



Fundraising Success That Can Scale

How CRM Advance's open architecture helped Oregon State University transform and grow their advancement efforts.

In 2015, Oregon State University Foundation (OSUF) was wrapping up their first fundraising campaign to the tune of \$1 billion—one of only 30 public land-grant institutions to break that number on their first outing. So why, on the heels of that much success, were they considering switching advancement solutions for their next campaign?

Mark Koenig, vice president for technology and chief innovation officer for OSUF, explained how they were stuck with a home-grown “legacy solution” in 2015. This outdated tool didn't have built-in analytics and reporting, or flexible data fields, forcing OSUF to compartmentalize information in places it didn't belong. The user experience was clunky, the security features were flimsy, and any integrations would require expertise and time to build, and neither were available. It was a dead-end product, and OSUF, which supports a STEAM-focused institution, was more than ready to evolve. OSUF had three key goals for a new solution: integration capabilities, analytics, and development officers' user experience.

Around the same time, Ellucian announced CRM Advance would offer integration with Microsoft Dynamics, which provided the kind of interconnectivity with MS Office that OSUF was looking for. Because of this—and because the total cost of ownership would be far lower than that of its top competitors—OSUF decided to join more than 40 institutions in CRM Advance's alpha phase. This meant they would provide feedback on how to meet the specific needs of higher education, therefore shaping CRM Advance into the powerhouse solution OSUF needed.



Case Study

Main Challenge

OSUF's legacy fundraising solution couldn't evolve with them.

Solutions

CRM Advance

Results

- Open architecture enables the integration of best-in-class tools
- Flexible data fields allow ongoing iteration as the business evolves
- Facilitated day-one processing of a \$50 million gift
- Ongoing support for current campaign, which has passed \$1 billion as of January 2023

Charting Their Own Course

For Koenig, the Microsoft Dynamics integration was CRM Advance's most important selling point.

“The open architecture allowed us to do things we would’ve never been able to do in a home-grown database solution or off-the-shelf product,” Koenig says. “It’s allowed us to become a far more modern IT shop. Otherwise, we’d be dealing with the old legacy solutions, trying to figure out how to build bridges and basically app develop to keep products talking to each other. With an ever-evolving platform, we don’t have that problem.”

That app development was not only time-consuming for OSUF’s IT staff, but increasingly untenable, as it proved challenging to find qualified talent. Koenig explained that with other solutions, even if they could find an app developer, it would run them around \$200 per hour. But because of the Dynamics platform’s consistency and the relative abundance of Microsoft certifications, that’s no longer a hurdle.

With CRM Advance’s integration capabilities, OSUF doesn’t have to settle when it comes to third-party applications. “We can find best-in-breed specialized solutions and connect them,” Koenig explains. “[CRM Advance] is agnostic to some extent, and that’s really powerful.”

Especially as economic factors put increasing pressure on advancement offices, flexible solutions enable OSUF to get ahead of the coming storm. Connectivity, Koenig says, is the key to not only adapt, but consistently differentiate themselves: “You can chart your own course.”

Advanced Analytics

For many advancement offices—including OSUF at the start of their second campaign—there is a need to inspire new donors, not just deepen relationships with longtime supporters.

To support these efforts, OSUF reimagined their research department into two groups: relationship insights and pipeline development. Equipped with CRM Advance’s analytics capabilities, OSUF’s pipeline development team modeled itself on more modern approaches to sales enablement.

Now, instead of inefficiently combing through donor bios or outsourcing persona work, OSUF has access to a wealth of information on their



constituents and tools to interpret it. “Every single one of my former researchers is now a Tableau analyst. They can all build Tableau reports,” Koenig explains, referring to the data visualization software that integrates seamlessly with CRM Advance. “It’s changed the way we do our work.” Data has become critical to OSUF’s enterprises now that they have a solution to capture, store, and segment information in a way that leads to meaningful insights. CRM Advance is their new center of truth.

“We had 40 reports developed at go live,” Koenig says. “Nobody had 40 reports [at that point].” That capability is what Koenig describes as “level one,” with level two being predictive analytics, and level three—which OSUF has now reached—being prescriptive. “We have what we call the ‘Amazon feature,’” Koenig explains, describing how they can make activity recommendations based on donor behavior. “Behind the scenes, we can say, ‘Because you give to x, y, or z, these funds may be also of interest to you,’ and vice versa.”

Koenig goes on to show how they’re able to track engagement across multiple metrics such as event participation, giving history, and volunteerism. “We see the tide of volunteerism and donations as critical,” Koenig says after describing the correlation between donating time and funding. “Our Alumni Association is now armed with that data... Last year, there were 3,621 volunteers. We want to know: How do we convert them to donors?”

Because OSUF can now centralize large volumes of data in their core platform, they’ve unlocked new ways to use artificial intelligence and machine learning. Koenig explains how predictive analytics can identify potential donors among their constituency and then create a personalized, AI-rendered videos based on behavioral data alone. The response to that outreach then helps OSUF further inform decisions, helping their team identify where someone drops off in the process so they can adapt accordingly. “Before, we just had a [donor] pyramid,” Koenig says. “Now we have a true marketing funnel.”

Empowering Staff, Scaling Business

As OSUF looks to scale, they’re finding ways to invest smarter, maximizing the value of all available resources. “We like to say we’re small, but mighty,” Koenig says. “When I look at our size and what we spend in technology compared to our peers ... we’re in the bottom quartile.”

And yet, on January 17, 2018—the official launch date of their CRM Advance solution—they successfully processed a \$50 million gift. “It was not easy,” Koenig says, but because they had the right tools, they could complete an extremely complicated operation right out of the gate.

Getting to that day-one success wasn’t just about implementation. It was equally important to manage change among the staff. In addition to a themed communications campaign, OSUF designed a training program



around small cohorts of user groups. “And so, when we went live, it was super easy,” Koenig says, before describing how they created an Apple-inspired “Genius Bar” at launch staffed with super users from each group. As a result, the change was well received.

Koenig compares new solutions to new cars. If you’re given a Lamborghini, but don’t know how to drive it, you might run it into a tree on your first outing. But with enough time and the right training, you can make the most of advanced technology.

“Our staff can evolve with the platform, and it evolves with us,” Koenig says.

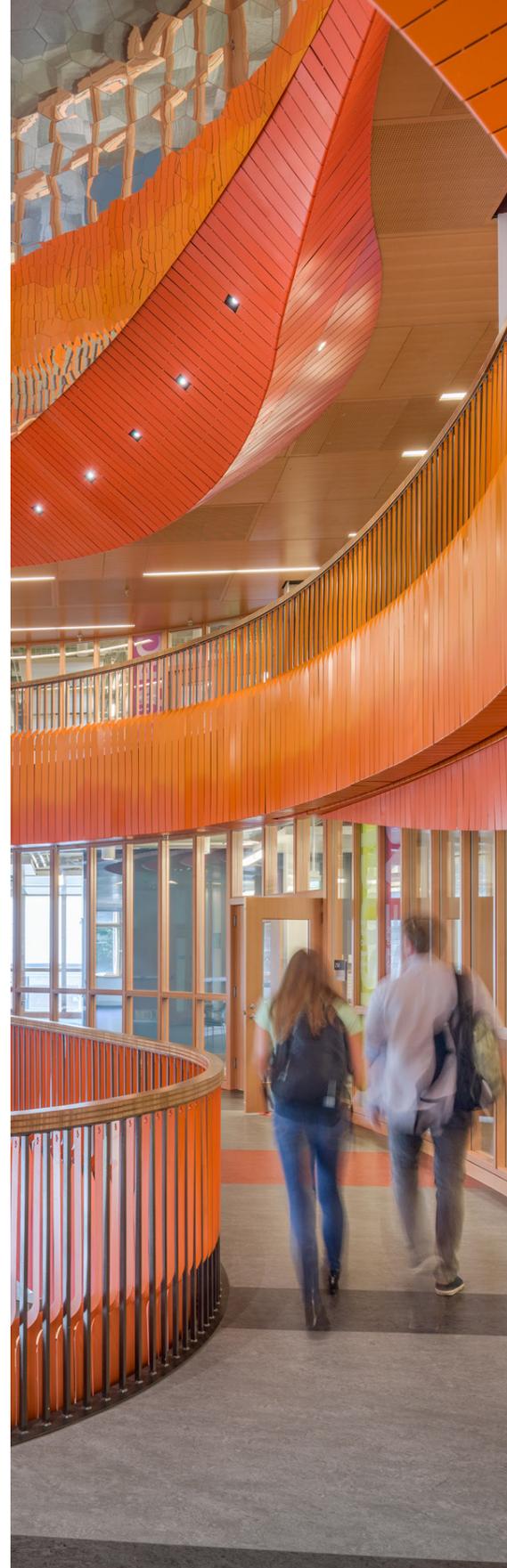
Unlike other solutions that might require specialized back-end support, CRM Advance lets OSUF choose new tools that their staff can learn and embrace, rather than force them into outsourcing talent.

One such tool was a sales enablement platform through which OSUF created the donor experience officer position. “Those new positions each have 1,000 people in their portfolios, and those 1,000 people get 10 to 15 touchpoints a year,” Koenig says. With CRM Advance, those touchpoints can be personalized, automated, and tracked, which ultimately multiplies the impact of each individual team member. “It allows us to scale our work,” Koenig concludes.

The Sky’s the Limit

OSUF managed to knock their inaugural campaign out of the park, but after any first-at-bat success, one question inevitably follows: Can they do it again? Turns out, with modern, scalable technology, they can do it even better. “We had our best year ever [in 2021], which was at \$217 million. That is well above our average,” Koenig says. “Our second-best year was two years before that at \$172 million.”

Since implementing CRM Advance, OSUF has proven their fundraising success is more than just beginners’ luck. In just five years, halfway through their current campaign, they’ve already raised over \$1 billion. With the ability to integrate new tools, utilize advanced analytics, and empower their staff, OSUF is primed for success on their way to a \$1.75 billion goal, an ambitious figure that will fund student support, faculty positions, facility renovations, outreach programs, global solutions, and much more in the years to come.



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