

# Give Day at UC Davis

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Advancement Services, UC Davis

# Agenda

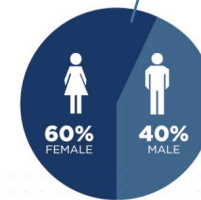
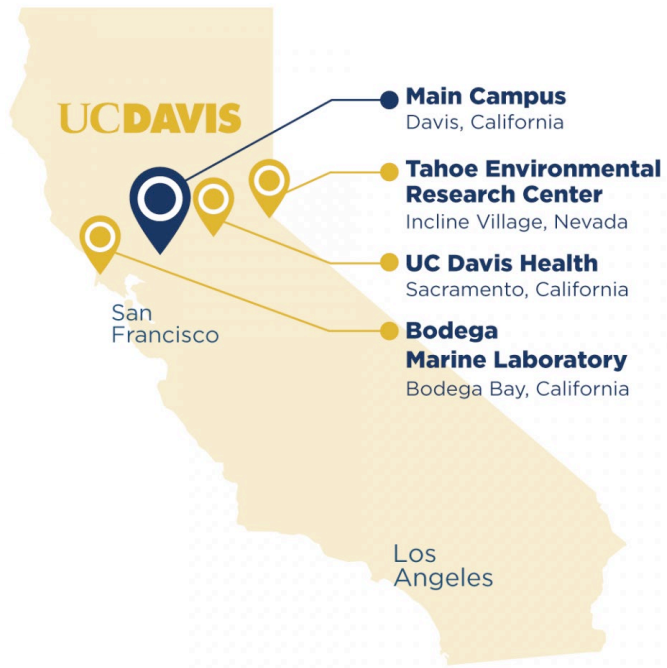
- About UC Davis
- Give Day at UC Davis
- How We Handle Give Day at Advancement Services:
  - Yearly Schedule of Sub-projects (Give Day Play Map)
  - Give Day Itself
  - After Give Day

Lessons Learned

Next Steps

Key Takeaways/Objectives

# About UC Davis



2%  
Gender  
Non-  
Binary

*Athletics name:*  
**AGGIES**

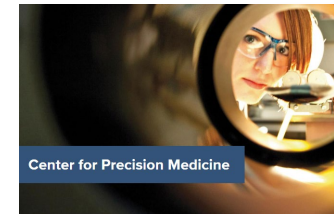
*Athletics level:*  
**NCAA Division 1**

*Intercollegiate sports:*  
**23 varsity teams**

**104**  
MAJORS



# The Big Ideas Campaign at UC Davis



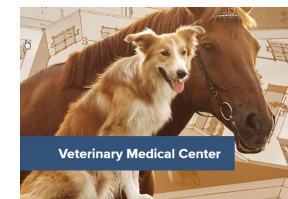
THANKS A  
**BILLION**

**BIG  
IDEAS**



Last Campaign  
\$1 Billion

This Campaign  
13 Big Ideas & \$2 Billion  
[bigideas.ucdavis.edu](http://bigideas.ucdavis.edu)



# About UC Davis Development

## Development and Alumni Relations Staff (DEVAR)

- Shaun Keister, Ph.D. Vice Chancellor
- 300+ Staff Members
- Hybrid Fundraising Environment



# About Advancement Services

## Advancement Services

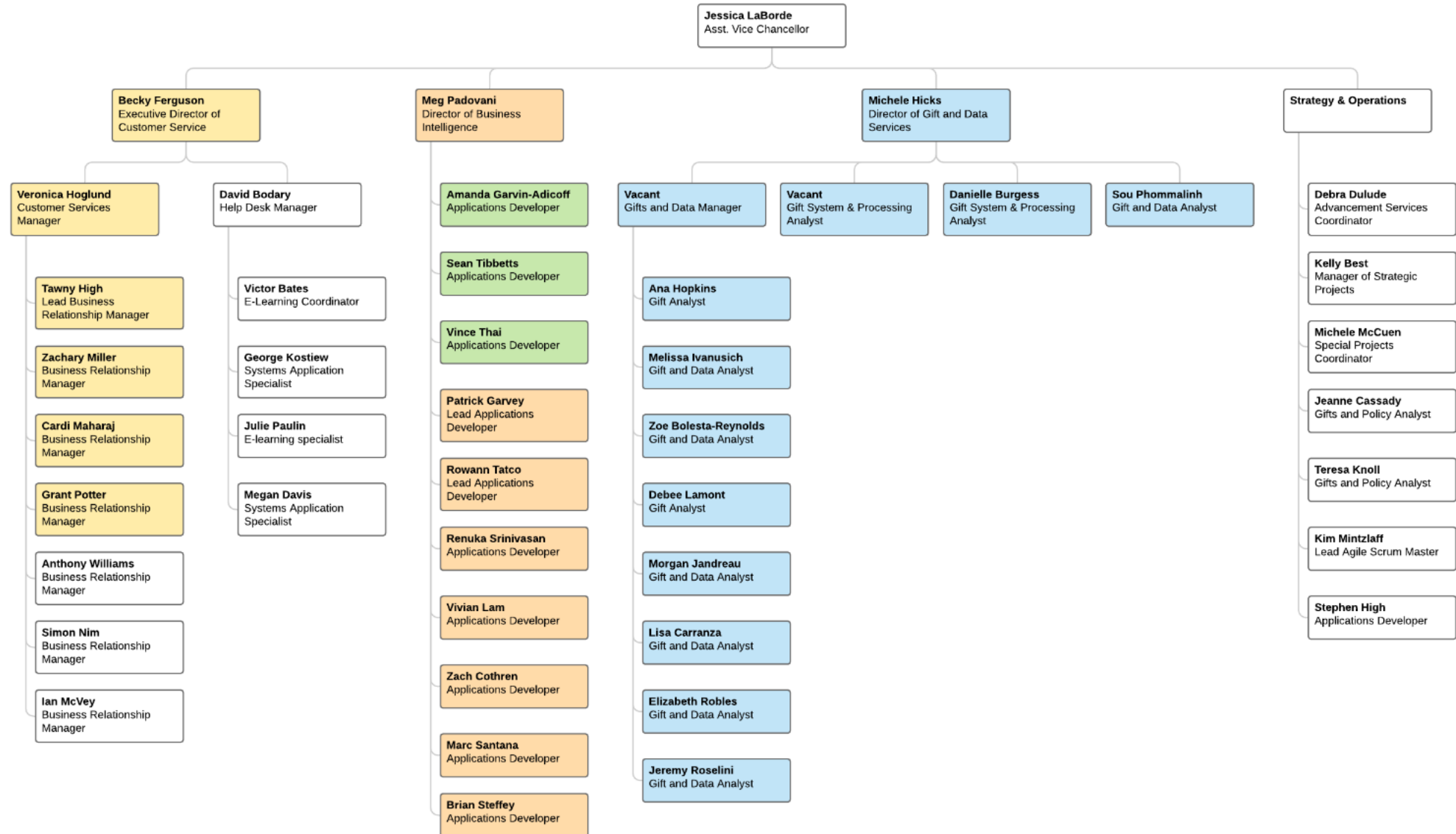
(The Cousteau Crew)

Agile Crew of 46

- Business Intelligence
- Customer Service
  - Help Desk and Training
  - Customer Relationship Management
- Gift and Data Services
- Gift Policy and Executive Support
  - Gift Agreements Team
  - Strategy and Operations



# Advancement Services: The People



# Advancement Services: The Numbers

## Our Gifts:

- 59,000+ Transactions per Year
- \$234 Million Raised from 36,800 Donors
- Average Processing Time: 3.5 Days
- 800 Gift Agreements Produced Each Year

## Our Projects:

- Complete Over 50 Priority Projects Each Year
- Managed 14,500+ Service Requests

## Our Data:

- 960K+ Entities in Advance
- 13 Systems Supported





# How Do We Work? We Are Agile?

Sure, but what does that mean?

It's difficult to describe. It can change.

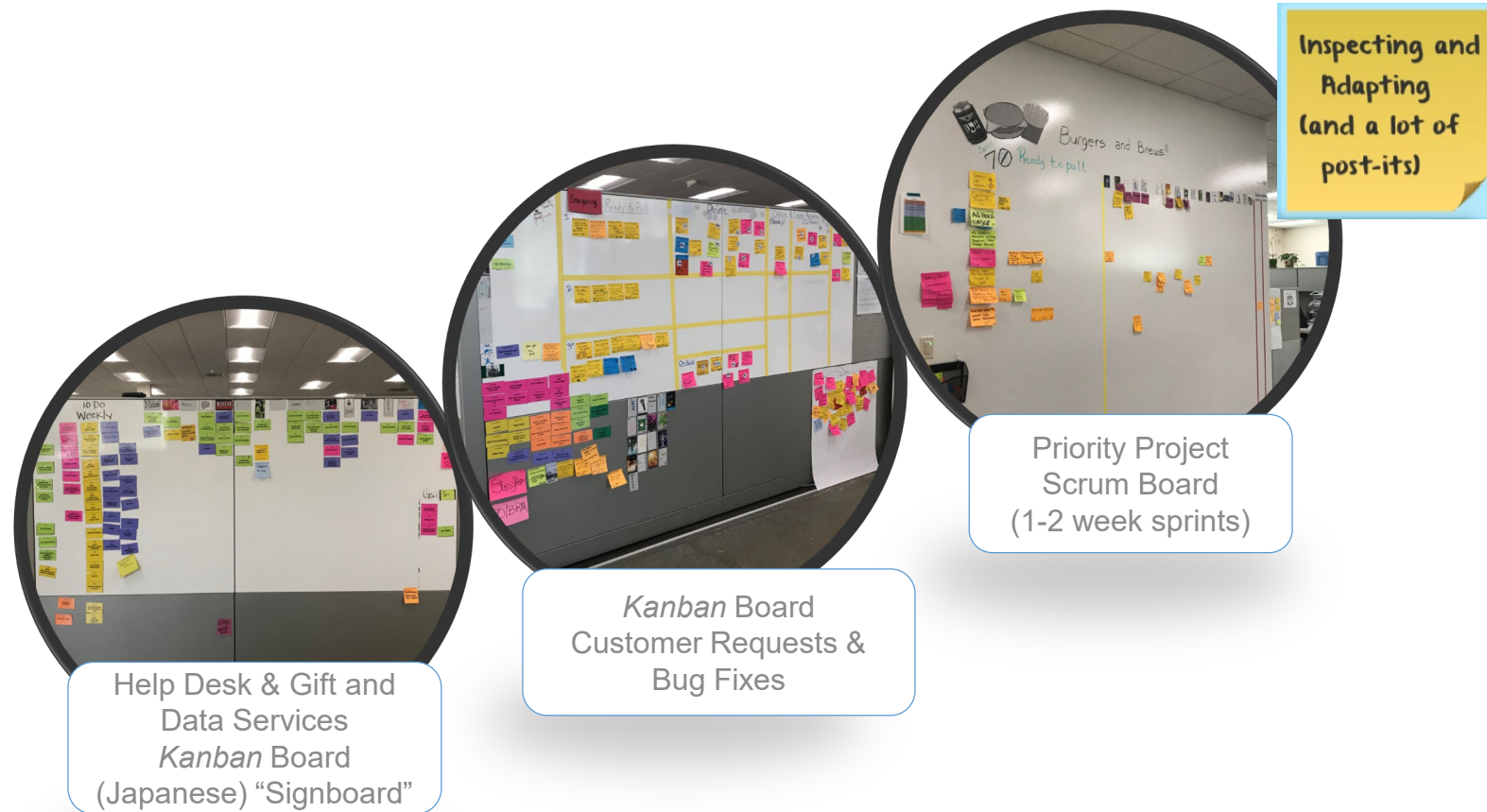
And Agile isn't just one thing.  
It's three:

- a framework for getting work done
- a value system
- process



<http://blogs.collab.net/agile/what-is-scrum-the-five-minute-explanation-for-folks-not-yet-practicing-it>

# Agile is a Framework for Getting Things Done



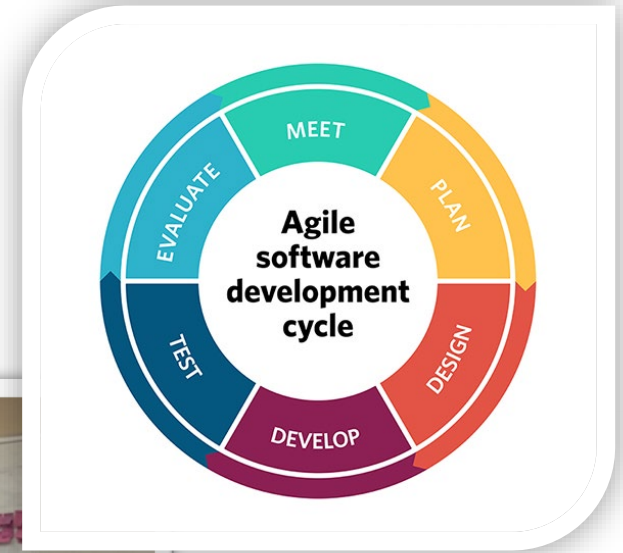
# Agile is a Value System

Individuals and interactions over processes and tools

Working software over comprehensive documentation

Customer collaboration over contract negotiation

Responding to change over following a plan



<https://agilemanifesto.org/>

# Agile is a Series of Processes

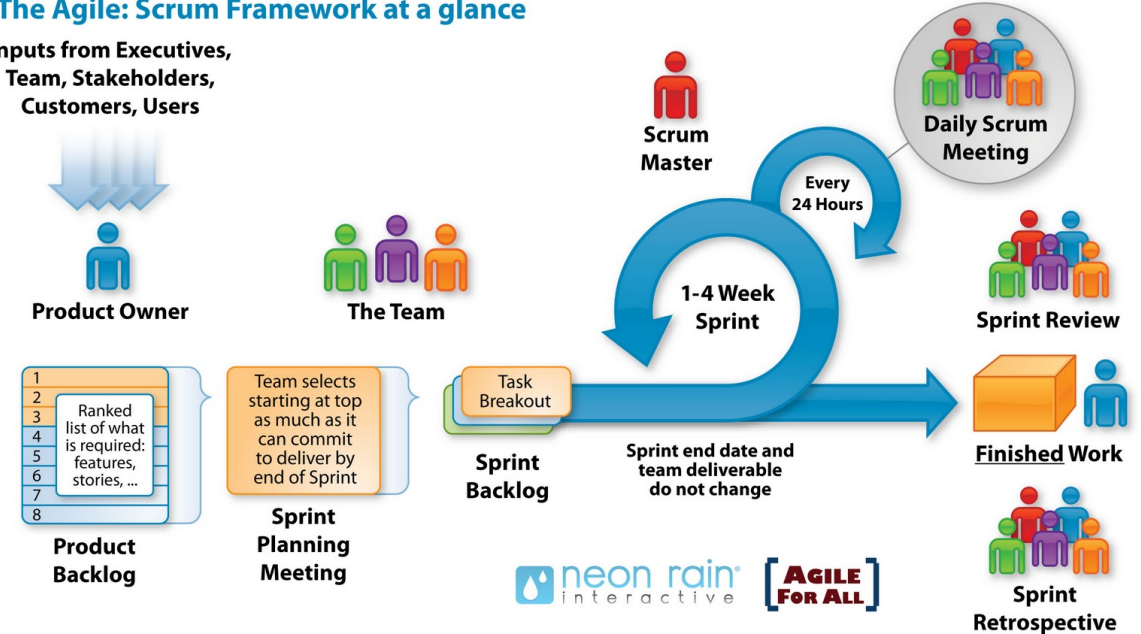
...that result in creating teams that:

- generally organize themselves into three roles
- participate in four regular meetings
- and produce and maintain three artifacts.

**Our Product Owners  
are Business  
Relationship  
Managers (BRMs) –  
and *vice versa***

## The Agile: Scrum Framework at a glance

Inputs from Executives,  
Team, Stakeholders,  
Customers, Users



# Business Relationship Managers/ Product Owners at Advancement Services

## They Are

The voice of the business for  
the developers

The voice of the developers  
for the business

Key element of our service  
model



## They Offer

Business-to-system-to-  
business translation

Training and issue  
resolution

Customer representation

Tactful negotiation of “no”

UC DAVIS 2019

# GIVEDAY

APRIL 12 & 13 EVERY AGGIE COUNTS

AMBASSADORS CHALLENGES DONOR WALL FAQ



## UC DAVIS GIVE DAY 2019

### MAKE IT COUNT!

UC DAVIS GIVE DAY 2019 HAS ENDED!

00 : 00 : 00  
HRS MIN SEC

**\$2,003,512** RAISED **4,454** GIFTS

<https://giveday.ucdavis.edu/>

**Planned Giving Challenge - Wayne & Jacque Bartholomew**

THANK YOU to our generous donors for helping us reach our goal of 75 planned giving requests! Your support for the Reggle Low Endowment In Cardiology and Mondavi Center Annual Program Fund Is Important and very

**\$100,000**

Thank you to Wayne Bartholomew for providing this challenge gift!

COMPLETED

**The Sullivan Family Challenge for the Davis Chancellor's Club**

THANK YOU to our generous donors for helping us reach our goal of 125 gifts! Your support for the Annual Fund and Davis Chancellor's Club Is Important and very much appreciated. Thank you to the Sullivan Family for providing this \$25,000 challenge gift!

**\$25,000**

🎁 125 / 125 GIFTS COMPLETED

**Davis Chancellor's Club Cabinet Challenge**

THANK YOU to our generous donors for helping us reach our goal of 50 gifts! Your support for the UC Davis Annual Fund Is Important and very much appreciated. Thank you to the DCC Cabinet for providing this \$16,000 challenge gift!

**\$16,000**

🎁 50 / 50 GIFTS COMPLETED

Challenge gifts

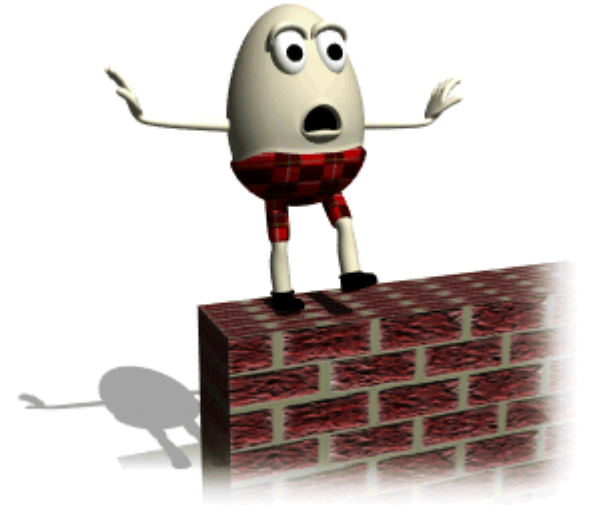
# What Give Day Means for Advancement Services

- Solicit + process the highest single day volume of the year
- Match (Solicitation Data, Entities)
- Batch (Consolidate data into similar “flavors”)
- Dispatch (Upload into database and move funds)
  
- We use ScaleFunder to accept and receipt gifts.
- We use our systems and processes to move the money and donor documentation into our systems



# Tales of Give Days Past

- First Year: Many Firsts, Much Learned
  - First Give Day + New Centralized Gift Processing System
- Second Year: Humpty Dumpty
  - Learned that divide does not always lead to conquer

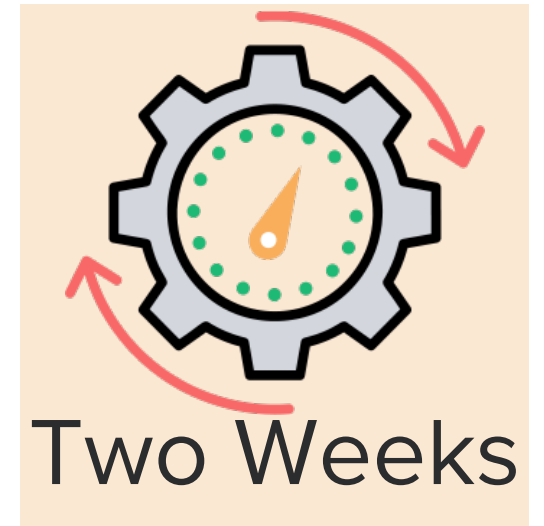




# Challenges Addressed in Year Three

Connecting Scalefunder data to our systems  
**without an API**

- Find Existing Donors (Entity Matching)
- Enter thousands of gift records using our Centralized Gift Processing system GREAT
- Convert to PDF and upload ScaleFunder receipts to the correct entity records
- Move money from holding accounts to benefitting units
- Update our system of record with free current contact data.



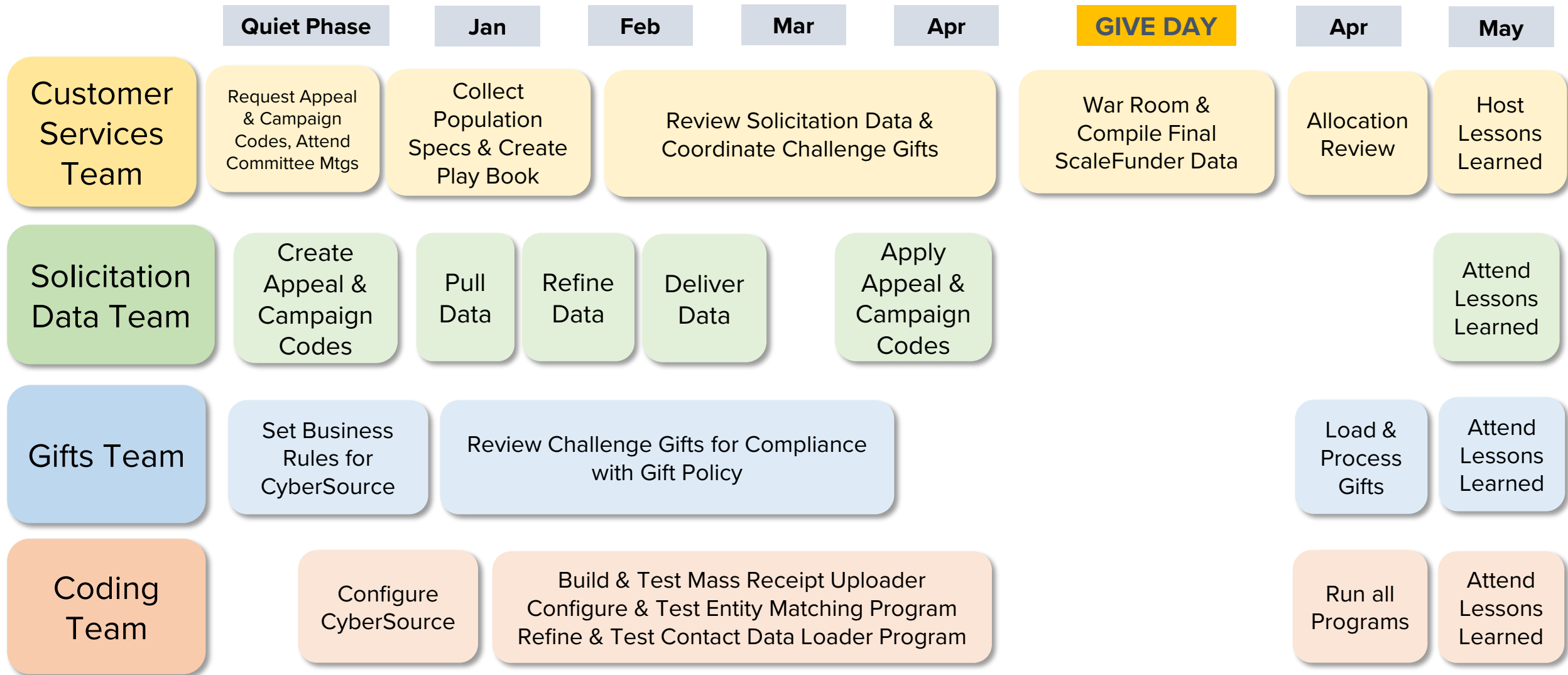
# How We Handle Give Day at Advancement Services

## **A Year in the Life of a Give Day**

- June to November (Quiet)
- January to April (Ramp up)
- Give Day Itself
- Post-Give Day Gift Processing



# Advancement Services Give Day Play Map (2019) – UC Davis



# Let's Talk Teams

## Give Day Teams

Customer Services Team (6)

Bridge between customer and delivery teams.

Solicitation Data Team (3)

Segmentation and create scanlines for mail pieces.

Gift & Data Team (20)

Ensuring donor intent through gift processing and bio data management.

Coding Team (8)

Developing applications to validate and upload gift data.

# Customer Services Team (CS)

- AKA The Project Management Team
- Business Relationship Management was Key
- CS Leadership Worked with Gifts Team to Ensure Compliance

# CS Team: Our First Approach: RACI

## Responsibility Matrix

- R = Responsible
- A = Accountable
- C = Consulted
- I = Informed

Verdict? So-so

Main Issue: Too many cooks on one deliverable caused confusion.

Item	Task/Deliverable	Sprint#	Planned Date	Actualized Date	Delta	Complete (X)	DR	PG	BF	VH	AG	MS	SH	JD	Comments
1	Meeting: Start working through bulk uploader requirements	Sprint 67	1/29/2018	1/29/2018	0	X			R	I	R				
2	Meeting: Backlog Grooming - 5 new stories groomed	Sprint 68	2/8/2018	2/8/2018	0	X	A	C	C	R					
3	Meeting: Call with Ag to clarify uploader req's	Sprint 68	2/12/2018	2/12/2018	0	X		R		A	R				
4	Meeting: Pre-sprint planning	Sprint 68	2/13/2018	2/13/2018	0	X		R		I		R	R	R	Attendees: Stephen, Patrick, Mark, Jeff, V

# Last Year: Playbook

- When, What, Who, and Important Details about the Task
- Single Accountability Indicator (Not permutations of 4)
- Functioned like a Project Milestone Map

Date	Task	Accountable	Notes
Monday, April 15, 2019	Review allocations in master file to ensure no inactive allocations exist AND review OTHER fund id's.	<a href="#">Veronica Hoglund</a>  <a href="#">Victor Bates</a>	Lessons Learned addition: Work through allocations with Danielle/Victor to update anything OTHER already on the calendar.  2019 LESSONS LEARNED ADDITION: ++For multiples, specifically - proposal: SFID+_1, SFID+_2, SFID- - essentially Need unique identifier per line item
Monday, April 15, 2019	Provide Guinea pig gifts to gifts team to process right away.	<a href="#">Veronica Hoglund</a>	Indicated in the file. PG/VB
Monday, April 15, 2019	Upload guinea pig gifts to GREAT	<a href="#">Patrick Garvey</a>	
Monday, April 15, 2019	Check guinea pig gifts in KFS	<a href="#">Patrick Garvey</a>	
Monday, April 15, 2019	Once guinea pig gifts are reconciled, push to processing	<a href="#">Patrick Garvey</a>	

## RACI

## Playbook

Pro	Con	Pro	Con
Very Detailed	Hard to maintain		Easy to maintain
Clear ownership	Can be messy acting people		In most cases, 1:1 person accountable per task
Clear deliverables	None		None
So many rules – E.g. For a simple task the same <b>person</b> can be <b>Accountable and Responsible. Accountability can only rest with one person.</b>	Takes a long time to assign roles		If not done right, can cause confusion

Bottom line, *the team* preferred the Playbook – so that is how we proceeded and WON.



# Solicitation Data Team

## Quiet Phase:

- Create Appeal /Campaign Codes

## January – March

- Pull and review segmentation data for **600,000 households**.
- It broke our shared drive server (maxed out!)
- Drop dates for DM and EM

## Give Day and Beyond:

- Apply Remaining Appeal/Campaign Codes



If one household = one seat in Dodger Stadium  
Then

We solicited the number of households that  
would fill dodger stadium 10 times!  
(That's a huge volume)

# Solicitation Data Team

The screenshot shows the UC Davis Giving website for the "Give Day 2020 - School of Veterinary Medicine" fund. The header includes the UC Davis Giving logo, navigation links for "Ways to give", "Why give", and "Areas to support", and a "Search Funds" button. The main image features a group of people and a dog, with a red banner reading "Give Day 2020 - School of Veterinary Medicine" and a "Give Today" button. Below the image is a breadcrumb trail: "Home / Give Day 2020 - School of Veterinary Medicine". The main content area has a heading "Give Day 2020 - School of Veterinary Medicine" followed by a paragraph about the school's mission. A second paragraph describes the school's status as the number one veterinary school in the nation. A third paragraph lists the types of animals the school cares for. To the right, an "INFORMATION" section lists contact details for Ms. Hnouzong Her, and a "TAGS" section is present.

UCDAVIS Giving Ways to give Why give Areas to support Search Funds

Give Day 2020 - School of Veterinary Medicine Give Today

Home / Give Day 2020 - School of Veterinary Medicine

### Give Day 2020 - School of Veterinary Medicine

The School of Veterinary Medicine's mission is to advance the health of animals, people and the environment. To carry out this mission, we focus on students of our professional Doctor of Veterinary Medicine program, Master of Preventive Veterinary Medicine program, graduate clinical residency program and graduate academic MS and PhD programs.

As the number one veterinary School in the nation, it serves the people of California by providing educational, research, clinical service, and public service programs of the highest quality to advance the health and care of animals, the health of the environment, and public health, and to contribute to the economy.

We address the health of all animals, including livestock, poultry, companion animals, captive and free-ranging wildlife, exotic animals, birds, aquatic mammals and fish, and animals used in biological and medical

**INFORMATION**  
Ms. Hnouzong Her  
School of Veterinary Medicine - Office of Advancement  
svmadvancement@ucdavis.edu  
(530) 752-7024 (Phone)  
(530) 752-2801 (Fax)

**TAGS**

The screenshot shows the UC Davis Giving website for the "Give Day 2020 - Childrens Hospital" fund. The header includes the UC Davis Giving logo, navigation links for "Ways to give", "Why give", and "Areas to support", and a "Search Funds" button. The main image features a man holding a child, with a red banner reading "Give Day 2020 - Childrens Hospital" and a "Give Today" button. Below the image is a breadcrumb trail: "Home / Give Day 2020 - Childrens Hospital". The main content area has a heading "Give Day 2020 - Childrens Hospital" followed by a paragraph about the hospital's status as the Sacramento region's only nationally ranked hospital. A second paragraph describes the types of care provided. A third paragraph encourages donations. To the right, an "INFORMATION" section lists contact details for Michelle Tafoya, and a "TAGS" section is present.

UCDAVIS Giving Ways to give Why give Areas to support Search Funds

Give Day 2020 - Childrens Hospital Give Today

Home / Give Day 2020 - Childrens Hospital

### Give Day 2020 - Childrens Hospital

UC Davis Children's Hospital is the Sacramento region's only nationally ranked, comprehensive hospital for children, offering the highest level of care for virtually every pediatric health condition. It has the Central Valley's only level I pediatric trauma center and emergency department, and includes state-of-the-art neonatal, pediatric and pediatric cardiac intensive care units.

Your gifts to the Children's Hospital on Give Day have a tremendous impact! Your contribution allows us to sustain our research to improve treatments for our youngest patients.

Join us! Click on a fund below and your gift will be counted!

**INFORMATION**  
Michelle Tafoya  
Director of Giving Programs  
mtafoya@ucdavis.edu  
(916) 734-9400 (Phone)  
(916) 734-9508 (Fax)

**TAGS**

# Gifts Team – Quiet Phase Planning

Quiet Phase (November - January):

Set CyberSource Business Rules

- Gifts Team worked with Coding Team to ensure that Cybersource would work well with our Give Day transactions.



# Gifts Team: Give Day Lead-Up Planning


January to April (Give Day Lead-Up):


Ensure Challenge Gifts Adhere to Existing Gift Policy

- Functioned like pledges
- Worked with Customer Services and Gift Agreement Teams to ensure compliance.

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 **\$25,000**

 125 / 125 GIFTS COMPLETED

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 **\$16,000**

 50 / 50 GIFTS COMPLETED

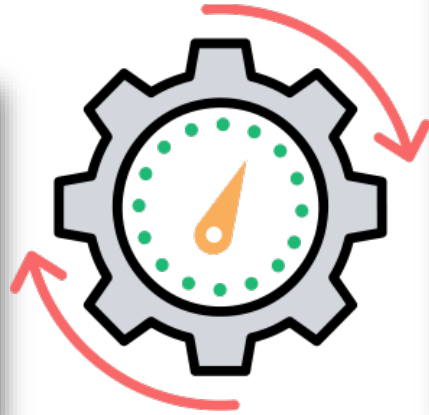
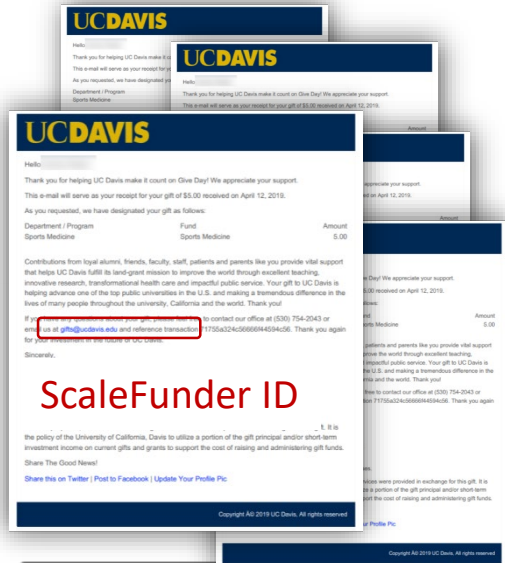
# Coding Team (CT): Building Tools to Connect Data

Quiet Phase and Ramp Up

Build or Update Tools to Facilitate the Movement of the Gift Documentation and Monies from ScaleFunder to Advance and Campus Accounts.

- Receipt Uploader Application
- Entity Match System
- Contact Data Loader
- Bulk Batch Tool

# CT: Receipt Extract, Convert & Upload Application



Receipt #: 0002099604 Completed

**Gift Info** Financial Details

Transaction Type: Gift  
Payment Type: Credit Card  
Amount: \$5.00  
Received Date: 4/12/2019  
Receipt #: 0002099604  
ScaleFunder Id: 71755a324c56666f44594c56  
Advance Record Date: 4/12/2019

**Primary Donor:**

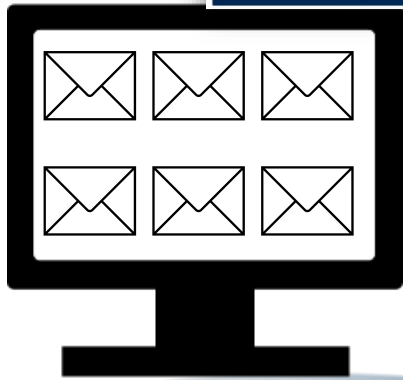
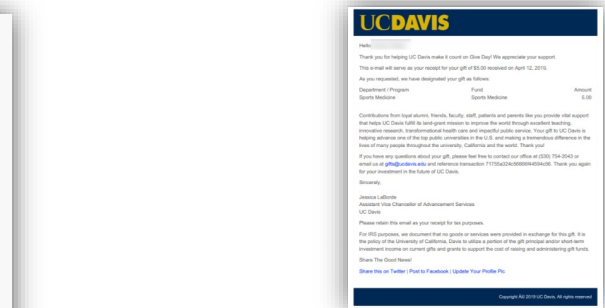
**Status**  
Completed  
Last Modified: 5/16/2019 9:52 AM

**Attachments**  
0002099604.pdf (receipt)  
View All

**Holding Scrubber Doc**  
AS-H30412131

**Upload Scrubber Doc**  
AS-H3050300H30503001

**Other Scrubbers**  
CY-H30413018 (Holding - 4/24/2019 2:51:22 PM)



**Receipt Number**

**Primary Gift Overview**

Primary Donor  
Date of Record: 04/25/2019  
Legal Amt: 5.00  
Receipt #: 2099604  
Allocation: Sports Medicine Development Fund  
Image: Gift Documents

**Gift Documents**

Giving Codes  
Matching Gifts  
Premiums

# CT: Entity Matching

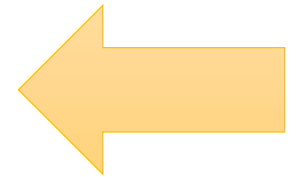
**Entity Matching** is the task of identifying a record that references the same entity from a different source

## Usage

- Give Day
- Admissions Load (Students, Parents etc)
- Online Giving

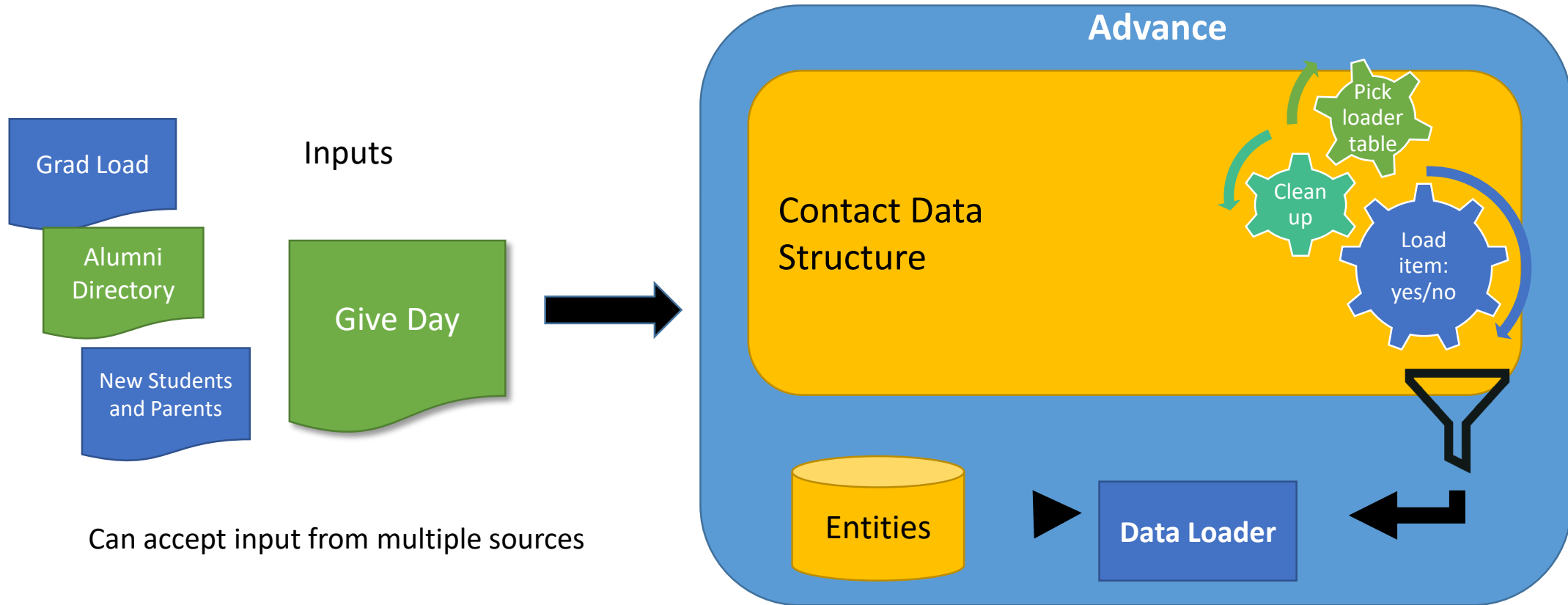
# CT: Entity Matching

ID	First Name	Middle	Last Name	Email	Phone	Address	Birthdate	Gender
233	Andrea		Gonzalez	<a href="mailto:andreaq@yahoo.com">andreaq@yahoo.com</a>	510-222-3333	123 Main St., Union City, CA 94555	01/28/1947	F
334	Arnold		Gonzales	<a href="mailto:arnold.gonzales@gmail.com">arnold.gonzales@gmail.com</a>	408-444-1111	222 Garcia Ave., Mountain View, CA 94403	05/12/1988	M
123	Andy	M	Gonzalez	<a href="mailto:agonzalez@yahoo.com">agonzalez@yahoo.com</a>	510-222-2111	123 Main St., Union City, CA 94555	04/11/1945	M
444	Andy	Matthew	Gonzalez	<a href="mailto:arnold@gonzalez.com">arnold@gonzalez.com</a>	510-222-2111	123 Main St., Union City, CA 94555	01/23/1982	M



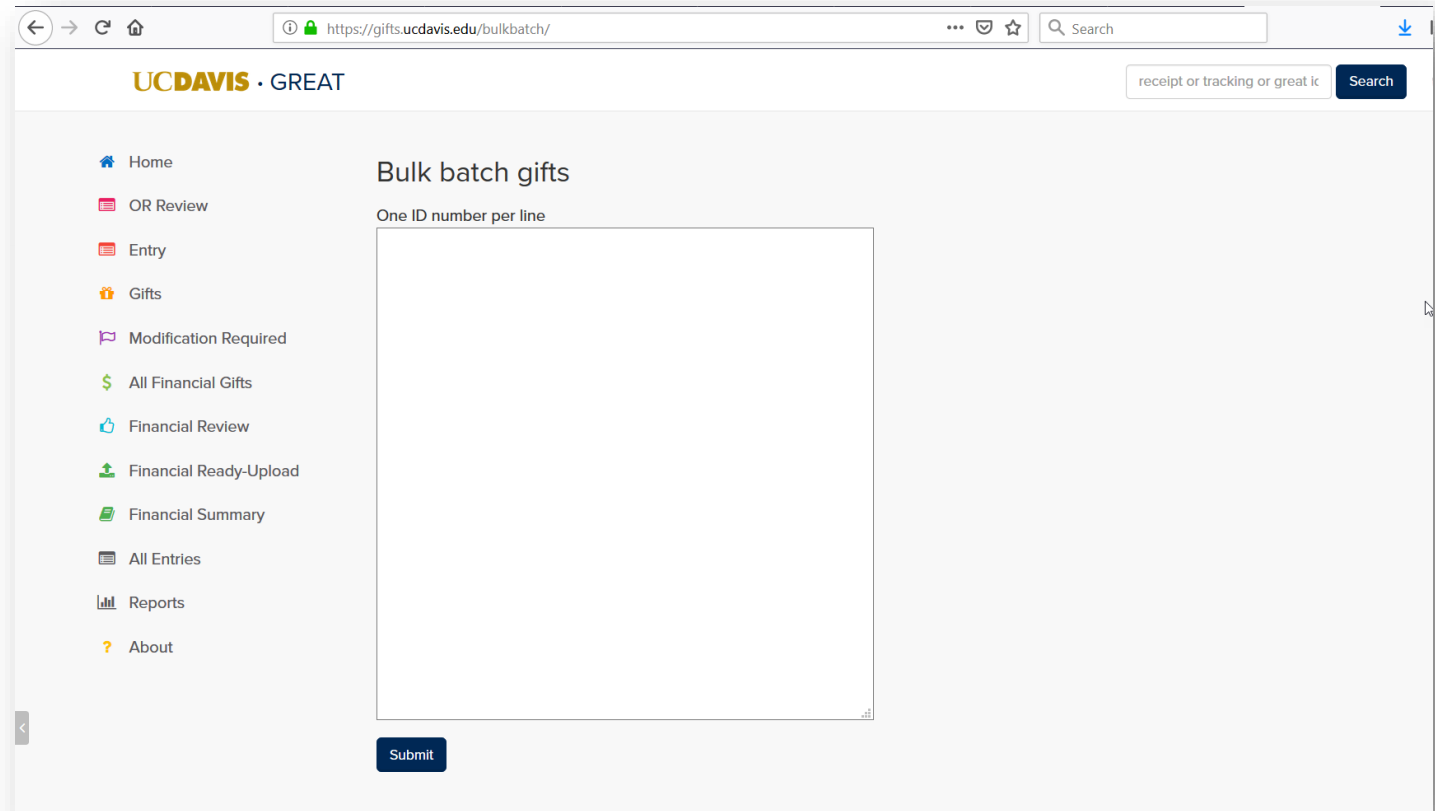


# CT: Contact Data Uploader

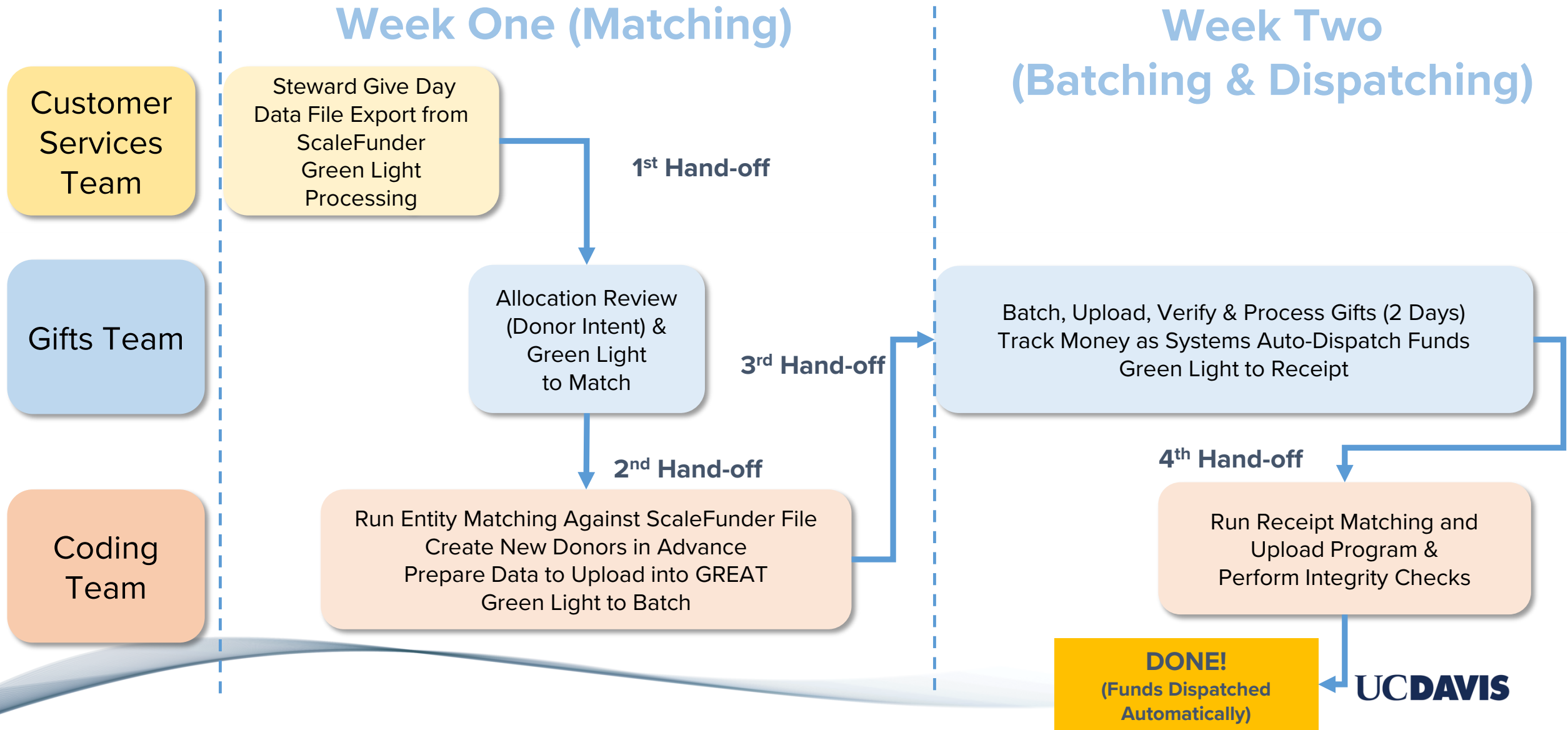


# CT: Bulk Batch Tool

- Allowed us to upload large batches of gifts without having to enter them manually.
- Saved a tremendous amount of time



# Give Day Gift Processing Timeline & Work Flow



# Post-Give-Day Processing Week One: Matching

- Prepared file for entity matching
- Allocation review
- Unmatched entities – created new entity records
- Prepared file for batching

# Post-Give-Day Processing Week Two: Batching

- Two new additional functions added to GREAT, our homegrown gift processing system.
  - Bulk Uploader Tool
    - ScaleFunder CSV file to create gift entries in GREAT in mass
  - Bulk Batch Tool
    - GREAT entries to batch to Advance in mass
- Prepared file to upload in “sizable chunks” to not bog down the GREAT system
  - Usually 7 smaller files of the larger file

# Post-Give-Day Processing Week Two: Dispatching

- File is organized by level of review needed
  - Simple (one gift) – No Touches
  - Multiples –
- Financial Review –
- Attach Receipts -

# Final Reporting



\$2,114,481

Segment

All

\* Including gifts not recorded in Advance, overall total is \$2,189,481.

This is where we are able to tell the story of the breakdown of our donors!

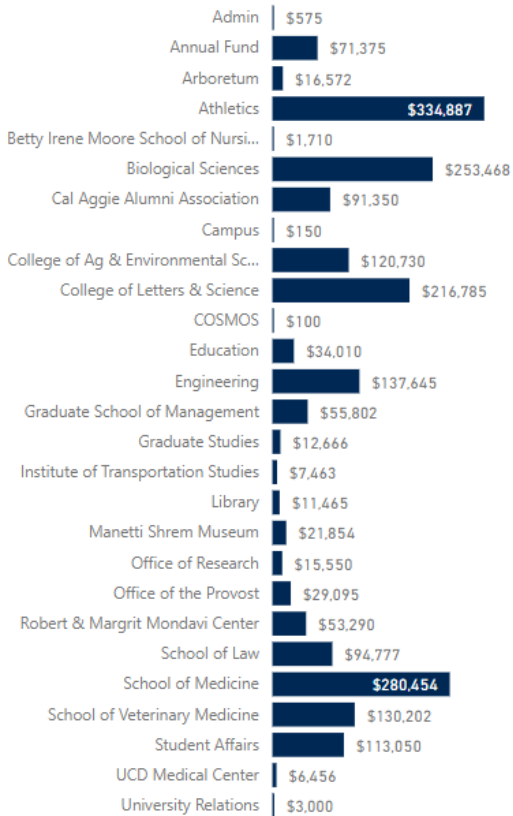
6,183

Donors

4,374

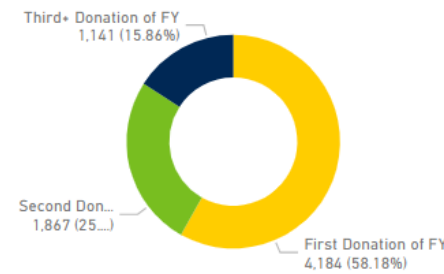
Households

Dollars Raised by Development Area

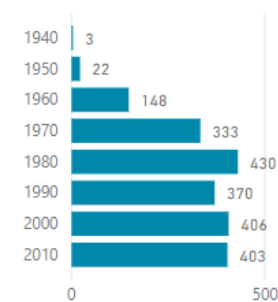


Alumni	Parent	Employee	Grateful Pa	Grateful Clients	Only Donation of FY
2,112	1,195	716	617	338	829
Friend	Student	International	Grateful Clients	Only Donation of FY	
2,034	233	40	338	3,499	

# of Donors by Giving Cadence



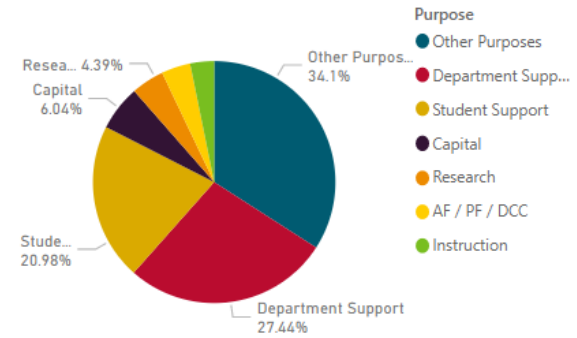
# of Donors by Graduation Decade



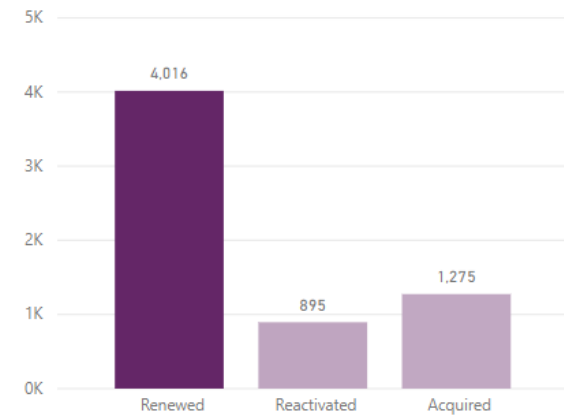
Top 10 Allocations by Dollars Raised

Allocation Description	Dollars Raised
Women's Basketball Development Fund	\$64,551
Ginger and David Moehring Fund for Global Orthopedics	\$61,955
College of Agricultural and Environmental Sciences Experiential Learning Fund	\$60,985
Q-Bio Specialized Tools and Equipment Fund	\$50,000
Reggie Low Endowment in Cardiology	\$50,000
College of Engineering Annual Fund	\$46,930
Dean's Circle	\$46,654
Class of 1968 Gift Fund	\$45,485
Materials Science & Engineering Faculty Support Fund	\$45,000
UC Davis Chancellor's Club	\$31,100

by Purpose



# of Donors and Dollars Raised by Activity



# Takeaways and Lessons Learned

- Map Your Process so You Can Improve it
- Apply Some Agile Principles:
  - Ditch the Multitasking - More Divide Does Not Always Equal More Conquer
  - Transparency Between Teams and Psychological Safety
- Batch your gifts – whatever that means for your shop
  - Low hanging fruit first
  - Assign one gift type to one person, not across people
  - Think through your tribute gift process as soon as possible.
- Gift Acceptance Compliance: Better Done in Advance





# Thank you!

## Please email your questions!



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Advancement Services, UC Davis

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[linkedin.com/in/michelehicks/](https://www.linkedin.com/in/michelehicks/)



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Advancement Services, UC Davis

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[linkedin.com/in/veronica-hoglund/](https://www.linkedin.com/in/veronica-hoglund/)