

# PPMO-0061 University of Illinois Foundation Annual Giving Data Request Process Improvement Executive Summary

## Business Case

The UIF Annual Giving office processes fundraising mass communications for all three campuses. During fiscal year 2017, the UIF Annual Giving office handled approximately 2,700 communications, of which approximately 1,700 were planned and 1,000 were unplanned, ad-hoc requests.

Planned efforts are created prior to the beginning of the fiscal year as a result of a planning process. These are more complex in the programming and style of the requests. Unplanned efforts are sent through a work order system. They are ad hoc requests that tend to be less complex.

The UIF Annual Giving office, specifically the Data Team, has experienced a high volume of inefficiencies due to changes and modifications to system processes. As a result, there are clear areas that act as bottlenecks and redundancies, which increase the amount of time spent producing a mass communication list.

## Goal

The goal of this project is to reduce the amount of requested changes after sign off reduce to 20% by end of FY 18.

## Approach

Planned efforts and unplanned efforts (work orders) were mapped as two separate current processes due to the manner in which they are currently conducted by the team. Once completed the team determined that the original goal of the project, the reduction requested changes, was the same despite the type of effort it was. Following the development of these process maps the team identified opportunities for improvement that focused around the customer and internal processes, respectively. A focus group was conducted with customers identified by UIF Annual Giving. These customers were advancement professionals across all three campuses. During this focus group customers were able to share their concerns and opinions around areas of communication, timeliness and effectiveness of the current process around both planned and unplanned efforts. This information, combined with the opportunities identified by UIF team members were used to build a larger list of opportunities of

improvement. This list was further narrowed by team members and was then used to brainstorm possible solutions to the issues. At this point, a second focus group was conducted with the same customers from the initial focus group providing them an opportunity to identify solutions to a list of presented issues. These solutions were combined with those generated by UIF and then narrowed to solutions that were fully in control by the UIF team. These solutions were ranked in order to ease of implementation, cost and sustainability and ordered accordingly. These solutions have been used to create a Solution Action Plan with task assignments and a timeline for completion.

## Outcome

The UIF AG Team developed 10 recommendations with 6 of the solutions being short-term and 4 being long term but completed no later than the end of May 2018. These recommendations will improve communication with the customer that will provide a quicker turnaround time and reduce the amount of rework on an effort.

### Key Findings

- **Checking efforts creates bottlenecks**
- **Changes requested after approval**
- **The implications of not using a file within a certain timeframe results in process starting over**
- **Communication to customers regarding process policy is lacking**
- **Tracking tool for effort communication has limitations**
- **Fundraising terms are not understood by programmers**
- **Varied SQL expertise**

### Short-term Improvement Recommendations

- 1. Put all projects on schedule from time of plan approval to reduce lead time and volume of emails**  
*All planned efforts will be considered approved after plan is finalized. This will reduce lead time and the volume of emails between AG and customers.*
- 2. Document Programming Timeframe Policy**  
*This will document the time at which and the time allotted for planned efforts and work orders to be programmed which will reduce lead time, rework and provide shared understanding between the customer and AG.*
- 3. Develop UIF AG Customer Service Plan**  
*This documentation will outline education, procedures, and communication templates that AG uses in order to reduce miscommunications, rework and provide a shared understanding between the customer and AG.*
- 4. Pilot a calendar to forecast and analyze workloads earlier in the FY to improve the timing of efforts**  
*This calendar will paint a picture of all planned efforts, their due dates and overlaps of projects to provide a road map for completion and reduce lead time and duplication of communication between AG and the customer*
- 5. Train all Data Specialists to review programming based on experience level to reduce checking bottle necks**  
*This will be a professional development opportunity for programmers in order to reduce checking bottle necks.*
- 6. Implement pilot process where all efforts in a series are completed by the same programmer.**  
*One programmer will be assigned an entire series in order to reduce communication between AG and customer, reduce lead time, communication with the customer and improve accuracy of efforts.*
- 7. Send staff to SQL training**  
*Increasing the SQL knowledge of staff will improve the accuracy of programming to reduce rework and will increase the rate at which complex efforts can be completed.*

### Short-term Improvement Recommendations

**8. Pilot plan for Campus Representative access to Trello as a communication tool**

*Allowing all units to have access to Trello boards currently in use by AG internally could reduce communication between customer and AG and foster a positive relationship.*

### Long-term Improvement Recommendations

**1. Offer quarterly roundtable meetings with multiple units to share AG information.**

*This will be an opportunity for AG to share information and have discussions with customers in order to reduce miscommunication and foster positive relationships.*

**2. Annual Giving office to attend Quarterly Fundraising meeting held on Urbana campus that would provide training on the business of fundraising**

*Attending this already well established professional development opportunity will increase the knowledge of AG of the business and language around fundraising.*

## Implementation of Recommended Improvements

Short term recommendations are currently being implemented with all activities scheduled for completion by May 2018.