

MVP Delivery Alignment Predictive Analytics



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Introduction

Yeshiva University, with a total enrollment of around 5500 students, occupies a very particular niche in the college fundraising environment.

Being a Jewish university guided by Modern Orthodox (Torah u'Mada) principles, YU's fundraising constituency is primarily the Modern Orthodox community, in addition to the Jewish community at large who share YU's vision.

DAV INC. conducted a series of sessions with YU fund-raising stakeholders focused on understanding technology and process optimization opportunities and the users involved in each of them. We then empathized with specific personas and the current process they experience in a particular use case; out of that, we identify some pain points in the existing fund-raising process, technology that support those activities, data infused in the workstream, and the people most affected by it.

After early exploration of today's business landscape and an impactful use case, we determined a baseline recommendation will be provided to address initial pain points pertinent to the chosen use case. Further discovery and scoping sessions would be necessary to align stakeholders and determine an appropriate roadmap towards the completion of an MVP.

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Competitive Landscape Analysis

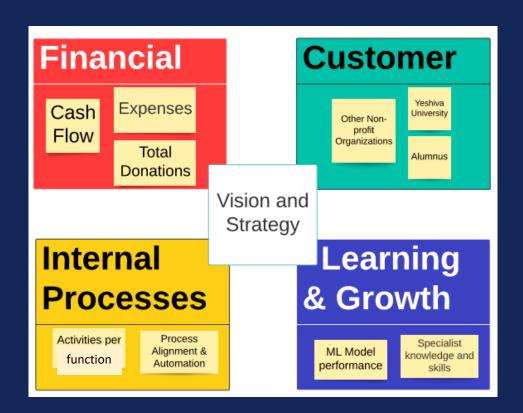
YU has two primary competitors in its fundraising endeavors. The first is Touro College, another Jewish university located in the New York City area, with a total enrollment of around 19,000 students. The second major competitor are various Jewish non-profit organizations (called "Tzedaka Organizations"). Since charity (Tzedaka in Hebrew) is a major Jewish value, and each donor only has a particular amount of money allocated to donate, non-profit organizations must compete for each dollar.

Our study will analyze YU's fundraising efforts from a data-driven perspective and endeavor to propose solutions to increase YU's fundraising efficiency and effectiveness.



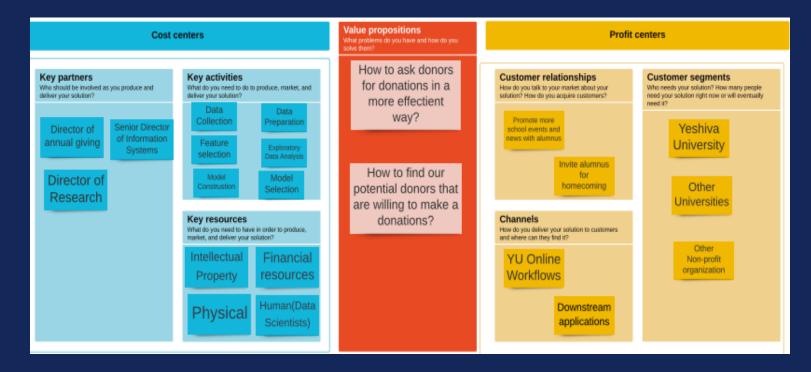
Balanced Scorecard

This balanced scorecard involves measuring four main aspects of a business: learning and growth, internal processes, customer, and financial. It is a performance metric used to identify, improve, and control a business's various functions and resulting outcomes. The customers of our service are Yeshiva University, alumni, and other non-profit organizations. The financial information includes cash flow, expenses, and total donations. The internal processes are the activities per function and processes alignment and automation. Finally, the learning and growth are the machine learning model performance and the specialist knowledge and skills.





Business Model Canvas







Recommended OKRs

The framework described below includes several items which help YU fund-raising employees prioritize, align, and measure the outcome of their efforts. The benefits of the framework include better focus on results that matter, increased transparency, and better strategic alignment.

DAV INC. proposed OKRs

- 1. Increase Donations Size (\$)
 - Increase donations by 5% from \$43M in 2020 to \$45.15M by 2022
 - Increase AVG donation by 5% from \$4,647 in 2020 to \$4,879.35 by 2022



- 2. Increase Amount of Donors
 - Increase number of donors by 5% from 9,274 in 2020 to 9,737 by 2022
 - Increase AVG donation by 5% from \$4,647 in 2020 to \$4,879.35 by 2022



- 3. Target Marketing Spending
 - Achieve a Cost Per Lead of less than \$100



Yeshiva University Roles for Co-Creation

Required

- Product Owner: Director of Annual Giving (Technical Project Lead)
- Architect/SME: Senior Director of Information Systems

Optional

- Data Engineers
- Data Scientists (Director of Research)



Product Owner

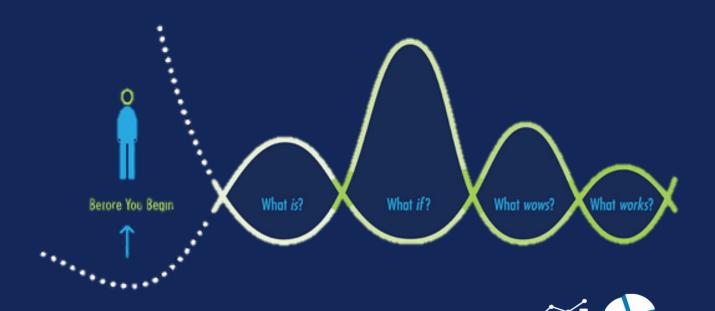
- Co-leads Iteration
 Planning Meeting (IPM)
- Prioritizes Stories
- Answer Questions
- Accepts Completed Stories
- Looks at Success
 Measures

Architect/SME

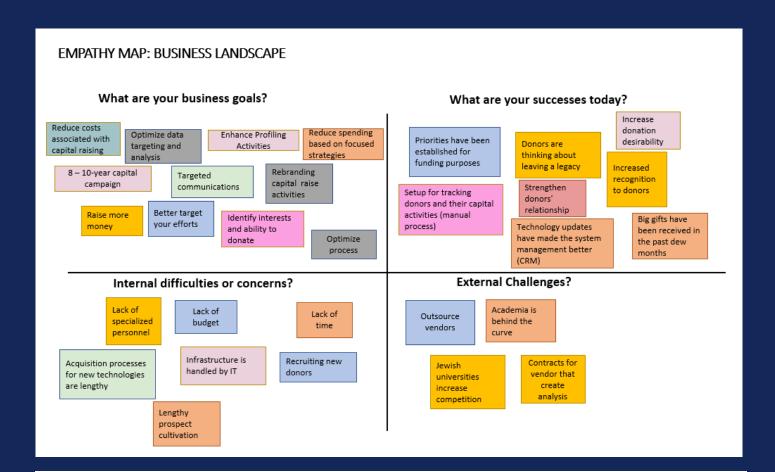
- Investigates key Technologies and Approaches
- Answer Technical Questions
- Envision Future Evolution /Implementation of the Solution



Design Thinking Artifacts



DAV INC



JOURNEY MAP: AS-IS DATA STRATEGY PHASES: COLLECT | ORGANIZE | ANALYZE | INFUSE Collect Organize Analyze Infuse Dashboards exists but Alumni gets added SSRS for reporting/ not currently used to database as they CSV output graduate duplicates is a manual process VP gets reports to keep track of raising capabilities Parents get added No advance graphing to the system as capabilities No automation students Erroll 1 database Siloed process/ Data ownership is rigid No freedom or ways to Admissions direct explore data Star Schema the inquires to be added to database Connectors move data from admissions



STORYBOARDS: DATA USE CASE AND PERSONAS

Use Case

Incorporating AI to your workflow to better target donors

Data Source

CRM / structured data is donors' data

Capabilities

Vendors due low-level donor targeting /email campaigns etc.

Persona

Director of annual giving/ highly technical role

Automation enhancement

CRM / SSRS Reporting Layer (source system) –structured data

Reporting production and delivery (CSV with graphs / YOY)

Senior Director of Information Systems/ Highly technical role

Tech mining to remove noise on the data from news and reports / NLP

Source System / web scraping NLP – unstructured data

External Report / Setup by name

Director of Research/ Highly technical

PRIORITIZATION MATRIX







Strategic & Analytical Discovery



YU Donation Strategy Summary Gift Stats Donation Sum **Donation Count** Amount Avg Count \$40M -14K \$39,260,742 \$3,461 \$1,000,000 11,344 \$39M 2016 \$38M 10K 11K 8K \$37M Count 10K 9К 2017 \$44,310,868 \$3,211 \$2,430,198 13,799 \$20M 6K 4K 2018 \$37.812.172 \$2.949 \$2,099,500 12.820 2K \$0M \$36,784,615 2019 \$3,708 \$1.573,000 9.920 2016 2017 2018 2019 2020 2016 2017 2018 2019 2020 \$43,092,588 2020 \$4,647 \$2,526,000 9,274 Fiscal Year Fiscal Year College Count Total Raised By College College F Yeshiva University RIETS Cardozo School of Law High Schools (combined) Center for the Jewish Future Stern College for Women Undergraduate Ferkauf Grad School of Psych Yeshiva College Wurzweiler School of Sox Work Sy Syms School of Business Yeshiva University Museum Azrieli Grad School of J Edu Bernard Revel Graduate School University-School Partnership I Belz School of Jewish Music The Katz School James Striar School College 🖛 College 🖛 College T Yeshiva University Undergraduate Cardozo School of Law High School of Law High Schools (combined) The Katz School Stern College for Women Sy Syms School of Business SySyms School of Business Yeshiva College Center for the Jewish Future Ferkauf Grad School of Psych Yeshiva University Museum Wurzweiler School of Soc Work University-School Partnership Bernard Revel Graduate School Belz School of Jewish Music 10K 12K 14K 16K 18K 20K Count = Amount = Katz School Total Raised Katz School Count of Donations \$2,263K \$2.500K \$2,583K 19 \$2,000K 20 \$2,117K 15 \$1,500K 10 \$1,000K \$500K 2016 2017 2018 2016 2017 2019 2020 2018 2019 2020

Fiscal Year

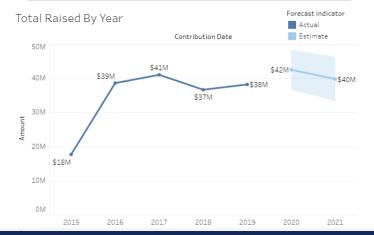


Fiscal Year

YU Donation Analytical Summary

Highest Total Raised By Zip

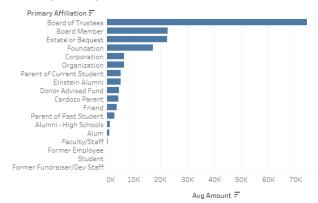
| Zip | <u></u> |
|---------|--------------|
| 10022 | \$14,598,998 |
| 7039 | \$11,666,606 |
| 7631 | \$11,644,554 |
| M4T 2S3 | \$8,873,106 |
| 7666 | \$5,576,134 |
| 7632 | \$4,871,544 |
| 10128 | \$4,298,789 |
| 11559 | \$4,274,752 |
| 10065 | \$4,175,207 |
| 10463 | \$4,009,511 |



Highest Total Raised By County

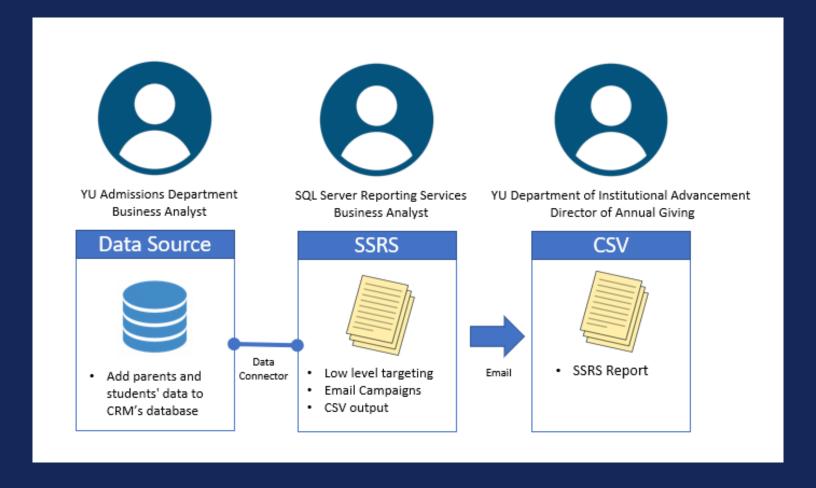
| _ | | |
|----------------|---|-------------|
| County | F | |
| Bronx | | \$7,507,732 |
| Brooklyn | | \$1,371,255 |
| Staten Island | | \$66,974 |
| Queens Village | | \$1,238 |
| Manhattan | | \$15 |

Avg Amount By Primary Affiliation





Current Flow | Processes & Personas





DAV INC. Proposed Recommendation



DAV INC. POV | Predictive Analytics Building Blocks

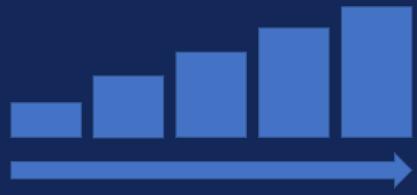
Use Case: Infuse ML Model Output to Support Fund-Raising Workstreams at YU

Through DAV INC. methodology, we arrive at our recommendation based on the key building blocks of a predictive analytics layer.

We believe pursuing this use case first will set you up from an optimization paradigm to your stakeholders.

We propose building an MVP for this use case focusing on the building blocks of a predictive analytics layer (~ 6 weeks).

The benefit of this MVP is that you can act on the use case with faster time to value.



Self-Service

Smarter Integration

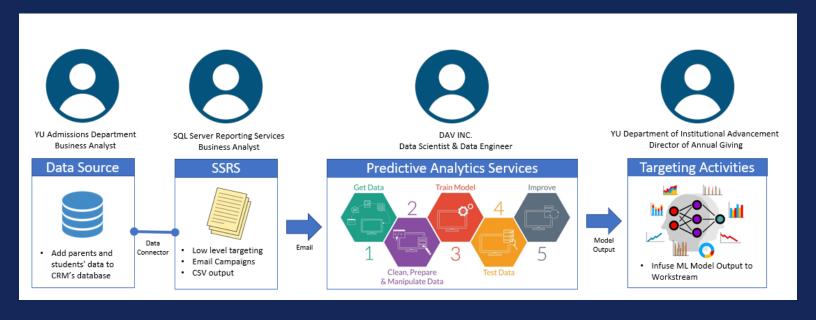
Augmented Knowledge

Governance

Unified Lifecycle



MVP Proposed Flow | Process & Personas







MVP Statement

Tittle: YU Fund-Raising, Predictive Analytics

If we provide: YU fund-raising employees, donors' data

With: An applied layer of advance analytics

We will address the risk of: Unfocused prospecting initiatives and marketing untargeted resource spending

By measuring: Prospects to donor's conversion rate, Before and after cost per lead, increase donations before and after infusing ML output to YU workstreams

We know we've arrived if: Donations increase, the number of donors increase and the cost per lead is reduced





Automated Workflows: leverage automation and existing resources to improve end-to-end user flows

Enhanced Insights: leverage ML models to better predict donors and donations

Productivity Gains: Meet fund-raising goals by leveraging predictive analytics

Ease of Use: Simplify workflow integration

Improved Collaboration: Breakdown process silos and promote synergies and business agility



MVP Journey



Working Together

$\overline{\infty}$ **Framing** Discovery Scoping **MVP** Build Solutioning Sessions 2 - 4 hours 2 hours - 2 days 2 hours - 2 days 2 - 4 hours 6 weeks Build MVP that leverages · Understand the strategy · Understand target end · Diverge to explore · Define hypothesis to be potential solutions outcomes · Determine business / users tested / proof-points to hybrid cloud technologies technology initiative(s) to · Understand 'as-is' · Converge to select be proven Define a secure minimum viable focus on context of business and/ solution to invest in · Define scope of Minimal architecture that mitigates risk · Align stakeholders on or technology validating Viable Product Set up cloud platform and · Guide narrowing focus · Identify platform / initial vision and desired · Identify resources needed to build MVP outcome technical components to **Build** skills through pairing · Confirm executive be used Create an implementation sponsor, product owner, · Develop roadmap roadmap for a hybrid, multi-cloud and governance model platform and DevOps adoption · Business landscape · Process mining Visioning · Hypotheses definition Approach MVP definition · Initiative exploration · End-user research · Generating big ideas **WORKLOAD** · Technical discovery Vision definition · 'Just enough' · Data required Opportunity canvas End user validation Data assessment architecture Modernization · Rapid prototyping needed assessment · Identify accelerators **PLATFORM** Platform initiation





Weekly Project Flow

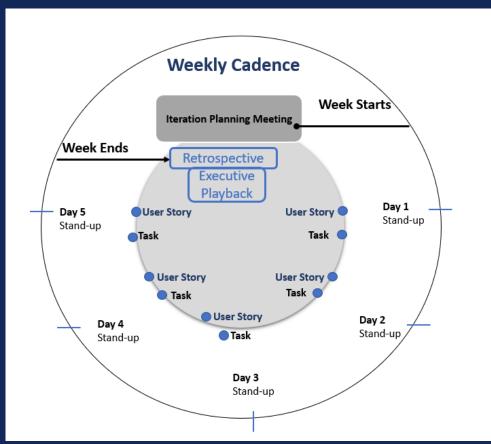
On MVP projects, *iterations* describe one week of dev work.

At the beginning of an iteration, we have an "Iteration Planning Meeting" (IPM), and the purpose of that meeting is to discuss the approach for the iteration, user stories, and tasks to complete.

At the end of an iteration, we have a "Retrospective" meeting to gather feedback and identify actions to ensure continuous improvement.

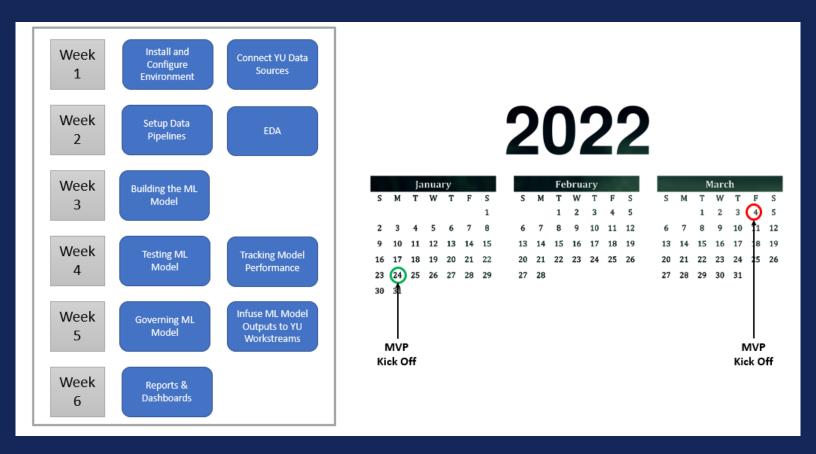
Stand-Up meetings are every day for a max of 15 minutes with the product owner and full delivery team.

Executive Playbacks showcase completed stories to larger stakeholder group.



Next Steps | MVP Build Proposed Schedule

- 1. Confirm MVP Kickoff
- 2.DAV INC. invested MVP (~6 weeks)







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