

Data Ecosystem Enhancement Discovery Phase Report

FINAL REPORT // MARCH 2024



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The Campaign for
Oregon State University

1.0 Introduction

The Oregon State University Foundation (OSUF) Discovery Phase Report is a deliverable of the OSUF Advancement Services team, aimed to inform the planning for the Unify & Streamline Initiative (USI), the Data Ecosystem Enhancement Project (DEEP) which serves as USI's first project, and support the technology objectives in the 2024-2028 OSUF strategic plan. This report describes the full scope of work during this phase, including:

- Key Findings
- Purpose
- Benefits
- Timeline

The discovery phase was conducted by Senior Director for Automation & Change Management, Scott Emery, under the vision and guidance of OSUF Vice President for Technology and Chief Innovation Officer, Mark Koenig. OSUF's business partner, Fundmetric, contributed to the design of this phase and were highly engaged throughout the process, participating in all 16 information gathering sessions.

The extensive engagement activities planned within this discovery phase represent a best practice by Advancement Services. These engagement efforts aim to help us gather requirements directly from our colleagues and learn from their work experiences. Advancement Services last performed such an exercise approximately five years ago with the adoption of our current CRM, Ellucian CRM Advance. These efforts help inform our work and lay a roadmap of enabling activities that support the three core pillars of the OSUF strategic plan.

As we look to enable increased philanthropic support, grow meaningful engagements with alumni, friends and donors, and position OSUF to amplify its impact and value, we aim to unify how our employees and teams work. Using unified data and technology, we aim to deliver on our aspirational goals and modernize our data ecosystem to streamline our organization's ability to operate holistically, with greater efficiency and effectiveness. The findings surfaced in this discovery phase support the development of a comprehensive change plan to be implemented through USI, as well as the individual projects and efforts that fall within this initiative, starting with DEEP.

2.0 Key Findings

Key findings from this phase are organized and synthesized by major themes that surfaced across all sessions. The insights gleaned are shared with specific details provided for context. (See the Appendix for summaries of the information gathered at each individual discovery session).

2.1 Case for Change

Much of the information, issues and concerns gathered from all teams highlight the need for a single, unified data management strategy that aims to harness the full potential of OSUF's data across the Foundation's essential systems and platforms. The following list outlines some of the key challenges and the case for change:

- **Data Inconsistency.** In some instances, our teams utilize various data sources for key fundraising and engagement efforts with our donors, alumni and friends. While this approach has been effective, it also presents challenges related to data consistency. These inconsistencies in information occasionally affect our ability to provide the level of personalization our constituents expect. Additionally, they could lead to misinterpretation of information by our staff as well as our constituents, posing potential for negative consequences for OSUF and our ability to achieve the Foundation's strategic objectives, especially where privacy and preference is concerned.
- **Compliance and Security Concerns.** Maintaining and reporting on our compliance with the Oregon Consumer Privacy Act (OCPA), as well as future state and federal data privacy regulations, is a current and future challenge. The potential for data breaches and non-compliance with industry standards are risks that must be accounted for.
- **Collaboration and Staffing Challenges.** Collaboration is at the core of our culture at OSUF; however, certain challenges, such as staff turnover, evolving processes, and the rapid expansion of OSUF's data landscape have posed hurdles to our collaborative efforts. As a result, we've observed instances where operations between units may have become more segmented than desired.
- **Resource Inefficiencies.** Our employees invest valuable time gathering, reconciling and validating data from various sources to support our fundraising initiatives, including (but not limited to) donor solicitation and segmentation. While these efforts are critical to our success, we recognize that inefficiencies in these processes may sometimes impact productivity and hinder essential efforts, including campaign outcomes. Additionally, we appreciate the value that custom in-house tools, such as Dlight, bring to our operations. However, we also acknowledge the potential risks associated with relying on in-house tools, particularly if the staff responsible for their maintenance and development were to depart.

OPPORTUNITY / RECOMMENDATIONS: To address these challenges, developing a **unified, core technological foundation** as scoped within DEEP will help scale our efforts, improve our ability to make informed decisions and operate more efficiently across the organization. This includes the development of:

- A **modern, scalable data warehouse** (OSUF data hub) that's built on modern infrastructure and works as a centralized data hub between our systems.
- **Data automation pipelines** that establish the connections between the OSUF data hub and our other key data systems, allowing processes to be automated at scale.
- A **privacy and preference center** that provides a contemporary constituent experience, allowing donors, alumni and friends the ability to configure their own privacy and preference options while also ensuring we're in compliance with current privacy regulations.

Such an investment will allow OSUF the ability to:

- Automate processes and practices.
- Adopt and evolve with AI and machine learning practices.
- Leverage our data to ensure we're engaging with the right people at the right time.
- Retain existing talent as well as attract new talent.
- Lower organizational silos and improve collaboration.

This opportunity aligns with several of OSUF's guiding principles and supports the six objectives that advance OSUF's aim to embrace technology and transform our organization's ability to deliver on our aspirational goals, as written in OSUF's 2024-2028 strategic plan.

2.2 Additional Findings

The following are additional key takeaways that surfaced during our engagement with many OSUF units and stakeholders. Though not exhaustive, they capture the main themes that emerged from our conversations. Much of the input we gathered underscores a need for change as outlined in 2.1 above, reinforcing the case for our proposed initiatives. We value the diverse perspectives shared and remain committed to addressing all relevant factors as we move forward.

2.2.1. Generating accurate constituent lists poses various challenges. As reported by several units:

- We are generating lists that don't always produce the expected results and occasionally require additional manipulation, sometimes manual, before sending.
- Managing spousal pairs during gift entry adds complexity to personalization efforts for our donors, highlighting the need for standardized householding procedures. Currently, we lack established standards and processes to support our donors in this regard.
- Campus partners consistently use outdated lists.
- RSVP list management presents another challenge, with different units adopting varying approaches. In some cases, manual creation of these lists remains the quickest option.

- Despite efforts, tracking constituent contact preferences and privacy settings lacks systematic oversight. The process for requesting data currently requires staff to have a deep understanding of the data in CRM to generate accurate information efficiently.
- The current in-house developed List builder tool was mentioned as helping to ease some of these challenges. List builder will continue to serve us well during the interim period, following an evaluation of where we go next.

OPPORTUNITY / RECOMMENDATIONS: As noted in section 2.1 above, creating a single, unified source for all OSUF constituent data, with automation processes connecting this source and our other essential data systems, working to ensure our data is maintained accurately, is a central recommendation. Ensuring that data is personalized to the individual is also essential. Investing in and implementing training programs to support our staff's access to accurate and efficient information is also recommended.

We are committed to fostering a culture that prioritizes data usage of our most up to date information while also ensuring that communication with our constituents is accurate and respectful. This will help prevent unintended communication with those who may no longer wish to receive certain types of information, or have passed away.

2.2.2. Cross-unit project and task management is not centralized, and groups have selected their own solutions and/or methodologies. Projects frequently require cross-unit coordination between project stakeholders and team members, though our staff are not using all the same tools.

- Asana is currently being evaluated although Trello and Microsoft Planner are also being used.
- Basecamp is used by one unit for internal task and project management.
- Feedback from multiple participants suggests that Basecamp's features are inadequate and do not align with desired cross-departmental functionality for task management.
- Communication around projects requires access to multiple systems. This is inefficient and taxing on staff time.
- Collaboration and communication between OSU and OSUF is common and necessary to accomplish much of our work; however, there are challenges in establishing simplified collaboration between our organizations where information security is concerned.

OPPORTUNITY/RECOMMENDATIONS: For project and task management, gather requirements with stakeholders to identify a single enterprise solution and invest in training and support to ensure workers have access to the tools and know how to use them. This approach will help ease buy-in and have a better chance of getting the most out of our investments, ensuring our workers can collaborate across units to get work done using a centralized system with standardized processes and training.

2.2.3. Current volume of cross-unit external communication put us at risk of losing constituent trust. Lack of shared visibility in our communication activities across OSUF, such as email and direct mail endeavors to our donors, alumni and friends, can lead the Foundation and its affiliates to appear uncoordinated from the perspective of our constituents.

- Events, activities and milestones are often tracked within unit-specific calendars only visible by the unit managing the calendar.
- We run the risk of our constituents receiving multiple “spamming” messages that lack personalization, leading to potential distrust.

OPPORTUNITY / RECOMMENDATIONS: As noted in section 2.1 above, developing a single, shared privacy and preference center to serve all OSUF constituents is a key recommendation. In addition, gather requirements with stakeholders to develop and implement a plan that would provide an enterprise-level view of OSUF communication activities, with an appropriate level of management and coordination between units to best serve our constituents (this work is currently underway).

2.2.4. Siloed workflows and personal preferences have resulted in some units investing in duplicative software tools. Foundation units are encouraged to collaborate with Advancement Services to (1) define the problem(s) that need solving, (2) gather any necessary requirements, and (3) determine the best solution based on these requirements. Currently, this process is not consistently implemented. As a result, software tools are sometimes purchased without full transparency and/or knowledge of other OSUF unit(s) facing similar challenges.

- Basecamp, Asana, Trello and Microsoft Planner are currently used for project and task management.
- A few teams either have made unit-level decisions without working with Advancement Services and/or reported being unaware of what OSUF tools might be available to them.

OPPORTUNITY / RECOMMENDATIONS: Every software investment and contract needs to be vetted and authorized by the CFO in partnership with the VP of Technology. Doing so helps ensure OSUF (a) is investing in tools that can scale, giving us the most advantageous return on investment, (b) can support our staff’s use of the software, including training and other support, and (c) can maintain a solid relationship with the vendor, allowing us to stay apprised of any ongoing changes and improvements with the software. Efforts are currently underway to identify a vendor management solution that will support this recommendation.

2.2.5 Revisit event management processes and solutions with cross-unit stakeholders to improve efficiency. Developing, managing and implementing events is a common activity for OSUF. Several units, including the Alumni Engagement Team, expressed a desire to improve the efficiency of cross-unit event management processes.

- Occasional complaints have been raised by donors who feel excluded from events that are important to them. It was reported that this happened to some Harris Society members who opted out of certain communications channels which then excluded them from events they felt they should have been invited to.
- Consistency in capturing attendee contact information on RSVP lists remains a challenge.
- Delays in engagement coding may result in outdated information for our staff.
- Eventbrite is an event ticketing platform we license only for its payment feature. This is currently a working solution though we can’t customize it.

- Event briefings templates are currently set up as Word documents. Formatting is too rigid to present the information in a cohesive, presentable format.
- For alumni events, several challenges were reported due to the manual work involved in managing events (~200/year). For example, it's difficult to know who should receive discounts, etc. when all attendees need to be tracked, including walk-ups. Post-event communications are expected within a tight timeline of 1-2 days after an event.

OPPORTUNITY / RECOMMENDATIONS: Engage with key stakeholders, including the Alumni Engagement Team, to build a shared understanding of the current processes, gather requirements, and identify best practices and potential opportunities for optimization. Work toward stronger cross-unit coordination in end-to-end event management. This includes developing a shared approach to capturing necessary RSVP list data, standardizing the ticketing and check-in system for alumni and fundraising events, and generating comprehensive attendee analytics. The priority of any solution should focus first on providing a positive experience for our alumni, donors and friends.

2.2.6. Accounting and gift processing workflows. A variety of points related to our accounting and gift processing workflows were documented during our discovery phase.

- Several accounting processes in our finance data warehouse, direct payment and reimbursement systems are served on an outdated, in-house system built on an outdated database (MS Access).
- Gift receipting is a manual process and requires a physical footprint to store up to 3 years of physical documents.
- Pledge reminders are currently sent manually.

OPPORTUNITY / RECOMMENDATIONS: Gather the necessary requirements to identify the right solution to replace the current finance data warehouse and associated systems and tools. Gather requirements and develop a plan for implementing automation in our accounting and gift processes and move away from inefficient manual processes. Ensure that information security is factored into all accounting and gift processing improvement efforts.

3.0 Methodology

3.1 Purpose

The discovery phase explored and prioritized opportunities for automation and improvement across the Foundation by engaging with and gathering information from key OSUF stakeholders and subject matter experts (SMEs). This exercise was a critical step to help us understand the current state of OSUF's various processes and identify the highest-impact opportunities for automation and improvement, as well as determine our next steps to modernize the Foundation's data ecosystem (i.e. OSUF data hub, etc.) for the next decade.

Our current data ecosystem has served us well, though as OSU and OSUF have continued to grow, the fundraising and alumni engagement landscapes have evolved in ways that require the Foundation to reexamine and reimagine how we operate. There are several strategic reasons we performed this work at this time:

- **A growing demand for more personalized digital experiences.** Shifting demands within our industry require us to reimagine the ways we do business and customize our communications and interactions with individual alumni, donors and friends.
- **New and expanded government regulations in the digital domain,** such as data privacy, are being created and refined. These demands drive the need for change in how we work.
- **Staffing and automation.** It is unsustainable for us to solely rely on a strategy of hiring more staff to meet these growing demands. We propose a deeper investment in technology to enhance and optimize the way we do business. Using AI tools to augment our work, we can improve how we operate, including how we analyze donor data and identify patterns, interests and demographics that lead to a more personalized customer experience. We can better analyze historical data and potential funding sources, optimize fundraising campaigns for greater impact and ultimately fulfill our strategic goals and objectives.
- **The long-term vision for our data ecosystem has changed.** We invested in this discovery phase now to reexamine our operations and reimagine how we work to help us avoid significantly higher investment costs and future risks.

3.2 Benefits

The discovery phase laid the foundation for a successful initiative by engaging directly with key stakeholders to understand our operations holistically, gather requirements, and allow a clear roadmap to be formed. Benefits of performing the discovery phase include:

- Developing a shared understanding with key stakeholders about our processes, including those we can build on and those in need of improvement.
- Gathering requirements to help leaders and stakeholders understand the current state of OSUF business processes so we know what needs to be improved and what we can build on.
- Mitigating risk and identifying potential issues early to improve our chances for success.
- Helping project sponsors and managers estimate resource costs.
- Ensuring we're aligned with OSUF business goals and objectives holistically.

- Instilling stakeholder confidence by fostering pro-active communication and collaboration with stakeholders from the beginning.

3.3 Timeline, Process & Participants

Completion of the discovery phase took approximately 8 weeks (about 2 months), from late September to mid-November 2023. During this time, we conducted a comprehensive engagement tour that included:

1. Two kick-off sessions with identified stakeholders, describing the process and plan.
2. A web survey to gather initial stakeholder input about the current state of our processes.
3. 16 information gathering sessions with key functional units to dive deeper into the current state of our processes and learn more about any desires for our future state.

In total, we engaged with over 80 stakeholders across 18 OSUF units, including:

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| • Administrative Support | • Athletics |
| • Advancement Services: Analytics | • Beaver Caucus |
| • Advancement Services: Data Operations | • Development |
| • Advancement Services: Relationship Insights & Pipeline Development | • Finance |
| • Advancement Services: Infrastructure | • Gift Administration |
| • Advancement Services: IT/security | • Gift Planning |
| • Alumni Engagement | • Marketing & Communications |
| • Annual Giving | • Stewardship |
| | • Talent Management |

Following this stakeholder engagement plan's implementation, the information gathered was reviewed and served to inform a proposal for USI. We want to thank all identified stakeholders who took the time to contribute to this effort.

Appendix

A summary of information gathered from each stakeholder session is available. // [Link to shared folder on the OSUF Data Transformation Sharepoint site.](#)

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