

One of my greatest strengths is problem-solving, which I genuinely enjoy. For instance, when I first joined the University of San Francisco, our data team was inundated with ad-hoc report requests from various departments. This constant demand left us with little time to focus on other important projects.

Recognizing the need for a solution, I developed a Self-Service Reporting tool using Tableau. This tool allowed users to generate their own reports by selecting user-friendly filters and visuals across multiple data sets. As a result, we were able to reduce ad-hoc report requests by 70%, freeing up significant time for other projects. The end-users also appreciated the flexibility and efficiency of the tool, which empowered them to accomplish much more on their own.

(A snapshot of one of the numerous pages from the Self-Service Report)

Approval Required for the Trustees, Trustee Emeriti, and Trustee Spouses. Please check their names in the Trustee Approval List tab.

Trustees Approval Code Show Sample Data

In order to make default load-time shorter, we set report to show Sample Data* only. Please MAKE SURE to select All Data after all your filters are set.

*Sample Data only includes records from San Francisco and zip codes that start with 94111.

Note: All filters are connected with "AND". If you need to do "OR"; please do it separately. ☐

General Filters

Purpose ☐ Mail Invitation ☐ Dedup the list? No, do not dedup ☐

☐ Deceased ☐ Do Not Contact ☐ Do Not Mail ☐ Do Not Email ☐ Do Not Call

☐ Confidential Records in Report ☐ Confidential Records Included ☐ 8,794 ☐ Age 0 to 163 ☐ Birth Month All

Select Constituent Type: ☐ Type 1 ALUMNI & STUDENT & LMA ☐ or Type 2 ☐ or Type 3

You need to have approvals to include these populations for invitation and solicitation. See Report Request Policies.

☐ Exclude SOL Only Alumni ☐ Exclude SOL Only Alumni + Spouses ☒ Include SOL Only Alumni ☐ Exclude All SOL Alumni ☐ Exclude All SOL Alumni + Spouses

☐ Exclude SOM Graduate Only Alumni ☐ Exclude SOM Grad Only Alumni + Spouses ☒ Include SOM Graduate Only Alumni ☐ Exclude Undergraduate Only Alumni ☐ Exclude Undergrad Only Alumni + Spouses ☒ Include Undergraduate Only Alumni

☐ Exclude Current Faculty and Staff? No, do not exclude ☐ 8,694

Manager ☐ All ☐ Number of Records: 8,726

GENDER ☐ All ☐ M 3,377 ☐ F 5,458

Ethnicity ☐ All ☐

Capacity ☐ All ☐

Donated Some Year But Not This Year ☐ All ☐ Not SYBUNT 6,832 ☐

Donated in the Past 5 Years ☐ All ☐ Not a Donor in Past 5 FYs 8,152 ☐

Last FY Donor ☐ All ☐ Not Last FY Donors 8,547 ☐

Current FY Donor ☐ All ☐ Not Current FY Donors 8,823 ☐

Other Filter Sections ☐

Campaign & Activity Filters ☐ Geographical Area Filters ☐ Education Filters ☐ Relationship Filters ☐

☐ ☐ ☐ ☐

In addition to my technical responsibilities, I play a vital role in leadership meetings, where I ensure that our progress and strategies are closely aligned with our long-term goals and projections. I regularly prepare and present detailed KPI reports, providing key metrics and data-driven insights to guide decision-making. By tracking these numbers, I help the team stay on course, ensuring that we are making informed adjustments and achieving our targets effectively.

