

Building Communities of Practice





Building Communities of Practice

Driving Fundraising
Impact through
Collaborative Reporting
Practices





KindCon²⁰²⁵



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Agenda

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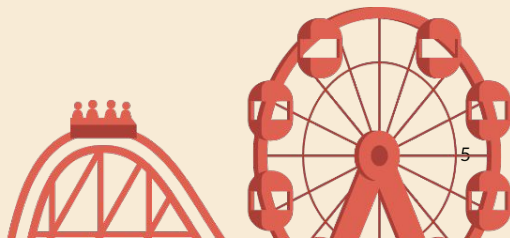
WFAA Background

1945: **Formation** - UW Foundation established by donors as the official fundraising organization for UW-Madison

2013: **Collaboration** – Kickoff of the All Ways Forward Comprehensive Campaign, with UW Foundation, Wisconsin Alumni Association and UW partnering more closely

2014: **Modernization** – UW Foundation implemented Blackbaud CRM, Financial Edge, custom data warehouse

2015: **Optimization** – UW Foundation and Wisconsin Alumni Association merged to form Wisconsin Foundation & Alumni Association



WFAA Reporting Investments 2014-2021



Team Growth

5 BI Report Developers
3 Data Warehouse Developers
2 Managers



In-house Analytics

Growth of in-house data science team & dynamic predictive models



SSRS & Tableau

Nearly 150 custom self-service reports developed



Org Growth

Growth in staff, skills and expectations for data-driven decisions



Advancement RM Implementation Goals 2022-2023

Understand Our Constituents

- Leverage data and systems to better engage constituents
- Develop personalization strategies
- Invest in interest-based framework

People Readiness

- Invest in skill development to use systems and data effectively
- Ensure system adoption

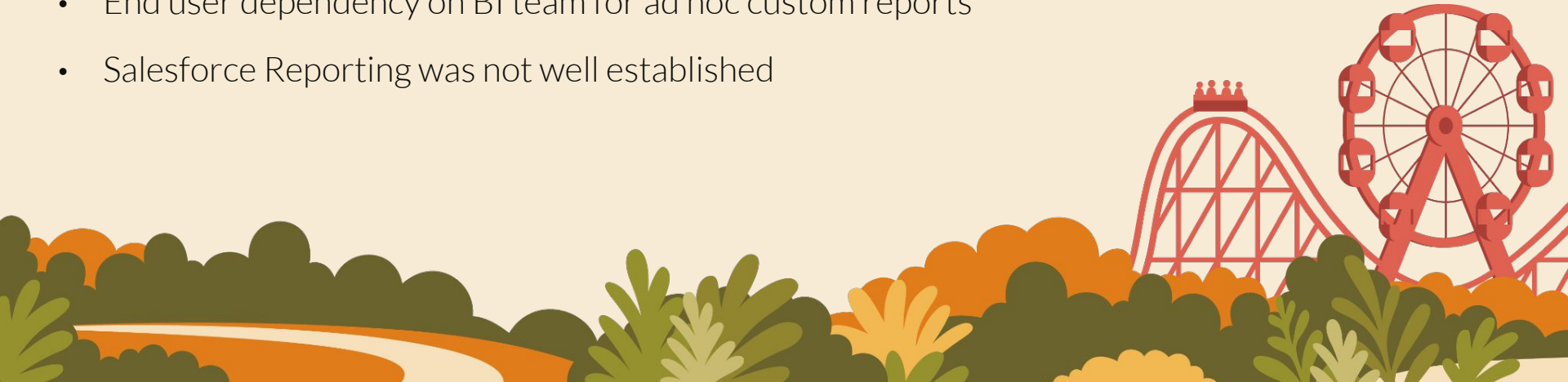
Data Driven Strategies

- Use data and analytics to drive advancement results
- Empower end users with greater access to data

Stabilization Period 2023-2024

Challenges & Opportunities for BI & Data Warehouse

- Changes to data structures delayed data warehouse rebuild
- Late decision to adopt Power BI
- Learning curve for new data and tools slowed report development
- End user dependency on BI team for ad hoc custom reports
- Salesforce Reporting was not well established





New Systems = New Approach:
Empower End Users
Focus BI on Strategic Reporting



Building Communities of Practice 2024-2025

Step 1

- Build self-service reports

Step 2

- Select & train power users

Step 3

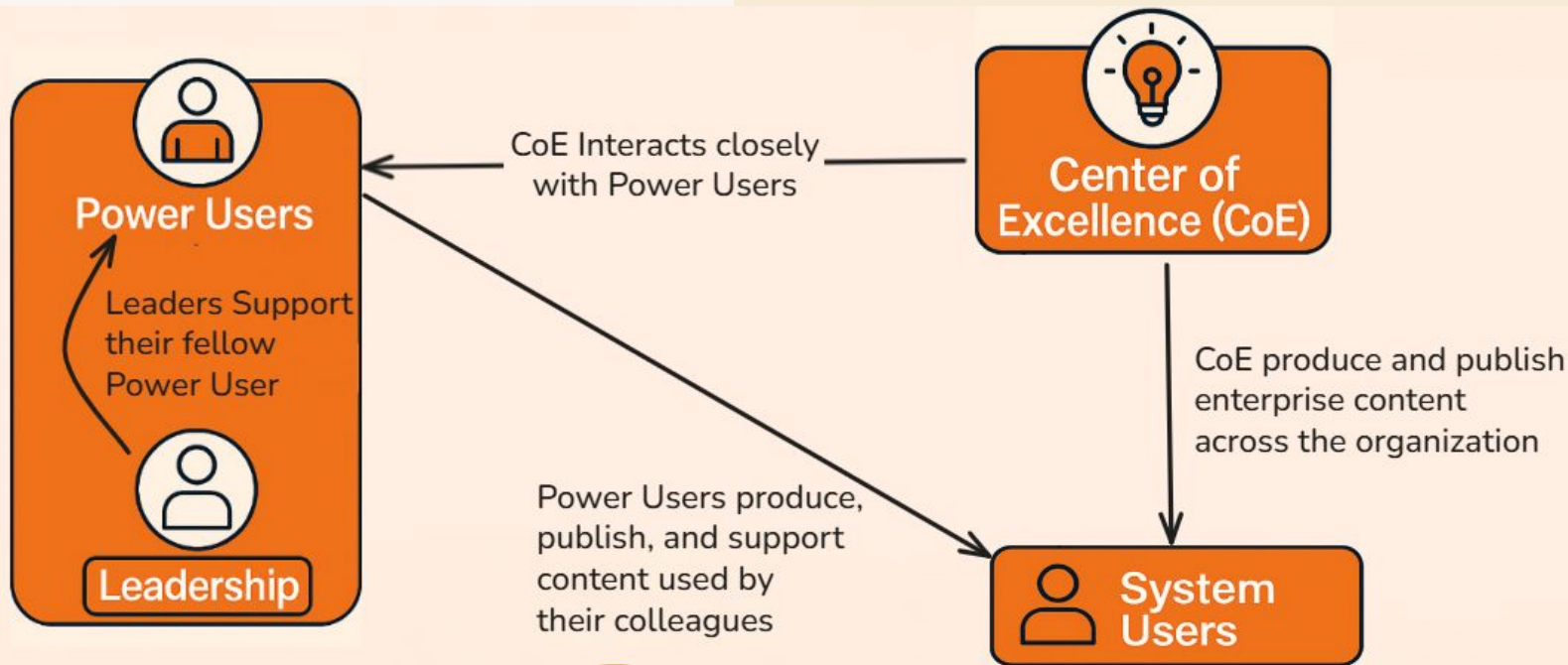
- Reduce BI time on ad hoc/custom report development

Step 4

- Deliver enterprise strategic reports



Community of Practice



Community #1: Operational Power Users

Goals

- Empower operational teams
- Upskill on Salesforce Reporting
- Reduce reliance on BI team

Tactics

- Train on Salesforce Reporting and Apsona
- Bi-weekly forums
- Microsoft Teams Channel

Outcomes

- Engaged power users
- Upskilled in reporting and data literacy
- Facilitated experimentation
- BI shifted to advisory role

Top 3 Salesforce Objects for Reporting

Gifts and Transactions: 420

Opportunities: 160

Accounts and Contact: 150



Top 3 Departments creating Salesforce Reports

Medical Annual Giving: 220

Prospect Development: 190

Gift Services: 120

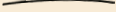


Top 3 Report Types

Audit: 320

Operational Metrics: 300

Informational: 300



Community #2: Development Power Users

Goals

- Reduce report requests to BI
- Empower Development teams
- Upskill on reporting tools
- Create self-sufficiency
- Improve engagement with campus partners

Tactics

- Train on self-service Power BI reports, Salesforce Reporting, Xlookup
- Bi-weekly forums

Outcomes

- Engaged power users
- Upskilled in reporting and data literacy
- Significant reduction in report requests
- Informed enhancements to existing self-service reports
- BI learned from power users

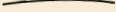
Collaboration led to...

- Three new Power BI reports
 - Many enhancements to existing reports
- 

As capabilities grew...

- 170% increase of report requests fulfilled by power users year over year
 - Shifted consumption from custom to self-service
- 

Feedback from users...

- More confidence in my abilities
 - Inspired to try new solutions
 - Helped my team advance our projects more quickly
 - Built stronger professional and personal relationships
- 

Community #3: Analytics Power Users

Goals

- Empower “citizen data analysts”
- Upskill on analytics toolsets
- Create self-sufficiency
- Create path to operationalize analyst reports

Tactics

- Standardize job descriptions
- Train on Power BI, SQL, data warehouse structure
- Establish curated data sets
- Implement peer reviews, version control and deployment standards
- Monthly forums

Outcomes

- Upskilled in broader analytics toolset and data literacy
- Better department level insights, more quickly
- Greater confidence in insights delivered

Components of Successful Communities



Leadership Support

- Buy-in
- Strategy support
- Resource commitment



Identify the Power Users

- Aptitude
- Interest
- Network



Prepare your team (CoE)

- Training
- Facilitation
- Shift in Philosophy



Create Communities

- Recurring meetings
- Communication channel (Teams/Slack)
- Training resources



Lessons Learned



Empower & Partner

You don't have all the answers
Community will generate new insights



Power Users as “Insiders”

Share sneak previews
Solicit quick wins



Start Small, Think Big

Grow this model incrementally
Have the end in mind



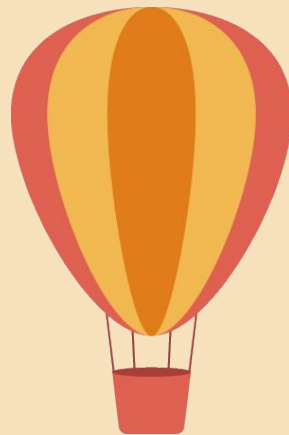
Abundance Mindset

Consider this model a multiplier
CoE as both teacher and student



Thank you.

KindCon²⁰²⁵



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Three Column Cards

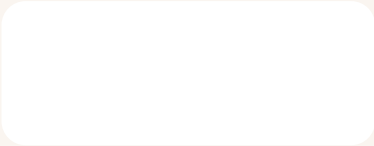




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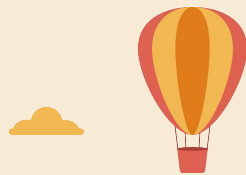
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