



odder

ON DEMAND DIGITAL ENDOWMENT REPORTS



An  evertrue company

You ODDER Know Your Speakers



Megan Miller

Stewardship Specialist
University of Oregon



Kim Peterson

Director,
Strategic Initiative
University of
South Alabama



Shea Sadler

Senior Director,
Advancement Information
and Analytics
University of South Alabama



Liz Menne

ODDER Specialist
EverTrue/ThankView



Lynne Wester

Donor Relations Guru



#1

Highest-rated advancement software



1,500+

Advancement & nonprofit partners



75+

Of the Top 100 US News & World Report Universities



What is EverTrue?



We unlock the hidden potential of your entire donor pyramid.
EverTrue equips digital-first advancement teams with...



Always-fresh Data

To show you prospects
you don't know yet



Software You Need

To reach them at the
right time in the right channel



Next-level Services

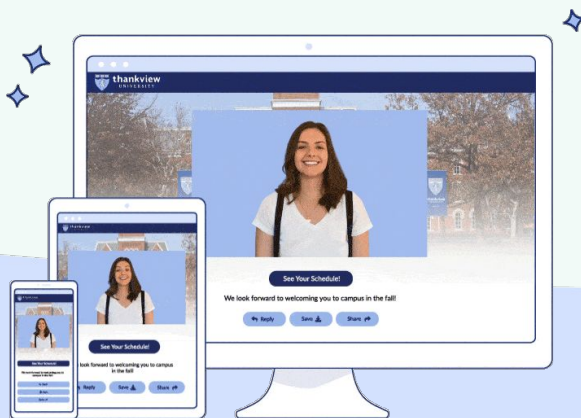
To partner for the best
possible results



The Video Platform That Builds Better Donor Relationships

Use it to

- ✓ Drive donations
- ✓ Promote events
- ✓ Send updates
- ✓ Thank supporters
- ✓ Automate outreach
- ✓ Collect video content



Must-have Features

- ✓ Collect and edit your video content
- ✓ Match your brand's experience
- ✓ Amplify your message and metrics



Closest Answer in the Chat Wins Coffee for 1 Week 🥤 🥤

- 1.** What is the most popular service purchased in 2021?
Merging, Report Templates, or Bundles
- 2.** How many customers purchased services in 2021?
We had 95 customers in 2021

Digital Endowment Reports



Securely deliver your endowment reports online with ODDER. No complicated portals to maintain or new processes to adopt. Share password-protected reports paired with personalized videos to surprise and delight donors. ThankView Required.



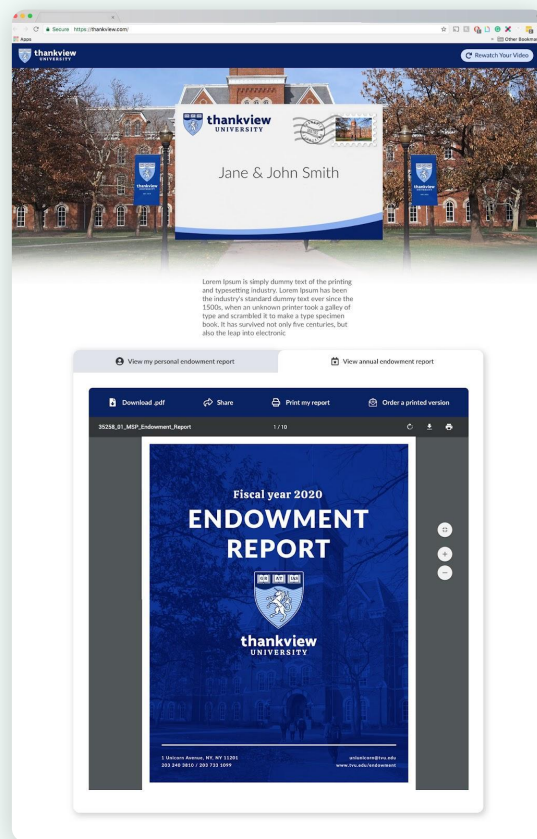
Share Reports Securely

Individual endowment report are stored and protected



Personalize Each Delivery

Allow donors to save, share, and print



Today's Agenda

1. Okay, so what is ODDER?
2. ODDER & Merging & More, oh my!
3. ODDER Services in the Wild
4. Live Q&A



The background features several teal-colored abstract elements: a large shape in the top right, a pattern of small triangles in the top left, and wavy lines on the right side. The number '01.' is partially visible in the bottom left corner.

ODDER in the Wild

01.

The background features several teal-colored abstract elements. In the top left, there is a light teal shape filled with a pattern of small, dark teal triangles. In the top right, there is a solid light teal shape. In the bottom left, the large number '02.' is partially visible in a light teal font. In the bottom right, there are three wavy teal lines.

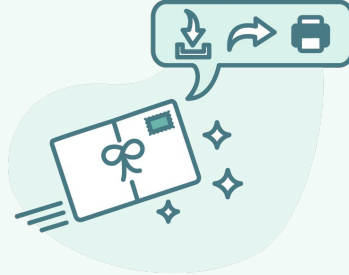
ODDER & merging & more, oh my!

Let odder Do the Work

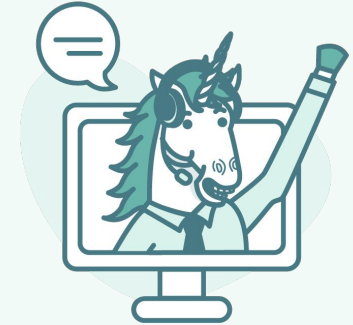


**Allow us to merge PDFs
for you**

Think about the hours, grief, and
money you can save




**Allow us to print and mail
your non digital reports**



**Consulting and project
management services**

Templates-Financials



ENDOWMENT FINANCIAL REPORT



Olivia Odder Endowment for Entrepreneurship

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ENDOWMENT ACTIVITY	
Book Value as of 5/31/2020	\$ 156,214.00
Market Value as of 5/31/2020	\$ 285,201.00
Total Expenditures as of 5/31/2020	\$ 16,510.00

LIFETIME GIVING AND DISTRIBUTIONS	
Contributions	\$ 250,000.00
Endowment Payout	\$ 21,350.00

ID: 1234567 FUND: 8901234




ENDOWMENT FINANCIAL REPORT

James T. Odder Family Scholarship Endowment for the Arts

ENDOWMENT ACTIVITY	
Beginning Book Value	\$ 201,386.00
Gifts & Reinvestment in FY19	\$ 40,000.00
Ending Book Value	\$ 241,386.00
Beginning Market Value	\$ 320,664.00
Ending Market Value	\$ 335,874.00
Projected Endowment Distribution FY20	\$ 15,210.00

ID: 1234567 FUND: 8901234



Templates-Narrative



**Sarah
Jennings '22**
MUSIC PRODUCTION
AND ENGINEERING
NASHVILLE, TN

ODDER Family Endowment for Music Business

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ID: 1234567 FUND: 8901234





Andrea James '21
NONPROFIT MANAGEMENT
CHARLOTTE, NC

James Odder Family Endowment

QUESTION 1

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QUESTION 3

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QUESTION 4

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QUESTION 5

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QUESTION 6

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ID: 1234567 FUND: 8901234



Merge Assistance



Pass that data off to the ODDER team!

What is needed for an ODDER Merge:

- Excel spreadsheet with clean data
- Merge template file (ex: InDesign, word)



Data Assistance

When excel makes your eyes cross, let the ODDER team help!

- Data clean up
- Data formatting
- Data editing



The Bundle

Hand ODDER all of your report elements and not worry about a thing!

We will work with your data, merge into a template, create your donor-specific PDFs and more!



Poll



What service interest you the most?

- ☐ Ready Made Template
- ☐ Merge Assistance
- ☐ Data Assistance
- ☐ The Full Package





Customer Spotlight

03.



University of Oregon



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Megan Miller

UO's ODDER Experience



1. | **We LOVE ODDER!**
2. | In 2019, we mailed nearly 1500 endowment and donor reports and had a plan to go digital within five years
3. | **Then came ODDER...**
4. | Year 1: December 2020—digital delivery service of 1200 endowment and donor reports (includes endowment reports, annual donor giving summaries, unit reports, and an annual “Year in Review” report)
5. | Year 2: November 2021—digital delivery service in addition to
 - a. Endowment template design
 - b. Endowment report merge service
 - c. Merge Service of unit reports with endowment reports



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Outcomes



1. Template and Merge Services

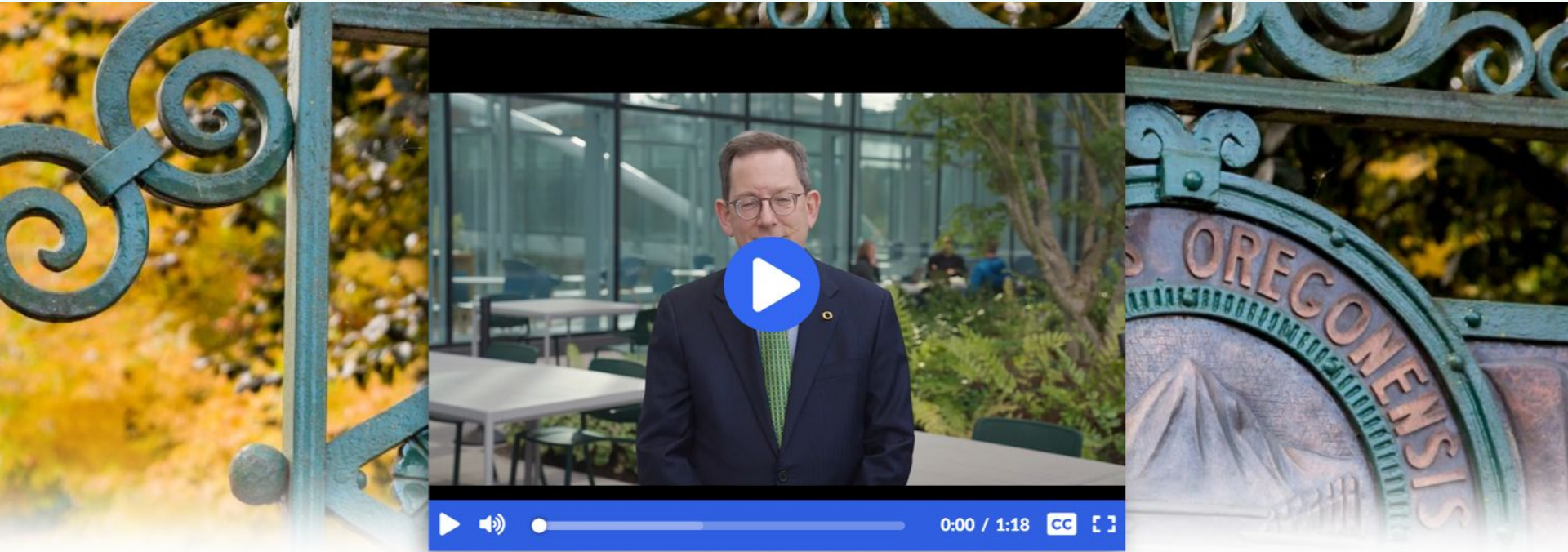
- a. Easier to read
- b. Easier to create a visually cohesive report
- c. Huge time savings
- d. Great communication and collaboration

2. Feedback

- a. Donor had overall positive feedback
- b. Foundation pleased with template and merge service
- c. Development and leadership please with look and donor experience.



University of Oregon Investors' Report



Dear Megan,

We are grateful for this historic year of giving and investment at the University of Oregon and are a better university because of your

Where we started

- Small print
- Too much information
- Business report feel



Endowed Fund Activity Report July 1, 2019 through June 30, 2020

The Oregon Duck Presidential Scholarship Endowment Fund
Purpose: Scholarships shall be provided to students who qualify for the UO Presidential Scholars program administered by Student Financial Aid.

	Spendable	Endowment
Beginning balances as of July 1, 2019	\$0.00	\$x,xxx,xxx.x
New contributions	0.00	0.00
Investment earnings	0.00	x,xxx.xx
Fees	0.00	(xx,xxx.xx)
Administrative fee reinvestment	0.00	x,xxx.xx
Other	0.00	0.00
Reinvestment	0.00	0.00
Cash made available for spending	xx,xxx.xx	(xx,xxx.xx)
Spending for designated purpose	(xx,xxx.xx)	0.00
Balances as of June 30, 2020	\$0.00	\$x,xxx,xxx.xx
<i>Pledged as of June 30, 2020</i>	<i>\$0.00</i>	<i>\$0.00</i>
<i>Estate Gifts as of June 30, 2020</i>	<i>\$0.00</i>	<i>\$0.00</i>

A Guide to Understanding Your Endowed Fund Activity Report
The endowment fund consists of two parts: spendable, representing the dollars available for spending to support the fund's designated purpose, and endowment, representing the fair market value invested through the Foundation's long term pool.

New contributions
Gifts and pledge payments during fiscal year 2020.

Investment earnings
The total amount earned by this fund during fiscal year 2020.

Fees
1% annual administrative fee. For new gifts, may include up to 5% fee which is transferred directly to the University.

Administrative fee reinvestment
Due to significant cost savings, the Foundation Board of Trustees voted to return a total of \$1,095,000 back to all endowed funds on a pro-rata basis as of June 30, 2020.

Other
May include revenues other than gifts, expenses associated with receiving gifts, and misc. expenses.

Reinvestment
Unspent cash returned to endowment.

Cash made available for spending
Dollars available for the University to spend on the donor designated purpose. This amount is calculated each year according to the Board approved spending policy (formula) which incorporates a 4% stated rate and fair market values on December 31.

Spending for designated purpose
The dollars spent during fiscal year 2020 in accordance with this fund's designated purpose.

Please contact Robert Erik, Sally Miles, or Kelly Brook, CFO, at 541-302-0300 with questions.
You can also contact us by e-mail: zckaccounting@uofoundation.org


Fund: 4002 Dept: 2500 - University Advancement



UNIVERSITY OF
OREGON

Where we are

- Cohesive look
- Easy to read
- Donor friendly



ENDOWMENT FINANCIAL REPORT

Olivia Odder Endowment for Entrepreneurship


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SUMMARY OF ENDOWMENT	
Beginning Balance as of July 1, 2020	\$ 74,617.00
New Contributions	\$ 74,617.00
Investment Earnings/Losses	\$ 74,617.00
Fees	\$ -
Administrative Fee Reinvestment	\$ -
Other	\$ (573.00)
Reinvestment	\$ 0.00
Cash Made Available for Spending	\$ (0,000.00)
Spending for Designated Purpose	\$ (0,000.00)
Balance as of June 30, 2021	\$ 63,092.67
Pledges as of June 30, 2021	\$ 74,617.00
Estate Gifts as of June 30, 2021	\$ 74,617.00

SUMMARY OF SPENDABLE	
Beginning Balance as of July 1, 2020	\$ 74,617.71
New Contributions	\$ 0.00
Investment Earnings/Losses	\$ 0.00
Fees	\$ 0.00
Administrative Fee Reinvestment	\$ 0.00
Other	\$ 0.00
Reinvestment	\$ 0.00
Cash Made Available for Spending	\$ 13,096.24
Spending for Designated Purpose	\$ -
Balance as of June 30, 2021	\$ 87,713.95
Pledges as of June 30, 2021	\$ 0.00
Estate Gifts as of June 30, 2021	\$ 0.00

Questions? Please contact the University of Oregon Foundation at askaccounting@uofoundation.org or 541-302-0300.

FUND: 8901234



UNIVERSITY OF
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University of South Alabama



Kim Peterson



Shea Sadler



Q&A

04.

Poll

Are you ready for a demo?
We'd love to show you more.





odder