

Raise \$200m, 50,000 alumni, "happy" donors

supports

Federated culture, State restrictions

constrains

University Gifting Process

Confirm Gift Intent

Create Gift Agreement

Approve Gift Agreement

Set Up Fund

Receive Gift

Deposit Gift

Acknowledge Gift

Workflow Design

Information System/ IT

Motivation & Measurement

Human Resources & Organization

Policy & Rules

Facilities/ Physical Environment

-MOU and Gift Acceptance process have significant back-and-forth flow
-Requirements change based on gift types
-Lack of transparency and communication across the process

-Gifting system is not consistently used as the system of record
-Multiple copies of data exist
-No central contact system
-All related documents/data are not stored digitally
-Federated groups have autonomy over IT systems

-Donation officers are measured predominantly on new money
-Few incentives for stewardship
-No "bonus" structure
-No measure of time invested related to gift size
-Need to balance donor expectations with processing complicated gifts

-Donation officers and Business Manager turnover causes loss of productivity
-Training is informal and optional
-Gift acceptance can not scale up at high times and is understaffed
-No ownership of process from beginning to end
-Conflicting priorities across groups

-MOUs require many live signatures
-All MOUs must be reviewed by a single person
-No pre-approved MOU forms exist
-No standard acknowledgment schedule/style
-Colleges/schools have different rules

-Distributed workforce
-Heavy reliance on inter-office mail and couriers
-Many ways information & documentation is transmitted with limited tracking