

Bridging Capital Campaigns and Reporting

Jeff Merth
OSU Foundation
February 18, 2010

Session rules of etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

Agenda

- About OSU and the OSU Foundation (OSUF)
- Sources for this presentation
- OSUF Campaign reporting
- Q & A

Oregon State University

- OSU's roots go back to 1858 when it was established as a private academy in Corvallis. College-level courses were added in 1865 and the first degrees were awarded in 1870.
- More than 200 undergraduate and 80 graduate degree programs
- 21,969 undergraduate and graduate students
- 3,446 faculty; 1,266 classified staff

OSU Foundation

- Incorporated as an IRS 501(c)(3) non-profit corporation on October 15, 1947
- Sole fundraising entity for OSU
- 100+ employees in Corvallis, Portland, and Bend
- 53-member volunteer Board of Trustees

OSU Foundation

- Campaign For OSU
 - \$625 million goal
 - \$557 million raised by the end of 2009



Sources for this presentation

- Shawn L. Scoville
Senior Vice President of Development and
Campaign Director
- Walter Fitch
Director of Information Systems (former)
- Microsoft Office SharePoint search

In the beginning...

- Campaign counting standards not defined
- Complicated, rudimentary reporting system in place at campaign launch in 2004
- System redesigned in October 2005
- First reference-quality reports available in February 2006

Need

- Organizational transparency
- Information correctness and consistency
- Reporting system flexibility and simplicity

Approach

- Standardize Campaign counting definitions

Gift Type	FASB	CAE	CASE 1994	Case 2004	OSU Campaign
Cash	Face Value	Face Value	Face Value	Face Value	Face Value
New Pledges	Present Value	Not counted	Face Value	Face Value	Face Value
Pledges Payments	Not counted	Face Value	Not counted	Not counted	Not counted
Securities	Fair Market Value	Fair Market Value	Fair Market Value	Fair Market Value	Fair Market Value
Non Governmental Grants	Face Value	Face Value	Face Value	Face Value	Face Value
Real Property	Appraised Value	Appraised Value	Appraised Value	Appraised Value	Appraised Value
Personal property	Not included	Fair Market Value	Fair Market Value	Fair Market Value	Fair Market Value

Approach

- Standardize unit “buckets” and goals
 - Agricultural Sciences
 - Athletics
 - Business
 - Central Initiatives
 - Education & 4-H
 - Emerging Initiatives/Other
 - Engineering
 - Forestry
 - Hatfield Marine Science Center
 - Health and Human Sciences
 - Liberal Arts
 - Linus Pauling Institute
 - Marine Mammal Institute
 - Oceanic & Atmospheric Sciences
 - OSU - Cascades Campus
 - OSU Alumni Association
 - OSU Libraries
 - Pharmacy
 - Science
 - University Honors College
 - Veterinary Medicine

Approach

- Standardize support area “buckets”
 - Facilities and Equipment
 - Faculty Support
 - Other
 - Private Grants Received by OSU
 - Program Support
 - Scholarships and Fellowships
- Standardize campaign “reachbacks”

Approach

Oregon State University Foundation
 Total Campaign Giving by Constituency



Thursday, December 31, 2009

Campaign Unit	Campaign Giving To Date
Agricultural Sciences	
Athletics	
Business	
OSU - Cascades Campus	
Central Initiatives	
Education & 4-H	
Engineering	
Forestry	
Health and Human Sciences	
Liberal Arts	
Linus Pauling Institute	
Oceanic & Atmospheric Sciences	
OSU Alumni Association	
Pharmacy	
Science	
Veterinary Medicine	
Emerging Initiatives/Other	
Grand Total:	\$556,537,254

Approach

Oregon State University Foundation Campaign Progress by Constituency



Thursday, December 31, 2009

Unit	Gifts and Pledges	Private Grants Received by OSU*	Total	Goal	% of Goal
Agricultural Sciences				\$36,500,000	
Athletics				\$129,500,000	
Business				\$36,500,000	
OSU - Cascades Campus				\$7,500,000	
Central Initiatives				\$35,000,000	
Education & 4-H				\$10,500,000	
Engineering				\$138,000,000	
Forestry				\$31,500,000	
Health and Human Sciences				\$15,000,000	
Liberal Arts				\$16,500,000	
Linus Pauling Institute				\$33,000,000	
Oceanic & Atmospheric Sciences				\$4,000,000	
OSU Alumni Association				\$5,000,000	
Pharmacy				\$7,000,000	
Science				\$73,000,000	
Veterinary Medicine				\$34,500,000	
Emerging Initiatives/Other				\$12,000,000	
Grand Total:	\$495,730,610	\$60,806,744	\$556,537,354	\$625,000,000	89.05 %

Approach

Oregon State University Foundation FY10 to Date by Constituency



Thursday, December 31, 2009

Unit	FY10 Gifts & Pledges To Date	FY10 Gifts & Pledges Goal	FY10 % of Gifts & Pledges Goal **	FY10 Private Grants * to OSU To Date	FY10 Gifts, Pledges, Private Grants To Date	FY09 Fiscal Year To Date Gifts, Pledges, Private Grants
Agricultural Sciences			%			
Athletics			%			
Business			%			
OSU - Cascades Campus			%			
Central Initiatives			%			
Education & 4-H			%			
Engineering			%			
Forestry			%			
Health and Human Sciences			%			
Liberal Arts			%			
Linus Pauling Institute			%			
Oceanic & Atmospheric Sciences			%			
OSU Alumni Association			%			
Pharmacy			%			
Science			%			
Veterinary Medicine			%			
Emerging Initiatives/Other			%			
Grand Total:			%		\$42,891,930	\$44,377,714

Campaign Report #005

Page 1 of 1

OSU Foundation reports are CONFIDENTIAL and for INTERNAL purposes only.

*Private grants are reported quarterly from the University. Recent grants may not be reflected on this report.
** Goal calculation does not include private grants received by OSU.

Approach

OREGON STATE UNIVERSITY STAY CONNECTED QUICK LINKS SEARCH

HISTORIC CAMPAIGN FUNDRAISING PRIORITIES HOW TO GIVE NEWS & EVENTS

THIS AMAZING PLACE
THIS HISTORIC MOMENT

MONTHLY Campaign Update

November 30, 2009

HIGHLIGHTS IMPACT PROGRESS TIMELINE CONTACT

The OSU Monthly Campaign Update tracks progress toward our \$625 million campaign goal, celebrates successes along the way, and, above all, showcases the impact philanthropy makes on OSU students, the state of Oregon, and our world.

Monthly Highlights

Some \$5.8 million was added to The Campaign for OSU in November, bringing the total to \$546 million by the end of the month. Learn more about campaign [progress](#).



The [Campaign Steering Committee](#) met December 10 in Portland, led by co-chair Pat Reser. Joined by consultant Martin Grenzbach, the group discussed the campaign timeline and progress, facility projects, and efforts to engage new donors.

The Foundation is especially encouraging [year-end gifts](#) to support the [President's Fund for Excellence](#) (which allows for strategic investments in programs with the greatest need, and greatest promise), the [University Venture Development Fund](#) (which directly supports research and economic development in our state), and [scholarships](#) (which are so important to recruiting and retaining the very best students, regardless of their financial circumstances).

To date more than one in five alumni have made a gift to The Campaign for OSU, passing on the gift of a great Oregon State University education to today's students and students to come. This month's update highlights three November gifts that show the [impact](#) alumni are making:

- **For students:** Dr. Renuka R. Sethi '69 established an endowed fund to create research opportunities for graduate students in Fisheries Science (College of Agricultural Sciences) and Human Development (College of Health and Human Sciences).
- **For Oregon:** John '76 and Sue Thompson '77 made a generous commitment to OSU's Accounting Development Fund (College of Business).
- **For the world:** Donna Bartels Gould '65 and David Gould '66 created the College of Science Disease Mechanism and Prevention Fund in support of research on Lou Gehrig's disease.

make a gift

About Us | Contact Us | Job Opportunities | OSU Home | OSUAA Home | Staff Resources | Trustee Sign In
© OSU Foundation | 850 SW 35th St. | Corvallis, Oregon 97331 | 541-737-4218 | 541-737-0498 fax

Oregon State UNIVERSITY OSU Foundation

CAMPAIGN PROGRESS: DECEMBER 31, 2009



\$556,537,354

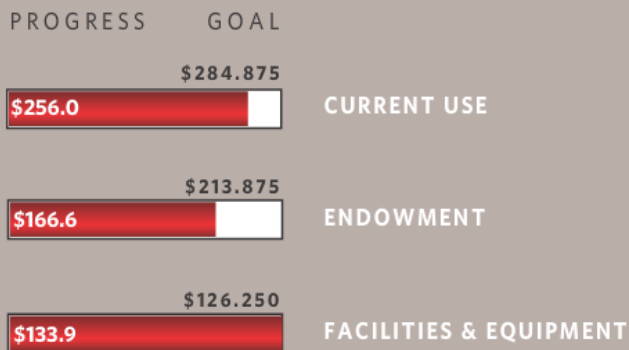
CAMPAIGN TOTAL

\$42,891,930

FISCAL YEAR 2009/10 To Date (unaudited)

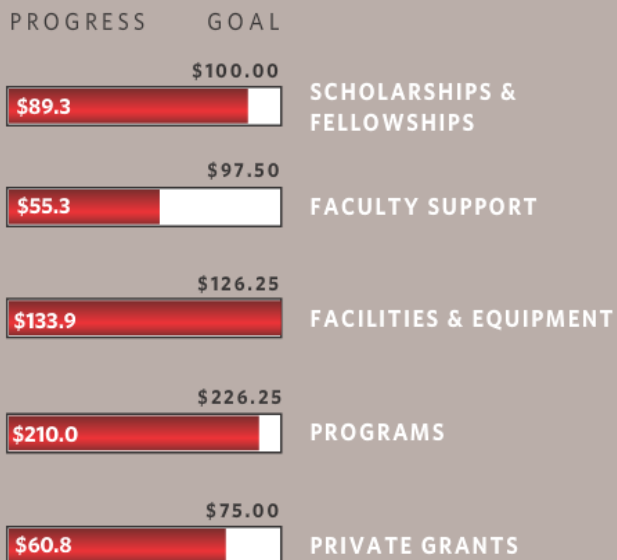
TYPES OF SUPPORT

(in millions)



AREAS OF SUPPORT

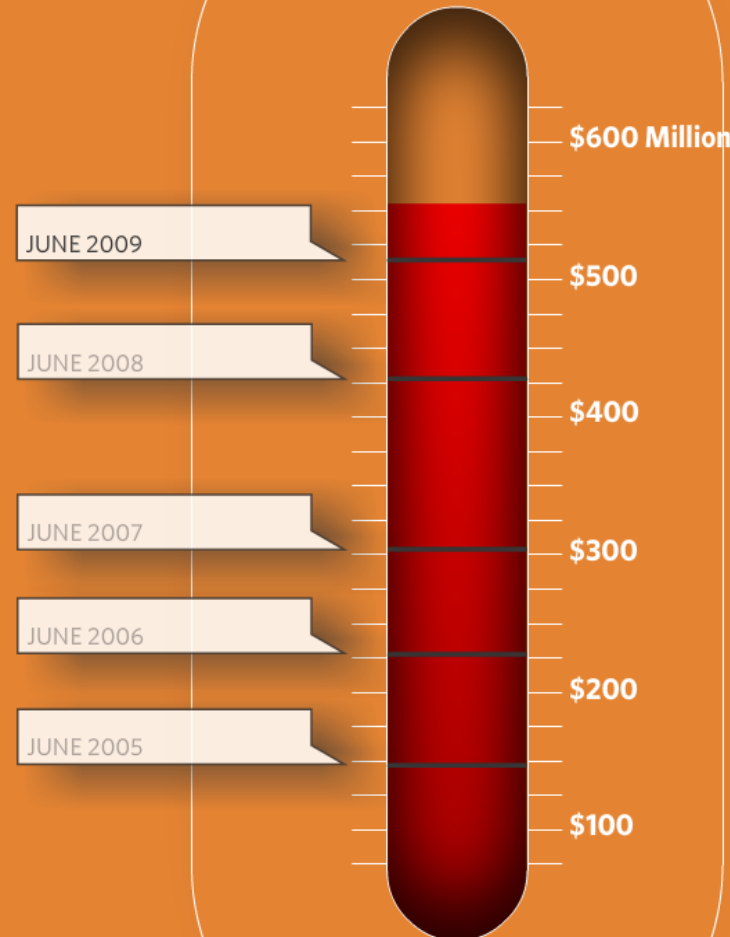
(in millions)



NOTE: an additional \$7.2 million has been raised outside of the areas listed above.

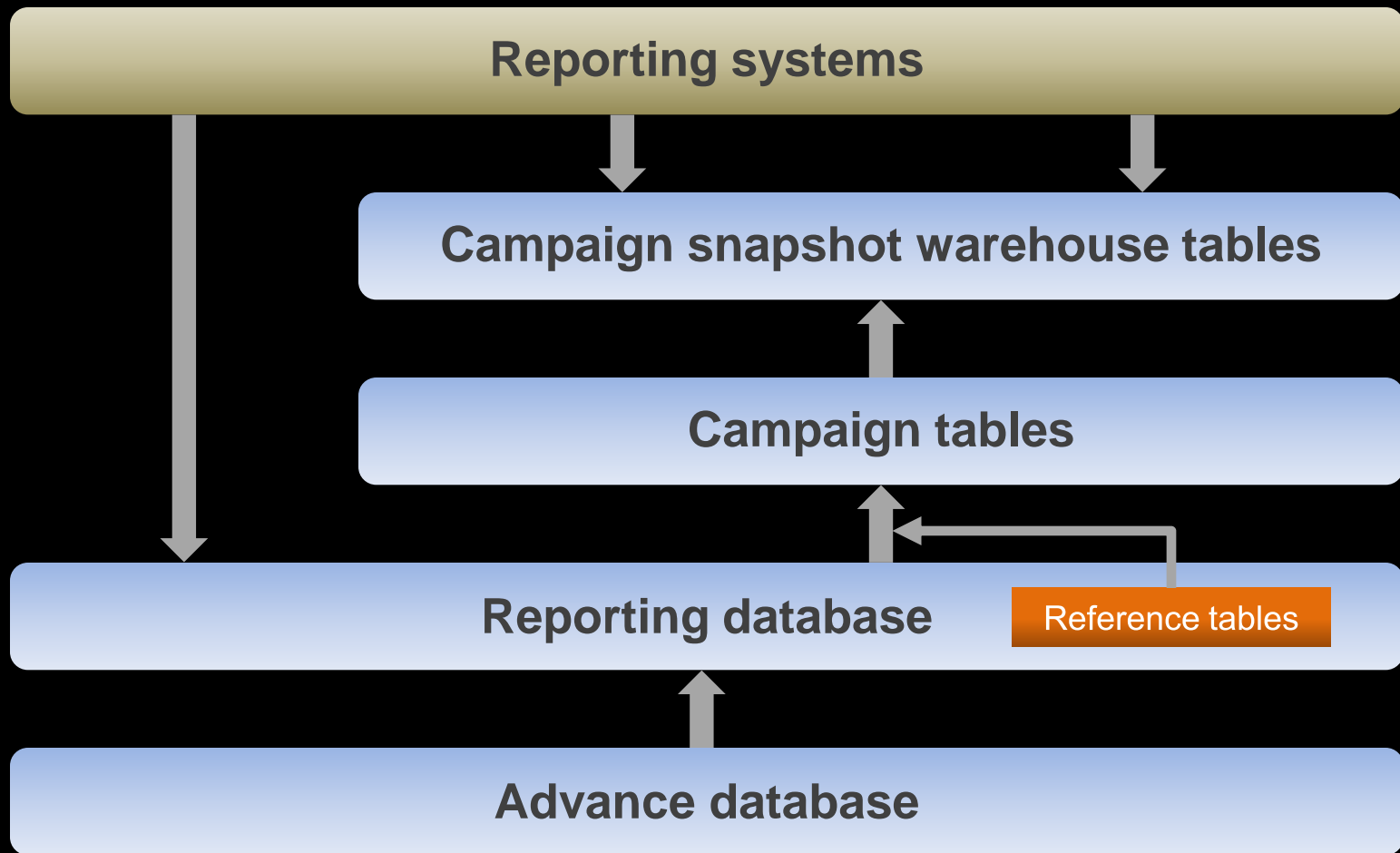
CAMPAIGN GOAL

\$625 MILLION



Replay

Approach



Approach

- All figures must be approved by the Campaign Director before being available to intended audience
- All changes to reports must be approved by Campaign Director

Benefits

- Snapshots of data freeze the information
- Reference tables facilitate flexibility
- OSU and OSUF leadership can have confidence in the numbers
- Approval process allows audit of Advance data

Competing ideas

- You tell me!

Lessons learned

- Wait until you can do it right
 - Start with a few key reports and add over time

Lessons learned



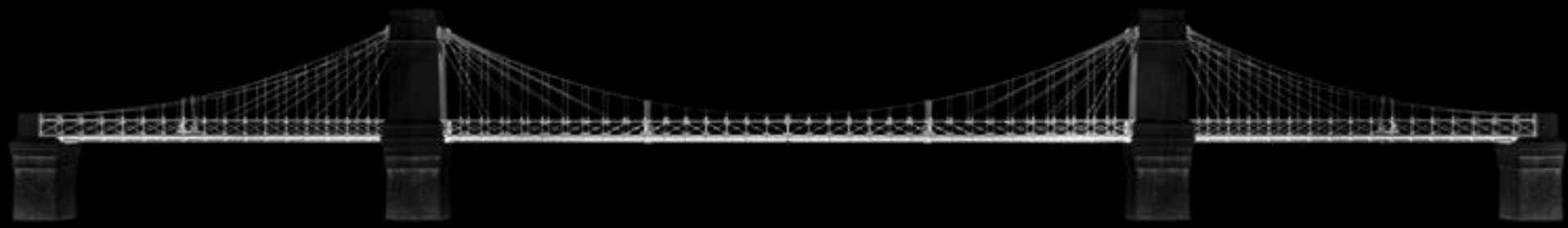
Lessons learned

- Consistency
 - Snapshots of data
 - No changes to reports during fiscal year
- Flexibility
 - Reference tables (for unit goals, campaign reachbacks, others)

Lessons learned

- KISS (keep it simple and stupid)
- Document, especially changes
 - Source code
 - Meeting minutes
- Data warehouse built and presented from a simple dimensional perspective
 - *The Data Warehouse Toolkit: The Complete Guide to Dimensional Modeling, Second Edition* by Ralph Kimball and Margy Ross

Q & A



Thank you!

jeff.merth@oregonstate.edu

