A Trusted Partnership, Customized Solutions

INTERIM STAFFING, MANAGED SERVICES, PREDICTIVE MODELING

Based in Orlando, with a dozen more locations throughout Central Florida, the University of Central Florida (UCF) has 13 colleges and more than 230 degrees programs. With an annual enrollment of more than 70,000 students (57% are first-generation college students, 49% are minorities), the alumni community today numbers 334,000 Knights strong and growing.

Securing contact information for that voluminous alumni community—half of which had graduated since the early 2000s—was daunting, as was determining how best to engage the alumni and discern who might be a viable candidate for outreach. Compounding the challenge was the fact that the average age of alumni was 41 years old (median age was 38) and over 27,000 alumni had a giving capacity of $100K or more. Updating data records was difficult given the reality that alumni in this age group were more likely to be mobile and changing addresses and jobs while getting established in their professional and personal lives. UCF Advancement leaders wanted not only to address data quality concerns but also use their data more effectively to inform decision making.

In 2019, BWF completed several consulting projects for UCF, including creating predictive models for major giving,

The University of Central Florida was founded in 1963 to "fuel the region's talent pipeline and support the growing US space program." Today, this leading metropolitan research university is ranked among the nation's top 20 most innovative colleges (according to *US News*) and is considered a best value by *Forbes*, Kilplinger, and The Princeton Review.

planned giving, and the annual fund and conducting a post-campaign assessment following the record-setting $500M IGNITE Campaign. That assessment included capacity analysis, staffing yield analysis, and projections—all conducted using UCF's sizable database. The partnership ultimately led to additional collaborations and a cutting-edge modeling project that dramatically changed how the Advancement team made decisions about engaging with prospects.

Interim Staffing: Providing Continuity, Setting Priorities

One of the early additional engagements involved interim staffing. At the time, UCF was experiencing significant data quality concerns and user experience issues after a prior implementation of Blackbaud CRM. Concurrently, the departure of UCF's AVP of Advancement Services led to the need for someone to provide leadership in this area, someone who could identify the operational and technical changes that would have the biggest impact on resolving concerns, prioritize tasks that needed to be completed, and support their successful campaign completion.

UCF retained BWF to serve in that critical interim leadership role. Then Associate Vice President Merrell Milano was essentially embedded with the Advancement team. In addition to meeting with stakeholders and advancement services leaders to identify a comprehensive and cross-collaborative list of projects, Milano was tasked with prioritizing the list and subsequently managing specific tasks to completion. The UCF teams received coaching on project management methodology and stakeholder communications to support these projects.

Building an Innovative Predictive Model

One of the pressing priorities identified during the interim staffing engagement was the need to determine which prospects would be more willing to engage with gift officers. With such a large alumni base, UCF needed to not only update and populate more records but also find a way to more efficiently allocate limited resources for maximum ROI. To do that, the team utilized several approaches, including reaching out via LinkedIn, direct mail, emails, and phone calls to enhance data integrity.

BWF then created a fully customized and unique predictive

model that zeroed in on prospect likelihood to accept a visit (i.e., a meaningful interaction that would advance the conversation and relationship). With such a young alumni base, gift officers were using these interactions as opportunities to introduce graduates to philanthropy, its importance to the institution and the impact it can make, and how they could play a role in advancing UCF's mission.

Getting Results That Advance the Mission

During the past four years, over 200 projects were completed jointly, impacting data integrity, reporting, and usability of the Blackbaud CRM system. In one instance, the incorporation of BWF models plus enriched contact information led to the doubling of the direct mail acquisition response rate—from .09% in FY19 to .18% in FY20.

UCF also worked with BWF to create a suite of custom models including annual giving leadership, major and principal gift, planned giving, and visit likelihood; an engagement/connection score; and the implementation of a dynamic scoring process embedded within the CRM to score new records and rescore existing records quarterly in order to track changes in engagement and likelihoods. The implementation of these likelihood ratings allowed the prospect development team to create highly curated prospect lists for a variety of purposes in addition to supporting portfolio optimization.

As Senior Director for Advancement, Prospect Development Kim Walz explained, "Our collaboration with BWF meant that for our predictive modeling projects, we were working with advanced analytics experts who deeply understood the business of

"Our collaboration with BWF meant that I could stay focused on division-wide priorities rather than getting pulled into the weeds on complex technical projects. In the absence of a permanent leader of our advancement services area, BWF stepped in to provide us with the support we needed to not only manage the day-to-day, but also to improve our data governance structure, staffing plans, and other high-level strategic priorities."

—RACHEL SCHAEFER, ASSOCIATE VICE PRESIDENT FOR ADVANCEMENT STRATEGY AND CHIEF OPERATING OFFICER

Feeding & Managing the Pipeline
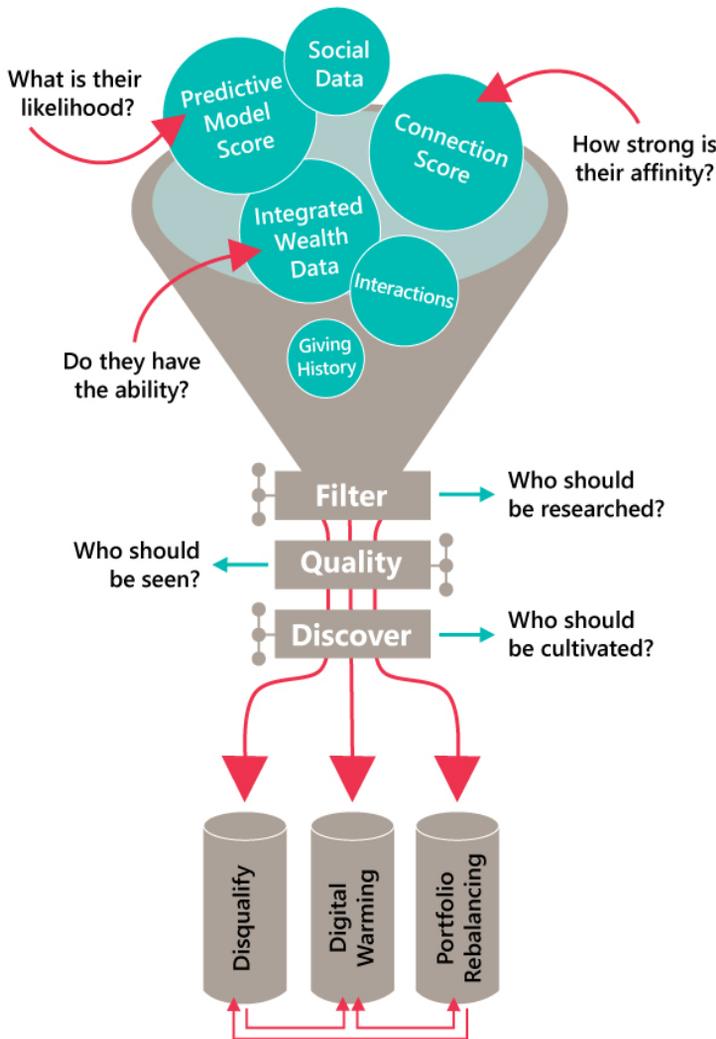
This graphic represents the various sources of raw data and analytics products that can all be filtered through an effective prospect management program to accurately sort and segment the pipeline for optimal resource allocation.

development and fundraising, who were open to exploring new possibilities within our data and with the types of analyses conducted. Our annual fund team incorporated several ratings into the student caller program and saw significant increases in total dollars raised per hour with the average gift size doubling, while a reduction in outreach attempts to connect with alumni donors was also realized."

UCF also successfully implemented the visit likelihood predictive model scores into their discovery list generation processes and saw a significant improvement in conversion rates. "As one significant example of success," noted Walz, "by utilizing these curated discovery lists our gift officers reduced the number of outreach attempts to secure a visit from 20:1 to 3:1, at best, and 5:1 on average." The collaboration on the visit likelihood model was so successful that BWF and UCF presented on their work at both the AASP Virtual Summit and the APRA Florida regional conference last year.

A True Partnership

For Associate Vice President for Advancement Strategy and Chief Operating Officer Rachel Schaefer, the engagements have been successful because there is a true partnership. "While we were always working from a detailed plan, nothing about the experience was prescriptive or templated," explains Schaefer. "We had to pivot multiple times in the past few years as new priorities or challenges arose, and BWF was always incredibly supportive and flexible. Sometimes this meant simply shifting their focus and attention, but other times it meant

bringing other BWF teammates on board with specific skill sets and experiences. Ultimately, they allowed us to navigate through a multitude of issues and we've come out better and stronger as a result."

Informing Long-Term Planning

Today, the UCF Advancement team is much better equipped to align staffing with the potential in the database and more efficiently and effectively direct efforts to those prospects likely to accept a visit. The team has improved consistency in tracking efforts year over year and is not averse to innovating, having seen the positive outcomes of the innovative visit likelihood modeling project.

As the Advancement looks ahead, it sees its long-term planning being shaped in important ways by this collaboration. The team summarized its planning as built on a foundation of four factors:

- The more data, the better.
- Consistency is key to tracking efforts over the years.
- Not being afraid to innovate.
- Using the process to improve future mobility through the donor pipeline.

And as Walz reflects on the yearslong collaboration, she notes that "this effort was successful because of BWF's customized approach and collaboration with the UCF team. The BWF team has remained dedicated to ensuring that the products of these models, and other projects such as the Engage Dx survey, were operationalized successfully. From delivering multiple presentations to share results and recommendations with a variety of stakeholder groups, to revisiting implementation strategies for improving operationalization, the BWF team has always been available and interested in the success of its products and services well beyond delivery." ◼

"I would recommend BWF because they truly are a full-spectrum consulting firm. From high-level strategic planning and visioning down to working through issues with vendors, they were able to offer us a team of professionals who were responsive and knowledgeable about not only our university, but our department-specific projects and goals as well."

–RACHEL SCHAEFER, ASSOCIATE VICE PRESIDENT FOR ADVANCEMENT STRATEGY AND CHIEF OPERATING OFFICER