advancement evolves in this new environment, advancement offices need technology that will help them be more effective. To achieve that goal and to mitigate the impact of the changes affecting higher education, OSUF chose Ellucian CRM Advance.



Oregon State University
Foundation

For over 70 years, OSUF has supported institutional programs at Oregon State University through comprehensive fundraising campaigns.

The foundation works with university partners to:

- ✓ Raise funds in excess of \$100 million per year to support the university's priorities
- ✓ Cultivate and steward a culture of philanthropy for the Oregon State community
- ✓ Manage an endowment of over \$500 million
- ✓ Engage alumni in service to the university

A tailored approach to prospect marketing

As it began planning for the future, OSUF considered how technology could help its staff work more efficiently. In particular, the foundation focused on how university systems—from recruitment to student success to advancement—could be better integrated with the foundation.

“It’s critical for us to be able to share the right information the right time with the right individuals,” says Mark Koenig, assistant vice president for advancement services, analytics, and digital strategy at OSUF. “CRM Advance is opening the door to leverage our information like never before, allowing us to capture individuals’ interests and market to them as they want to be marketed to.”

Partnership drives performance

As a long-time Ellucian partner, Oregon State University Foundation participated in both alpha and beta development cycles for Ellucian CRM Advance, which was specifically designed with institutional partners to address the complex and unique considerations of higher education advancement offices.

“Thanks to a great partnership with Ellucian, we were able to implement the new database in under a year, allowing us to better engage alumni, parents, faculty, and friends of Oregon State University,” says Koenig.

On its first day with CRM Advance, OSUF went live with 38 custom data reports and processed a multifaceted \$50 million gift—its largest ever.

Powering the future of advancement

Building on that success, the foundation is spearheading several new initiatives. It’s developing and testing new targeted communications, optimizing data for analytics, exploring predictive analytics and behavioral targeting, and using AI technology integrations to build and automate personalized profiles and digital communications.

By combining these technologies with new staff training and revised process flows, OSUF is helping its advancement team become efficient and effective in achieving its fundraising initiatives. Its ability to explore new capabilities and fine-tune strategy is also helping it become a driving force behind new cross-campus initiatives—from improving organizational performance to enhancing and supporting the student and alumni experience to using new technologies to improve the quantity and quality of engagements with core audiences.

“Now that CRM Advance is live,” Koenig says, “we have a lot of opportunities that we’d never been able to think of or consider before.”

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MARK KOENIG,

Assistant Vice President for Advancement Services, Analytics, and Digital Strategy, Oregon State University Foundation



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