

University Gifting Analysis

2015

University Process Innovation

Background

The College Park Foundation wanted to take a closer look at the current process by which they accept gifts in an effort to improve the efficiency of the process and to gain insights into their pipeline. This process analysis effort provided the Foundation the opportunity to better understand where they could make critical improvements to their operations. While they had begun improvement efforts prior to the analysis, there were significant new opportunities to increase the speed and accuracy of their process and improve the overall experience with their donors.

Client Challenge

The Foundation was in the enviable position that every year they were bringing in more gifts. They had made some investments in human resources, but as their volume increased, they had not had time to take a holistic look at the process to ensure it could support the new level of activity. Their main objectives for this project were to:

- Make sure donors were happy
- Create a faster process for everyone involved
- Ensure gifts were in compliance and auditable.

UPI Process Approach & Recommendations

The UPI team started the process with a meeting with the sponsor and his leadership team to better understand the project objectives and various groups involved in the gifting process. Next twenty interviews with faculty and staff from over ten departments were conducted to document the existing process and identify the challenge areas.

The UPI team put together a comprehensive swimlane diagram showing the process starting at the discussion of a possible donation, through the gift receipt, and to the point when the money is in the bank and the donor is acknowledged. A minimum

of 40 steps were identified which involved at least 15 different people to process a single donation, and that assumed there were no complications which were also common. Many challenges were highlighted along the way, but ultimately the biggest problem was that the growing volume of activity. The increased fundraising could not be sustained with existing processes which were not scalable. There was a backlog of

Key Takeaways

- Legacy processes are not scaling to increased load
- IT systems are disbursed and non-integrated
- A lack of consistency in practice exists leading to high administrative cost
- Existing process are manual processes with limited use of technology

work to be done, not enough people to do it, and very limited use of technology to automate manual, labor intensive actions. Gifts were not being deposited or acknowledged in a timely fashion which negatively affected everyone involved. Additionally, no one person understood the process from start to finish so previous efforts to improve the process were isolated and while they may have improved one area, it was at the detriment of another.

At the conclusion of the analysis, a facilitated workshop was conducted with all process participants and the group worked together to ensure the process was completely documented. This documentation was eye opening and immediately triggered suggestions from the group on how to improve the process. The entire group left the workshop with a much better understanding of the end to end process and the challenges they needed to overcome. Recommendations were delivered to the Foundation leaders and included standardizing many of the existing documents, more training and self-help materials, making use of electronic signatures and routing, and development of software to track, route, and process future gifts. The analysis and workshop changed the direction of the efforts they had already begun.

Results

After the UPI analysis was delivered and shared, change started to happen almost immediately. The focus on existing challenges and documentation of the process gave leadership the ammunition to initiate change. The various groups involved started communicating and collaborating to ensure smoother handoffs and training was made a higher priority. Additionally, a new direction was given to the development that was already underway with the IT system and about a year after our work completed, the first version of the software was delivered and has changed the way the Foundation processes gifts. There has been a noticeable cost and time savings, and the quality of the services they provide has been elevated.

“Working with UPI allowed the us to take a broad, objective look at a complex process and identify areas for improvement and refinement. Through their assessment and report, we learned a great deal about our strengths and deficiencies and have utilized their observations and recommendations to improve our programs and inform our long-term plans for staffing, systems and operations.”

- Fulvio Cativo