Give Day at UC Davis

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UC DAVIS
UNIVERSITY OF CALIFORNIA

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

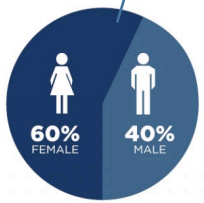
Key Takeaways/Objectives

About UC Davis

35,415 enrolled students

104 MAJORS

$704 million research funding for 2014-2015



2% Gender Non-Binary

20,500 bicycles on campus a day

99 GRADUATE PROGRAMS

Athletics name:
AGGIES

Athletics level:
NCAA Division 1

Intercollegiate sports:
23 varsity teams

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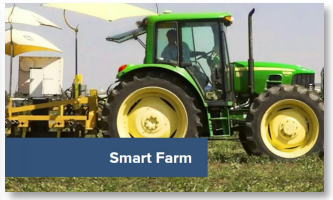
The Big Ideas Campaign at UC Davis

THANKS A BILLION

Last Campaign
$1 Billion

BIG IDEAS

This Campaign
13 Big Ideas & $2 Billion
bigideas.ucdavis.edu



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About UC Davis Development

Development and Alumni Relations Staff (DEVAR)

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

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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

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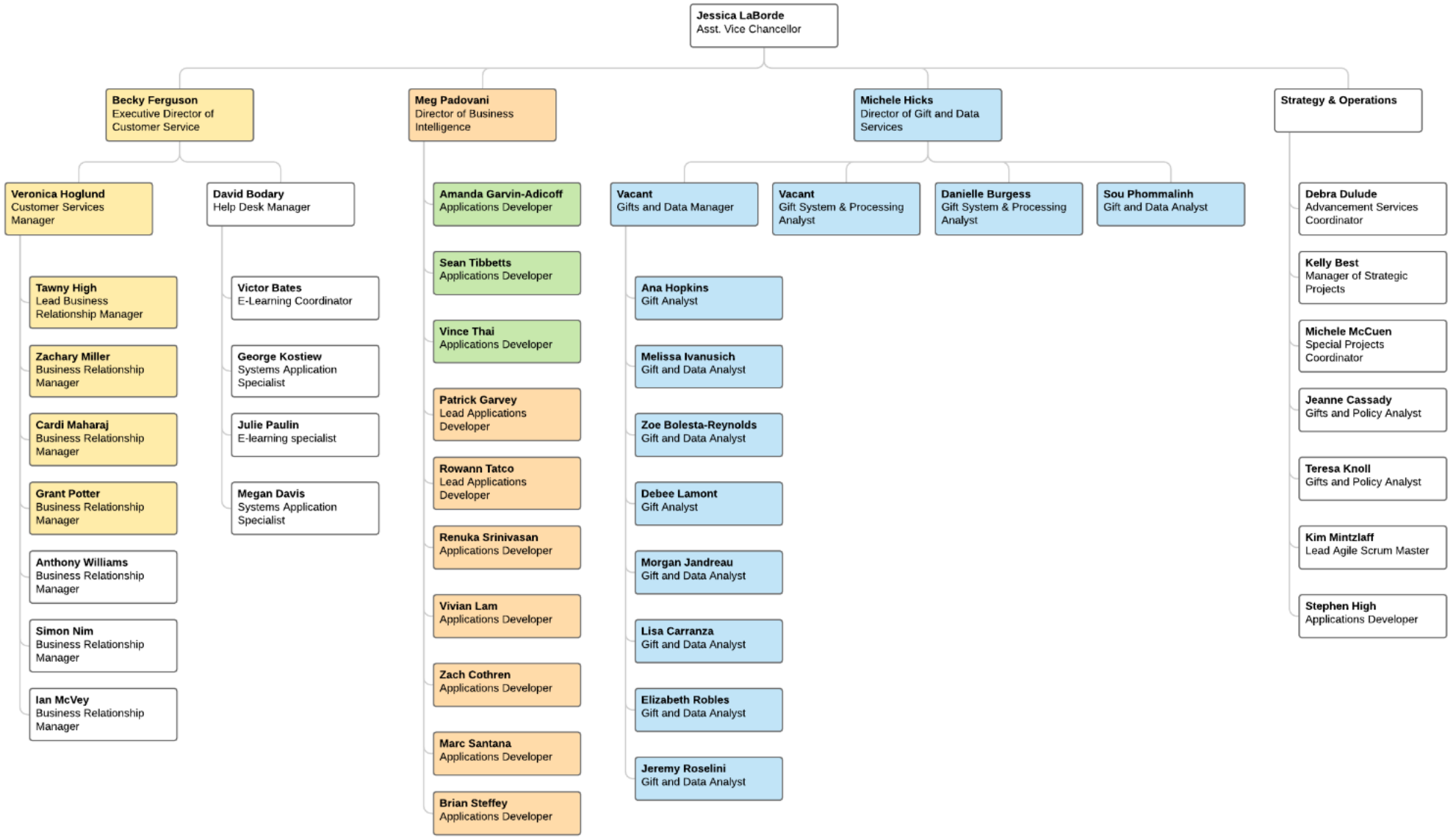
Advancement Services: The People



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

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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

Priority Project
Scrum Board
(1-2 week sprints)

Kanban Board
Customer Requests &
Bug Fixes

Help Desk & Gift and
Data Services
Kanban Board
(Japanese) “Signboard”

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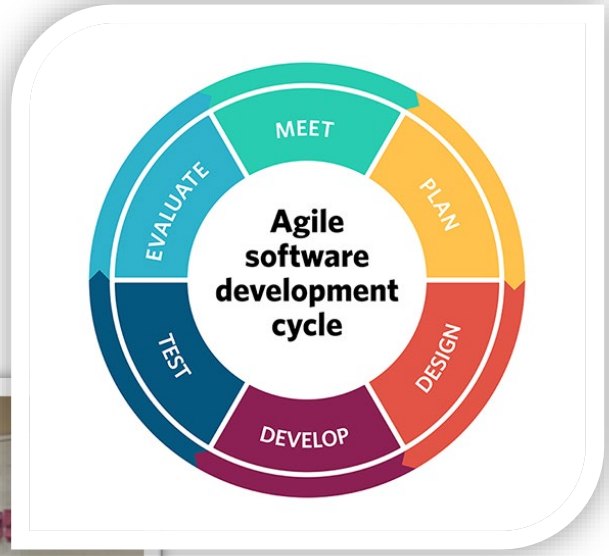
Agile is a Value System

Individuals and interactions over processes and tools

Working software over comprehensive documentation

Customer collaboration over contract negotiation

Responding to change over following a plan



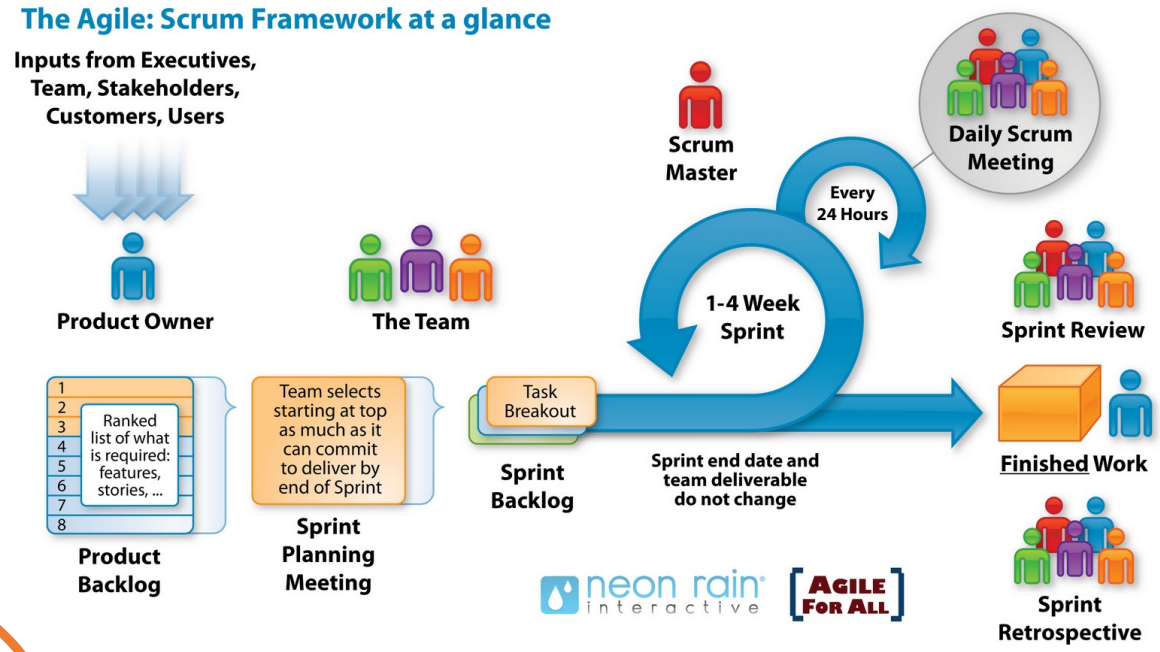
https://agilemanifesto.org/

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*



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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”

https://giveday.ucdavis.edu/

Planned Giving Challenge - Wayne & Jacque Bartholomew

$100,000

THANK YOU to our generous donors for helping us reach our goal of 75 planned giving requests! Your support for the Reggie Low Endowment in Cardiology and Mondavi Center Annual Program Fund is important and very
Thank you to Wayne
omew for providing
nge gift!

COMPLETED

The Sullivan Family Challenge for the Davis Chancellor's Club

$25,000

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!

125 / 125 GIFTS COMPLETED

Davis Chancellor's Club Cabinet Challenge

$16,000

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!

50 / 50 GIFTS COMPLETED

Challenge gifts

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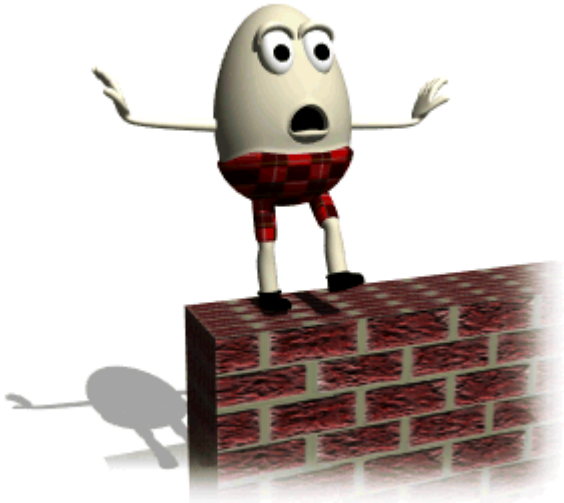
What Give Day Means for Advancement Services

- 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

	Quiet Phase	Jan	Feb	Mar	Apr	GIVE DAY	Apr	May
Customer Services Team	Request Appeal & Campaign Codes, Attend Committee Mtgs	Collect Population Specs & Create Play Book	Review Solicitation Data & Coordinate Challenge Gifts			War Room & Compile Final ScaleFunder Data	Allocation Review	Host Lessons Learned
Solicitation Data Team	Create Appeal & Campaign Codes	Pull Data	Refine Data	Deliver Data	Apply Appeal & Campaign Codes			Attend Lessons Learned
Gifts Team	Set Business Rules for CyberSource	Review Challenge Gifts for Compliance with Gift Policy					Load & Process Gifts	Attend Lessons Learned
Coding Team	Configure CyberSource	Build & Test Mass Receipt Uploader Configure & Test Entity Matching Program Refine & Test Contact Data Loader Program					Run all Programs	Attend Lessons Learned

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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.	Veronica Hoglund Victor Bates	Lessons Learned addition: Work through allocations with Danielle/Victor to update anything OTHER o already on the calendar. 2019 LESSONS LEARNED ADDITION: ++For multiples, specifically - proposal: SFID+_1, SFID+_2, SFID- essentially Need unique idenfier per line item
Monday, April 15, 2019	Provide Guinea pig gifts to gifts team to process right away.	Veronica Hoglund	Indicated in the file. PG/VB
Monday, April 15, 2019	Upload guinea pig gifts to GREAT	Patrick Garvey	
Monday, April 15, 2019	Check guinea pig gifts in KFS	Patrick Garvey	
Monday, April 15, 2019	Once guinea pig gifts are reconciled, push to processing	Patrick Garvey	

RACI

Pro	Con
Very Detailed	Hard to m
Clear ownership	Can be m acting pe
Clear deliverables	None
So many rules – E.g. For a simple task the same **person can** be **Accountable and Responsible**. **Accountabilit y can** only rest with **one person**.	Takes a lo assign rol

Playbook

Pro	Con
	Easy to maintain
	In most cases, 1:1 person accountable per task
	None
	If not done right, can cause confusion

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

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Solicitation Data Team

Quiet Phase:

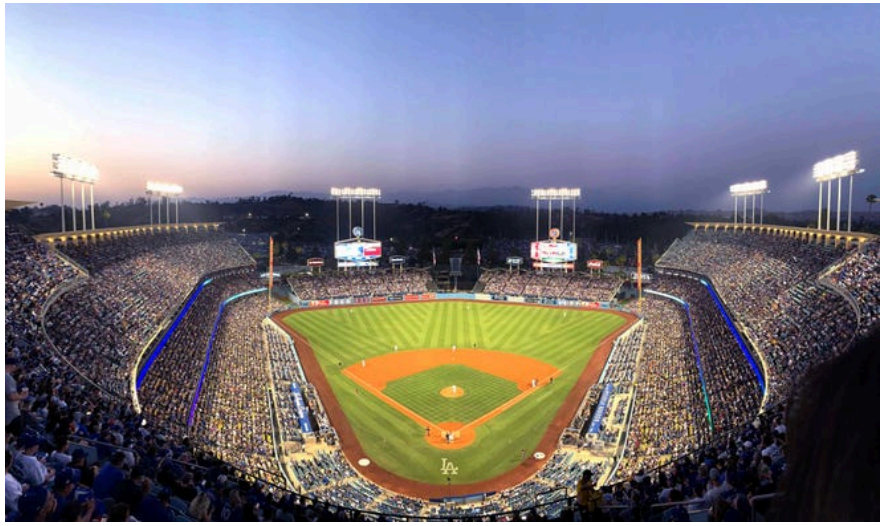
- Create Appeal /Campaign Codes

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)

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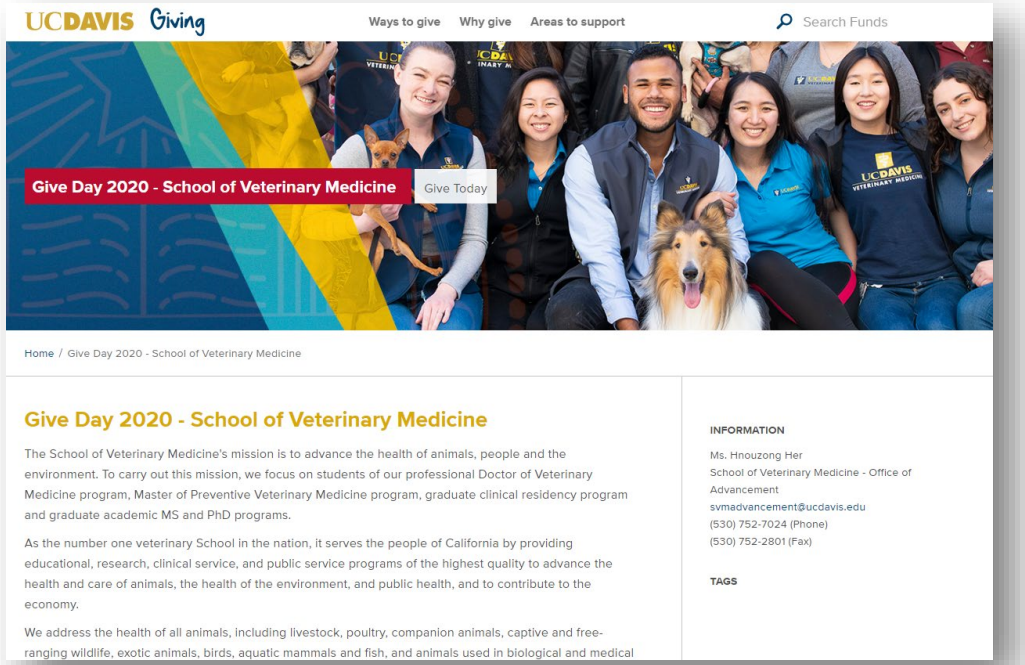
Solicitation Data Team



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Gifts Team – Quiet Phase Planning

Quiet Phase (November - January):

Set CyberSource Business Rules

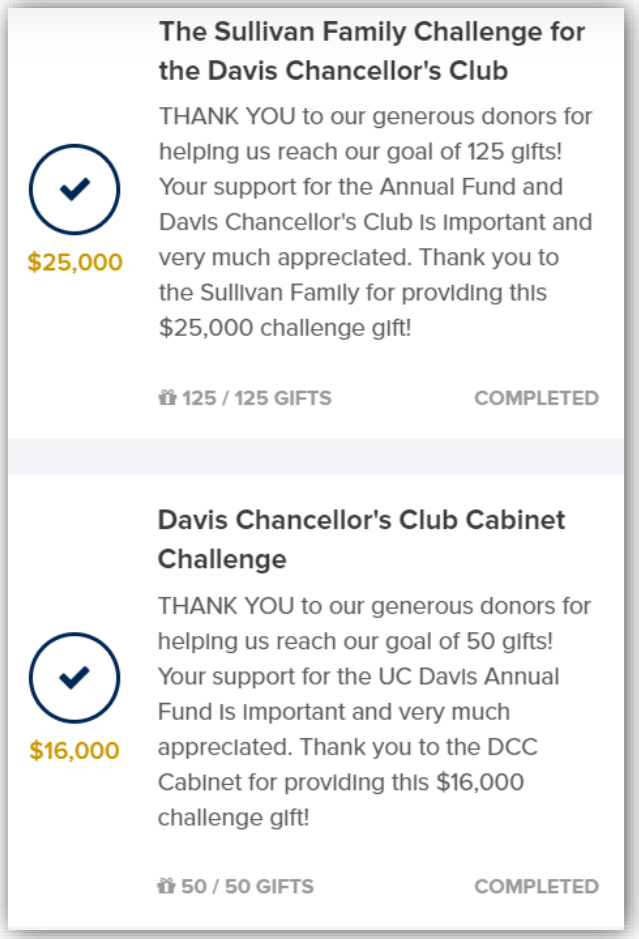
- Gifts Team worked with Coding Team to ensure that Cybersource would work well with our Give Day transactions.

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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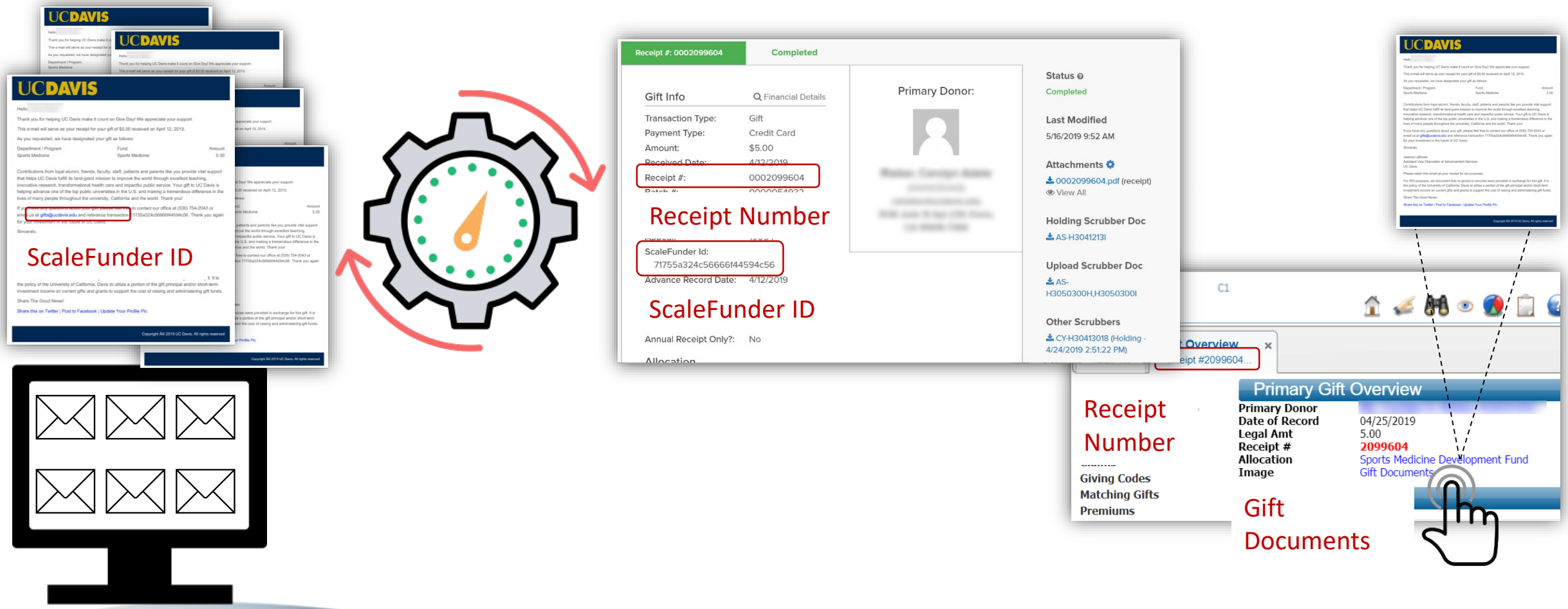
Coding Team (CT): Building Tools to Connect Data

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



CT: Entity Matching

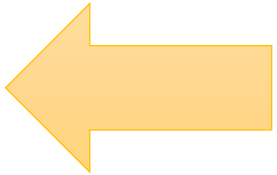
Entity Matching is the task of identifying a record that references the same entity from a different source

Usage

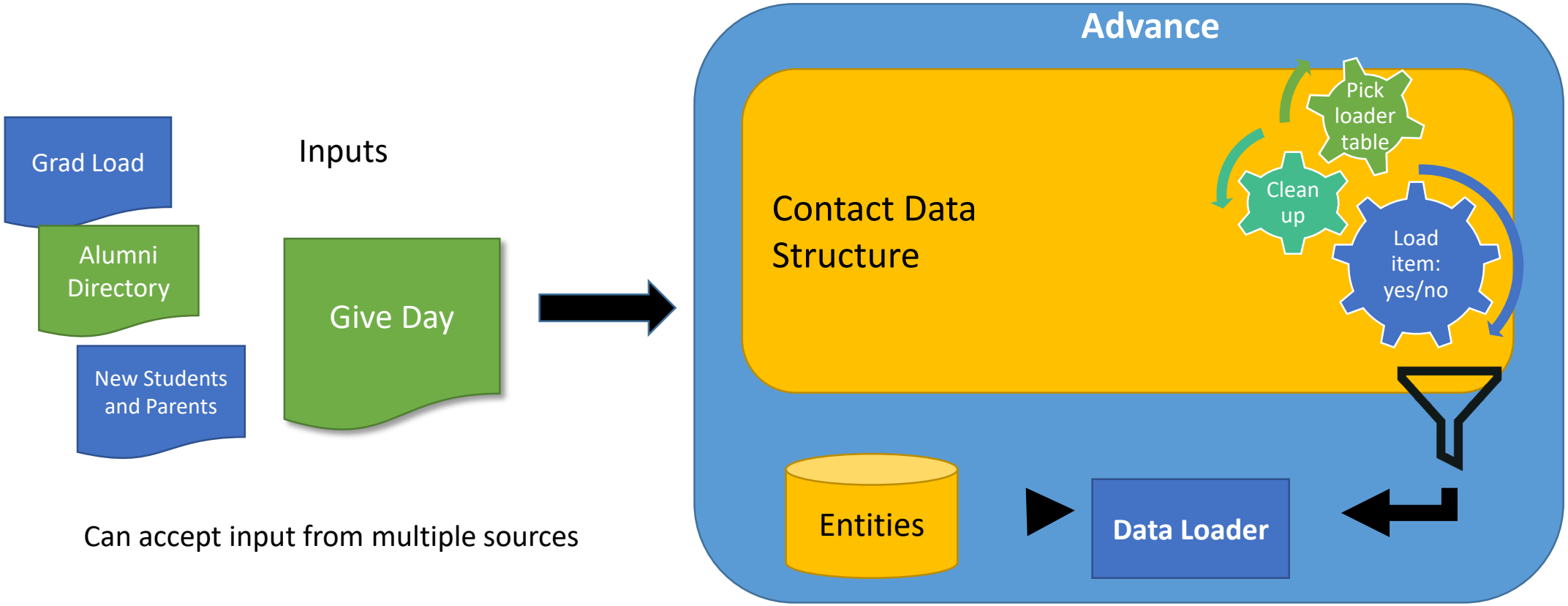
- Give Day
- Admissions Load (Students, Parents etc)
- Online Giving

CT: Entity Matching

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



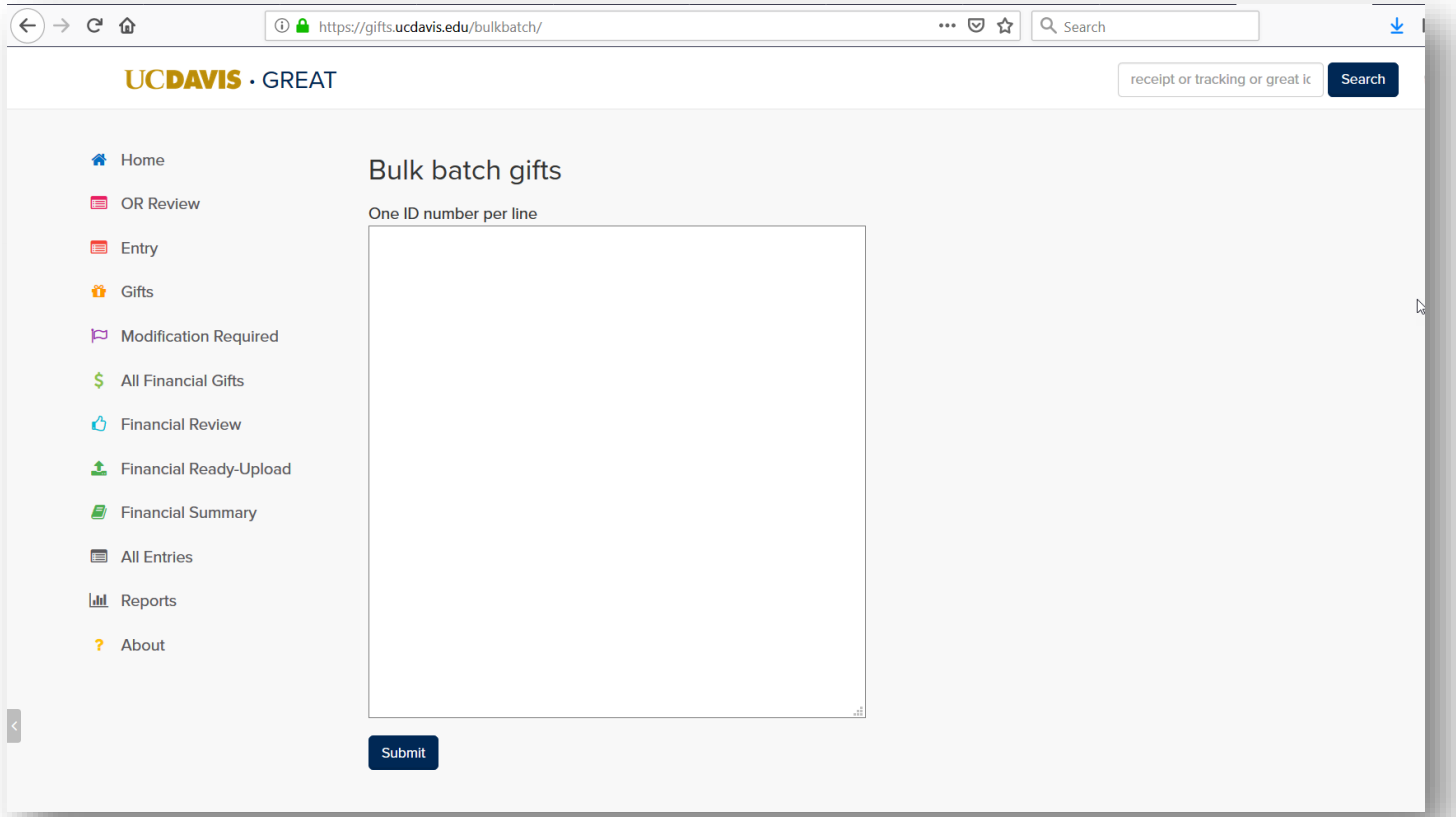
CT: Contact Data Uploader



Can accept input from multiple sources

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

Week One (Matching)

Week Two (Batching & Dispatching)

Customer Services Team

Steward Give Day Data File Export from ScaleFunder
Green Light Processing

1st Hand-off

Gifts Team

Allocation Review (Donor Intent) & Green Light to Match

3rd Hand-off

Batch, Upload, Verify & Process Gifts (2 Days)
Track Money as Systems Auto-Dispatch Funds
Green Light to Receipt

2nd Hand-off

Coding Team

Run Entity Matching Against ScaleFunder File
Create New Donors in Advance
Prepare Data to Upload into GREAT
Green Light to Batch

4th Hand-off

Run Receipt Matching and Upload Program & Perform Integrity Checks

DONE!
(Funds Dispatched Automatically)

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Post-Give-Day Processing Week One: Matching

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

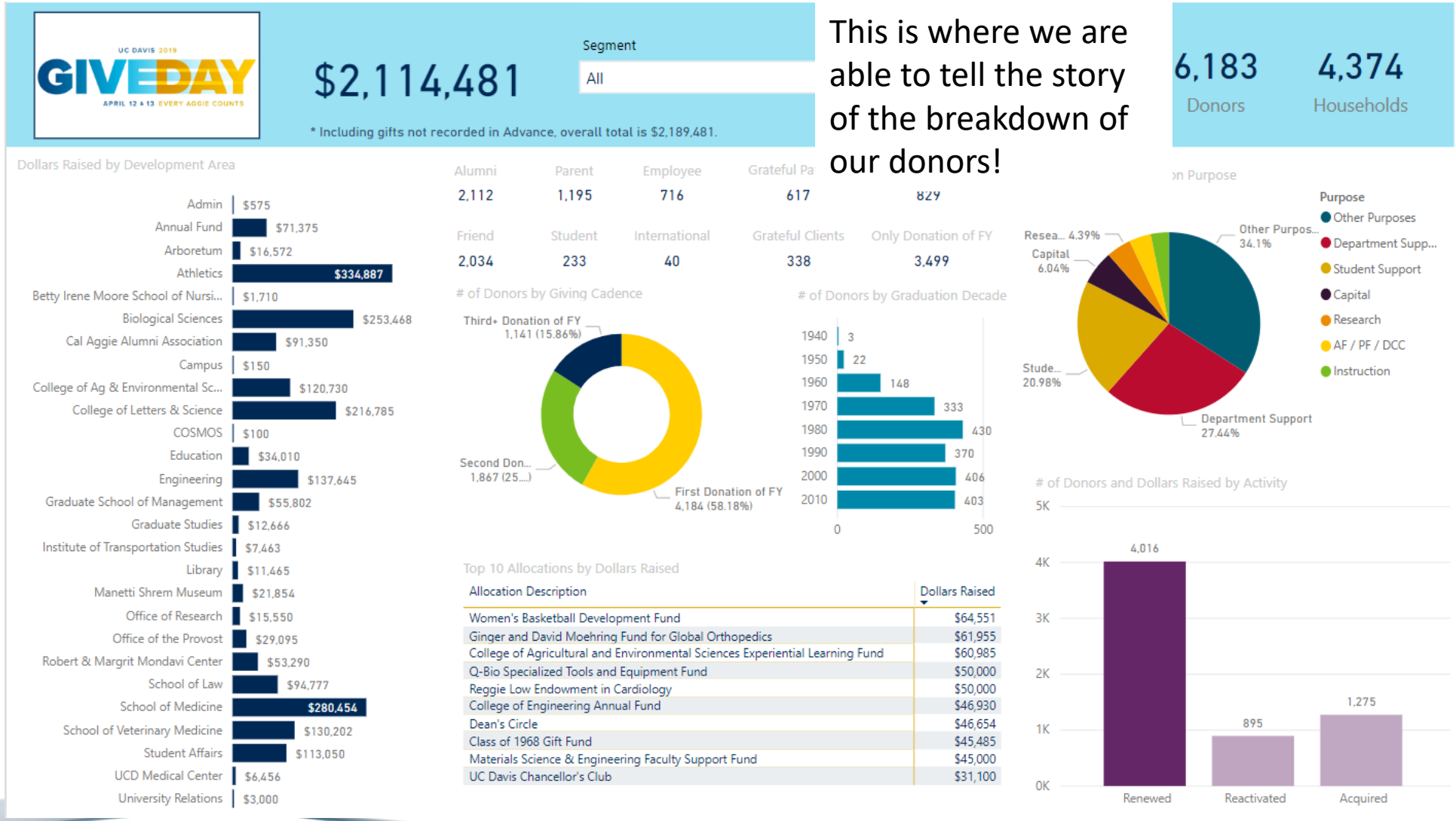
Post-Give-Day Processing Week Two: Batching

- 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



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

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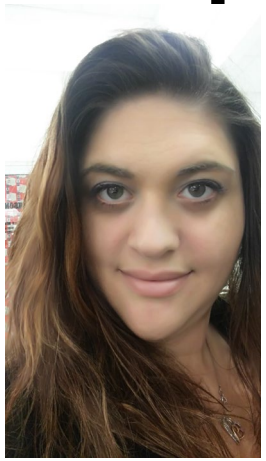
Takeaways and Lessons Learned

- 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

Cherry, K. (2019). How Multitasking Affects Productivity and Brain Health. Retrieved From https://www.verywellmind.com/multitasking-2795003

Thank you!
Please email your questions!



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