

WEBINAR

The End of the Mail Merge Era:

How CSU Chico Reclaimed Time, Trust,
and Strategic Focus

TUESDAY, AUGUST 20TH AT 2 PM ET



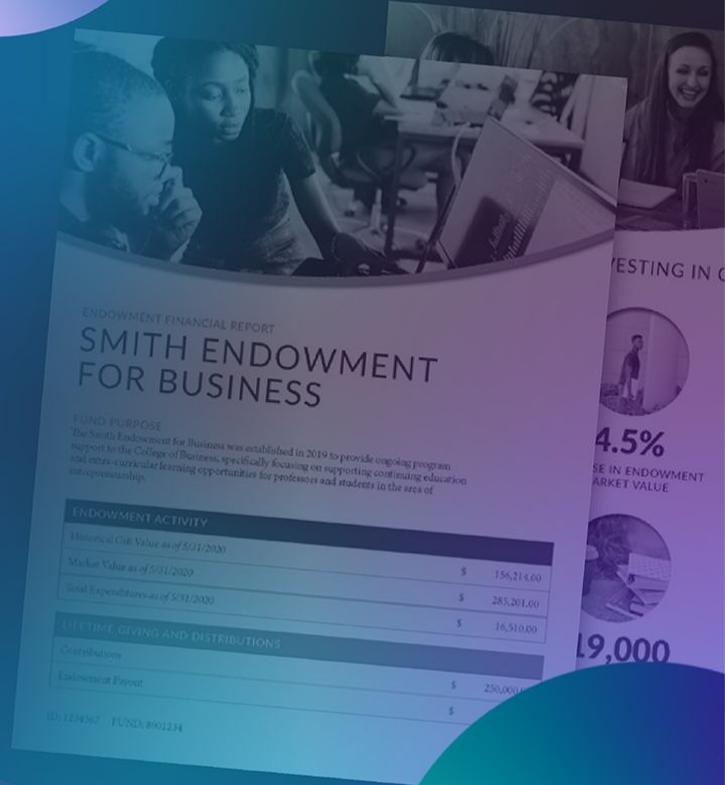
Jessica Booth
Director of Donor Relations
and Stewardship
California State University, Chico



Jennifer Post
Manager, Implementation
Partners
EverTrue



Jennifer Johnson
Senior Product Manager
EverTrue









**Jennifer
Post**

Implementation Manager

 California State
University Chico



**Jessica
Booth**

Director of Donor Relations
and Stewardship





**Jennifer
Johnson**

Senior Product
Manager

Impact

by evertrue

Get Endowment Reports Out Faster—With Fewer Steps.

Impact, built on Balance, helps you stop chasing spreadsheets and send clear, accurate endowment reports—fast. Donor and fund data live in one place, so you can create reports donors understand without relying on finance.

With Impact, you will:

- Combine donor and endowment fund data in one web-based platform
- Access real-time balances, giving history, and financial details
- Use templates to create clear, customizable reports in minutes
- Deliver endowment reports to donors directly and securely via ThankView's ODDER platform

ENDOWMENT FINANCIAL REPORT
SMITH ENDOWMENT FOR BUSINESS

FUND PURPOSE
The Smith Endowment for Business was established in 2019 to provide ongoing program support to the College of Business, specifically focusing on supporting continuing education and extra-curricular learning opportunities for professors and students in the area of entrepreneurship.

ENDOWMENT ACTIVITY	
Historical Gift Value as of 5/31/2020	
Market Value as of 5/31/2020	\$ 156,214,600
Total Expenditures as of 5/31/2020	\$ 285,201,600
	\$ 16,510,000

LIFETIME GIVING AND DISTRIBUTIONS

Contributions	
Endowment Payout	\$ 250,000.00

TESTING IN OUR STUDENTS!

- 4.5% IN ENDOWMENT MARKET VALUE
- \$17M DISTRIBUTIONS
- 19,000 LARGE SCHOLARSHIP AMOUNT
- 5,500 GIFTS RECEIVED

impact

Dashboard
Funds
Constituents
Reports
Awardees
Administration

POWERED BY fundriver

Fundriver University Demo

Annual Fund #600008

PURPOSE

Performance | Impact Statements | Constituents

Showing 1 to 10 of 60 entries

DATE RANGE 14
12/01/2019 - 12/31/2019

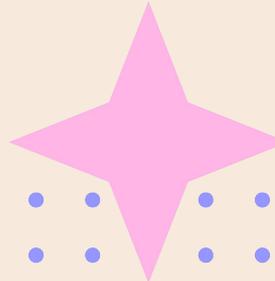
ENDOWMENT ACTIVITY		LIFETIME GIVING AND DISTRIBUTIONS	
Historical Gift as of 12/31/2019	\$12,210,588.74	Contributions	\$0.00
Market Value as of 12/31/2019	\$18,594,978.95	Endowment Payout	\$0.00
Total Expenditures	\$0.00		

MARKET VALUE \$18,594,978.95 As of 12/31/2019
HISTORICAL VALUE \$12,210,588.74 As of 12/31/2019
INCEPTION DATE 6/30/2008
NET ASSET CLASSIFICATION Without Donor Restriction
AUTHORIZED DATE
PURPOSE/USE Other
DEPARTMENT

What We'll Cover



- 1. The problem** - Why generic mail merges and static reports were no longer sustainable
- 2. The pivot** - How CSU Chico moved to a more strategic, streamlined reporting process
- 3. The transformation** - What changed—from formatting chaos to confidence and clarity
- 4. The impact** - Time saved, stronger donor relationships, and a more energized team





**In one word how would you describe
donor reporting season?**



What Made Reporting Season So Difficult



- ✓ Mail merges that caused headaches
- ✓ Collating pages for a single donor
- ✓ Several week process to get reports out the door
- ✓ Time consuming between Donor Relations and Endowment Accounting Teams
- ✓ Underwhelming donor experience



Time for a new approach

The moment for change



Reporting was pulling focus away from strategy and stewardship

The team wanted:

- Less back and forth
- More confidence in data
- More time to think creatively
- Reports that felt meaningful to donors

Then vs. Today



California State University Chico
University Foundation

April 26, 2022

Ken Crandall
Superior Region WET Regional Partnership Coordinator
CIBHS
2125 19th Street, 2nd Floor
Sacramento, CA 95818

Dear Ken,
The 2020-21 fiscal year was full of new and unprecedented challenges, from stay-at-home wildfires to market volatility and economic uncertainties imposed by COVID-19. Though the were not immune to these conditions, I am pleased to share that endowment performance improved, and for the period of 12 months ending June 30, the portfolio experienced 35.6%

We have built a plan for it remain impactful, independent market overall. Our goal is purchasing power over the Through our investment at maximize return while not paramount to remain vigilant building value for the stakeholders of Chico State.

To that end, beginning in 2021, the revised University Foundation Board investment policy once a new endowment account has reached a book value of \$25,000, the funds will be held period of one fiscal year (July 1 – June 30), allowing the account to earn sufficient interest to the first distribution, such as a scholarship to a deserving student. The University uses end a spending rate of 4% that is applied to the three-year average balance of the endowment.

We owe deep gratitude to the Chico State alumni and friends who through their unweary more than \$17 million in cash, multi-year, and deferred pledges in fiscal year 2020-21. The making a direct impact on students, faculty, and programs that strengthen and enhance our academic offerings.

Enclosed is the annual report for your fund for July 1, 2020, through June 30, 2021. If you h about this information, please don't hesitate to contact Jessica Booth, donor relations and manager, at 530-898-4796 or jbooth@csuchico.edu.

Thank you for all you do to support the University. Your generosity helps ensure Chico State generations to come.

Sincerely,

Ahmad Boura
Vice President for University Advancement
CEO, University Foundation

California State University Chico
University Foundation

Prepared for Nancy Fox

Nancy & Jack Fox Future Teacher Scholarship Endowment

FINANCIAL SUMMARY

Market Value as of July 1, 2020	\$47,494.19
Gifts	
Net Gains (Losses)	16,340.73
Endowment Administrative Fee	(911.08)
Endowment Distribution	
Transfers	
Market Value as of June 30, 2021	\$62,923.84

Nancy & Jack Fox Future Teacher Scholarship

FINANCIAL SUMMARY

Balance as of July 1, 2020	\$
Gifts	2,580.00
Endowment Allocation	
Transfers	
Scholarships & Awards	
Balance as of June 30, 2021	\$2,580.00

8413 | 7667

This report was produced by the California State University, Chico Office of Donor Relations.
If you have any questions or comments, please contact Donor Relations at 530-898-4796.

California State University Chico
University Foundation

Prepared for Nancy Fox

Jack and Nancy Fox Golf Scholarship Endowment

FINANCIAL SUMMARY

Market Value as of July 1, 2020	\$46,825.11
Gifts	
Net Gains (Losses)	16,110.52
Endowment Administrative Fee	(898.24)
Endowment Distribution	
Transfers	
Market Value as of June 30, 2021	\$62,037.39

Jack and Nancy Fox Golf Scholarship

FINANCIAL SUMMARY

Balance as of July 1, 2020	\$ 126.31
Gifts	450.00
Endowment Allocation	
Transfers	
Scholarships & Awards	
Balance as of June 30, 2021	\$576.31

8369 | 7652

This report was produced by the California State University, Chico Office of Donor Relations.
If you have any questions or comments, please contact Donor Relations at 530-898-4796.

California State University Chico

**Anna DeBow Scholarship Fund
2021-2022 Recipient**

Recipient: **Millerose Oduruke**
Class Level: **Junior**
Major: **Nursing**
College: **College of Natural Sciences**

As a recipient of the Anna DeBow Scholarship, I wanted to express my gratitude for the generosity of the financial support towards my higher education. Let me tell you a little bit about myself. I am currently a junior in my first year of nursing school at Chico State. I am from a small town, not too far from Chico, known as Redding. I have three older siblings who are all in the health field (nurses/doctors), and two of my brothers attended Chico State in the past. My dedication and passion to pursue nursing has allowed me to achieve a grade point average of 3.95. My freshman and sophomore year I was involved in the Chico State Track and field team, but sadly, due to the rigorous pacing and time requirements of nursing school, I had to say goodbye to my team. I was so happy and grateful that I was accepted into the program my first time applying, and I am on track to graduate in 4.5 years (nursing program is 5 semesters) with my Bachelors of Science in Nursing. Thanks to you, I am one step closer to completing my goal. Coming from a lower income immigrant family, you have lightened my financial burden drastically. This enables me to focus and put more importance into my education and learning. Words cannot really express the amount of gratitude I have, and I hope one day to be able to help students achieve their goals just as you have helped me.

Sincerely,

Millerose Oduruke

CALIFORNIA STATE UNIVERSITY, CHICO | 400 W. FIRST STREET | CHICO, CALIFORNIA 95929-6156

Then vs. Today



THANK YOU FOR YOUR GENEROSITY

You have made a profound difference in our university community, and we are so grateful. In 2023-24, you and other dedicated donors contributed \$21 million to the University Foundation, making our most successful fundraising year to date. Your generosity has been essential in helping Chico State reach new levels of excellence and achievement.

The investment market environment has been exciting with new technologies propelling some markets to new highs, and we are pleased to have participated in these returns. The long-term performance of the endowment has been consistent, and our diversified approach has helped weather much of the volatility the investment markets have seen over the past five years. As market cycles continue to evolve, our endowment is poised to take advantage of themes across the globe, including artificial intelligence, healthcare and other exciting opportunities in private equity and real estate.

This report includes an accounting for your fund for the period of July 1, 2023, through June 30, 2024. If you have any questions about this, please contact Jessica Booth, donor relations and stewardship manager, at 530-898-4796 or jbooth@chico.edu.

Thank you for your support! With each gift, and your confidence in our mission, we continue to enhance educational offerings, ensure real-world learning opportunities, and provide cutting-edge labs, facilities, and technology.

AHMAD BOURA
CEO UNIVERSITY FOUNDATION, VICE PRESIDENT FOR UNIVERSITY ADVANCEMENT

2023-24 FUND R

YOU MAKE AN INCREDIBLE DIFFERENCE FOR OUR WILDCATS

\$21M
RAISED THIS YEAR

\$100.2M
ENDOWMENT VALUE

80%
OF ENDOWMENT DIRECTLY SUPPORTS STUDENTS

927
SCHOLARSHIPS AWARDED

\$1,500
AVERAGE SCHOLARSHIP AMOUNT

\$2.28M
SCHOLARSHIPS AWARDED

**FUND FINANCIAL REPORT
JACK AND NANCY FOX GOLF SCHOLARSHIP ENDOWMENT**

ENDOWMENT MARKET VALUE		SUMMARY OF SPENDING	
Market Value as of June 30, 2023	\$ 59,562.49	Balance as of June 30, 2023	
Gifts	\$ 0.00	Gifts	
Endowment Distributions	\$ (2,000.00)	Endowment Allocation	
Transfers	\$ 0.00	Transfers	
Fees	\$ (1,036.33)	Fees	
Net Gains (Losses)	\$ 5,419.90	Funds Expended	
Market Value as of June 30, 2024	\$ 61,946.56	Balance as of June 30, 2024	

ID: A00156005 FUND: 400838900

JACK AND NANCY FOX GOLF SCHOLARSHIP ENDOWMENT

SCHOLARSHIP IMPACT

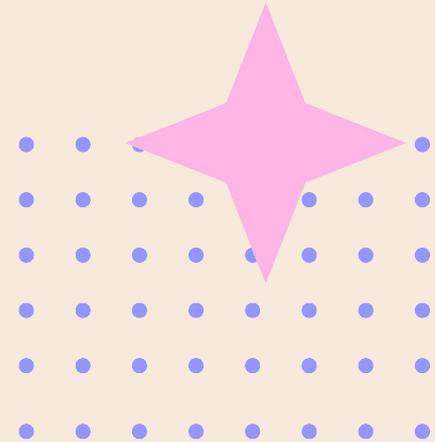
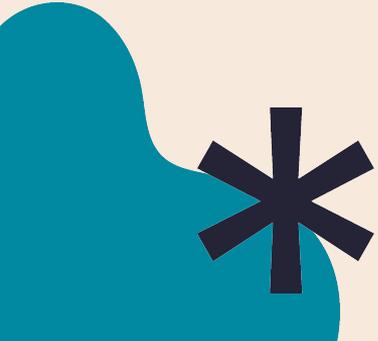
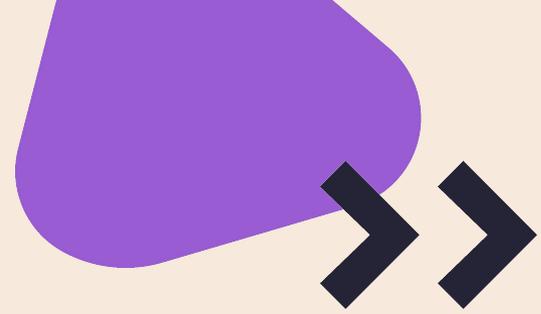
- By investing in Chico State, leadership partners like you help ensure that gaps in state funding won't hinder our ability to provide state-of-the-art learning and a meaningful Chico State experience for current and future Wildcats. The rising cost of living and education should never stop students from achieving academic success.
- Scholarships are critical to students' educational and personal success - providing them with opportunities to excel in their studies and pursue goals with dedication and determination.
- Thanks to you, in 2023-24, more than \$2 million was awarded as scholarships to over 600 students, who receive these profound impacts with gratitude and genuine appreciation.
- Thank you for providing encouragement to these Wildcats and inspiring them to persevere toward their dreams.

SCHOLARSHIP RECIPIENTS

NAME	HOMETOWN	MAJOR	YEAR
Benjamin Mosser	Pismo	Mechanical Engineering	2026

ID: A00156005 FUND: 400838900

Impact by EverTrue



Fund Data at Your Fingertips

Impact Fund Data Interface Overview

Navigation Menu: Dashboard, Funds, Constituents, Recipients, Reports, Import/Export

Fund Details: Athletic Scholarship Endowment #445888

- Reporting Period: 01/01/2025 - 12/31/2025
- Contributed Value: \$266,000.00 (As of 12/31/2025)
- Inception Date: 6/30/2008
- Purpose/Use: Scholarship
- Department: Business

Performance Summary (12/01/2025 - 12/31/2025)

Metric	Value
Beginning market value 12/1/2025	\$276,150.98
Investment performance	\$1,062.42
Withdrawals	\$0.00
Transfers	\$0.00
Contributions	\$2,500.00
Ending market value 12/31/2025	\$279,713.40
Ending contributed value 12/31/2025	\$266,000.00

Fund Valuations as of 12/31/2025 12:00:00 AM

Fund Name / ID	Active Constituents	Purpose Length	Fund Value	Created Date
Law School Unrestricted 60020	6	0	\$286,000	4/5/2024
Library Fund 60012	9	0	\$386,793	4/5/2024
Management Award 60015	6	0	\$177,250	4/5/2024
Management Chair 60005	13	0	\$278,850	4/5/2024
Management Chair Quasi 60006	6	0	\$166,000	4/5/2023
Management Scholarship 60001	6	0	\$97,500	4/5/2023
Marketing Chair 60002	7	0	\$135,000	4/5/2023
Marketing Chair Quasi Fund 60003	9	0	\$24,500	4/5/2022
Marketing Scholarship 60004	7	0	\$140,090	4/5/2022
Mathematics Lectureship 60017	10	0	\$138,750	4/5/2022

Quickly See Recipients & Impact Statements

The screenshot displays the 'impact' system interface for 'Fundriver University Demo'. The user is logged in as 'Andrea Cirilli'. The main view shows the details for recipient 'Sara Jones #20000'. The recipient information includes: MAJOR (CLASS YEAR 2021), MINOR (HOMETOWN Buffalo, NY), and RECIPIENT DETAIL (School of Arts and Sciences). An 'INTERNATIONAL?' field is set to 'No'. The 'LAST MODIFIED ON' field is 'N/A'. Below this, there is a section for 'Impacts' with a 'Change Details' link and an 'Add impact statement' button. A search bar is present. A table lists impact statements:

FUND NAME / ID	REPORTING PERIOD	RECIPIENT TYPE	IMPACT TYPE	TOTAL NARRATIVE CHARACTER COUNT
▶ Smith Endowment for Business and Smith Endowment for Business 600011	01/01/2019 - 12/31/2019	Faculty	Thank you (horizontal)	▲ 1649/1600
▶ Ballet Fund 600009	01/01/2019 - 12/31/2019	Faculty	Thank you (horizontal)	1162/0

At the bottom, there is a 'Show 10 per page' option and a 'Support' button.

An inset window shows a detailed view of an impact statement for the 'Smith Endowment for Business and Smith Endowment for Business 600011' fund. It includes a table with columns for Fund Name, Reporting Period, Recipient Type, Impact Type, Total Narrative Character Count, Photo, and Actions. The impact type is 'Thank you (horizontal)' with a character count of 1649/1600. Below the table, there is an 'Impact page version' section with the text 'Thank you (horizontal)'. This is followed by a 'Recipient name' field (Sara Jones), 'Hometown' (Buffalo, NY), 'Recipient detail' (School of Arts and Sciences), 'Class year' (2021), and 'International?' (No). There is also an 'Image filename' (20000.jpg) and 'Image size' (0.03 MB). A 'Thumbnail' image is shown. The impact statement text is divided into three paragraphs:

Paragraph 1 I am honored to be one of the recipients of the Smith Endowed Scholarship. Thanks to your generous support I am the first in my family to attend college.

Paragraph 2 Growing up in a less privileged community has not only offered financial and academic challenges but has also helped me realize the value of a college education.

Paragraph 3 I have just begun my undergraduate career as a freshman at Fundriver University and can already report that my academics are off to a first-rate start. My plans at this stage are to

Navigation buttons include 'View fund', 'Edit impact', and 'Remove'.

Take the guesswork out of building reports

The screenshot shows the 'Report templates' section of the Impact software. The top navigation bar includes 'Reports', 'Report templates', and 'Report deliveries'. The 'Report templates' section has a search bar and a 'Create new report template' button. Below this is a table of existing templates:

TEMPLATE NAME	PAGES	STATUS	ACTIONS
2026 Endowment Report	14 pages	Draft	Copy Archive Remove

The table also shows a date '08/06/2025 02:40 PM by' and a user profile 'Andrea Cirilli'. Below the table, there are two options for creating a new template: 'Classic (Basic)' and 'Classic (Pro)', each with a preview image and a description.

This block shows a preview of a report page and its management interface. The report page is titled 'FINANCIAL PAGES' and includes a header image of a person. The management interface, titled 'Manage pages', allows users to select which pages to include in the report. The 'Statistics' page is currently selected and highlighted in yellow.

Manage pages
Select a page to view the content for this report template and enable or disable pages.

- Cover
- Message
- Endowment Overview
- Endowment Performance
- Flex
- Statistics**
- Financials
- Recipient List
- Question + Answer
- Thank You (horizontal)
- Thank You (vertical)
- Narrative + Quote
- Glossary
- Back Cover

Statistics page
A visual way to share important data with the stewardee.
Character counts: Data less than 15 each and each descriptive should be no more than 100 with spaces.

Include page?
 Include "Statistics page" in this report template

Photo
Drag and drop to upload

Heading

Buttons at the bottom: Proof template, Save changes, Copy template, Discard changes

Every Fund They Support. Every Report They've Received.

Impact Fundriver University Demo Andrea

REPORTING PERIOD: 01/01/2019 - 12/31/2019

Constituents / Sudie A. Ackiss

Sudie A. Ackiss

#4078

ADDRESSEE
Sudie A. Ackiss

ADDRESS
87 Langspur Yard
Hosston, LA 71043
United States

SALUTATION
Ackiss

Funds Reports

[Add funds](#)

Search

FUND NAME / ID	NO. OF CONSTITUENTS
Academic Nursing Endowment 321000	1
Ballet Fund 600009	15
Law School Scholarship 600016	9
Law School Unrestricted 600020	6

Show 10 per page

Fundriver University Demo

REPORTING PERIOD: 01/01/2019 - 12/31/2019

Constituents / Sudie A. Ackiss

Sudie A. Ackiss

#4078

ADDRESSEE
Sudie A. Ackiss

ADDRESS
87 Langspur Yard
Hosston, LA 71043
United States

EMAIL
N/A

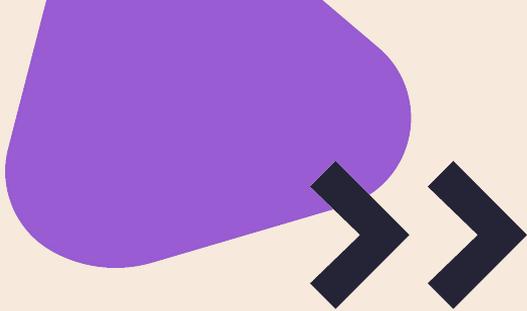
SALUTATION
Ackiss

Funds Reports

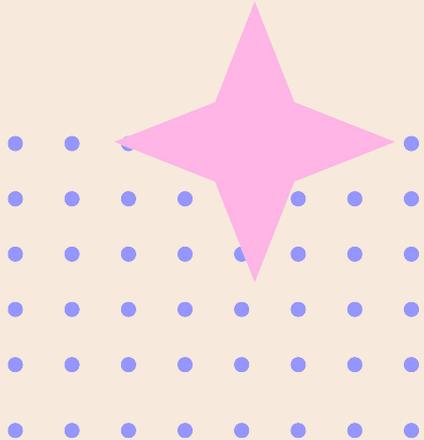
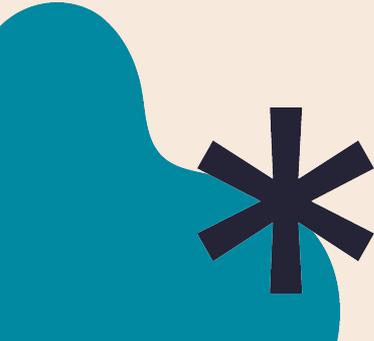
Search

Showin

REPORT BATCH NAME	FUND COUNT	APPROVED BY/ON	APPROVED REPORT
Ash Report View report batch	4	6/18/2025 9:19:37 AM ashley.debaro@evertrue.com	Download report
Erik's Report View report batch	1	6/3/2025 11:17:25 AM erik.rapp@evertrue.com	Download report
Britta View report batch	1	4/17/2025 4:15:31 PM britta.mckinney@evertrue.com	Download report



The Bigger Impact



Less Back-and-Forth, More Alignment

- Everyone's working from the same set of numbers
- There's less time spent double-checking and more trust in the data
- Donor relations and finance are in sync, which builds confidence across the board



FUND FINANCIAL REPORT JACK AND NANCY FOX GOLF SCHOLARSHIP ENDOWMENT

ENDOWMENT MARKET VALUE		SUMMARY OF SPENDING	
Market Value as of June 30, 2023	\$ 59,562.49	Balance as of June 30, 2023	\$ 0.00
Gifts	\$ 0.00	Gifts	\$ 300.00
Endowment Distributions	\$ (2,000.00)	Endowment Allocation	\$ 2,000.00
Transfers	\$ 0.00	Transfers	\$ 0.00
Fees	\$ (1,036.33)	Fees	\$ 0.00
Net Gains (Losses)	\$ 5,419.90	Funds Expended	\$ (2,000.00)
Market Value as of June 30, 2024	\$ 61,946.06	Balance as of June 30, 2024	\$ 300.00

impact Fundriver University Demo

Annual Fund #600008

PURPOSE

Performance Impact Statements Constituents

Showing 1 to 10 of 60 entries

DATE RANGE 12/01/2019 - 12/31/2019

ENDOWMENT ACTIVITY		LIFETIME GIVING AND DISTRIBUTIONS	
Historical Gift as of 12/31/2019	\$12,210,588.74	Contributions	\$0.00
Market Value as of 12/31/2019	\$18,594,978.95	Endowment Payout	\$0.00
Total Expenditures	\$0.00		

MARKET VALUE \$18,594,978.95 As of 12/31/2019

HISTORICAL VALUE \$12,210,588.74 As of 12/31/2019

INCEPTION DATE 6/30/2008

NET ASSET CLASSIFICATION Without Donor Restriction

AUTHORIZED DATE

PURPOSE/USE Other

DEPARTMENT

Time and Mental Energy Reclaimed

- Reports are built and delivered in days, eliminating hours of manual work
- Staff can shift focus from execution to thoughtful donor engagement and follow-up
- The reporting process no longer drains capacity during the most critical stewardship windows



More Strategic Stewardship

- Time saved on production is reinvested in message development, segmentation (future)
- Phasing in new reports to become more strategic over time
- Stewardship efforts are aligned with long-term relationship goals, not just immediate deadlines



California State University Chico
Anna DeBow Scholarship Fund
2021-2022 Recipient

Recipient: Millierose Odurukwe
Class Level: Junior
Major: Nursing
College: College of Natural Sciences

As a recipient of the Anna DeBow Scholarship, I wanted to express my gratitude for the generosity of the financial support towards my higher education. Let me tell you a little bit about myself. I am currently a junior in my first year of nursing school at Chico State. I am from a small town, not too far from Chico, known as Redding. I have three older siblings who are all in the health field (nurses/doctors), and two of my brothers attended Chico State in the past. My dedication and passion to pursue nursing has allowed me to achieve a grade point average of 3.95. My freshmen and sophomore year I was involved in the Chico State Track and Field team, but sadly, due to the rigorous pacing and time requirements of nursing school, I had to say goodbye to my team. I was so happy and grateful that I was accepted into the program my first time applying, and I am on track to graduate in 4.5 years (nursing program is 5 semesters) with my Bachelors of Science in Nursing. Thanks to you, I am one step closer to completing my goal. Coming from a lower-income immigrant family, you have lightened my financial burden drastically. This enables me to focus and put more importance into my education and learning. Words cannot really express the amount of gratitude I have, and I hope one day to be able to help students achieve their goals just as you have helped me.

Sincerely,

Millierose Odurukwe

CALIFORNIA STATE UNIVERSITY, CHICO | 400 W. FIRST STREET | CHICO, CALIFORNIA 95929-0156

How We've Determined Success

✓ Positive feedback

Feedback from donors and teams shows the value is clear.

✓ Less questions

Consistent format reduces questions and builds lasting confidence.

Tips for getting started



- 1.** Be collaborative with your Finance Department!
- 2.** Start small with one or two pages
- 3.** Don't be afraid of change, your time is precious!

Tips for Reports to WOW donors

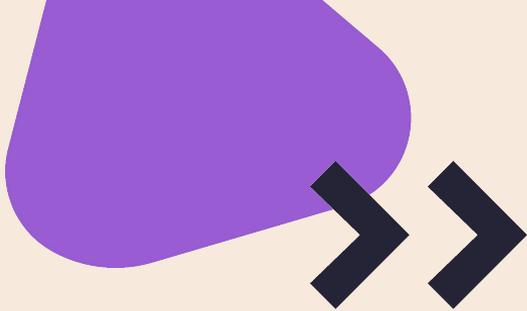


1. Include impact stories
2. Personalize reports
3. Adding stats to tell stories

Interested in learning more?



- ✓ Yes! Please have someone from EverTrue reach out to me
- ✓ Not right now - I'll keep researching



Q + A

