

UC Davis Campaign Reports

Supplemental Documentation

CASE District VII Circle of Excellence, 2019

Index

- Examples of paper-based mockups
- Linking Advance allocations to Big Ideas
- Data Architecture (including Change Data Capture)
- Reports Main Menu in Power BI
- Report View in Power BI
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- Training Materials

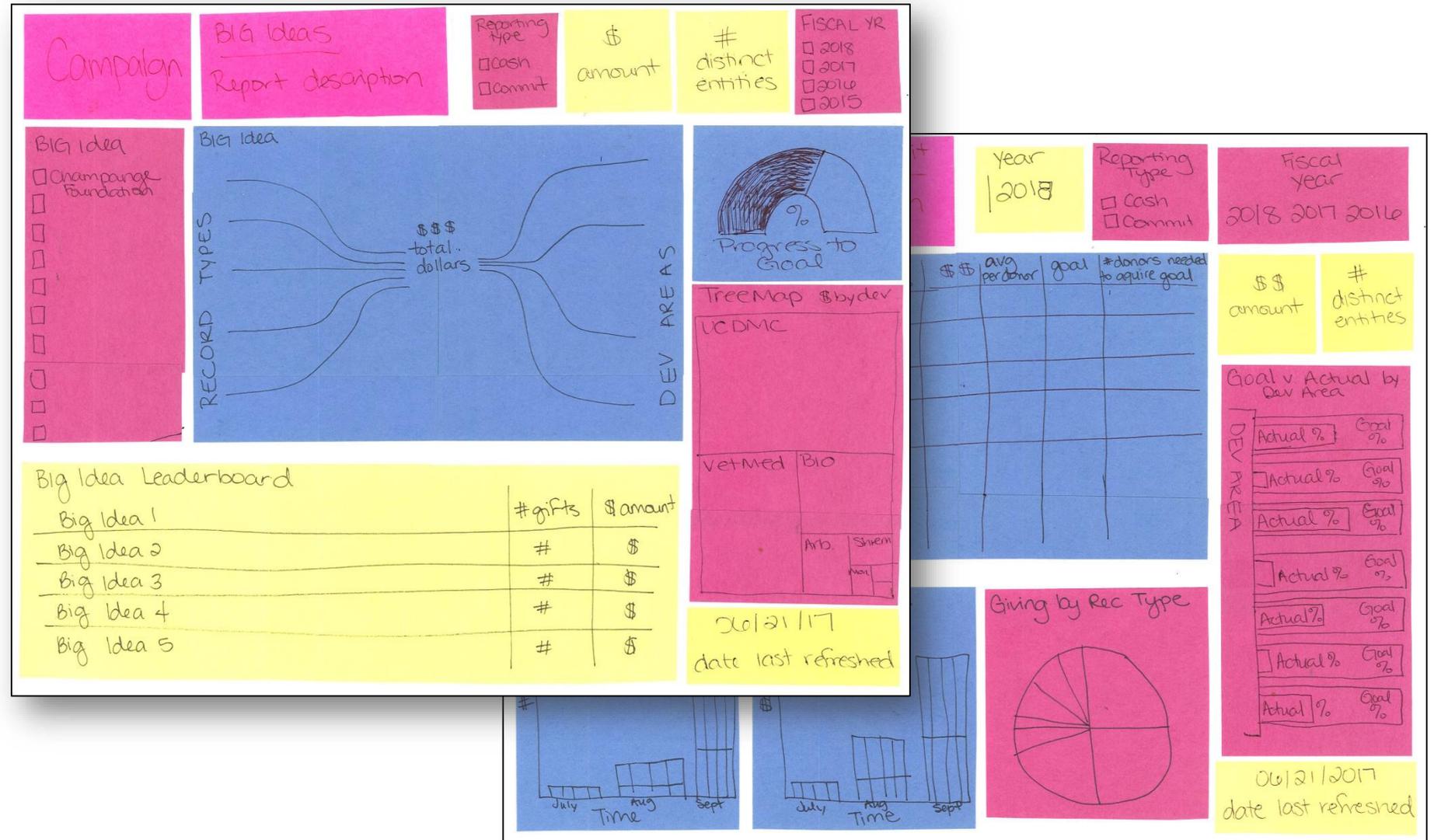
Examples of Post-it Note Report Mock-Ups

Low Tech, Highly Effective

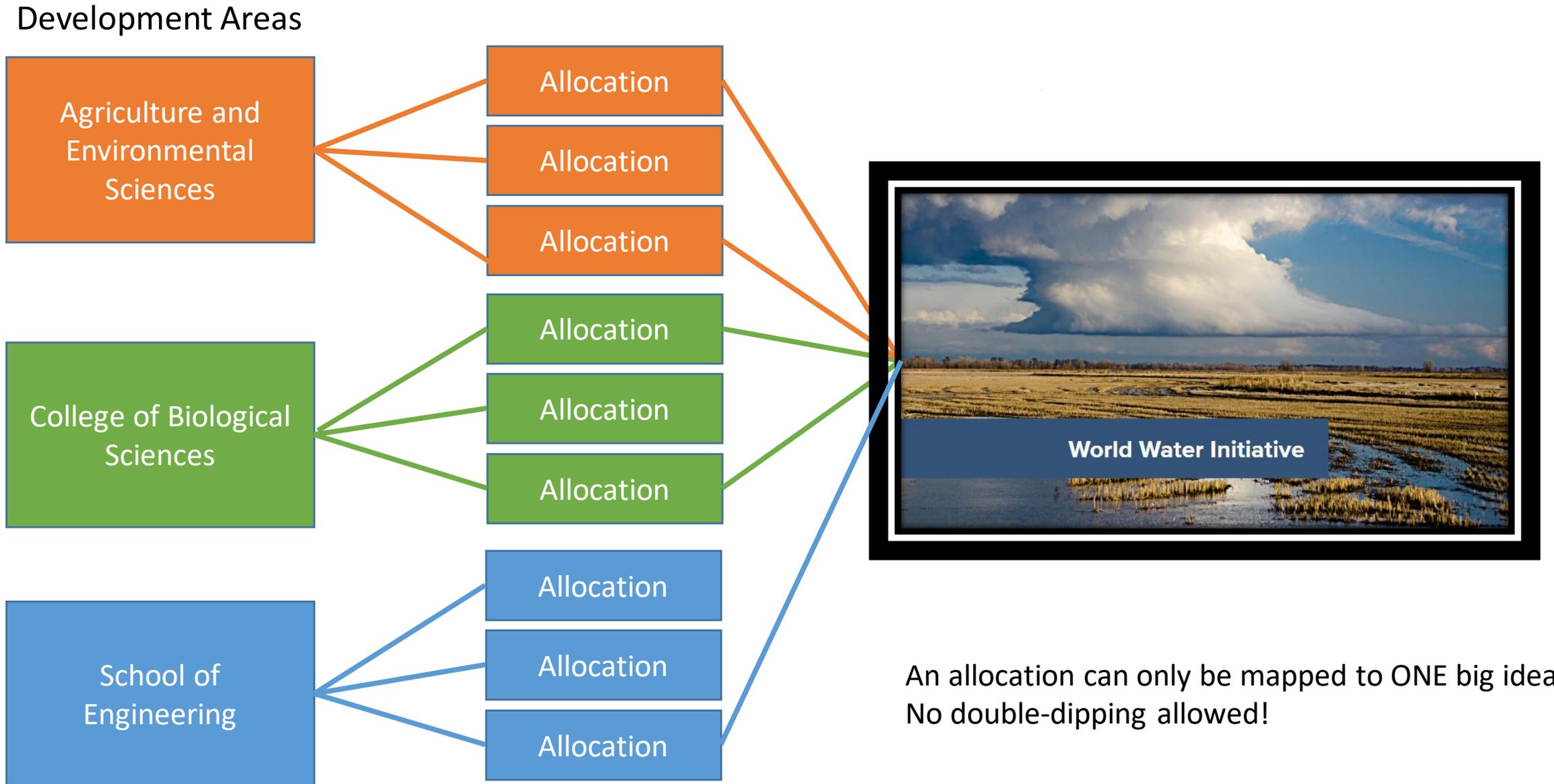
Each sheet of paper represents a report (approximate dimensions of a screen in Power BI).

Color-coded Post-its represent different data visualization modules.

We repositioned the Post-its around the sheets as we were meeting with leadership, which made it possible for them to visualize the reports before we built them. This was low tech but the key timesaver (We built in just 10 months.)



How Big Ideas Are Created in Advance



Linking Allocations to Big Ideas

The screenshot shows the 'Allocation Detail' section of the Ellucian Advance system. The main form is for the 'Veterinary Medical Center Fund (v008650)'. A magnifying glass is positioned over the 'Category' and 'Sub Category' fields. The 'Category' is set to 'BIC' (Big Ideas Campaign 2017) and the 'Sub Category' is set to 'L' (Veterinary Medicine Center). Other fields include Agency (R), Allocation (V008650), Account (407486-47595), Investment, Quali/Payout (3-V008650), UC Fund (47595), Campus, School (VETM), Dept (AD15170), Sub Dept, Division, Program, Fund Type (CURRENT), Purpose (CAP), Restriction (BLD), Rest #, Steward ID, Endow Pool, Start Date (11/18/2016), and Long Name.

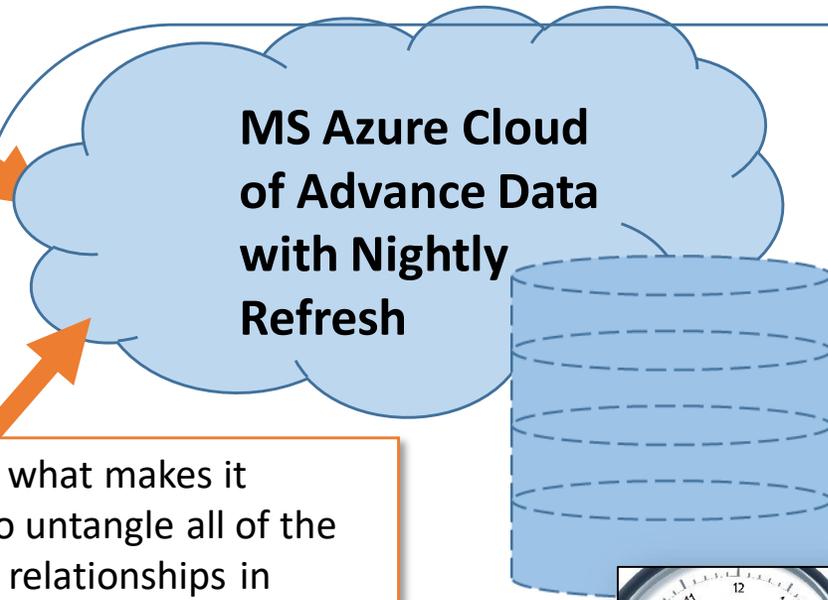
This close-up shows the dropdown menu for the 'Sub Category' field. The menu is open, displaying a list of options. The 'Veterinary Medicine Center (L)' option is highlighted by the mouse cursor. The other options are: Global Education for All at UCD (E), Healthy Aging in a Digital World (F), Healthy Brain Aging Initiative (G), Institute for Global Human Rights (H), Leading the Way to Climate Neutrality (I), Precision Health (J), Smart Farm (K), and World Water Institute (M). The 'Category' field above it is set to 'BIC' and 'Big Ideas Campaign 2017'.

We used the Category and Sub Category feature of the Allocation Detail section in Ellucian Advance to map individual allocations to a single Big Idea (no double dipping permitted.)

Campaign Reports – Data Structure



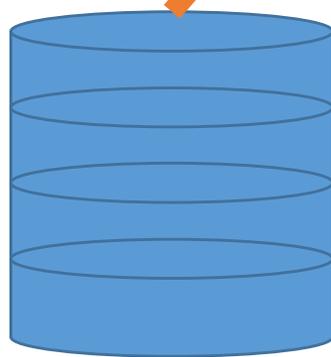
Campaign goals entered directly to cloud



Procedures held in the cloud assemble the data so that they are easily consumable by Power BI and are in line with current reporting needs. This also means it's easy to adapt to changing reporting needs over the course of the campaign.

ETL:
Extract
Transform
Load

The ETL is what makes it possible to untangle all of the necessary relationships in Advance between donors, gifts and gift types. A flat dataset is an agile dataset.

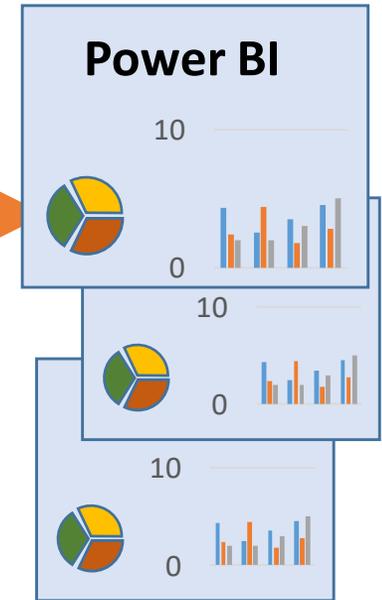
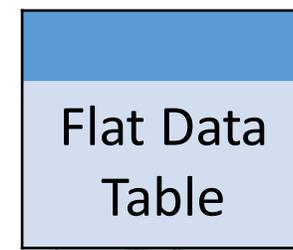


Ellucian Advance



CDC:
Change
Data
Capture

The CDC keeps track of all instances of an entity record allowing us to track donors and dollars over space and time (CDC is included in the SSIS package.)



SSIS: SQL Server Integration Service

Campaign Reports Main Menu in Power BI

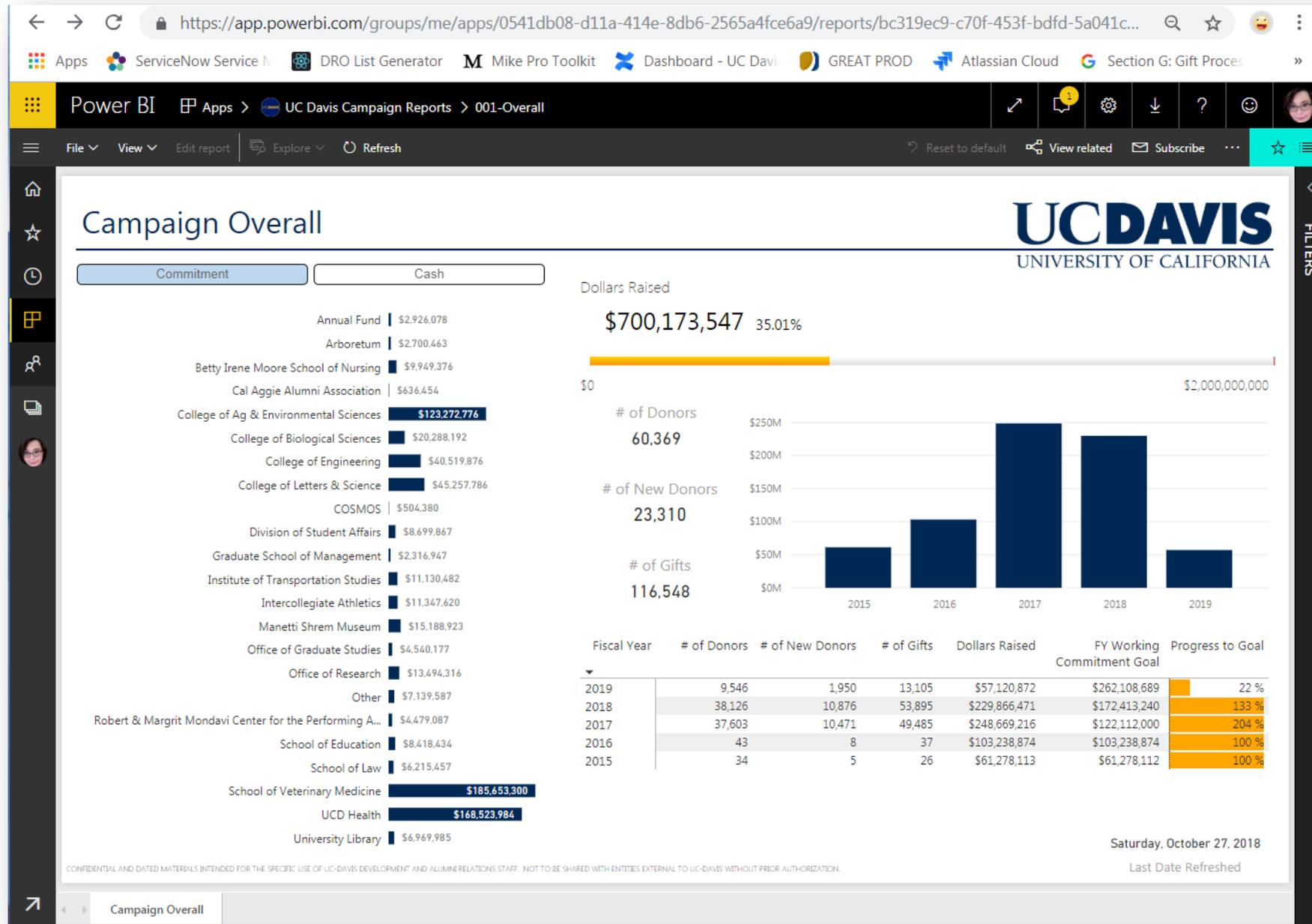
NAME	ACTIONS
001-Overall	[Icons: Report, Lightbulb, Share]
002-Development Area	[Icons: Report, Lightbulb, Share]
003-Development Reporting Area	[Icons: Report, Lightbulb, Share]
004-Geographical Giving	[Icons: Report, Lightbulb, Share]
005-Geographical Giving Table	[Icons: Report, Lightbulb, Share]
006-Big Ideas	[Icons: Report, Lightbulb, Share]
007-Donor Population	[Icons: Report, Lightbulb, Share]
008-Trending	[Icons: Report, Lightbulb, Share]
009-Glossary	[Icons: Report, Lightbulb, Share]

Secure log in with individual license.

Users click on any one of the these 8 menu items to gain access to the report of their choice.

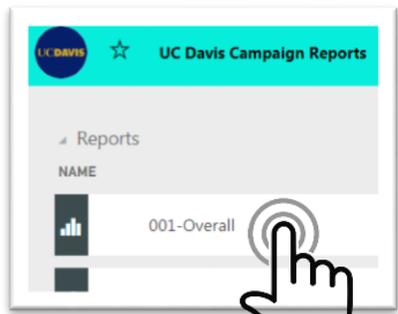
Handy glossary of terms used within the reports.

Report View in Power BI



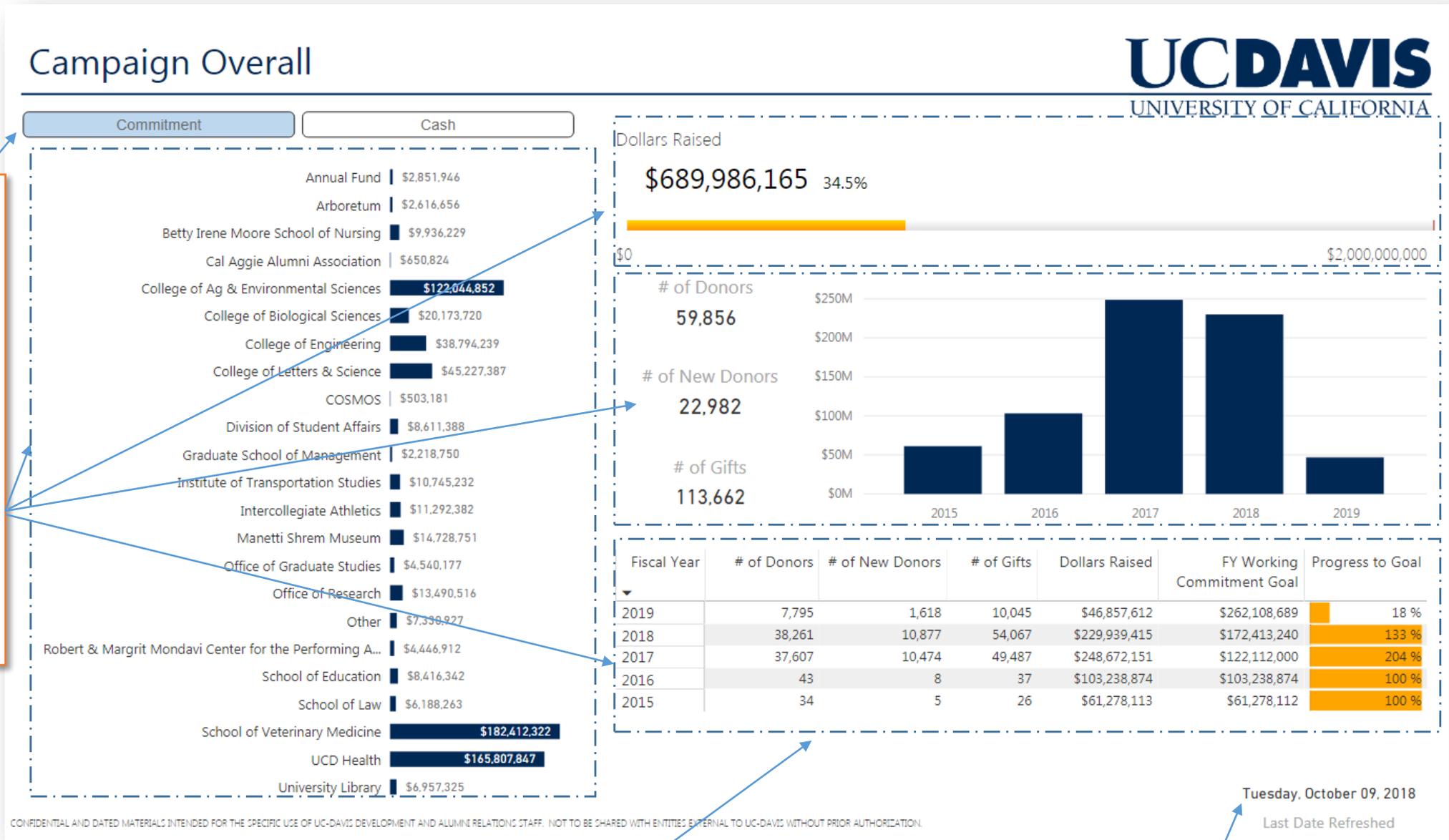
Annotated Campaign Reports 1- 8 + Glossary

High-level overview of university-wide progress-to-date.



Toggle between cash and commitments changes the data displayed in the charts, tables and graphs.

Dotted-lined boxes indicate distinct 'visualization' components, as represented by the individual Post-it notes in the paper mockups.



Year-over-year, high level gift metrics and donor attributes

Data refresh date

Campaign progress narrowed by development area

Campaign Development Area

Commitment Cash

Fiscal Year: All

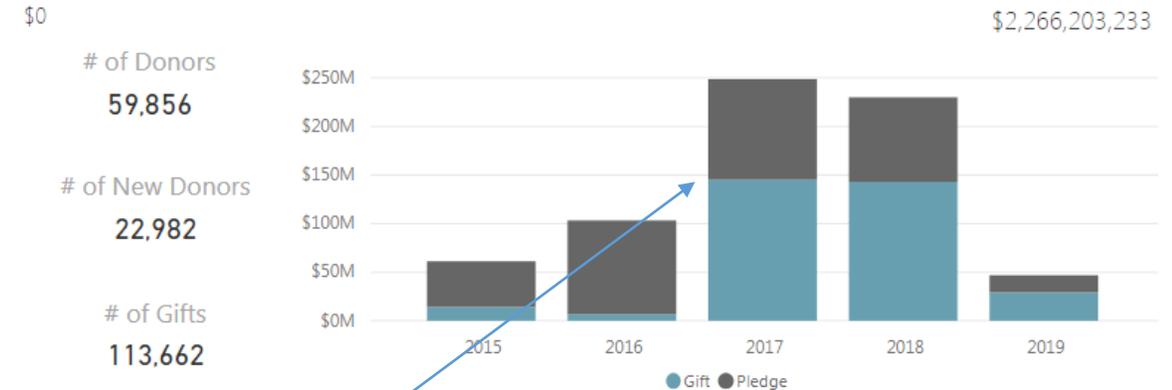
Gift Type: All

Development Areas: All

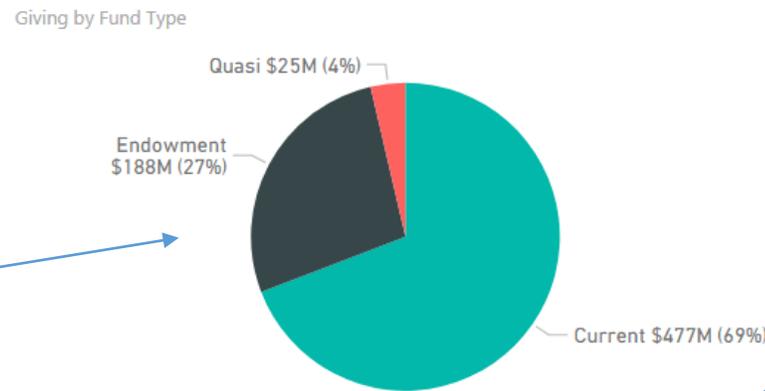
Department: All

Dollars Raised

\$689,986,165 30.45%



Fiscal Year	# of Donors	# of New Donors	# of Gifts	Dollars Raised	FY Working Commitment Goal	Progress to Goal
2019	7,795	1,618	10,045	\$46,857,612	\$262,108,689	18%
2018	38,261	10,877	54,067	\$229,939,415	\$172,413,240	133%
2017	37,607	10,474	49,487	\$248,672,151	\$122,112,000	204%
2016	43	8	37	\$103,238,874	\$103,238,874	100%
2015	34	5	26	\$61,278,113	\$61,278,112	100%



Drop down filters that narrow the data used in the visualizations (similar to the column filter feature in Excel).

Department drop-down will dynamically populate based on the selected Development Area.

Pie chart of dollars raised per fund type e.g. endowment, or FFE

Grey = pledges; blue = gifts

Breakdown of key campaign progress metrics.

Progress per major development area towards its established campaign goal.



Goals and progress listed for all development units (and visible by all users). This “radical transparency” was new for us.

Pie chart shows dollars raised by gift purpose, such as student support, research or capital projects (extracts this information from Advance allocations.)

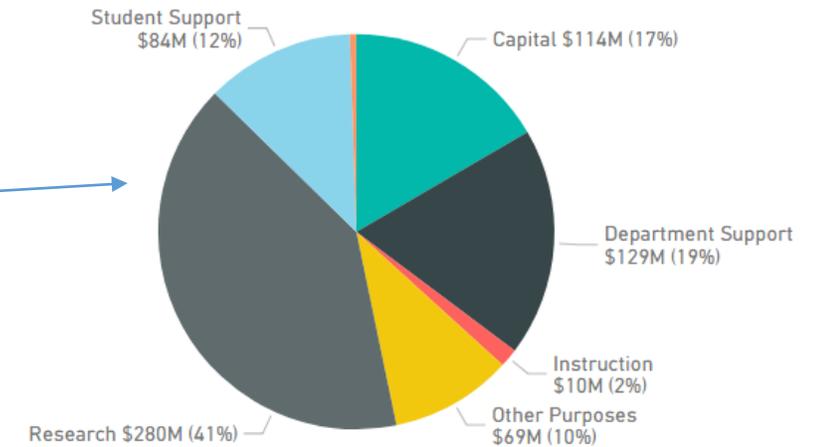
Campaign Development Reporting Area



Development Reporting Area	Commitment		Cash	
	Working Commitment Goal	Dollars Raised	Progress to Goal	
Annual Fund	\$10,000,000	\$2,851,946	29 %	
Arboretum	\$25,966,667	\$2,616,656	10 %	
Betty Irene Moore School of Nursing	\$24,292,408	\$9,936,229	41 %	
Cal Aggie Alumni Association	\$400,000	\$650,824	163 %	
College of Ag & Environmental Sciences	\$504,672,362	\$122,044,852	24 %	
College of Biological Sciences	\$71,650,616	\$20,173,720	28 %	
College of Engineering	\$97,825,334	\$38,794,239	40 %	
College of Letters & Science	\$196,730,000	\$45,227,387	23 %	
COSMOS	\$1,030,000	\$503,181	49 %	
Division of Student Affairs	\$35,625,000	\$8,611,388	24 %	
Graduate School of Management	\$44,785,834	\$2,218,750	5 %	
Institute of Transportation Studies	\$47,128,334	\$10,745,232	23 %	
Intercollegiate Athletics	\$73,028,334	\$11,292,382	15 %	
Manetti Shrem Museum	\$19,587,500	\$14,728,751	75 %	
Office of Graduate Studies	\$7,500,000	\$4,540,177	61 %	
Office of Research	\$56,089,792	\$13,490,516	24 %	
Other	\$2,500,000	\$7,330,927	293 %	
Robert & Margrit Mondavi Center for the Performing Arts	\$18,733,334	\$4,446,912	24 %	
School of Education	\$23,575,000	\$8,416,342	36 %	
School of Law	\$27,083,334	\$6,188,263	23 %	
School of Veterinary Medicine	\$521,580,967	\$182,412,322	35 %	
UCD Health	\$445,918,417	\$165,807,847	37 %	
University Library	\$10,500,000	\$6,957,325	66 %	
Total	\$2,266,203,233	\$689,986,165	30 %	

UCD Health	Working Commitment Goal	Dollars Raised	Progress to Goal
UCD Medical Center	\$44,300,000	\$2,052,664	5 %
School of Medicine	\$401,618,417	\$163,755,183	41 %

Giving by Purpose



Tuesday, October 09, 2018

Last Date Refreshed



Campaign Geographical Giving



Fiscal Year:
 Gift Type:
 Geographic Area:

Dollars Raised by Latitude and Longitude



These buttons toggle between geographical areas (map, chart, and table adjusts accordingly).

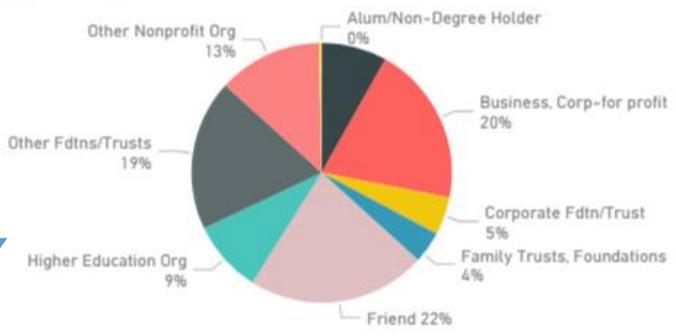
These filters further narrow the region.

The bigger the purple circles, the more money raised in that geographical area.

Pie chart shows the distribution of dollars raised per donor type (e.g. friend, alumni)

Dollars Raised
\$161,732,844

Giving by Record Type



Geographic Area	# of Donors	# of New Donors	# of Gifts	Dollars Raised	CAAA Members
Arizona	357	122	709	\$7,131,610	102
Austin Metro	109	52	133	\$121,631	45
Boston Metro	391	148	549	\$7,371,754	104
Chicago Metro	224	119	333	\$4,391,800	22
Colorado	423	177	562	\$12,080,984	101
Dallas Metro	193	93	823	\$3,349,633	37
Houston Metro	146	49	234	\$1,862,055	55
Los Angeles County	2,595	1,045	3,774	\$27,949,236	954
New York Metro	912	388	1,439	\$30,760,621	140

Tuesday, October 09, 2018

Last Date Refreshed

CONFIDENTIAL AND DATED MATERIALS INTENDED FOR THE SPECIFIC USE OF UC-DAVIS DEVELOPMENT AND ALUMNI RELATIONS STAFF. NOT TO BE SHARED WITH ENTITIES EXTERNAL TO UC-DAVIS WITHOUT PRIOR AUTHORIZATION.

Progress-to-date of strategic regions associated with filter selection.



Table of donors and gifts per gift level, per region(s) as selected in filters. Data set extended to include all previous fiscal years to enhance comparative capability.



Campaign Geographical Giving Table

Fiscal Year:
 Gift Type:
 Geographic Area:



of Donors: **10,113** # of New Donors: **4,098** # of Gifts: **15,572**

These filters allow users to customize the contents of the table to reflect the geographic region selected.

FY-comparative breakdown of donors per top gift levels.

Can use “# of New Donors” column to quickly identify new donor acquisitions, how much they gave, and in which region they were acquired (as per filter selection).

Fiscal Year Gift Level	Previous FYs				2018				2019			
	# of Donors	# of New Donors	# of Gifts	Dollars Raised	# of Donors	# of New Donors	# of Gifts	Dollars Raised	# of Donors	# of New Donors	# of Gifts	Dollars Raised
\$10M+												
\$5M - \$9.9M	1	0	1	\$7,628,405								
\$1M - \$4.9M	16	0	19	\$37,949,321	7	0	7	\$12,235,131	1	0	1	\$1,000,000
\$500K - \$999K	10	3	12	\$7,931,313	10	0	11	\$9,166,954	3	0	3	\$2,232,212
\$250K - \$499K	26	3	30	\$9,704,025	33	4	37	\$13,474,239	6	1	7	\$2,279,777
\$100K - \$249K	55	4	65	\$9,535,281	55	6	67	\$10,385,103	17	1	19	\$2,815,737
\$25K - \$99K	174	38	204	\$10,315,941	164	24	208	\$11,461,189	50	10	49	\$2,745,941
Less than \$25K	6,163	1,827	6,787	\$4,794,829	6,178	1,945	7,054	\$5,195,641	900	232	1,046	\$881,806

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This project made it possible to track this crucial information for the first time.

Progress to goal for Big Ideas per gift type; top 10 Big Idea allocations.

- 004-Geographical Giving
- 005-Geographical Giving Table
- 006-Big Ideas 
- 007-Donor Population

These filters allow users to customize report contents by gift type and Big Idea.

The top 10 Advance allocations (per Big Idea, shifts as filters applied).

Bow-tie chart provides visual comparison of progress-to-date for Big Ideas, divided by gift source (an aggregate of different gift sources per Advance gift record.) The larger the "branch" the more funds raised.



Campaign Big Ideas

Fiscal Year:

Gift Type:

Big Idea:

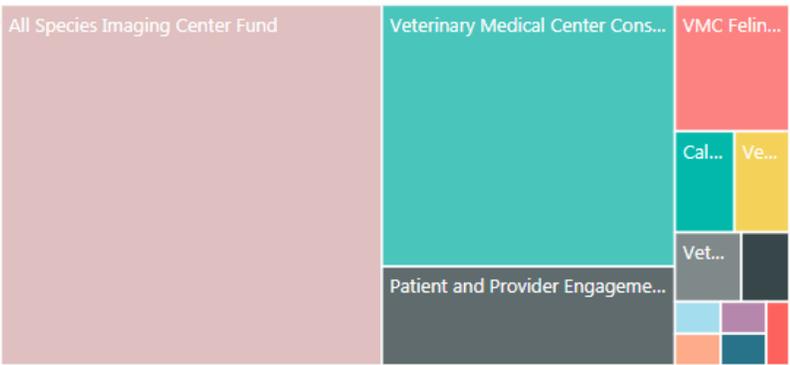
Dollars Raised

\$19,904,610 8.88%

\$0 \$224,100,000

	# of Donors	# of New Donors	# of Gifts
	415	111	450

Top 10 Allocations by Big Idea Giving



Gift Source	\$ Raised
Individuals	\$15,169K
Corporatio...	\$2,520K
Foundations	\$1,391K
Other Non...	\$592K
Alumni	\$233K

Big Idea	\$ Raised
Veterinary ...	\$16,628K
Healthy Ag...	\$2,004K
World Wat...	\$782K
Global Edu...	\$360K
Center for ...	\$101K
SmartFarm...	\$15K
Consortiu...	\$10K
Healthy Br...	\$3K
Center for ...	\$1K
Center for ...	\$0K
Carbon Ne...	\$0K
Global Hu...	\$0K

\$ Raised

\$19,90...

Tuesday, October 09, 2018
Last Date Refreshed

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The definitions of each Gift Source provided in the Glossary.

Campaign progress-to-date by entity type and level of donor loyalty.

- 004-Geographical Giving
- 005-Geographical Giving Table
- 006-Big Ideas
- 007-Donor Population



These filters allow users to customize report contents by fiscal year and development area.

A new metric for us: dollars raised by entity type & donor loyalty level (Renewed, Reactivated, Lapsed, & Acquired)

Dollars raised per FY quarter by donor loyalty level.

Campaign Donor Population



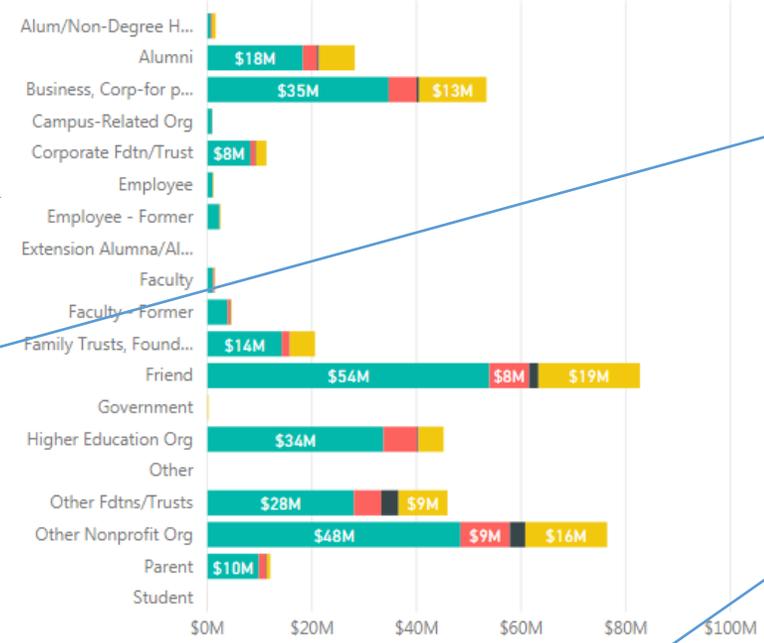
This report is a cash-based report only.

Fiscal Year:

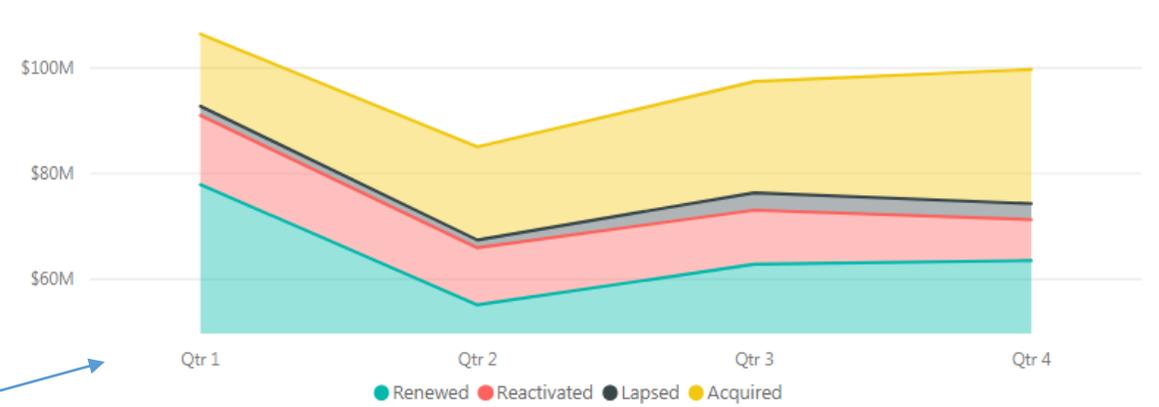
Development Area:

Dollars Raised by Record Type and Population

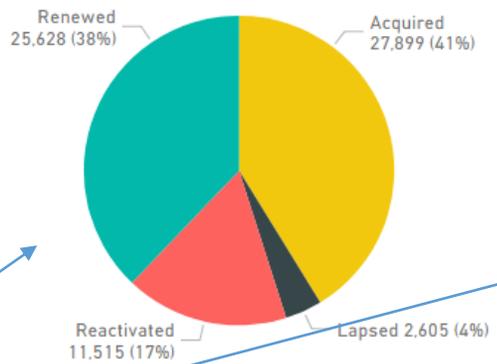
Population: ● Renewed ● Reactivated ● Lapsed ● Acquired



Donor Count by Quarter and Population



Donor by Population



Fiscal Year	Donor Count	Household Count
2019		
Renewed	5,182	4,111
Reactivated	986	722
Lapsed	240	184
Acquired	1,838	1,515
2018		
Renewed	19,129	13,630
Reactivated	5,124	3,784
Lapsed	1,253	947
Acquired	12,954	10,614
2017		
Renewed	18,399	13,074

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Breakdown (pie and table) of donor loyalty level. Definitions in glossary.

- 005-Geographical Giving Table
- 006-Big Ideas
- 007-Donor Population
- 008-Trending



These filters allow users to customize report contents by development area.

Top CA counties by dollars raised & Top 10 donors.

Line graph of dollars raised by fiscal year.

Pie chart of dollars by gift or pledge type.

Bar graph of dollars raised by gift source (entity type).

Campaign What's Trending?

This report is a commitment-based report only:

Development Area

All

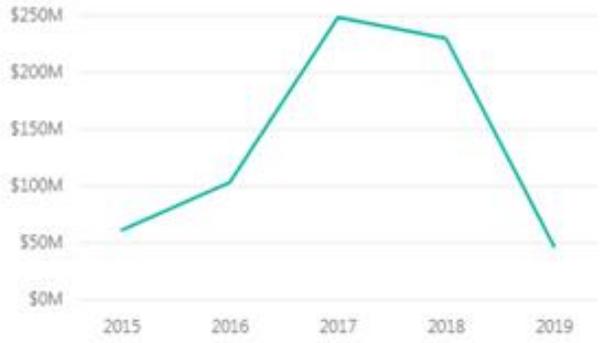
Top 8 CA Counties by Dollars Raised

Sacramento	\$76,675,491	Dollars Raised
Alameda	\$74,695,637	Dollars Raised
Yolo	\$57,139,625	Dollars Raised
Los Angeles	\$27,919,688	Dollars Raised
San Francisco	\$26,326,467	Dollars Raised
Santa Clara	\$23,167,050	Dollars Raised
Stanislaus	\$15,445,353	Dollars Raised
San Mateo	\$14,238,694	Dollars Raised

Top 10 Donors

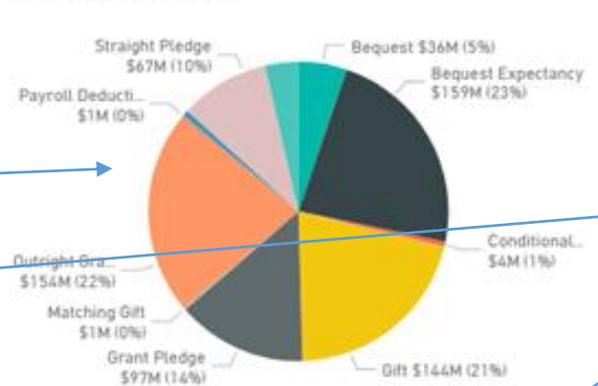
Preferred Name	Dollars Raised
...	\$50,100,000
...	\$37,000,000
...	\$12,087,689
...	\$10,000,000
...	\$9,632,849
...	\$9,551,750
...	\$9,536,732
...	\$9,500,000
...	\$7,634,977
...	\$7,420,407

Dollars Raised by Fiscal Year



Appeal Description

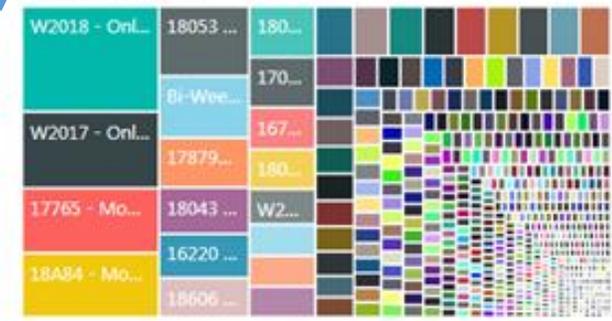
Dollars Raised by Gift Type



Dollars Raised by Gift Source



Top Grossing Appeals



Tuesday, October 09, 2018

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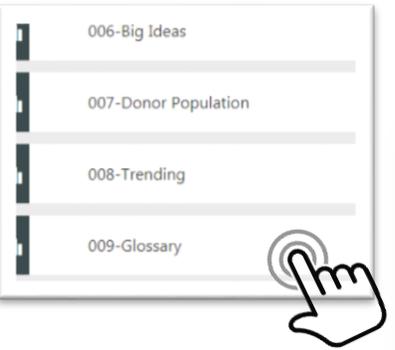
Top-grossing appeals, drop down box allows a typed-input or selected search of appeal code.

Campaign Glossary

Term	Definition
# of Donors	Count of distinct entities who have made gifts within the given timeframe selected
# of Gifts	Count of distinct gifts made within the given timeframe selected
# of New Donors	Count of distinct entities who have made their first gift to the University within the given timeframe
Acquired	Donors who made their first gift to the University in the current fiscal year and have no other gift history
Area	Geographic location of a gift based on a donor current valid address
Big Idea	Big Idea for UC Davis
CAAA Member	The distinct count of entities that have an active, CAAA Membership (Annual, Parent, Student, or Life)
Cash	Sum of dollars raised from gifts and payments
Commitment	Sum of dollars raised from gifts and pledges
Department	Department of the Allocation that the gift was made to
Development Area	Area of the Allocation that the gift was made to
Dollars Raised	Sum of totals for the gifts using cash or commitment logic based on selection
Donor Count	Distinct count of entities
Fiscal Year	"7/1/_" to "6/30/_" of prior fiscal years and "7/1/_" to the last date the data was last refreshed for the current fiscal year
Gift Level	Amount of a single gift transaction
Gift Source	Grouping of entity Record Types. Alumni= Alumna/Alumnus, Alumni, Alum/Non-Degree Holder, Estate Alum, Student; Campus Related Orgs.= Campus-Related Org; Corporations= Business, Corp-for profit, Corporate Fdtn/Trust; Foundations= Family Trusts, Foundations, Other Fdtns/Trusts; Individuals= Employee, Employee – Former, Estate Friend, Estate Parent, Extension Alumna/Alumnus, Faculty, Faculty – Former, Friend, Parent; Other Nonprofit= Government, Higher Education Org, Other Nonprofit Org
Gifts	Bequest(BQ), Grants(GR), Gifts(GF), Matching Gifts(MG), Outright Grant(GR), and Planned Gifts(PG)
Household Count	Distinct count of household
Lapsed	Donors in the current fiscal year who made a gift and have a gift history that was from 5+ years ago, but no gift history since then

Tuesday, October 09, 2018

Last Date Refreshed



Campaign Glossary

Term	Definition
Development Area	Area of the Allocation
Dollars Raised	Sum of totals for the
Donor Count	Distinct count of ent
Fiscal Year	"7/1/_" to "6/30/_"
Gift Level	Amount of a single
Gift Source	Grouping of entity F Corporations= Busin Former, Estate Frien Other Nonprofit Org
Gifts	Bequest(BQ), Grants
Household Count	Distinct count of ho
Lapsed	Donors in the curre
Last Date Refreshed	Data valid through
Payments	3rd Party Pmt(3P), B Pmt(PD), Plg Pmt(PF
Pledges	Bequest Pledge(BE), Pledge(ST), and Test
Reachbacks	Selected gifts/pledg
Reactivated	Donors in the curre
Region/State/International	Toggle buttons that territories (excludin
Renewed	Donors in the curre
To Date	"7/1/_" - to current

Training Materials

User guides in PDF format. Materials used in the 15+ mandatory classroom training sessions we conducted across campus (which granted access to Power BI.)

Campaign Reports | Advancement Services

Not secure | ais.ucdavis.edu/learningcenter/campaign_reports/index.html

Advancement Services

Make a gift now

Option 2 | Learning Center | Technical Services | DataHub | Gifts | Centralized Gift Processing | About Us

Home > Learning Center > Campaign Reports

Campaign Reports

Log In!

- ADVANCE WEB
- MICHELANGELO
- REEHER
- GREAT
- DO METRICS
- CAMPAIGN

How to Gain Access

First time log in instructions (Access can be requested by emailing devarhelpdesk@ucdavis.edu)

Campaign Reports User Guides

- 001 - Overall
- 002 - Development Area
- 003 - Development Reporting Area
- 004 - Geographical Giving
- 005 - Geographical Giving Table
- 006 - Big Ideas
- 007 - Donor Population
- 008 - Trending

[Glossary](#)

DEVELOPMENT & ALUMNI RELATIONS
ADVANCEMENT SERVICES

001 - Overview

Tracks Commitment or Cash progress to overall campaign goal. Displays dollars raised, number of donors, number of new donors, and number of gifts. Allows users to isolate by Unit or Fiscal Year.

Campaign Overall

UC DAVIS
UNIVERSITY OF CALIFORNIA

Overall Report: \$844,306,945 42.2%

of Donors: 139,807
of Gifts: 44,629
of New Donors: 191,151

Fiscal Year	# of Donors	# of Gifts	# of New Donors	Dollars Raised	% Commitment Goal	Progress to Goal
2016	10,624	1,551	8,700	\$1,406,950	20,000,000.00	10%
2017	14,612	2,490	12,074	\$2,203,021	20,000,000.00	11%
2018	13,842	1,204	10,638	\$1,490,027	20,000,000.00	8%
2019	15,484	2,434	11,050	\$1,714,400	20,000,000.00	9%
2020	14,822	2,204	10,616	\$1,794,270	20,000,000.00	9%
2021	17,103	2,449	12,025	\$1,704,744	20,000,000.00	9%
2022	20,282	2,982	14,300	\$1,798,000	20,000,000.00	10%
2023	20,282	2,982	14,300	\$1,798,000	20,000,000.00	10%

Key Definitions:

- # of Donors: Count of distinct entities who have made gifts within the given timeframe selected
- # of Gifts: Count of distinct gifts made within the given timeframe selected
- # of New Donors: Count of distinct entities who have made their first gift to the University within the given timeframe
- Cash: Sum of dollars raised from gifts and payments
- Commitment: Sum of dollars raised from gifts and pledges
- Development Area: Area of the Allocation that the gift was made to
- Dollars Raised: Sum of totals for the gifts using cash or commitment logic based on selection
- Fiscal Year: "7/1_" to "6/30_" of prior fiscal years and "7/1_" to the last date the data was last refreshed for the current fiscal year
- Last Data Refreshed: Data valid through

Hover cursor over specific regions within the report to get more details:

All training materials and user guides are posted on our website.