

“How I Kindsight” lightning round

Practitioners share the strategies they're using to get the right information to the right fundraisers at the right time.



Advancement RM Training Journey

Emily Guy, Assistant Vice Chancellor
Prospect Development & Engagement
Texas Tech University System



Agenda

Background

Training Pre-Go Live

Re-Training Post Go-Live

ARM Yourself Training

Lessons Learned



Background



Organizational Structure and Background

- Interdependent: No Employees of the Texas Tech Foundation
- Service 3 out of 5 universities in the TTU System
- 70+ Development Professionals, including LAG and Athletics
- Go Live – April 2025 on Advancement RM (ARM)



KindCon²⁰²⁶

Training Pre-Go Live



Go Live Readiness and Support Structure



Wolf Pack

Committee created to oversee implementation



Prior to Go Live

2 weeks of training



Training Groups

Development Officers and Advancement Staff



Help Group

Established on Go Live to answer questions and address issues

Re-Training Post Go Live





January 2026 – survey
sent to ARM users



Feedback created topics
for additional trainings



Wolf Pack categorized
feedback and created
training schedule

ARM Yourself Training





Launched May 2026



Monthly Trainings



Blackout Dates

Monthly Calendar

May: Navigation

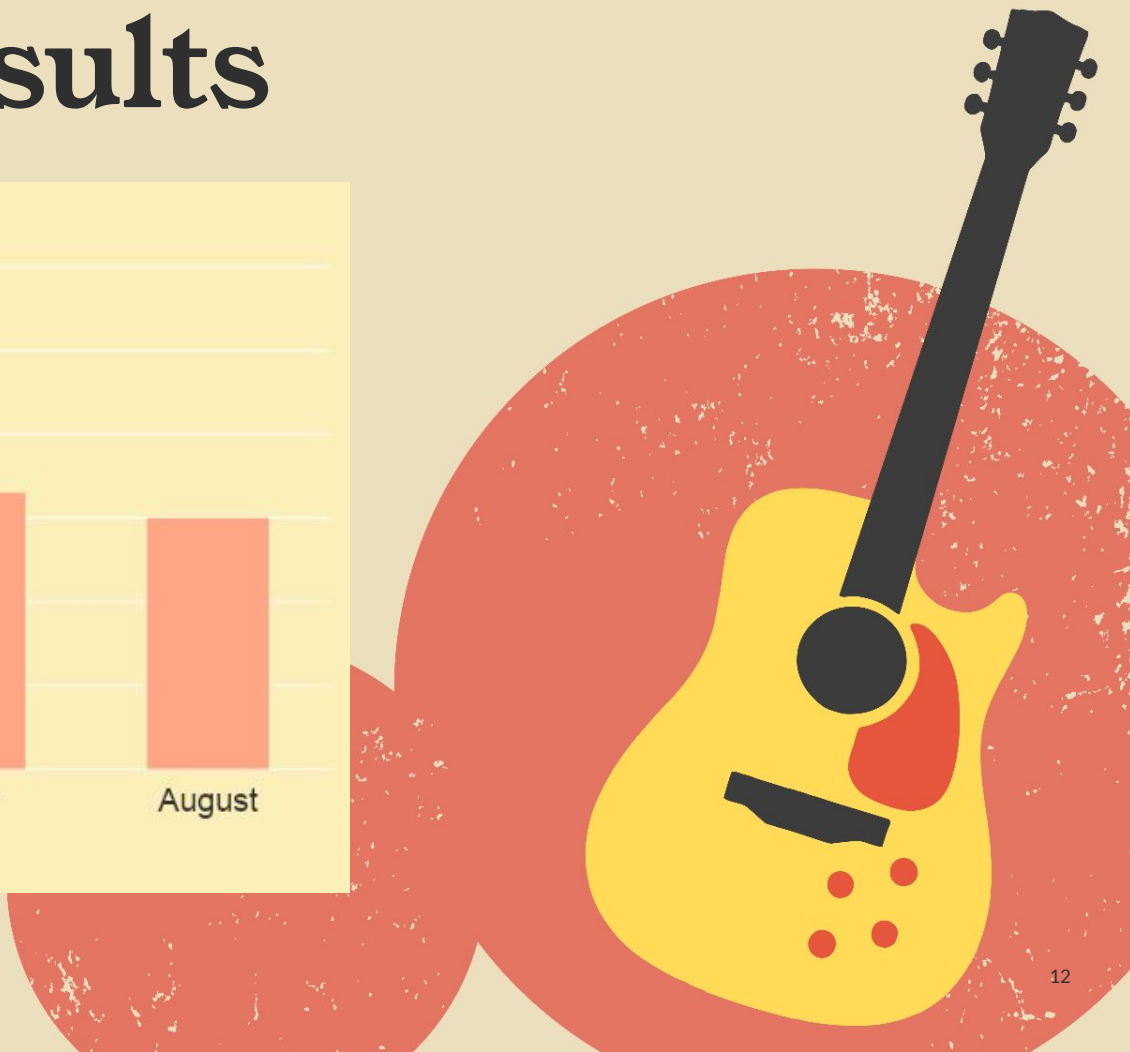
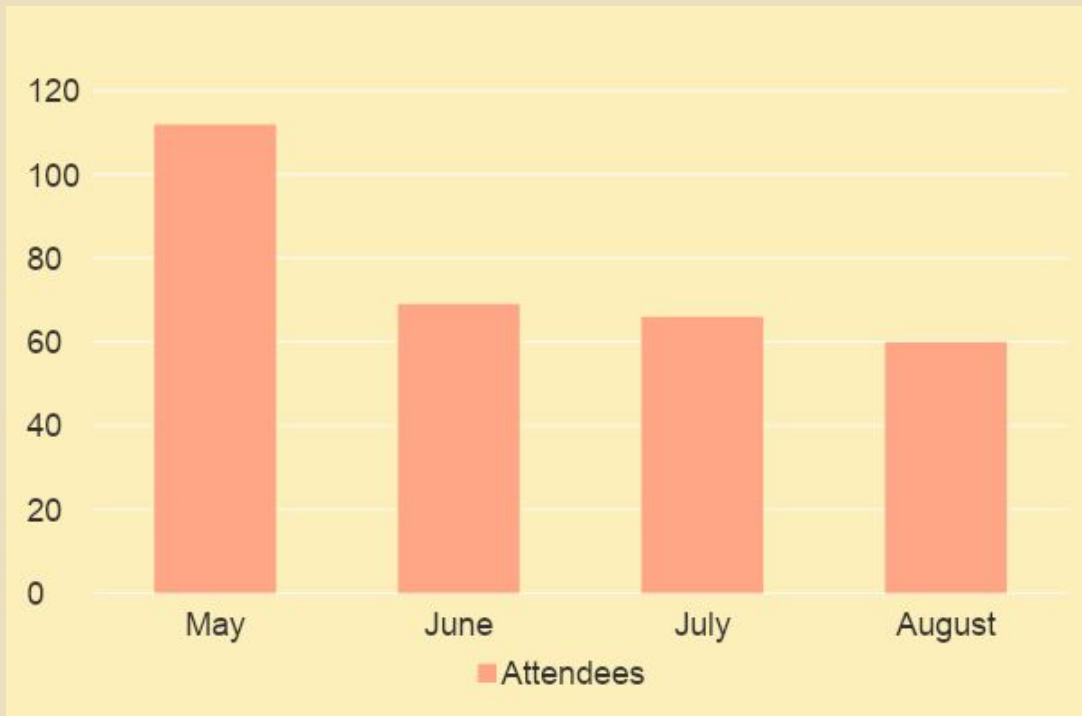
June: Reporting

July: Cases

August: Campaigns & Events

September: Blackout Date

Training Results



Lessons Learned



Anonymize Survey



Communication Balance



Technology



Q&A



Thank
you.

KindCon²⁰²⁶

Building Actionable Development Officer Dashboards

University of Colorado Anschutz





About CU Anschutz

- Academic health campus – one of four at CU
- Six schools and colleges, 4,500 students
- Two nationally-ranked hospitals, 2.9 million patient visits per year
- Team of ~70 in Advancement, including 22 with frontline fundraising roles
- Average CASE total \$228M per year last five years
- Went live on Ascend in May 2023

Jerry Sinning

Managing Director of Development, Data Insights

Special thanks also to:

Josh Chaney
Taylor Trumble
Laura Strand

Emily Randall
Meg Kinney
Morgan Holleran

KindCon²⁰²⁶



How can *Salesforce*
Dashboards help streamline
the gift officer experience in
Ascend?

Disclaimers and Context



One tool in toolbox

- Salesforce Reports & Dashboards
- IBM Cognos reports & dashboards
- Tableau dashboards*
- SQL analysis
- Custom list views



Not the full picture

- DO Performance Dashboard
- Monthly DO Engagement Reports
- Proposals Dashboards
- Referrals Analysis
- Portfolio Reviews



Portfolio factors

- DOs are mostly generalists
- TYs assigned for nearly all gifts; many direct to portfolio
- Patient referrals also (security factors in)



Early phase

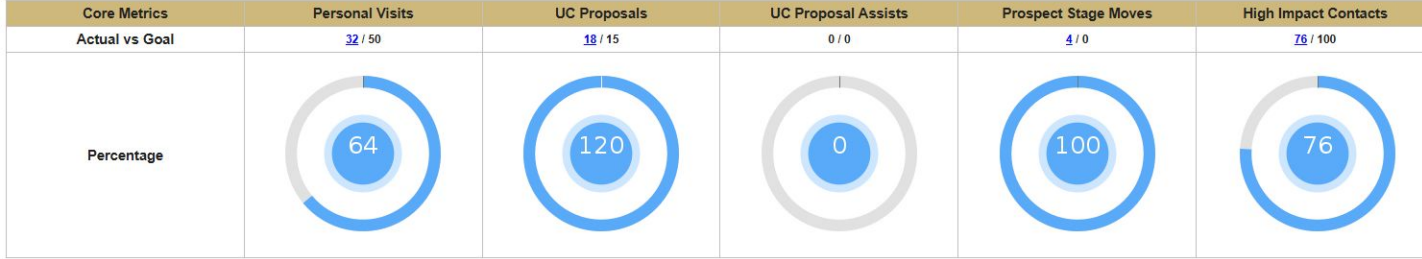
- Launched March 2026
- Iterative development
- Potential for relocating some to Tableau in future

What already existed for development officers (DOs)?





Prompt Beg Dt	Prompt End Dt	Prospect Manager ID	Prospect Manager	Campus	Office	Staff Start Date	Staff Stop Date
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Contact Reports

Count CR All	Distinct Visits Count	Qual DQ Count	Group Visit Count	A	G	H	K	L	M	P	Q	S	
307	25	0		1	ASSIGNMENT_TYP	DAYS SINCE LAST DO CO	CONTACT_METHOD	LAST_GIFT_AMC_DATE_OF_RECOR	COUNT_CONTACTS_12MON	COUNT_CONTACT_METHODS_12MON	TIME_IN_PORTFOLIO	TOTAL_AMC	Engagement Rate
				2	Prospect Manager	Not Contacted Yet	Not Contacted Yet				354		98%
				3	Prospect Manager	214	Email	12/8/2025	1	1	1,911	\$ 30,000.00	
				4	Prospect Manager	209	Email	11/29/2021	2	2	4,499	\$ 309,389.00	
				5	Prospect Manager	151	Phone Call-Spoke to Don	6/12/2023	2	2	3,632	\$ 100.00	
				6	Prospect Manager	117	Email	12/31/2025	18	6	1,112	\$ 892,650.00	
				7	Prospect Manager	116	Email	12/22/2025	5	2	2,335	\$ 5,900.00	
				8	Prospect Manager	99	Email	12/18/2025	10	5	4,707	\$ 1,552,929.65	
				9	Prospect Manager	94	Phone Call-Spoke to Don	12/23/2025	10	6	991	\$ 1,001,800.00	
				10	Prospect Manager	74	Email	11/14/2025	8	4	2,089	\$ 1,800,327.70	
				11	Prospect Manager	74	Email	12/3/2025	10	3	3,086	\$ 1,200,000.00	
				12	Prospect Manager	74	Email	10/15/2025	3	2	2,988	\$ 2,026,445.00	
				13	Prospect Manager	74	Email	8/13/2025	4	3	3,274	\$ 7,500.00	

List View Example: My Assignments

Object to navigate to for this list: Assignments

From a newly created list view page, adjust the filters to include:

1. **All assignment** under the **Filter by Owner** filter.
2. Add a new filter on the **Assigned Relationship Manager** field
 - a. Leave the Operator to **Equals**
 - b. In the Value section, search for the Primary Authors name *as it appears in the system*.
 - i. **Note:** If you are attempting to pull a list that is pulling several different primary



CU Anschutz Advancement Quick Guide

Creating a List View for Navigating Assigned Referrals and Thank You Calls

In CU Ascend, assigned thank you calls and referrals (patient or non-patient referrals) will be linked to Tasks. Building a list view for these types of Tasks will allow you to easily navigate to them and monitor and update their statuses. To build this list view, follow these steps:

1. Open the Task object from the App Launcher in your navigation bar

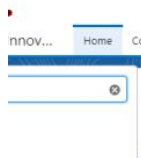


CU Anschutz Advancement Quick Guide

Creating a List View for Proposals

In CU Ascend, Proposals are a type of Opportunity. (Gifts, pledges and matching gifts are also Opportunities, so it's important to not assume that Opportunity = Proposal.) To view Proposals based on a specific Proposal Manager (or other criteria), you can use proposal reports in Advancement Intelligence (AI). These will give you the most robust information currently available. However, for quick access to a list of Proposals within CU Ascend (which will help you navigate quickly to them), we recommend building a list view. To build this list view, follow these steps:

1. Navigate to the Opportunities object. It should be at the top on your Navigation Bar, but you can also find it from the App Launcher (waffle icon).
2. Click the gear icon to see the List View Controls. From this list, select New. (Note: Don't press the new button above the funnel icon; that will create a new Proposal instead.)

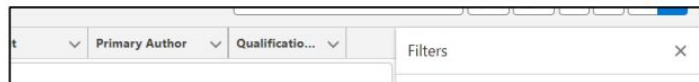


List View Example: My Contact Reports

Object to navigate to for this list: Contact Reports

From a newly created list view page, adjust the filters to include:

1. **All contact reports** under the **Filter by Owner** filter.
2. Add a new filter on the **Primary Author** field
 - a. Leave the Operator to **Equals**
 - b. In the Value section, search for the Primary Authors name *as it appears in the system*.
 - i. **Note:** If you are attempting to pull a list that is pulling several different primary authors (example: Gwen D'Elia AND Michael Wolbrom), you *must* switch the operator to **contains** and include a comma and space between your search terms.
 - Example: Gwen D'Elia, Michael Wolbrom



Issue: Frustrating Experience for DOs



Go-Live: Custom List Views

Workload shifted to DOs for “reports,”
leading to inconsistencies



List Views don't always cut it

Single-object capability limits what can be
built; have to go to 10+ lists



Have to work outside Ascend

Lack of embedded reports/dashboards
for DO-related work



Metrics reports aren't enough

Looking for data at their fingertips, not
just how they have been performing

DO Dashboard Data Points

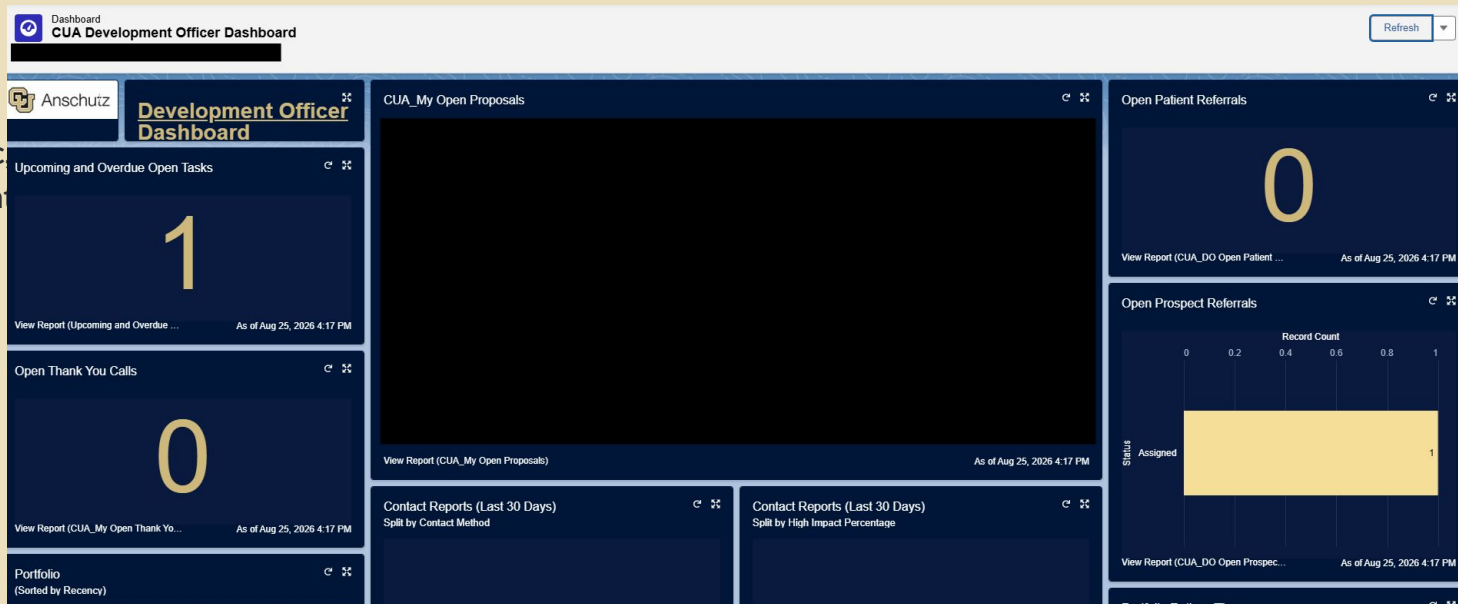
- Upcoming and overdue Tasks (inc. assigned thank you calls)
- Open Proposals and Referrals
- Recently entered Contact Reports
- Assignments/Portfolio (by date assigned and tiers)
- Active Strategies, Interests, Affiliations (employers)
- Upcoming Hospital Visits (scheduled appointments) for managed patients
- Geographical distribution of portfolio



Development Officer Dashboard

- Doesn't replace existing metrics reports
- Replacement OR supplement to List Views

- Dynamic
- Accelerated



Thoughts on Dynamic Dashboards

- Great for end-user experience – set all to filter on running user automatically
- Can pull in many different objects without challenges of filtering
- Subscribing (to dashboard or underlying reports) can help adoption

But...

- Limited number with your Salesforce account
- Harder to build and test when you don't have data yourself
- Needed to build separate Development Assistant version for supporting DOs



Development Assistant Dashboard



1. WHAT WE NEEDED

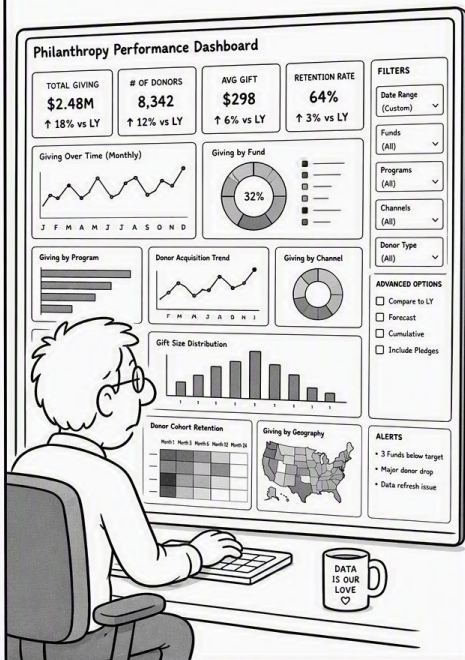
We just need a simple report of giving by month.



GIVING BY MONTH

MONTH	TOTAL GIVING
JAN	\$125,000
FEB	\$143,000
MAR	\$132,000
APR	\$156,000
MAY	\$141,000
JUN	\$128,000
...	...

2. WHAT WE BUILT

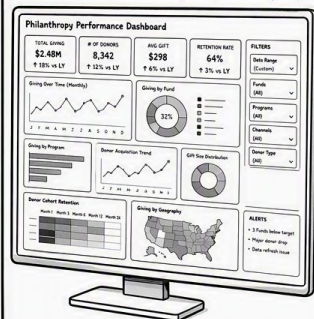


3. WHAT USERS GOT

I just wanted the giving by month.



I have no idea what I'm looking at.



Q&A



Thank you.

Jerry Sinning

jerry.sinning@cuanschutz.edu

[Connect with me on LinkedIn](#)

[CU Anschutz Office of Advancement](#)

Implementation Updates

How UC Berkeley communicates with a broad
& diverse Advancement audience



Riley Jordan

Director, Solutions Management
Advancement Information Services
UC Berkeley



Modernizing Advancement Systems at UC Berkeley

! Reason for Change

- **CADSbase** is at **end of life** and **end of support**
- **CADSbase** does **not efficiently support** UDAR's data and technology ecosystem (**> 2 million records**)
- Customization **beyond sustainable** support levels

🎯 Goals & Objectives

- **Unify** Advancement's technology and data systems on a single platform
- **Enable** data-driven decisions to improve programs, engagement, and performance
- **Foster** collaboration across departments for holistic constituent engagement
- **Modernize** and simplify services by streamlining processes, reducing customizations, and replacing outdated tools with updated technology



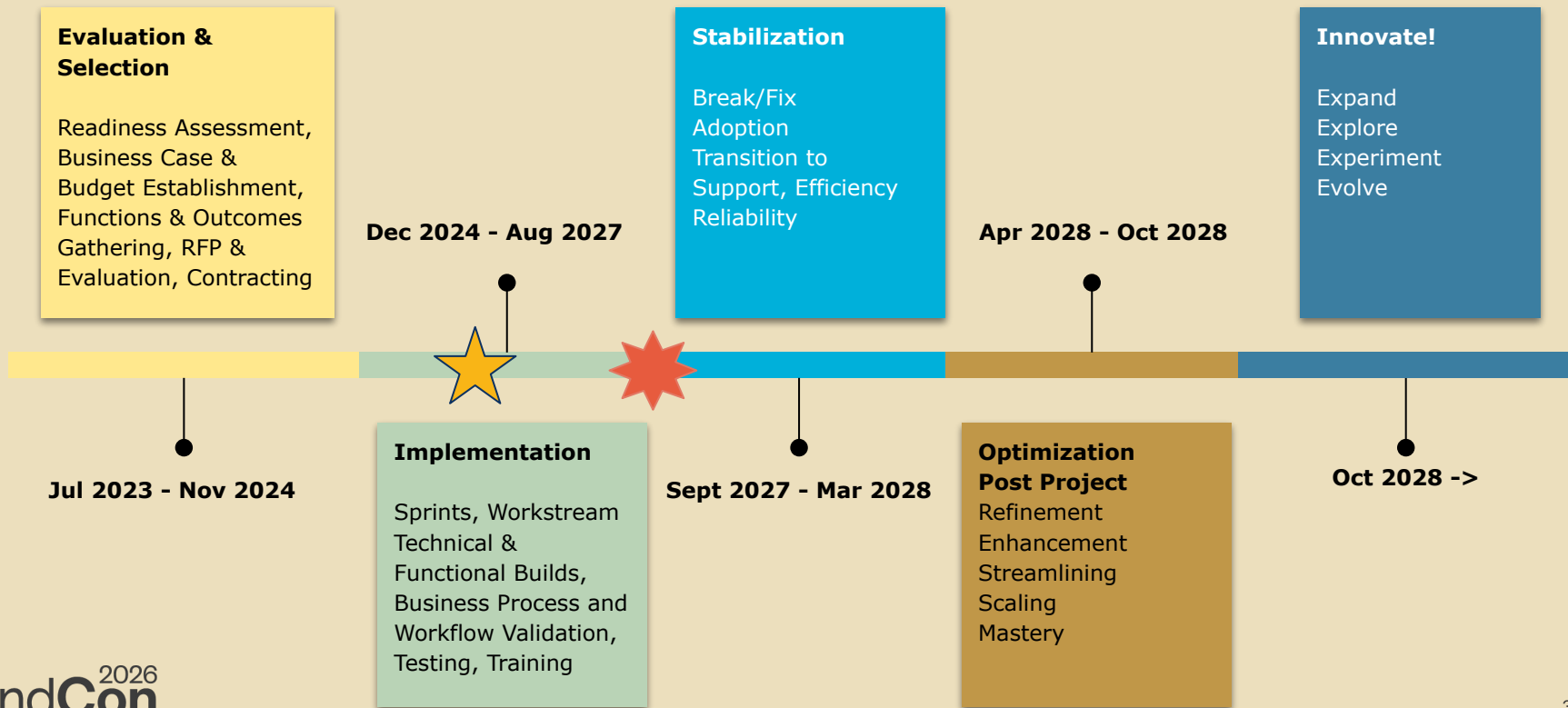
URSA Timeline



= We are here



= Projected Go Live



URSA Implementation:

Expected benefits, impacts and outcomes

Improved Efficiency

Better Decision-Making

Enhanced Collaboration

Cost Savings &
Sustainability

Improved User Experience

Future-Readiness

And more...

Expected Benefits



Executives & Leadership

Cal Advancement Data
System (CADS) Users

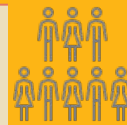
UDAR Units

Development Officers /
Frontline Fundraisers

Data Governance
Committees

And more...

Impacted Groups



Move away from
disconnected tools like
Smartsheet and Excel

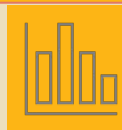
Decrease time spent on
manual tasks through
automation and self-service
reporting

More accurate, timely, and
complete data

High user adoption

And more...

Outcomes

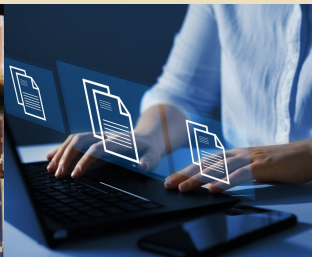


Communication channels



URSA Info. Hub

Visit the project website, a one-stop space for all project answers, news, and recorded demos. Fundraisers should visit the [Newsroom](#) monthly.



Monthly Showcases

Join these demos to verify that URSA configurations meet your specific frontline requirements.



Lunch & Learns

Stay updated on project vision and progress. View upcoming milestones to ensure you can plan your team's activities accordingly.



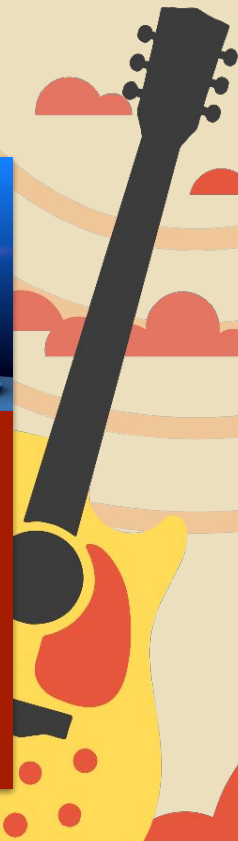
URSA Adoption Network

Nominate a team member to represent your unit, support peers through the transition, and strengthen confidence.



URSA Communications

Read the Know Do Share to review your calls to action, along with the newsletter and weekly status update to stay aligned.

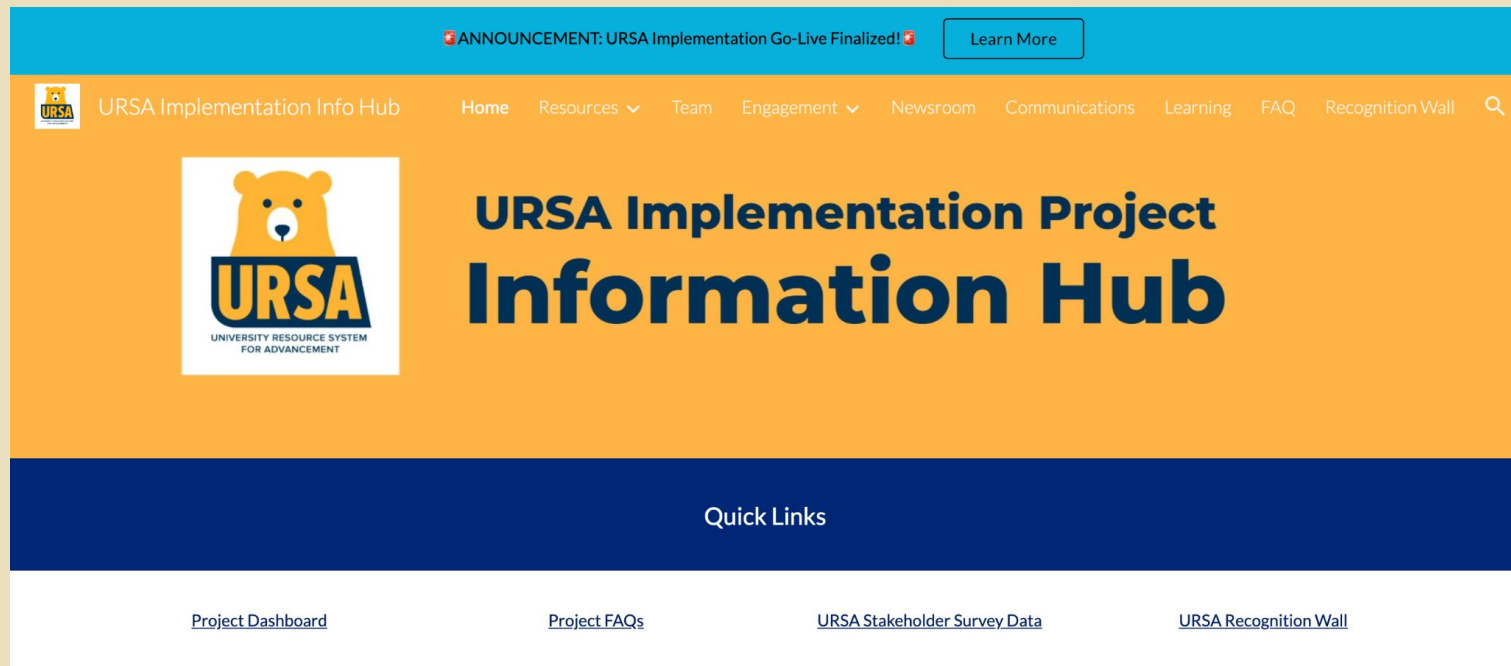


Communication channels

- InfoHub website
- Newsletters
 - Weekly Status updates
 - Berkeley Advancement biweekly news briefs
 - Monthly Newsletter
 - Know Do Share - high level summary for executive leadership
- Showcases
- Lunch and learns
- URSA Expo
- Governance Committees
 - Data Priorities Advisory Council
 - Data Advisory Committee
 - Technology Advisory Committee
 - Executive Steering Committee
- Small Unit Consortium
- URSA Adoption Network



URSA Information Hub



URSA Newsletters

- Weekly Status updates
- Berkeley Advancement biweekly news briefs
- Monthly Newsletter
- Know Do Share - high level summary for executive leadership



Weekly Status Updates

URSA: University Resource System for Advancement Charter			↑ = improving ↔ = no change ↓ = declining	● = healthy ● = warning ● = critical
Category	Status	Trend	Explanation	
Overall Status	●	↔	URSA implementation is progressing steadily, with most areas healthy and on track. Overall status remains yellow as a few areas continue to have outstanding issues and dependencies that require attention before the implementation can be considered fully on track.	
Advancement Solution	●	↔	Work remains on track with all key areas stable and healthy. Security and permissions testing continues, with additional time allocated through August to support completion.	
Data Conversion	●	↑	The workstream is focused on completing outstanding TR1 work updates, which are currently on track. Overall status remains yellow due to ongoing finalization of the TR2 execution strategy and dependencies, along with the in-progress resource transition.	
Stakeholder Enablement	●	↔	Workstream remains on track for the August 31st Small Unit Consortium (SUC) Kickoff and upcoming future-state presentations.	
Data Warehouse	●	↔	The DW team will be re-testing all previously failed test cases and documenting discrepancies to be shared with the Data Conversion workstream.	
Document Management	●	↔	On track and overall healthy momentum.	
Integrations/ Environments	●	↔	SIS remediation for Degrees continues through end of September; Lockbox POC testing continues; E-Comm, Scalefinder, and Cal Performances work are in progress.	
Information Delivery	●	↔	Development work continues to progress on unit-specific Acknowledgment Service Program reports. A Communication & Engagement Package for functional teams and campus units is in the planning stages. Discovery is also underway on embedding best practices (e.g. Tableau).	
Marketing Cloud	●	↔	Implementation continues; preference object and Business Unit decision delays do not pose an overall timeline risk. Lessons learned on cross-team decision cadence will inform planning for future cycles.	

Berkeley Advancement News Briefs

URSA IMPLEMENTATION PROJECT

URSA Implementation Go-Live Finalized

The official launch date for the URSA implementation has been finalized, establishing a clear timeline for the final phases of our project.

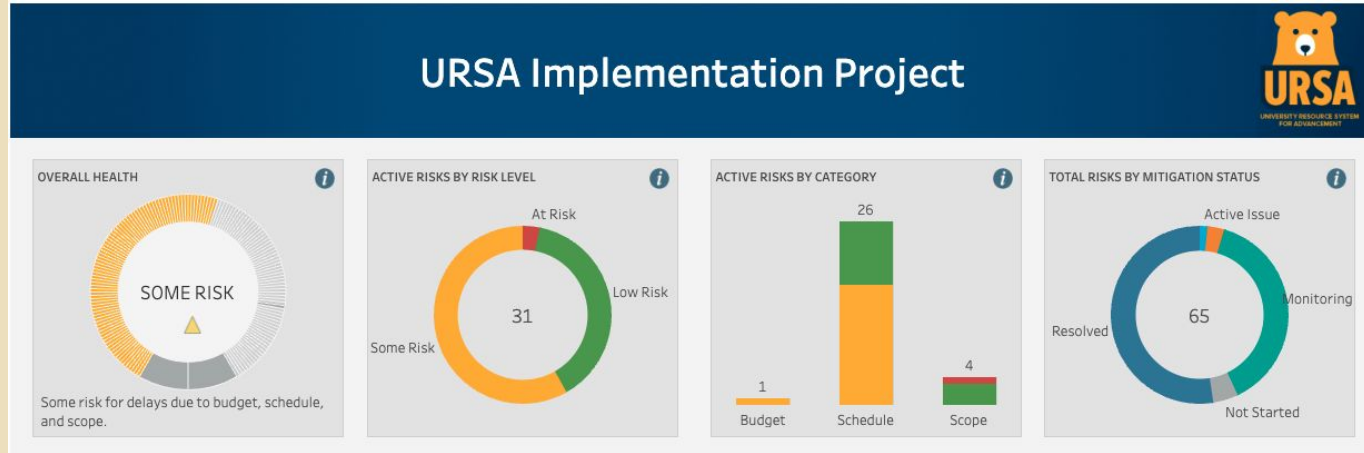
- **Finalized Go-Live:** Week of August 16, 2027

Over the next several months, the focus will be on system readiness and user preparation. High-level next steps on our roadmap include:

- **System testing:** Scheduled for this upcoming Fall/Winter.
- **User training:** Scheduled for Winter/Spring.

If you have any immediate questions, please feel free to reach out to the project team at ursaimplementation@berkeley.edu.

Monthly Newsletter



Know Do Share

June 2026: Know, Do, Share

KNOW	DO	SHARE
Here's what we need you to know: • 2026 Stakeholder Engagement Survey Launched: The survey is officially open! Our goal is to increase the 2025 response rate to ensure our data represents the entire Berkeley Advancement Community and we'll need your advocacy to encourage your teams to participate! • Go-Live Date Finalization Underway: We have reached a critical milestone where the URSA go-live date must be confirmed. This decision will be driven by stakeholder input and a comprehensive assessment of project health—including scope, competing priorities, resourcing, budget, and expected business outcomes. • The URSA Adoption Network is Growing: To date, 23 colleagues have volunteered to lead adoption efforts within their respective units.	Here's what we'll need from you: • Champion 100% Participation in the 2026 Stakeholder Engagement Survey: Lead by example—complete the 2026 Stakeholder Survey today and actively challenge your team to participate. Your leadership sets the tone—aim for 100% participation and make it a fun team challenge. • Familiarize yourself with the Go-Live Date Finalization Process: Review these resources: ◦ Recording (PW: B#63pQ@0) ◦ Slide Deck • Nominate Adoption Leads: This ensures your unit has a direct seat at the table to influence system usability and gain a "head start" on training before go-live.	Communicate these updates during team meetings or one-on-ones: • Team Goal: Challenge your Team! Everyone should complete the survey—let's see if we can hit 100% participation. Your team's input will directly inform how we tailor support and training for a successful launch. Bragging rights if we're one of the first teams to get it done! • Spread the Knowledge: Encourage your teams to watch the May Lunch & Learn recording and/or review the slide deck to better understand what it takes to finalize a go-live date. • The Opportunity: We are looking for team members to join the URSA Adoption Network. If you want to get early hands-on experience with the new system and become your unit's resident expert, this is a great role for you.



URSA Showcases

Monthly analyst led sessions
on specific areas of focus

Demo Time



KindCon²⁰²⁶

URSA Lunch & Learns

Monthly project manager led sessions on
broad project updates



URSA Expo



URSA Governance

- Executive Steering Committee
- Technology Advisory Committee
- Data Advisory Committee
- Data Priorities Advisory Council



Governance Role in URSA Project

URSA Project Steering Committee

- Final arbiter for decisions impacting project scope, budget, or timeline changes
- Unresolvable project decisions are escalated to the Executive Steering Committee
- Customization request review (sub-set of Steering Committee)

Technology Advisory Committee

- Issue/Decision escalation - final arbiter
 - Data decisions
 - Cross-functional workflows/processes
- Organizational strategy alignment

Data Advisory Committee

- Data decisions that require organizational strategy
 - Align decisions with existing organizational and team strategies
- Arbiter to resolve data decisions as forwarded from DPAC

Data Priorities Advisory Council

- Operational data decisions
- Evaluate data review/decision requests from Data Stewards
- Forward data decisions requiring strategies to DAC

URSA Small Unit Consortium



URSA Small Unit Consortium

The Purpose

A collaborative forum designed to elevate the perspectives of UC Berkeley's smaller campus units. The Consortium ensures that the operational realities of small advancement teams, specifically those with limited staffing and multi-functional roles, are integrated into the URSA system design, adoption, and long-term support.

Key Objectives

- **Champion Collective Needs:** Align around the shared challenges and interests of the small-unit community to ensure no team is left behind.
- **Ensure a Manageable Transition:** Drive a practical, well-paced implementation journey that respects the capacity of small teams.
- **Inform User-Centered Design:** Provide direct feedback on system usability, training materials, and workflows to ensure they work in "real-world" small-unit scenarios.
- **Optimize Long-Term Support:** Shape how enhancements and updates are delivered post-launch to remain relevant and effective.

The Value to Your Unit

- **Direct Influence:** Your team's day-to-day experience directly informs implementation.
- **Reduced Friction:** Active participation as "Change Champions" helps identify and resolve bottlenecks before they impact your operations.
- **Peer Network:** Connection to a cohort of other small units to share best practices and solve common problems.

URSA Adoption Network



Thank
you.



Go Bears!

Q&A

