



# Creating Optimized and Seamless Matching Gift Workflows in Blackbaud CRM™

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**DEVELOPERS’  
CONFERENCE**  
June 15–17, 2021

BLACKBAUD CRM™ TRACK

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**TEAM FROM UNIVERSITY OF SOUTH CAROLINA**

*Session Host: Scott Parrish*



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# Agenda

- Issue
- Clean-up
- Solution
- Results
- Next Steps



# University of South Carolina

- 750,000 Constituents
- 9 in IT/Data Analytics
- Blackbaud Hosted in MS Azure
- 15 Months on CRM





## Issue – Matching Gift Process

- \$25M Annual Cash Receipts
  - Individuals
  - Direct Donations
- \$183K in Matching Gifts
- Nonprofit Benchmark 5-10% Eligible
  - ~\$2M Possible
  - 9% Current Baseline (183K/2M)
- Goal – 25% of Possible
  - $\$500K - \$183K = \$317K$  annual increase



## Clean-up

- Convert to Blackbaud CRM (4/6/2020)
  - Non-Constituent notes for employment
- Organization Tree
  - Identify Primary Organization
  - HEP Company ID
  - Add Matching Gift Information
  - Parent and Subsidiary Tree
- Employee Append



# HEP Data

Matching gift  
company  
information loaded  
into CRM

## ⌵ Matching gift conditions + Add

**Employee** Edit Delete

Matching factor: 1.00  
Min match per gift: \$0.00  
Max match per gift: \$6,000.00  
Revenue type: Gift  
Applies to: Employee  
Notes: Deadline: January 31st of the following year

Max match per year: \$6,000.00  
Max match total: \$6,000.00  
Matching amount: Tax deductible portion only

## ⌵ Alternate lookup IDs (2) + Add More ▾

Type	Lookup ID
HEP COMP ID	99990190

# Mailed Gifts

22% of our gifts are received via mail



## Cash Receipt Processed by Inbound Channel

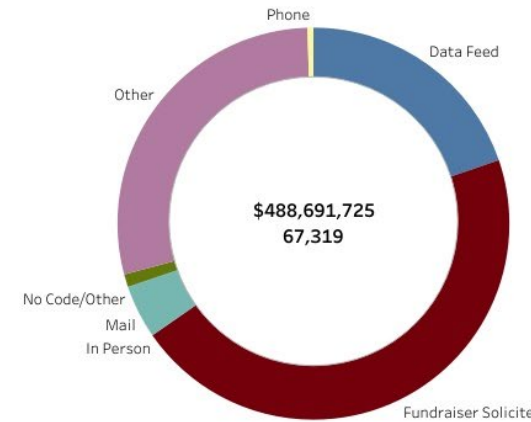
Site All  
Dimension All  
Fiscal Year Multiple values  
FYTD. All

### Constituent Filters

- Alumni All
- Undergraduate Alumni All
- Current Student All
- UofSC\_School All
- Current\_Fac/Staff All
- Fac/Staff All
- Career Level All
- HR Division All
- Parent All
- Athletics Memberships/Seats All

- Calculation
- Production
  - Cash Receipt
  - Annual Giving
- Dimension
- Inbound Channel
  - Site (Dollars)
  - Education
  - Constituency
  - Gift Application
  - Appeal Site
  - Appeal Category
  - Appeal ReportCode
  - Appeal (Individual)
- Breakout\_Dimension  
None

- Pie Charts
- By Dollars
  - By Donors
- Data Feed
  - Fundraiser Solicited
  - In Person
  - Mail
  - No Code/Other
  - Online
  - Other
  - Phone



	FY 2017		FY 2018		FY 2019		FY 2020		FY 2021	
	Dollars	Donors	Dollars	Donors	Dollars	Donors	Dollars	Donors	Dollars	Donors
<b>Grand Total</b>	<b>\$169,223,401</b>	<b>34,426</b>	<b>\$103,163,916</b>	<b>32,342</b>	<b>\$98,411,940</b>	<b>31,493</b>	<b>\$57,514,253</b>	<b>23,703</b>	<b>\$60,378,216</b>	<b>20,383</b>
Data Feed	\$24,394,473	18,103	\$22,803,613	16,372	\$20,472,748	16,859	\$13,406,370	14,504	\$15,422,371	11,156
Fundraiser Solicited	\$98,131,164	455	\$40,134,619	636	\$35,157,425	660	\$23,455,696	997	\$26,002,112	465
In Person							\$25	2	\$116,298	145
Mail	\$940,044	3,586	\$1,199,297	5,649	\$814,390	3,266	\$7,096,979	3,038	\$11,562,443	4,504
No Code/Other							\$864	19	\$1,275	3
Online	\$610,193	2,511	\$777,480	2,923	\$1,087,702	5,585	\$1,126,483	4,466	\$1,520,863	5,609
Other	\$44,452,591	7,284	\$37,642,509	5,268	\$40,490,909	4,340	\$12,415,883	2,754	\$5,116,589	166
Phone	\$694,937	5,682	\$606,398	5,103	\$388,766	3,827	\$11,953	56	\$636,266	75

# Company Search

Powered by two  
ad-hoc queries and  
the BBIS query API

Results (722 records found. Only the first 500 rows are shown.)

Page 1 of 10

Name	Alternate Lookup IDs\Lookup ID	Address (Primary)\Address	Address (Primary)\City	Address (Primary)\State	
3M Corporation	97910000	3m Center. St.	Saint Paul	Minnesota	55144-1001
A. O. Smith Corporation	93240000	Water Products Division Post Offic...	Mc Bee	South Carolina	29101-0600
AAA Carolinas	15000010	AAA Travel Agency 6600 AAA Drive	Charlotte	North Carolina	28212-8259
AAI Corporation	9430000	124 Industry Lane	Cockeysville	Maryland	21030-3342
AARP	15000013	Attn: Ms. Carrie Sinkler-Parker 120...	Columbia	South Carolina	29201-3227
Abbott Laboratories	130000	100 Abbott Park Rd	North Chicago	Illinois	60064-3502
AbbVie Foundation	99990552	6111 West Plano Parkway, Suite 1...	Plano	Texas	75093-0014
Abf Freight System Inc	13590000	Post Office Box 697	Cherryville	North Carolina	28021-0697
Academy of American Poets	15000147	584 Broadway, Suite 1208	New York	New York	10012-3227
Adidas America Incorporated	99990138	5055 N Greeley Ave	Portland	Oregon	97217-3524
Administaff, Inc.	98620000	19001 Crescent Springs Drive	Humble	Texas	77339-3802
Adobe Systems Incorporated	92270000	345 Park Avenue	San Jose	California	95110-2704
ADP	920000	1 Adp Blvd	Roseland	New Jersey	07068-1728
Advent Software	15000659	301 Brannon Street	San Francisco	California	94107-3815
Aegis Sciences Corporation	15000829	515 Great Circle Road	Nashville	Tennessee	37228-1310

# Query API

Two ad-hoc queries. One for parent corporation and one for subsidiaries

```
query.getResults(ADF.Defaults.hepParentQuery, function (data) {
    // clean results
    results = [];
    var fields = data.Fields,
        rows = data.Rows,
        fieldArray = [];

    $.each(fields, function (key, value) {
        fieldArray[value.Name] = key;
    });

    $.each(rows, function () {
        //console.log(this.Values);
        var values = this.Values;
        var pushResults = false;

        results.push({
            name: values[0],
            id: values[1],
            address: $.trim(values[2]) + "<br>" + $.trim(values[3]) + ", " +
                $.trim(values[4]) + " " + $.trim(values[5])
        });
    });
});
query.getResults(ADF.Defaults.hepSubsQuery, function (data) { ... });
});
```

# On-Line Gifts

Search for  
Matching Gift  
Companies

Bloodhound Type-  
Ahead Library

Check to see if your employer will match your gift!

Micr

LinkedIn Matching Gifts Program  
One **Microsoft** Way  
Redmond, Washington 98052-8300

**Microsoft**  
One **Microsoft** Way  
Redmond, Washington 98052-8300

**Microsoft Corporation**  
One **Microsoft** Way  
Redmond, Washington 98052-8300

# On-line Gifts

Capture  
Information in a  
Revenue Attribute

BBIS Matching Gift Attribute	BBIS Matching Gift Company HEP ID	BBIS Matching Gift Company Name
Yes		Russell Investments
Yes		UofSC
Yes	5980000	McKesson Corporation

# Creating a Record on the e-Match Portal

## Scheduled Processes

- Two Processes
  - Python script that runs every 5 minutes
    - Connects to read-only access and looks for new transactions with a revenue attribute
    - Split gifts based on which foundation they are giving to
    - For each record, call HEP API to create record
      - If HEP ID is populated from search, use it. If not perform a search on HEP to see if they have a record
  - Python script that runs nightly
    - Same process as above, but for non-BBIS gifts

# Posting Online Transactions HEP

Transactions.Data  
Stored in XML  
Attribute IDs 506  
and 609

```
SELECT *
FROM dbo.Transactions
WHERE TransactionType = '{5705B543-4033-4a3a-bbcd-a731403ee1e6}'
```

ID	TransactionID	TransactionType	Data	ProcessedDate	IsDeleted	BeginDownload
1	1	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-04-01 16:02:38.577
2	2	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-04-05 23:17:35.907
3	3	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-04-05 23:17:35.907
4	4	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-04-05 23:17:35.907
5	6	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-04-05 23:17:35.907
6	7	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-04-05 23:17:35.907
7	13	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-04-06 00:17:37.230
8	14	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-04-06 13:05:27.607
9	31	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-05 20:09:25.873
10	32	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-05 20:21:26.020
11	33	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-08 21:29:24.430
12	34	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-08 21:33:24.490
13	35	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-12 20:29:26.933
14	36	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-12 20:35:27.057
15	38	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-14 20:31:41.077
16	39	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-14 20:35:41.180
17	43	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-15 17:35:24.830
18	45	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-20 18:41:25.707
19	46	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-27 20:39:36.483
20	47	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-29 19:13:28.463
21	48	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-29 19:25:28.770
22	50	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-29 22:37:32.727
23	51	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-05-31 14:07:38.830
24	52	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-06-01 18:29:48.090
25	53	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-06-01 20:49:50.730
26	55	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-06-03 17:45:31.573
27	56	{5705B543-4033-4a3a-bbcd-a731403ee1e6}	<?xml version="1.0" encoding="utf-8"?> <ShelbyDonation Tran xmlns:xsd="...	NULL	0	2020-06-04 15:17:28.690



# BBIS Process

```
for account in details:
    data = {
        'grant_type': 'password',
        'username': conn_data['Accounts'][account]['Username'],
        'password': conn_data['Accounts'][account]['Password']
    }
    response = requests.post(
        'https://gpc.matchinggifts.com/o/token/',
        data=data, auth=(conn_data['Accounts'][account]['Client ID'],
        conn_data['Accounts'][account]['Secret']))
    access_token = response.json()["access_token"]

    #input()
    header = {"Authorization": "Bearer " + access_token}

    license_key = conn_data['Accounts'][account]['License Key']
    output_format = 'json'

    conn = pyodbc.connect(conn_data['SQL Connection'])
    cursor = conn.cursor()
```

## BBIS Process (continued)

```
sql_comm = """
    SELECT LOOKUPID FROM CONSTITUENT
    WHERE ID = '""'+data_dict['ShelbyDonationTran']['Donor']['RegistrantId']+""'
    """

cursor.execute(sql_comm)
lookupid_rows = cursor.fetchall()
conn.close()

name = data_dict['ShelbyDonationTran']['Donor']['FirstName']+ \
      ' '+data_dict['ShelbyDonationTran']['Donor']['LastName']
email = data_dict['ShelbyDonationTran']['Donor']['EmailAddress']
amount = details[account]
phone = data_dict['ShelbyDonationTran']['Donor']['Phone']
source = data_dict['ShelbyDonationTran']['TransactionSource']

try:
    donor_id = lookupid_rows[0][0]
except IndexError:
    donor_id = ''
```

## BBIS Process (continued)

```
aux1 = donor_id
aux2 = data_dict['ShelbyDonationTran']['PKID']
aux3 = str(row[2])

aux4 = str(data_dict['ShelbyDonationTran']['Gift']['GiftDate'][:10])

if(re.search("[.][0-9][0-9]",str(details[account])) == None):
    aux5 = "$"+str(details[account])+"0"
elif(re.search("[.][0-9][0-9]",str(details[account])) != None):
    aux5 = "$"+str(details[account])

aux9 = ''
```



# BBIS Process Aux Mapping

- Constituent Lookup ID → **Aux1**
- Donation Transaction PKID → **Aux2**
- Current DateTime → **Aux3**
- Donation Transaction Gift Date → Aux4
- Donation Transaction Amount → Aux5
- Empty string → Aux9
  - This is empty because this is where we will enter in the Revenue Lookup ID that matches that given transaction.

\*The bolded Aux fields are those that are used as a composite key by HEP\*



## BBCRM Process

- Works the same way, outside of a few differences
- We can pull all the details we need using a SQL query and do minimal lifting via Python
- Still have a company check to attempt to get match in HEP
- The Aux2 and source values are different.

# BBCRM Process - SQL



```
COMPANY_HIERARCHY
```

```
AS
```

```
(
```

```
    SELECT
```

```
        RS.ID AS FIID
```

```
        , ORGANIZATIONDATA.ID
```

```
        , PARENTCORPID
```

```
        , RS.LOOKUPID
```

```
        , RS.CONSTITUENTID
```

```
    FROM ORGANIZATIONDATA
```

```
    INNER JOIN REVENUE_SET RS ON RS.COMPANYID = ORGANIZATIONDATA.ID
```

```
    WHERE ORGANIZATIONDATA.ID = RS.COMPANYID
```

```
    UNION ALL
```

## BBCRM Process – SQL (continued)

```
SELECT
    COMPANY_HIERARCHY.ID AS FIID
    , ORGANIZATIONDATA.ID
    , ORGANIZATIONDATA.PARENTCORPID
    , COMPANY_HIERARCHY.LOOKUPID
    , COMPANY_HIERARCHY.CONSTITUENTID
FROM ORGANIZATIONDATA
JOIN COMPANY_HIERARCHY
ON ORGANIZATIONDATA.ID = COMPANY_HIERARCHY.PARENTCORPID
)
```

# Donor Notification

Donors receive initial email with directions and follow-up emails on a scheduled basis

Confirmation Email	Initial Reminder Email	Subsequent Reminder Emails	Thank You Email
<b>Email Notification Interval (in hours)</b> How often do you want your donors to get reminder emails? These only go out if they have not completed their matching gift paperwork. Notification email will be sent immediately			
<input type="text"/>			
<b>Thank You Email Subject</b> This is the subject of the email that will be automatically sent to the donor when they submit their information. Make Your Gift to South Carolina Go Further - Match It!			
<b>Donor Email Introductory Text</b> This is the introductory text in the automatic email sent to the donor. Use this space to make a great first impression. Your recent gift to the University of South Carolina makes a world of difference to the success of our educational mission. You can multiply the impact of your generosity through your company's matching gift program. Just a few simple steps will help us get started on a matching gift. Please use the information we have provided below to access your company's Matching Gift Form and Guidelines. You may also need to reference the information provided below in the "Non-Profit Information" section to complete your form for a matching gift.			

- Confirmation – within 5 minutes
- Initial Reminder – 5 days
- Two subsequent reminders – every 7 days



# Follow-up

Gifts flow into outside vendor for follow-up

HEP data AN SSB COMPANY University of South Carolina Educational Foundation © 2021 Copyright: HEPdata 2.6.1 (prd - prod). All Rights Reserved

Pending \$104,026.73

53

Donations

- Pending 53 \$104,026.73
- Completed 10 \$5,293.00
- Rejected 4 \$8,485.00
- More Information 0 \$0.00
- Needs Follow Up 299 \$539,700.82
- Archived 0 \$0.00

Reports

Search donations NO FILTERS SET

Name	Amount	Matching Company	Matching	Potential	Date Created	Last Updated	Donor ID	Phone	Flag	Subscri...
	\$100.00	Delta Air Lines	D M	\$100.00	6/2/2021	6/2/2021			P	✓
	\$10.42	Duke Energy Corp.	D N M	\$10.42	5/29/2021	5/29/2021			P	✓
	\$5.00	State Farm Insurance Co...	D N M	\$5.00	5/29/2021	5/29/2021			P	✓
	\$25.00	Duke Energy Corp.	D N M	\$25.00	5/29/2021	5/29/2021			P	✓
	\$250.00	Allstate Giving Campaig...	D M	\$250.00	5/25/2021	5/25/2021			P	✓
	\$100.00	McKesson Corp. Match ...	D N M	\$100.00	5/24/2021	5/24/2021			P	✓
	\$100.00	State Farm Insurance Co...	D N M	\$100.00	5/21/2021	5/21/2021			P	✓
	\$10.00	CIGNA Corp. Volunteer	D M	\$10.00	5/21/2021	5/21/2021			P	✓
	\$25.00	IBM	D M	\$25.00	5/21/2021	5/21/2021			P	✓
	\$2,583.34	Wells Fargo	D M	\$2,583.34	5/21/2021	5/21/2021			P	✓

# Matching Gift Status

As donors complete steps, progress is updated.

TIAA	<span>D</span> <span></span> <span>M</span>	\$50.00	2/23/2021
Truist Financial Corporat...	<span>D</span> <span></span> <span>M</span>	\$2,500.00	3/11/2021
ADP	<span>D</span> <span>N</span> <span>M</span>	\$100.00	3/19/2021
Sony Corporation of Am...	<span>D</span> <span></span> <span>M</span>	\$100.00	4/22/2021
State Farm Insurance Co...	<span>D</span> <span>N</span> <span>M</span>	\$100.00	4/22/2021
Humana, Inc.	<span>D</span> <span>N</span> <span>M</span>	\$50.00	4/22/2021

# CRM Integration

API Link

### HEP eMatch Portal Integration

Alumni Association | Business Partnership Foundation | Development Foundation | **Educational Foundation** | Test

HEP Records (366) + Add | Filters | More

Lookup ID	Donor	Amount	Potential	Company	Revenue ID	Status	Email	Phone	Donor	Match	Non-profit	Source	Date Added	Transaction Date	Transaction ...
207436		\$100.00	\$100.00	Sony Corporati...	rev-14783460	COMPLETED			✓			BBCRM	4/22/2021	2021-04-21	\$100.00
950948		\$50.00	\$50.00	Humana, Inc.		COMPLETED			✓		✓	ADF	1/7/2021	2020-09-17	\$50.00
291773		\$100.00	\$100.00	State Farm Insu...	rev-147823226	COMPLETED			✓		✓	BBCRM	4/22/2021	2021-04-21	\$100.00
950948		\$50.00	\$50.00	Humana, Inc.	rev-14782683	COMPLETED			✓		✓	BBCRM	4/22/2021	2021-04-21	\$50.00
2953505		\$100.00	\$100.00	ADP		COMPLETED						ADF	3/19/2021	2021-03-19	\$100.00
267464		\$2,500.00	\$2,500.00	Truist Financial ...		COMPLETED						ADF	3/11/2021	2021-03-11	\$2,500.00
524460		\$50.00	\$50.00	TIAA		COMPLETED						ADF	2/23/2021	2021-02-23	\$50.00
320264		\$120.00	\$120.00	Merck		COMPLETED					✓	ADF	12/31/2020	2020-12-31	\$120.00
188163		\$1,973.00	\$1,973.00	Texas Instrume...		COMPLETED						ADF	12/30/2020	2020-12-31	\$1,973.00
923724		\$250.00	\$250.00	TE Connectivity		COMPLETED						ADF	1/7/2021	2020-11-10	\$250.00
196082		\$100.00	\$100.00	Delta Air Lines	rev-14791589	PENDING						BBCRM	6/2/2021	2021-05-26	\$100.00
62677		\$10.42	\$10.42	Duke Energy C...	rev-14791386	PENDING						BBCRM	5/29/2021	2021-06-01	\$10.42
373470		\$5.00	\$5.00	State Farm Insu...	rev-14791308	PENDING						BBCRM	5/29/2021	2021-06-01	\$5.00
263205		\$25.00	\$25.00	Duke Energy C...	rev-14791270	PENDING						BBCRM	5/29/2021	2021-06-01	\$25.00
272640		\$250.00	\$250.00	Allstate Giving ...	rev-14791017	PENDING						BBCRM	5/25/2021	2021-05-07	\$250.00
		\$100.00	\$100.00	McKesson Corp...		PENDING						ADF	5/24/2021	2021-05-22	\$100.00
125696		\$100.00	\$100.00	State Farm Insu...	rev-14766500	PENDING						BBCRM	5/21/2021	2021-02-01	\$100.00
135710		\$10.00	\$10.00	CIGNA Corp.Vo...	rev-14763984	PENDING						BBCRM	5/21/2021	2021-01-16	\$10.00
153345		\$25.00	\$25.00	IBM	rev-14760893	PENDING						BBCRM	5/21/2021	2020-12-21	\$25.00
259167		\$2,583.34	\$2,583.34	Wells Fargo	rev-14790997	PENDING						BBCRM	5/21/2021	2021-05-20	\$2,583.34
262608		\$42.00	\$42.00	Houghton Miffl...	rev-14772801	PENDING						BBCRM	5/21/2021	2021-03-01	\$42.00
283001		\$19,472.72	\$19,472.72	Cardinal Health...	rev-14785965	PENDING						BBCRM	5/21/2021	2021-04-20	\$19,472.72
283675		\$20,000.00	\$20,000.00	State Farm Insu...	rev-14760829	PENDING						BBCRM	5/21/2021	2020-12-31	\$20,000.00
286370		\$1,730.00	\$1,730.00	Balfour Beatty ...	rev-14772634	PENDING						BBCRM	5/21/2021	2021-03-08	\$1,730.00
290560		\$2,000.00	\$2,000.00	Abbvie	rev-14764353	PENDING						BBCRM	5/21/2021	2021-01-21	\$2,000.00
3414		\$116.29	\$116.29	ICF International	rev-14764510	PENDING						BBCRM	5/21/2021	2021-01-20	\$116.29
397738		\$220.00	\$220.00	Pfizer	rev-14774771	PENDING						BBCRM	5/21/2021	2021-03-11	\$220.00
406980		\$17,150.00	\$17,150.00	Dell	rev-14774576	PENDING						BBCRM	5/21/2021	2021-03-11	\$17,150.00
47688		\$1,359.46	\$1,359.46	McGuireWoods...	rev-14774690	PENDING						BBCRM	5/21/2021	2021-03-11	\$1,359.46

#### Edit a HEP record

Donor Id:

Donor:

Amount:

Status:

Subscribe

Email:

Phone:

Donor Confirmed

Match Confirmed

Non-profit Confirmed

Source:

Transaction Date:

Transaction Amount:

Revenue ID:



# Results

- No Improvement Yet
  - Measured by Matching Gift Claims
- Reasons
  - Process Started December 2020
  - Tracking via Vendor
  - Increase Employee Relationships
  - Improve Employee Online Search Option



## Next Steps

- Monitor and Measure
  - Increase to Matching Gift Revenue
- Employee Information
  - Encourage Units to Enter Employee Relationships
  - Bulk Imports for Employment
  - Maintain Corporation Tree



#bbdevdays

Thank you!