

# ENABLING ADVANCED ANALYTIC TOOLS AND ACCESS TO DATA

Bringing technology and people  
together for better analytics

A revamped session from Apra PD 2022



# AGENDA

Providing actionable data

Encouraging strategic questions

Analyzing the “right” things

Creating strong partnership

Data access

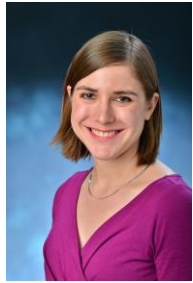
Data definitions

Personalization vs. standardization

<https://app.sli.do/event/7UxzvLb6QRj6C6VHJ71HKT/embed/polls/c94cdffc-21c6-4f63-ba58-ea8cb7bb872d>



# SPEAKER INTRODUCTIONS



Katie Princo  
Assistant Director  
Research & Analytics



Aron Sage  
Assistant Director  
Business Intelligence

- 12 years with CU
- University of Colorado MMus in Composition '13
- 5 years of campus Advancement experience
- 5 years with the Research & Analytics team
- The coolest thing I've done at CU:
  - Learn to use Python for analyzing spreadsheets too big for Excel

- 10 years with CU
- Advancement & Central Information Systems experience
- The coolest thing I've done at CU:
  - Built out Cognos Business Intelligence for Advancement



# UNIVERSITY OF COLORADO INTRODUCTION

Decentralized reporting structure and campuses

Centralized Advancement support services

- Often somewhat partially duplicated on the campuses

Other campuses:

- CU Foundation
- University of Colorado Boulder
- University of Colorado Denver
- University of Colorado Anschutz Medical Campus
- University of Colorado Colorado Springs





# TOPIC 1

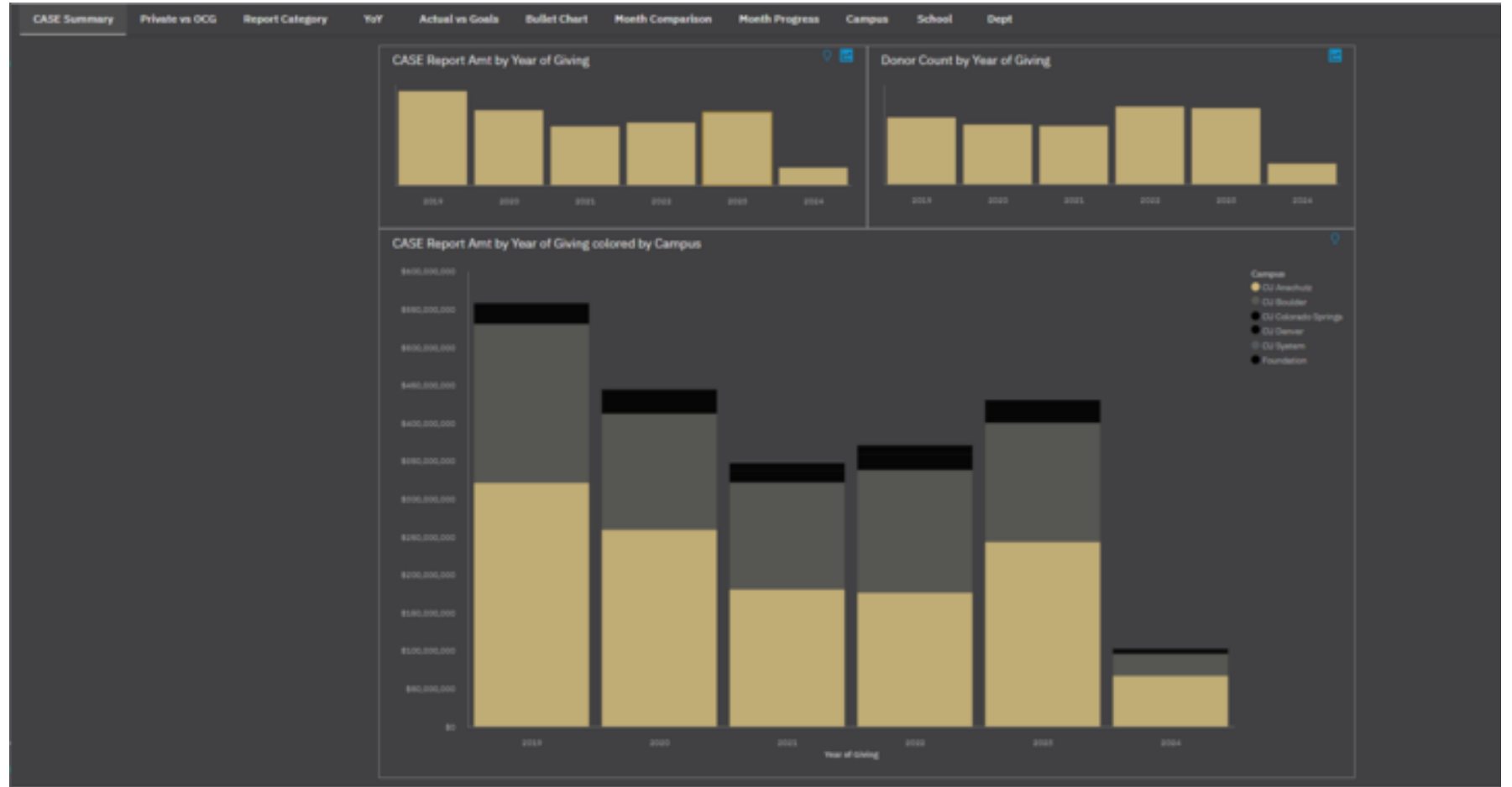
## How do you as a prospect development professional provide actionable data?

- Aron's perspective
  - Levels of access for different user groups
  - Tier 1 – Central Advancement key stakeholders – SQL access
    - Includes ad hoc training and code review
  - Tier 2 – Savvy campus users – data model access/pre-calculated fields
  - Tier 3 – Standard users – reports & dashboards – Ex. President's fundraising dashboard



# EXAMPLE

## CASE Fundraising Dashboard



# TOPIC 1

How do you as a prospect development professional or other partner provide actionable data?

- Katie
  - Ensure you understand context with standard research requests
  - Be willing to explore with them and try something new to fill their need!
  - Fundraising analyses – Ex. Anschutz college analyses



# EXAMPLE

## Analysis

- Request
- Recommendations
- Prospect pool
- Giving trends analysis
- Donor demographics
- Counts of donors by gift band, dollars raised
- Donor retention
- Annual giving reports and insights
- Unmanaged and managed prospect demographics

ADVANCEMENT PROSPECT DEVELOPMENT & RESEARCH

University of Colorado

PD & Research Locations: Chelsea Lewis & Katie Perico  
Date Prepared: DATE  
Requested by: CUSTOMER

ANALYSIS

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### PURPOSE

CUSTOMER requested an assessment of the fundraising potential for the CU School of Underwater Basket Weaving. They are benchmarking this school with peers as part of their strategic planning process. One of the focus areas for the strategic plan (draft version) is diversifying financial resources.

### RECOMMENDATION

The CU School of Underwater Basket Weaving (SUBW) has a healthy prospect pool of alumni, donors, and organizations. Many donors to SUBW also give elsewhere at CU.

When reviewing the SUBW pool, it is clear it is appropriately managed. Those with high capacity, high affinity, and a history of giving to CU are managed primarily by staff supporting that school.

27% of recent (past 5 years) donors to the SUBW are alumni of the SUBW, though only one alum is giving at a major gift level. Increasing engagement with individual donors could increase giving, especially giving by SUBW alumni in particular. Focusing on individual donors whose giving falls in the \$1,000-\$9,999 band could also lead to increased major gift activity.

### Overall SUBW Pool

The pool analyzed includes all SUBW alumni, including those who are not donors, and all donors to SUBW who have made a gift in the past 5 years (since July 1, 2015, to capture 5 full fiscal years). INSERT ADDITIONAL POOL CRITERIA HERE

The pool contains 3,447 entities who would be considered prospects for the SUBW. 3,346 of these entities are individuals, while 101 are organizations. 869 are donors, including 237 donors who are also alumni of the SUBW. 27% of donors to the SUBW are also alumni of the SUBW. Organization donors remainder of the donor pool is composed primarily of alumni to other programs at CU (39% of overall SUBW donor pool) and friends (13%).

### Giving Trends of the Prospect Pool

Based on our pool, the giving analysis below focuses on donors who have made a gift to SUBW in the past 5 years (since July 1, 2015). Only one SUBW alum is giving at a major gift level. Although the pool has a very low number of organization donors, they make up 71% of the donors who have made a gift of \$10,000 or more to SUBW. There is a pool of 77 individual donors and 25 organization donors with lifetime giving in the \$1,000-\$9,999 band who could be good prospects to review to convert to major gift donors. Of those 77 individuals, 7 have capacity ratings of \$250,000-\$999,999, 22 have capacities of \$100,000-\$249,999, and 12 have capacity ratings of \$25,000-\$99,999, totaling 41 individuals with major gift capacity. 31 of those 77 individuals, plus 3 organizations, are currently managed prospects.

SUBW Lifetime Giving Total	People / Individual Donors			Organizations	Total
	SUBW Alumni	Non-SUBW Alumni			
\$1,000,000+	0	2		6	8
\$100,000-\$999,999	1	8		24	33
\$10,000-\$9,999	0	14		30	44
\$1,000-\$9,999	10	67		25	102
Less than \$1,000	226	440		16	682
<b>Total</b>	<b>237</b>	<b>531</b>	<b>101</b>		<b>869</b>

There are 2,815 SUBW alumni in this pool, 2,578 of whom have never made a gift to the SUBW (91%). Acquisition efforts around this alumni pool could help build the donor base. Of the alumni who are not also donors to SUBW, 234 have giving to CU, 1 in the lifetime \$100,000-\$999,999 band and 4 in the \$10,000-\$9,999 band. 112 non-SUBW donor alumni have giving elsewhere at CU.

Lifetime Giving Range	Giving to CU		Giving to Basket Weaving	
	# of Prospects	% of Pool	# of Prospects	% of Pool
\$1,000,000+	33	0.96%	8	0.23%
\$100,000-\$999,999	42	1.22%	33	0.96%
\$10,000-\$9,999	51	1.48%	44	1.28%
\$1,000-\$9,999	134	3.89%	102	2.96%
Less than \$1,000	843	24.45%	682	19.75%
Never given	2,144	68.00%	2578	74.75%
<b>Total Overall</b>	<b>3,447</b>		<b>3,447</b>	

The chart above shows a lack of giving to SUBW within its donor and alumni prospect pool. Of the 33 donors to CU in this pool with giving of \$1 million or more, 11 percent on average of these prospect's of their CU giving to the SUBW, with only one donor (SPECIFIC DONOR INFO) contributing 100% donors giving less than 10% of their CU giving to SUBW.

Organizations make up a substantial part of the group of donors to SUBW who have given \$10,000 or more lifetime to SUBW (71% of donors are organizations). They are however most likely to have a low percentage of their CU giving allocated for the SUBW. For individuals and organizations who have given more than \$10,000 lifetime to SUBW, the average percentage of their CU giving that went to the SUBW is 38% for organizations and 71% for individuals.

### Overall Giving Trends

The following chart tracks all donors who have made a single gift of \$10,000 or more to the SUBW, by last gift date to the SUBW, broken down by organizations and individuals. Most of the individual donors





# CHECK OUT EXAMPLES!



## DATA SCIENCE

### What It Really Means to Provide a Fundraising Analysis: Part 2

By Katie Princo | FEBRUARY 02, 2023

Given our industry's focus on data-driven decision-making, prospect researchers are increasingly asked to amp up their analytic offerings and capabilities. In Part 2 of this series, follow along for some analysis resources, with comments from the author.

[connections.aprahome.org/Data-Science](https://connections.aprahome.org/Data-Science)

Part 1 – philosophy

Part 2 – Examples!

Sample analysis

Prospect analytics/identification video

Sample Prospecting excel



## DATA SCIENCE

### What It Really Means to Provide a Fundraising Analysis: Part 1

By Katie Princo | DECEMBER 13, 2022

Given our industry's focus on data-driven decision-making, prospect researchers are increasingly asked to amp up their analytic offerings and capabilities. But what does that entail? In Part 1 of this series, learn how the research and analytics team at the University of Colorado developed their own fundraising analysis process.



PROSPECT DEVELOPMENT 2022 | #ApraPD2022



# TOPIC 2

How do you encourage or influence your partners to ask strategic questions and ensure you can efficiently answer?


- Aron
  - Asking questions
  - Figure out the problem they are trying to solve
  - Understanding where the data exists
- Katie
  - Asking questions
  - Knowing our partners – Ex. Prospecting Plans



# EXAMPLE

## Prospecting Plans

- Team
- Prospecting Goal(s)
- Key Initiatives
- Key Constituencies
- Methodology
- College Top Prospects
- Regions
- Historical Knowledge
- Tools

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**PROSPECTING PLAN**

**School of Underwater Basket Weaving Advancement Team**

**TEAM:**  
Yesmin Hardy, Interim Assistant Dean for Advancement  
Cal Regale, Director of Development  
Jared Center, Assistant Director of Development  
Noel Samson, Assistant Director of Annual Giving and Alumni Engagement  
Jessica Nevarez, Program Manager for Strategy and Stewardship  
Theresa Benning, Development Assistant

**PROSPECTING GOALS**  
*The School of Underwater Basket Weaving team is primarily focused on qualifying and disqualify new prospects added to portfolios in Spring, 2023. Their portfolios currently seem large though much of this is due to the new prospects still in identification. They are especially focused on an endowment fundraising as part of their campaign, which needs to continue to be the focus for their portfolios.*

*They want to strengthen their work on IFR, especially foundations. Board members and other donors especially feel this could be a missed opportunity.*


*Their team is also hiring a new Assistant Dean for Advancement, who will need to be onboarded and will also likely have their own goals for the team.*

**KEY INITIATIVES**

- SUBW+ Campaign
  - Primary focus for the team
  - \$50,000,000 campaign
    - Originally split where half was to go to endowment, but it was recently simplified to be a total, overall goal
    - \$6.3 million remaining
- Emerging Priorities:
  - SUBW Dean's fund – Increase funding to support discretionary costs, including around facilities
  - Emergency funds for students – Increased need for current use support (vs. endowment)

**KEY CONSTITUENCIES**

- Alumni
  - Continuing to build program
  - Work to distinguish themselves within the larger campus framework
  - Engaging with alumni virtually – happy hours, alumni highlights

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- Attendance at regional conferences
- Engagement is still pretty low. Alumni are active on social media. Alumni donation participation is low; work to increase annual gifts
- Not a major constituency for major gift donors at this time, though this could change as the program grows. Older alumni have been coming forward recently with major gifts
- Younger alumni are interested in connecting; older alumni are more interested in giving

• Donors/Friends

- Consumers of SUBW products
- Because this group are primarily connected via the SUBW online shop, this is a nation-wide pool
  - Additional local pool based out of the student-run SUBW physical store
- Includes local leaders
- They also are the spouses of many tribute endowments, memorial funds family members set up to honor a loved one's passion for underwater basket weaving. The family may not have any connection to CU, but they are part of the local community and will direct the giving here. Many of these are memorial scholarship endowments
- Funds have also been set up as tributes to faculty members or alumni. Strong affinity for past faculty and alumni. Major gift donors can be cultivated from these donor pools

• Faculty and Staff

- A lot of them gave during the emergency building initiative. Because of this, many of them are appearing on prospect lists as recent donors with high affinity, but they may not necessarily be top prospects. There was strong encouragement to give as part of this short-term capital fundraising initiative in 2018 that may not translate to long-term potential right now
- Emeritus and retired faculty are better prospects and may already be engaged

• IFR

- Sponsorships for SUBW
- Strong relationships with family foundations and smaller community funds (ex. Named foundation, Other Named Foundation, SYZ family, etc.). When these exist, the team does a good job managing these relationships, which are approached like individual relationships
- Lot of opportunity in this realm, not a top priority over individual prospects right now

**METHODOLOGY**

- Applying the capacity + affinity + propensity model
  - Will be useful in the future to help segment travel, prospect, and alumni lists
  - \$25,000 capacity threshold
  - Affinity includes purchasing history for SUBW
- Exclusions to account for:
  - Previously disqualified prospects – there are new names they should focus on, so don't refer prospects who have been disqualified recently (past 5 years)



# TOPIC 3

## How do you ensure you're analyzing the “right” things without wasting time?

- Katie
  - This will always be a challenge
  - Relates to the above (you have to know what question they're trying to answer)
  - Struggles with acquiring the data – Ex. 1, Screening results analysis, Ex. 2, Parent data model





# EXAMPLE

## Screening Analysis

- Stats
- Changes to scores
- Demographic changes
- Managed prospects with changes

- 1,385,823 householded capacity results returned by vendor
  - 1,383,725 householded existing results this was compared to\*
  - 2,295 Research Donor Scores and 336 Development Capacity Scores removed from analysis
  - 1,112,225 households with new screening results and prior scores in Advance for comparison
  - 298,232 scores increased (27%)
  - 84,337 scores decreased (8%)
  - 729,656 scores stayed the same (65%)
  - 43,218 scores increased by 1 rating level
  - 20,851 scores decreased by 1 rating level
- There were very few scores that decreased overall this year. Last year there was a big shift with people being Unable to Rate increasing to the \$2,500-\$9,999 band. There don't seem to be any big changes like that this year; the increased proportion appears to be reasonable.

The biggest shifts changing scores were:

Current Advance Score	New Vendor Rating	Count of affected households
7 (\$2,500-\$9,999)	9 (Unable to Rate)	200,937
7 (\$2,500-\$9,999)	Screened, No result	19,300
7 (\$2,500-\$9,999)	5 (\$25,000-\$99,999)	15,568
6 (\$10,000-\$24,999)	9 (Unable to Rate)	14,727
5 (\$25,000-\$99,999)	6 (\$10,000-\$24,999)	12,226
5 (\$25,000-\$99,999)	7 (\$2,500-\$9,999)	13,524
5 (\$25,000-\$99,999)	9 (Unable to Rate)	11,568
4 (\$100,000-\$249,999)	5 (\$25,000-\$99,999)	11,320

### Demographic changes:

I created pivot tables comparing how someone's capacity changed (first column) compared to how demographic factors changed this year, such as real estate totals, count of real estate, # of states in which they own real estate, and SEC stock values. The trend below that seems interesting to me and perhaps worth investigating is...





# EXAMPLE

## Parent Data Model

### Process for Identifying Top Freshmen Parents

Last updated 5/19/2022

#### Top Tier Criteria

- *Confirmed* DonorSearch capacity rating of 1 or 2 (\$1 million or more in capacity)
- *Confirmed* \$1 million or more in charitable giving (outside of CU)
- Tier 1 PLS High School (select in-state school and highly ranked out of state schools)

#### Second Tier Criteria

- *Confirmed* DonorSearch capacity rating of 3 (\$250,000 or more in capacity)
- *Confirmed* Windfall estimated net worth of \$20 million or more (capacity indicator)
- *Confirmed* \$100,000-\$999,999 in charitable giving (outside of CU)
- *Confirmed* \$1,000 or more in charitable giving to education (non-higher ed, outside of CU)
- Tier 2 PLS High School
- Anyone from this list of elite boarding schools from [Business Insider](#)

#### Lower Tier Criteria

- *Confirmed* DonorSearch capacity rating of 4 (\$100,000 or more in capacity)
- *Confirmed* Windfall estimated net worth of \$10 million or more (capacity indicator)
- *Confirmed* \$100,00 or more in SEC-reportable stock (capacity indicator)
- *Confirmed* \$25,000 or more in giving to higher education (outside of CU)
- Tier 3 PLS High School (primarily schools in Colorado)

#### Deprioritized

- In 2022, parents who are also alumni, faculty, or staff of CU will be deprioritized in the prospect identification process. This means they must have more of the above to appear on the list
  - This is especially true for those with giving to UCB Athletics

Within these tiers, the following criteria are reviewed and can disqualify a prospect from the top 400 list (they will remain on the top 1,500 list):

- Lives in San Francisco, Southern California, or the Front Range and their capacity rating is based on the value of only one home not purchased in the past 5 years
- Prior DQ by the PGBAP team or another CU unit (Katie and Brittany will review these together)

As previously noted that prospects who live on the San Francisco Peninsula or those who live in Rancho Santa Fe with a PO box as their primary mailing address tend to be better prospects; these are prioritized in these regions



# TOPIC 3

How do you ensure you're analyzing the “right” things without wasting time?

- Aron
  - Low-fidelity approach – Ex. Low-fidelity diagram
  - Capturing requirement documents – Ex. Requirements document



# EXAMPLE

## Low Fidelity Diagram



# EXAMPLE

## Requirements Document

- Report overview
- Report presentation
- Stakeholders
- Scope of work
- Timeline
- Team members
- Report specifications

Report Name (Update)

Statement of Work  
Business Intelligence  
Central Advancement  
Date Approved: June 1, 2019

### Project Overview

Campus/Unit: Requesting Unit Name, Campus

Reporting Service: Build/Update Advancement Intelligence Report

Ticket Number (Monday Card): 111111

### Report Specification and General Information

Business Description:

Business Purpose:

Report Owner:

Target Users:

Acceptable Response Time Performance:

Security Requirements:

Sample Report Provided (Y / N)?

Sample Report Name / Location:

Is System training on report needed?

Default Preferred Viewing Method:

Estimated Level of Effort  
(Extremely High, High, Med, Low):



# TOPIC 4

How do you get access to data without needing customized reports or help from other areas of the organization?

- Aron
  - Updates to existing reports
  - Drill throughs
  - Providing access to data tools – Ex. Data modules

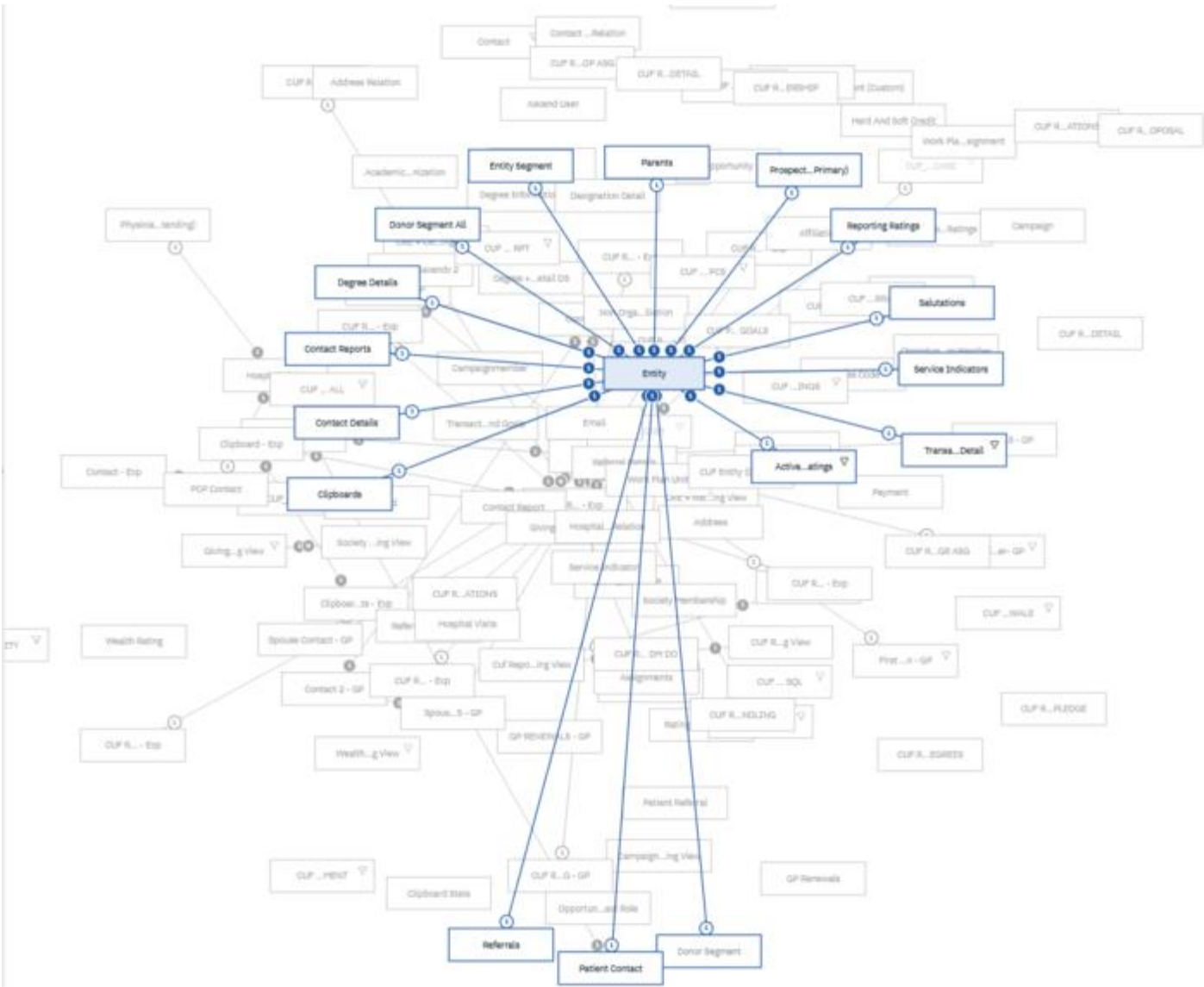
*Remember – the data also changes, why does this look different now?*





# EXAMPLE

## Data Modules



# TOPIC 4

How do you get access to data without needing customized reports or help from other areas of the organization?

- Katie
  - Getting access to the back-end
  - Documenting our process and saving workbooks/data – Ex. Alumni dashboards

*Remember – the data also changes, why does this look different now?*



# EXAMPLE

## Alumni dashboards

University of Colorado School of Physical Activity   CU Anschutz										
Alumni:		Graduate Student (Current & Studies)	Residents - Interns & Fellows Only	Certificates Only	SOA Es (2012-2019)	Family & Counsel (2012-2019)	MidL & Counsel (1989-1999)	Retirees (1984-1978)	Total (not including freshmen)	Percentage of Total
<b>Total</b>		7	1	2	3	6	28	11	2,612	
<b>Lost</b>		1	2	3	6	0%				
<b>Non Solicitable</b>		1	10	12	6	28	1%			
<b>Special Handling</b>		19	1	15	176	85	25	286	11%	
<b>Contact Information</b>										
<b>Total Contactable</b>		6	93	77	87	77	87	87	2,601	100%
<b>Email Address</b>		4	113	95	95	95	95	95	2,481	95%
	ucdenver.edu	74	40	444	110	7	-	-	561	21%
	cuanschutz.edu	488	9	107	17	5	-	-	129	5%
	colorado.edu	23	5	21	3	-	-	-	30	1%
	other	75	4	59	1,242	436	83	-	1,761	67%
<b>Available</b>		4	97	77	87	77	87	87	2,205	84%
<b>Phone Number</b>		5	93	87	87	87	87	87	2,239	86%
<b>Physical Address</b>		6	93	87	87	87	87	87	2,519	96%
	Top In-State Market Denver	434	2	63	886	276	62	-	1,224	47%
	Top In-State Market Colorado Springs	65	-	4	138	19	2	-	159	6%
	Top In-State Market Boulder	29	1	5	76	38	6	-	120	5%
	Top Out-of-State Market Arizona	5	-	1	30	11	2	-	43	1%
	Top Out-of-State Market Nashville	1	-	3	19	11	4	3	34	2%
	Top Out-of-State Market San Francisco	-	-	-	-	-	-	-	-	0%
<b>LinkedIn Account</b>		59	1	44	477	46	46	46	772	30%
<b>Employer Data</b>		5	55	688	79	79	79	79	1,134	43%
<b>Giving</b>										
<b>Lifetime</b>		41	2	20	292	82	82	82	514	20%
	\$1 - \$499	37	1	18	276	103	61	-	440	17%
	\$500 - \$999	1	-	1	7	13	5	-	25	1%
	\$1,000 - \$3,999	1	1	1	8	17	12	-	37	1%
	\$10,000+	2	-	-	1	7	4	-	12	0%
<b>School of Public Health Lifetime</b>		7	2	5	167	63	42	42	272	10%
<b>School of Public Health Past 5 years</b>		3	1	3	65	29	9	9	103	4%
<b>School of Public Health FYTD*</b>		1	1	1	25	8	3	3	36	1%
<b>Events</b>										
<b>Alumni Engaged FY22-23</b>	FYTD*	1	1	460	23	7	7	7	490	19%
<b>Volunteer Engagement</b>	Historic	1	1	14	6	6	6	6	20	1%
	FYTD*	1	1	11	1	1	1	1	12	0%
<b>Recognition Engagement</b>	Historic	3	3	307	4	1	1	1	312	12%
	FYTD*	1	1	261	1	1	1	1	262	10%
<b>Attended Events</b>	Historic	1	6	308	67	16	16	16	391	15%
	FYTD*	92	1	72	13	4	4	4	89	3%
<b>First Time Event Attendees</b>	FYTD*	85	1	64	11	4	4	4	79	3%
<b>Attended Multiple Events</b>	Historic	35	1	82	20	7	7	7	109	4%

\*FYTD - Fiscal Year To Date (current)  
Fiscal Year Shown Above: FY23 (July 1, 2022-May 25, 2023)



# EXAMPLE

## Alumni dashboards

A	B	C
CHAPA_CLASSIFICATION	(Multiple Items)	
ATTENDED_MULTIPLE_EVENTS	1	
Count of ID_NUMBER		
MAX_CLASSIFICATION	Total	
3	26	
8	75	
7	45	
6	6	
5	5	
<b>Grand Total</b>	<b>157</b>	

	A	B	G	K	L	M	N	O	P
1	ID_NUMBER	MAX_CLASSIFICATION	CHAPA_CLASSIFICATION	LOST_ALUMI	NON_SOLICI	SPECIAL_HAI	CONTACTAB	EMAIL_ADDF	EMAILABLE
2	0001231920	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
3	0002133683	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
4	0002003999	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
5	0002003991	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
6	0002137083	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
7	0002137091	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
8	0001876336	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
9	0002141583	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
10	0001878916	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
11	0002137084	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
12	0001881234	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
13	0002004094	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
14	0000844862	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
15	0001883527	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
16	0002003994	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
17	0001870507	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
18	0002004092	10.00	10.00	0.00	0.00	1.00	1.00	1.00	0.00
19	0002006749	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
20	0002137379	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
21	0001880949	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
22	0001876396	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
23	0002004835	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
24	0001738404	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
25	0002137081	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
26	0001876269	10.00	10.00	0.00	0.00	1.00	1.00	1.00	0.00
27	0001880944	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
28	0002003995	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
29	0000906328	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
30	0002133736	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
31	0001021840	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00
32	0002133824	10.00	10.00	0.00	0.00	0.00	1.00	1.00	1.00



# TOPIC 5

## What datapoints have consistent definitions, and who decides what those definitions are?

- Who makes the definitions?
  - Some at enterprise level – CASE standards, “alumni”
    - Defined by Steering Committee
  - Some at campus/unit level – “alumni”
    - Defined by partner

**Pro tip: When enterprise-level definitions change, much more efficient to change the underlying data mart than to fix every single report**





# TOPIC 6

How do you tailor work to meet individual needs without overwhelming your team or other teams with personalization for different data?

- Aron
  - Agile methodology
  - Adhering to requirement documents
  - Peer programming
  - Good leadership that creates space for developers
- Katie
  - Recycle – code, processes, etc.
  - Create efficiencies
  - Peer knowledge sharing



# TOPIC 7

Do you empower gift officers or other partners to do their own research/reporting/analytics? What are the pros & cons of doing so? How do you manage that?

- Katie
  - Access to research tools – freebies and paid
  - Providing trainings on research tools
  - Providing trainings on best practices
- Aron
  - Direct query access (for internal partners)
  - Providing BI/analysis tools to advanced analytics users (including campus partners)
    - We provide specific data models for different analytics groups
    - We provide ability to load external files into advanced analytic tools



# QUESTIONS AND FURTHER DISCUSSION

Ask us anything!

*If you come up with a question later, please feel free to reach out!*

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# THANK YOU!

