



Inside the Gift Office

Tactical takeaways from the field





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UC San Francisco is a leading university dedicated to **advancing health worldwide** through preeminent **biomedical research**, **graduate-level education** in the life sciences and health professions, and excellence in **patient care**.

- **Individual Constituents** - 1M+
- **Orgs** - 58K+
- **Alumni** - 86K+
- **Patients** - 244K+
- **Patient and Guarantor Leads** - 3.2M+
- **AdvancementRM** - live since 5+ years
- **Salesforce** - 10+ years
- Last 5 FYs # of unique donors annually - 22K to 27K
- Last 5 FYs # of gifts processed annually - 26K to 44K

FISCAL YEAR	ATTAINMENT TOTAL	CASH TOTAL
2024	\$1.1 Billion	\$810 Million
2025	\$814 Million	\$789 Million
2026	\$1.5 Billion	\$885 Million



Patient Care

Research

Education

KindCon²⁰²⁶

UCSF Overview

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- **Technical, Systems and Data team**

- Salesforce official training, certifications, professional development
- Data Schema, Business Processes, Data Integration tools
- No new hires except when when staff retired, all new hires had a pre-req for Salesforce
- Ongoing Salesforce and AdvRM training

- **Gift Admin**

- In-house training on Affinaquest/AdvRM and SmartBatch
- 7 gift processors
- 2 supervisors - Director and Assistant Director
- Year-end gift processing no longer needs temp gift processors
- Timely FY and CY closure



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Total Living Alumni: 560,000+

Current Students: 52,000

Ascend

- Live July 2023
- Version 7.56
- “Legacy” Gift Processing UI, moving to Expedited Gift Processing (xGPv2) UI
- 1,505,680 Entities
 - Constituents- 1,453,229
 - Organizations- 52,451

Transactions

- **202,152 Processed in FY26**
 - 197,560 Gifts/Pledge Payments
 - 3,057 Pledges
 - 1,535 Match Gifts

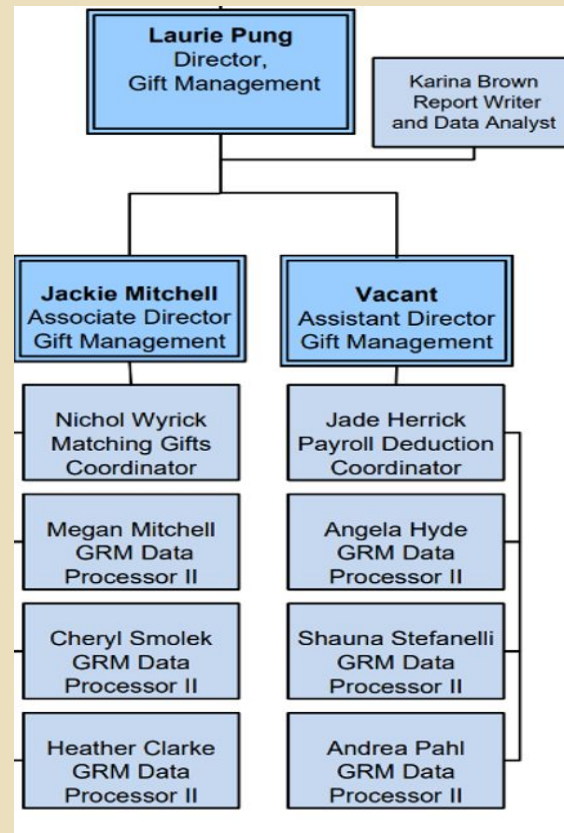
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Ascend Staffing Changes

- Reclassified positions
- Increased and broadened professional development

Gift Management Team (12)

- Director
- Report Writer/Data Analyst
- Associate Director
- Assistant Director
- Matching Gift Coordinator
- Payroll Deduction Coordinator
- Data Processor (6)



Gift Integrations



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Automated gift integrations & workflows:

ADDRESS STANDARDIZATION

QAS
Instant Address

Batch Processing
and Automated

KindCon²⁰²⁶

MATCHING PROCESS

Automated
Matching Jobs and
Processing

Custom Matching
Logic for Contacts,
Leads, Org
Accounts

Alternate ID Match

Exact and Fuzzy
Matches

NEW ACCOUNTS & CONTACTS

New Constituent
and Account
records are created
for unmatched
records

(we include fuzzy
matches for gift
integrations)

Post-processing
steps

CUSTOM OBJECTS

Custom
Integration
Objects

Unique Batch Item
Reference ID
becomes the
Gift/Pledge
External ID

Data
Transformations

GIFT INTEGRATION

Lockbox -
including
documents,

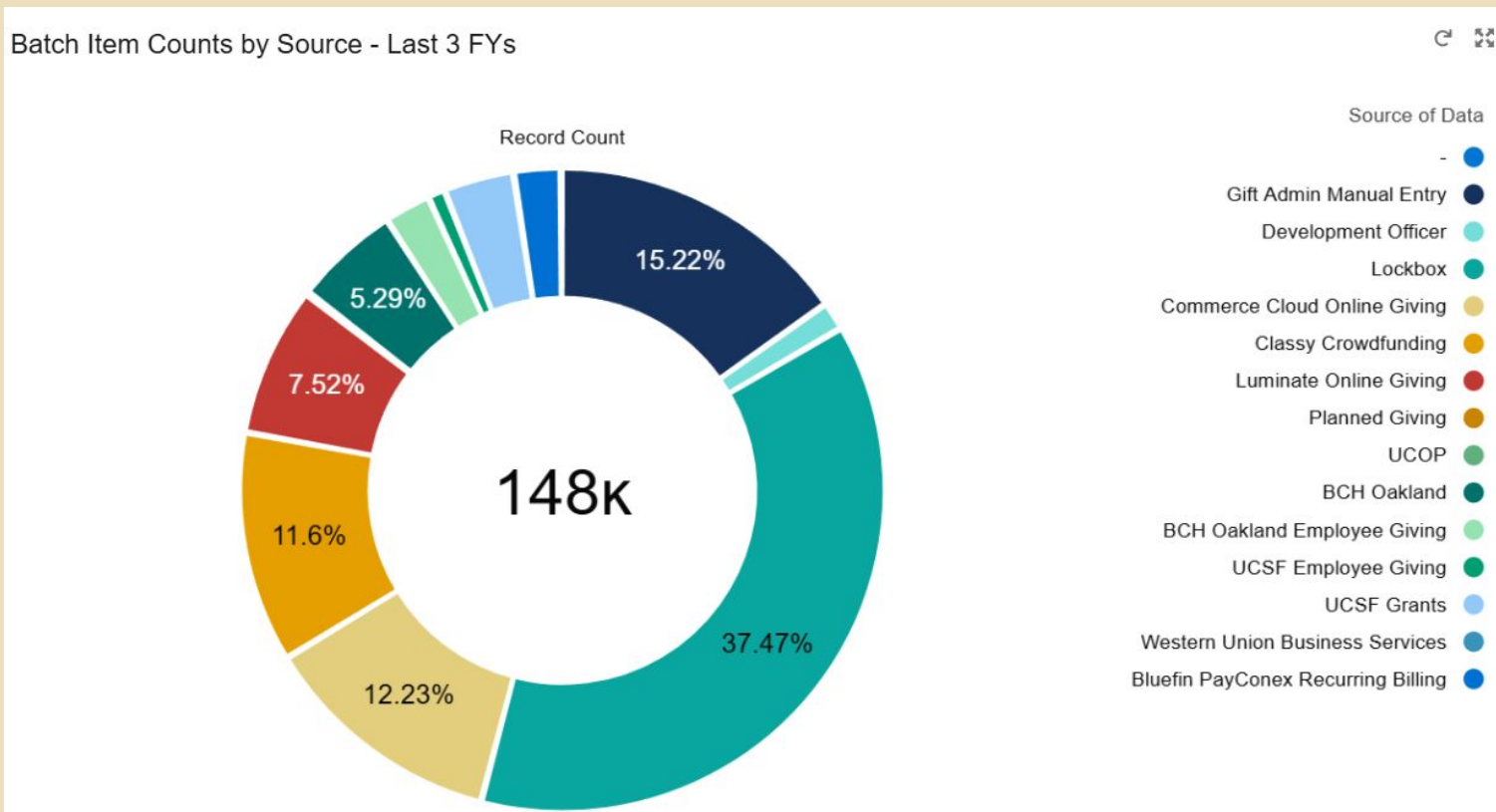
Online Giving,
Crowdfunding,

Payroll Deduction,

Grants and
Awards

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75% to 85% of
Gift Entry is
Automated



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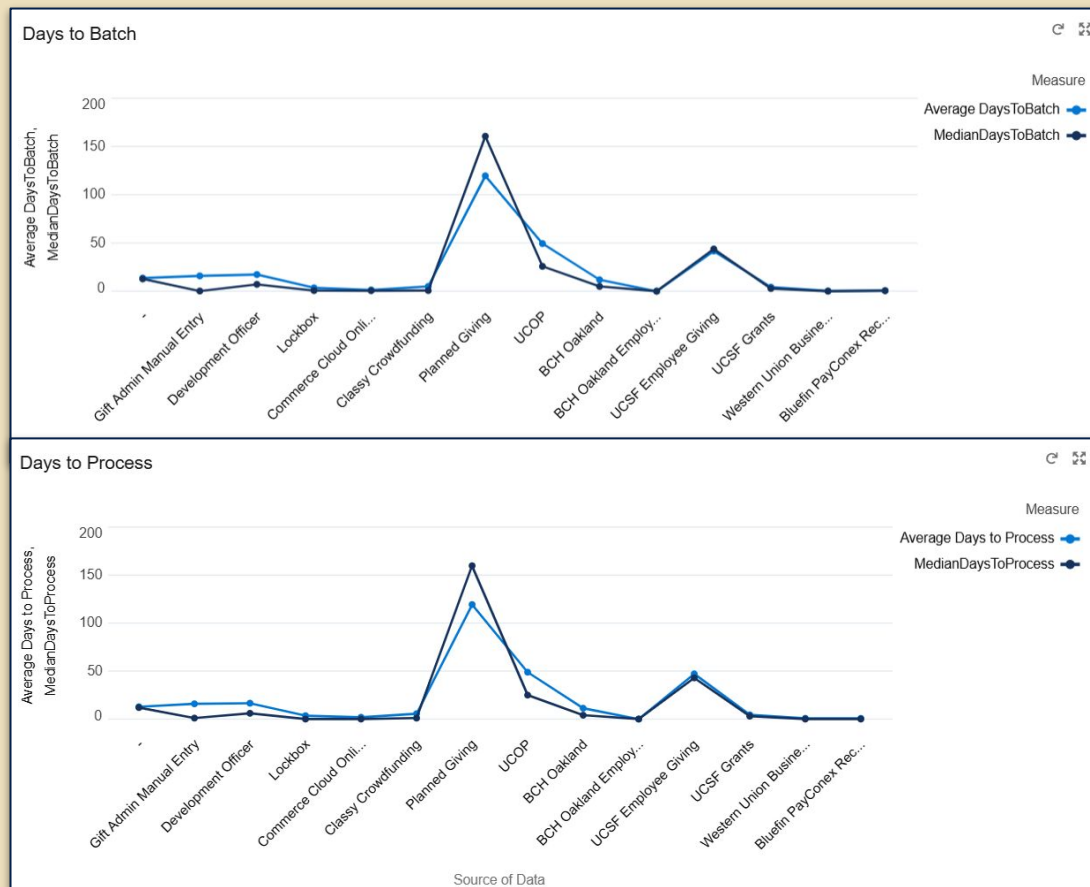
Automated workflows lead to faster gift entry, processing, and reconciliation.

Data Transformation, validations and business logic, AQ record links

Least manual intervention for integrated gift batches

Current and Previous FY:

- Average Days to Batch = 6.46
- Median Days to Batch = 0.65
- Average Days to Process = 6.68
- Median Days to Process = 1.00



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Batch Review Reports - minimize batch closure errors and faster processing times

Name ↑	Folder	Description
STEP 1 - Batch Items w/Generic Donor	Batch Review Reports	Batch Items that are associated with 'Generic Donor' in a specific Batch
STEP 2-Batch RecogCredit w/Generic donor	Batch Review Reports	Batch Item with Batch Recognition Credit review for 'Generic Donor' links in a specific Batch. Another report in the same folder lists all of the Batch Item Recognition Credits for all Batch Items of a specific Batch Number.
STEP 3-Batch Items w/ Item Tributes	Batch Review Reports	List of Batch Item Tributes for each Batch Item in a Batch. For review to check Generic Donor IDs , Missing links for Contacts , In Memory to link to Deceased contacts, in Batch Item Tributes.
STEP 4-Batch Item w/ Batch Recog Credit	Batch Review Reports	Batch Item with Batch Recognition Credit review for a specific Batch Number. Check for 'Generic Donor' links, Gift Recog Credit %, Legal Credit %, and other entries for completeness.
STEP 5-Review Batch Item Transactions	Batch Review Reports	Review Batch Item Transactions created manually. Check the Method, Amount, Fees, links to related batch item and account.

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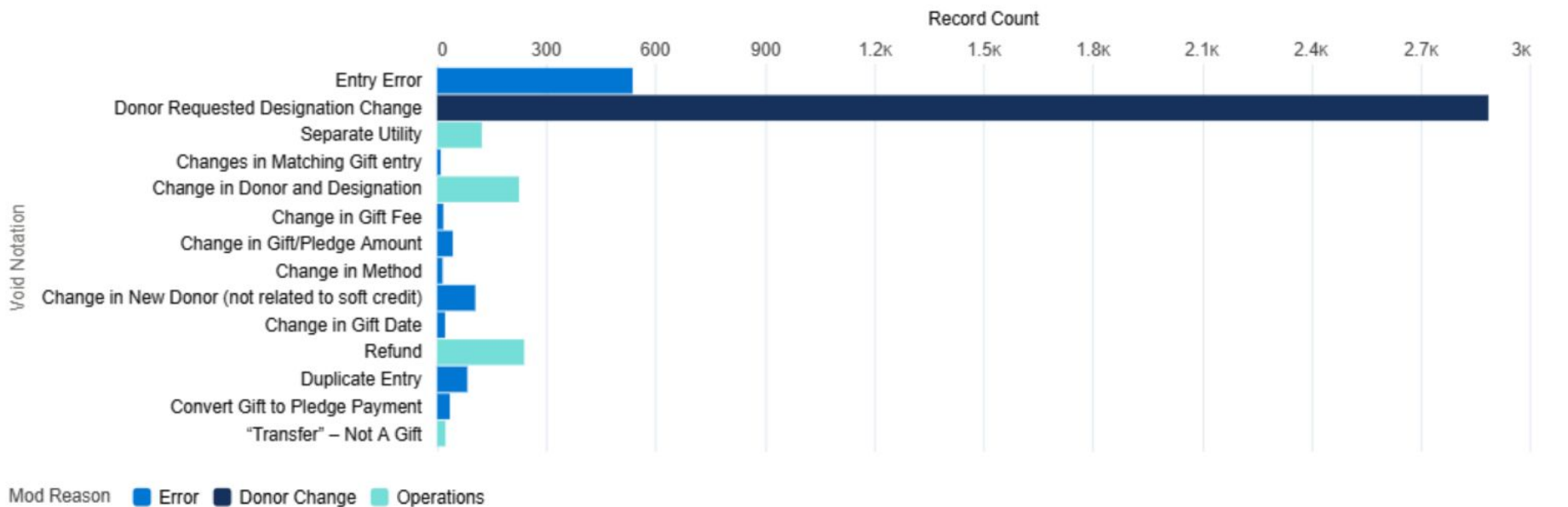
Daily Reconciliation Reports - allows Information Systems, Gift Admin, and Accounting to review daily and track cash

Name	Folder	Description
Weekly Non-Gift Log	Reconciliation Reports	Non-Gift Revenue Transfer Gifts Processed - based on Entry Type = Transfer and Method = Transfer. To be run daily or weekly as needed by editing date filter.
Daily Gifts Processed Log	Reconciliation Reports	Daily Log of All Gifts Processed. Change the date filter as needed. Includes Voids but Excludes Pledge Payment/Grant Payment/Matching Gift Payment OFFSETS as requested by GA. Excludes Soft Credits and Pledge Soft credits.
Daily New Cash Reconciliation	Reconciliation Reports	Daily Reconciliation log of NEW CASH Gifts Processed. Change the date filter as needed. Excludes Reversals, Modifications, Payment Offsets, and Soft Credits. Includes new pledge payments in modified Pledges. This is not a daily gift report.
Daily Reversals Reconciliation	Reconciliation Reports	Daily Log of REVERSALS Processed by Deposit Source, Batch, and Gift/Pledge Number. You can see the link to Corrected Gift/Pledge, if the gift was re-entered by GA. If not re-entered, Fdn Acctg will reverse in Peoplesoft. Batch Closed Date filter is used.
Daily Modifications Reconciliation	Reconciliation Reports	Daily Log of MODIFICATIONS Processed by Deposit Source, Batch, and Gift/Pledge Number. Includes Modified Gift/Pledge, Voided and Corrected transaction. View Transaction Desc for details. Batch Closed Date filter.

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Gift Modifications - 60 to 70% Donor Requests, 10 to 15% Operations, 15 to 20% Errors

Batch Modifications - Last 2 FYs



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Sushmita Seth

a.k.a Mita



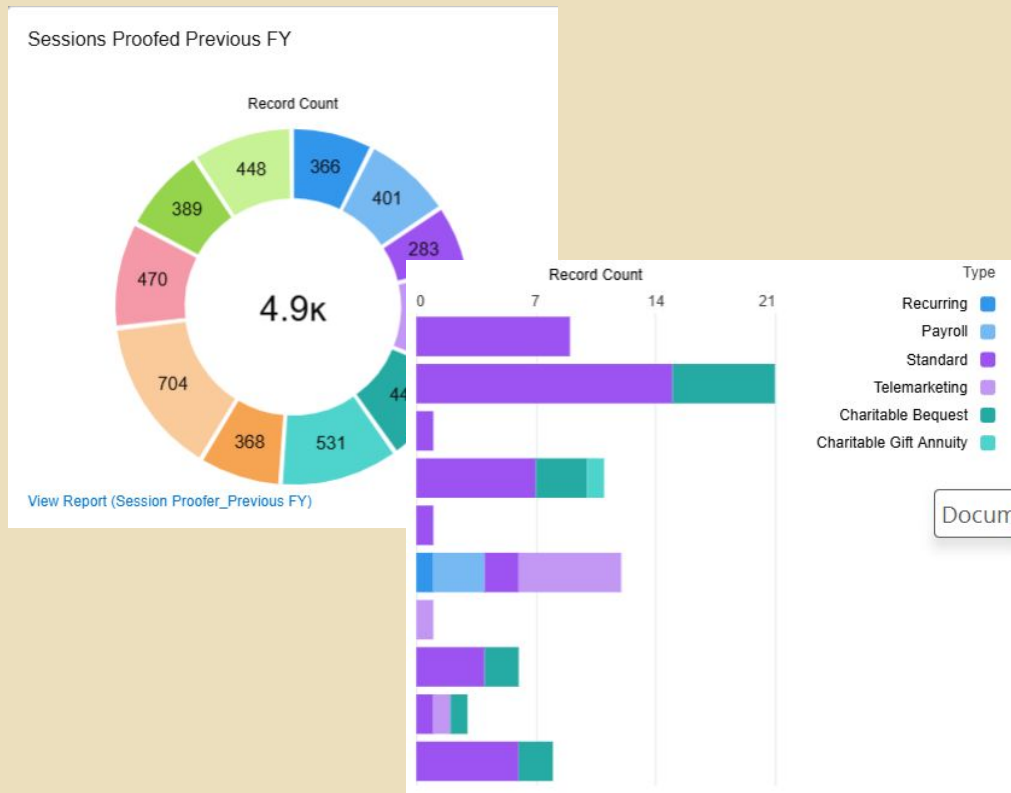
Gift Management Metrics Dashboards



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Metric Dashboard (current month, current fiscal year, previous fiscal year)

- Sessions Proofed by operator
- Sessions Processed by operator
- Pledge and Recurring Shell by operator
- Payments by Operator
- Interims by Operator
- Turnaround Time by Operator
- Average Session Turnaround Time



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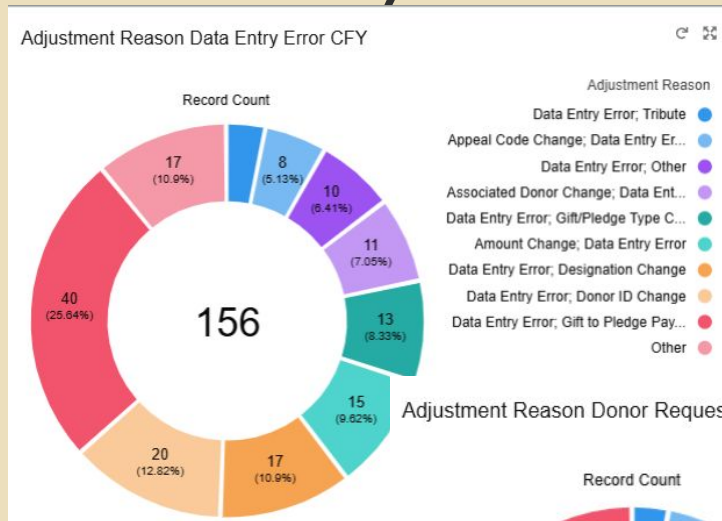
Adjustment Dashboard

Why are we adjusting

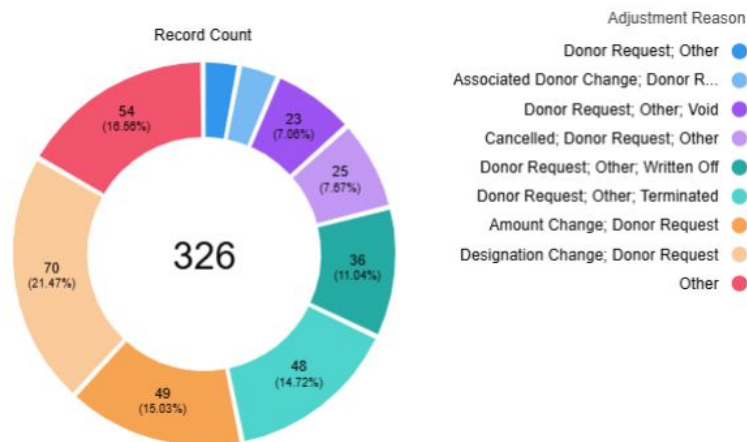
- Date Entry Error
- System Cleanup
- Staff Request
- Donor Request

What are we adjusting

- Designation
- Appeal
- Write Off/Cancel/Void
- Gift to Pledge Payment



Adjustment Reason Donor Request CFY

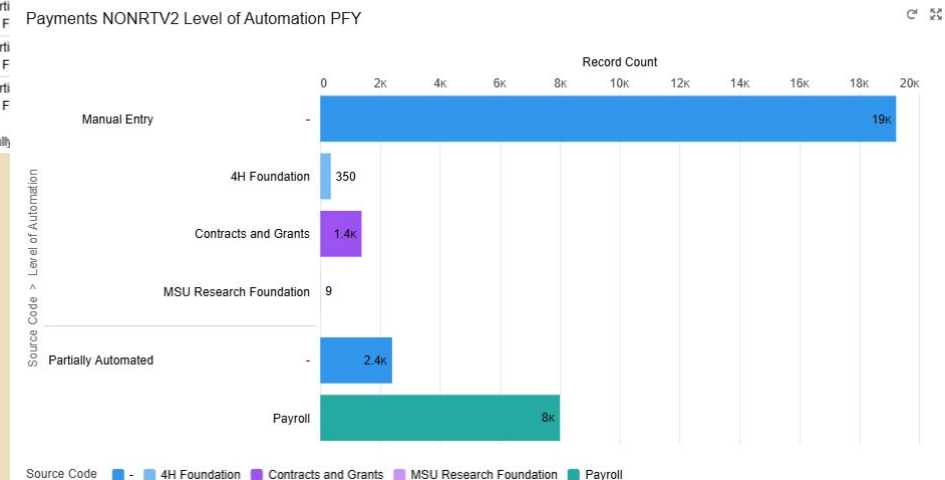
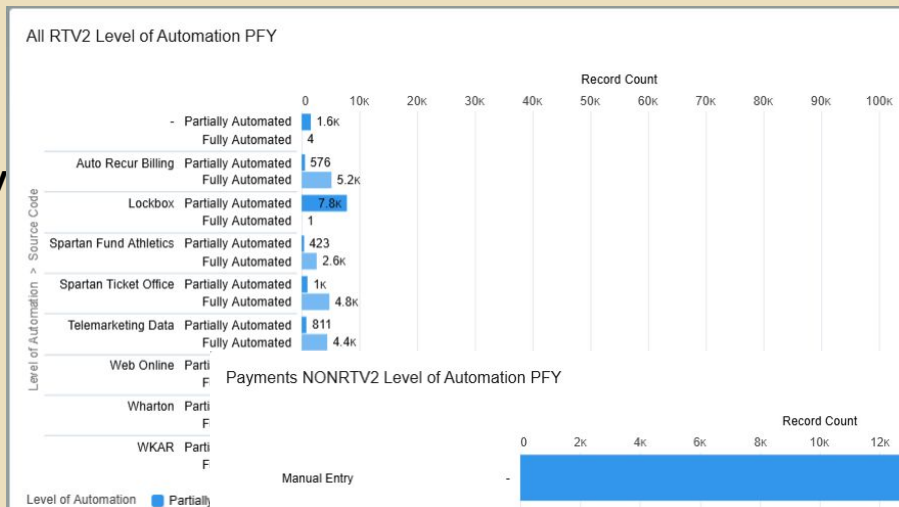


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Level of Automation Dashboard

Manual Entry vs Partially Automated v Fully Automated (Happy Path)

- All RTV2
- Payments
- Pledge and Recurring Shell





Q&A

Thank
you.