



Advancement Symposium

Ivy+ Enterprise Systems Symposium Series

October 25, 2022

About today's symposium

Stanford's Alumni & Development Application Platform Transformation

Today's symposium will focus on Stanford's ADAPT program, a large complex ecosystem of multiple cloud-based systems with some custom components.

The vision for ADAPT is to provide the best alumni and donor experience by increasing constituent engagement, providing targeted highly relevant content, while delivering a modern and personalized experience.

The Stanford team will share about their significant challenges and learnings managing ADAPT.

Have another device or open another browser window to log into PollEv
Reach out to our tech team via Zoom Chat if you run into a problem



VIDEO ON
if possible



MIC MUTE
unless you're speaking



This meeting
will be **RECORDED**



**CLOSED
CAPTIONING
AVAILABLE**



We will be using
POLL EVERYWHERE
for Q&A:
pollev.com/suzoom

Agenda

10:00 am PT Welcome

10:05 am PT ADAPT Program Overview

- Steve Gallagher
- Kathy Pappas-Kassararas
- ADAPT Team Leads

11:05 am PT Questions and Discussion
Moderated by Way Leon

11:25 pm PT Concluding Remarks

11:30 pm PT Adjourn





Advancement Systems

Ivy+ ERP Symposium
October 25 2022

DRAFT v10202022

Stanford | Office of Development

Stanford | *alumni*

Stanford





Chapter 1:
**Where we
started**



ADAPT is part of Stanford's Renew, Extend, Replace (RER) Roadmap



Reporting, analytics, and data management are part of every program in RER

*ADAPT: Alumni & Development Application Platform Transformation

Why ADAPT*?

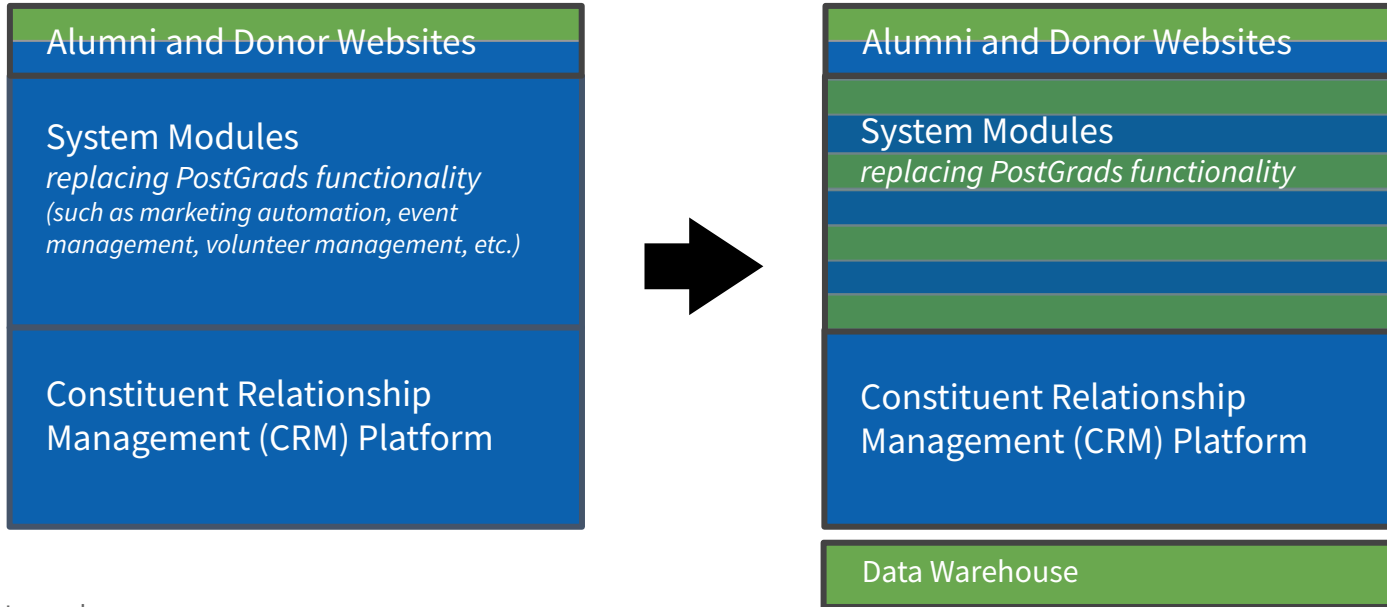
Replace end-of-life platform

Improve capabilities and increase capacity

Deepen alumni and donor engagement

Realize benefits of a broader enterprise ecosystem


ADAPT Program Reset and Strategy Adjustment



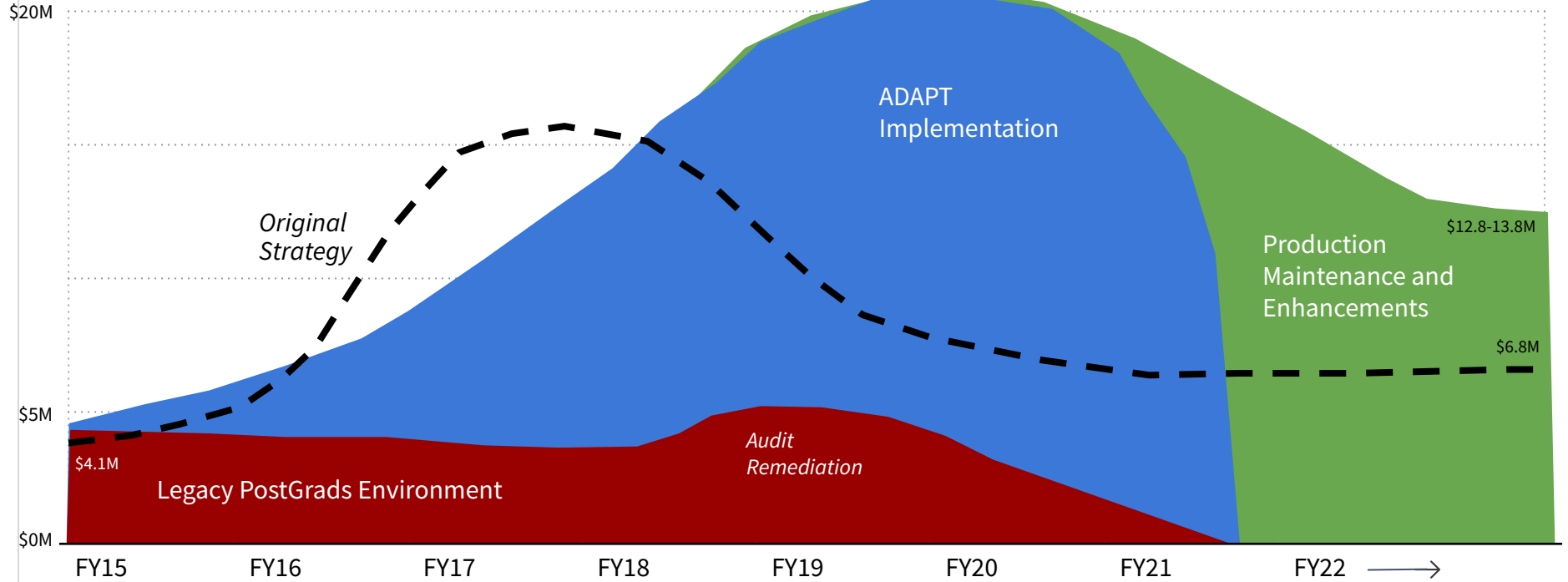
Legend:

 Licensed system

 Stanford-developed system

 Some Stanford-developed systems,
some licensed systems

ADAPT Project Costs versus Maintenance Costs



New ADAPT Program Timeline

FY 2015
ADAPT Program
Approved Dec 2014

FY 2018
ADAPT Program Reset
Apr 2018



Jul 2015
ADAPT Program
begins

Nov 2017
Planned
Giving Pilot

Early 2017
Stanford
abandoned
roundCorner

Apr 2017
Updated roadmap
and timeline

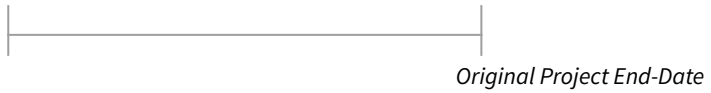
FY 2019
Phase 1
Go Live

FY 2020-23
multiple releases



Phase 3 Ongoing

*Ongoing program
Production maintenance and
enhancements + Decommission PG*

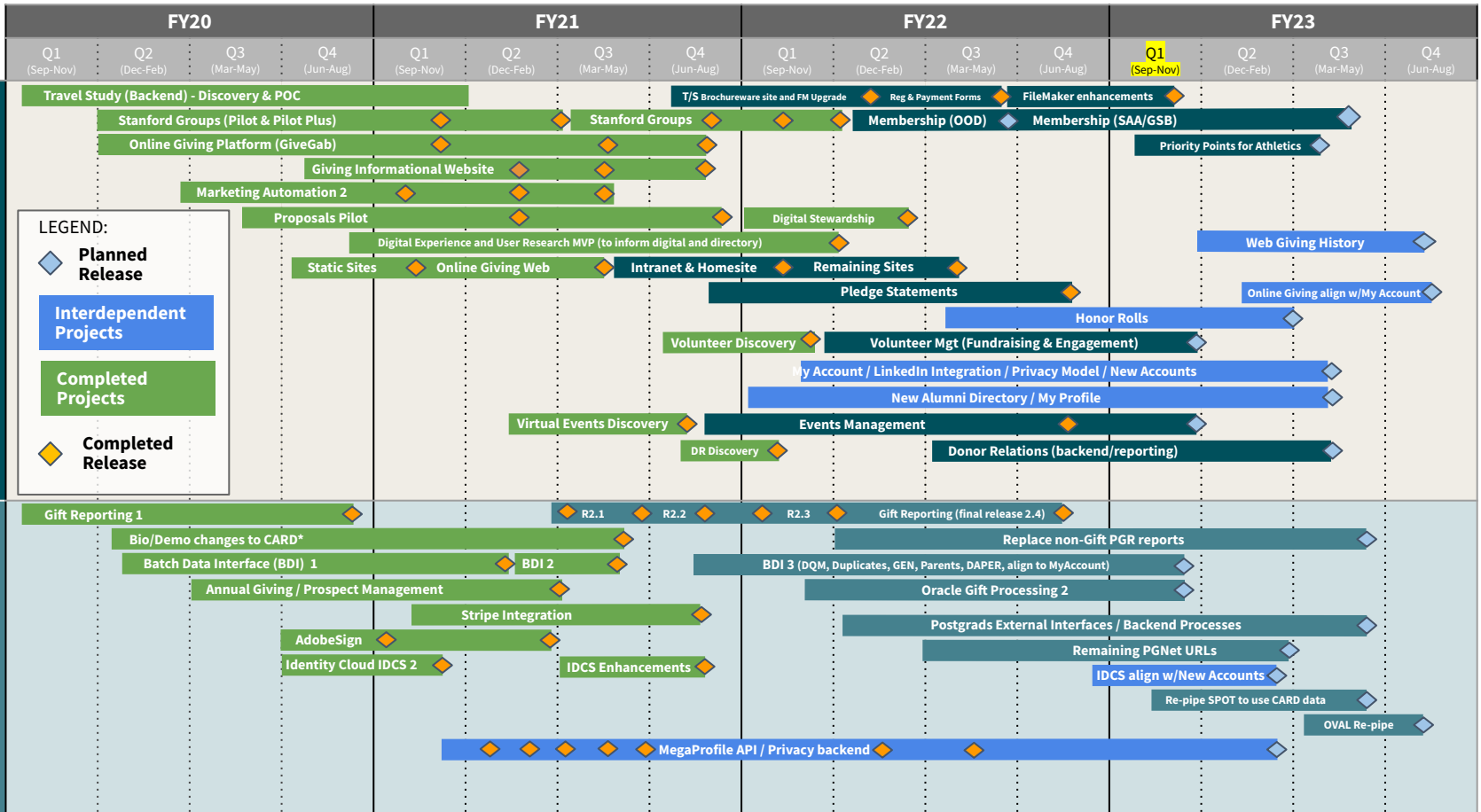
FY14 FY15 FY16 FY17 FY18 FY19 FY20 FY21 FY22 FY23 →



ADAPT Program Phases

<p>PHASE 1 completed Sep 2019</p> 	<p>Oracle Gifts Processing (Release 1 - Jun 2019) (Release 2 - Sep 2019)</p> <p>Document Storage Solution (Jun 2019)</p> <p>Identity Management (Mar 2019)</p>	<p>Constituent Relationship Management (CRM)* (Jun 2019)</p>	<p>Business Intelligence/ Reporting (Jun 2019)</p> <p>Data Hub* (Jun 2019)</p> <p>Marketing Automation* (Apr 2019)</p>	<p>Completed in 2019, Phase 1 was foundational to our internal capabilities</p>
<p>PHASE 2 in progress will complete in summer 2023</p> 	<p>CAMPAIGN READINESS</p> <ul style="list-style-type: none"> Campaign Gift Reporting Campaign Feasibility Online Giving* Donor Relations 	<p>CONSTITUENT ENGAGEMENT</p> <ul style="list-style-type: none"> Clubs, Groups, Forums* Events * Memberships Alumni Directory Volunteer Management 	<p>Web Redesign and Replacement of 40+ sites*</p> <p>Advanced Reporting</p> <p>CRM Phase 2</p> <p>Marketing Automation Phase 2</p>	<p>Phase 2 is transforming the <i>overall alumni and donor experience</i> and creating capabilities to manage a <i>modern campaign</i></p> <p><small>*Asterisked systems were implemented with enterprise agreements and may be extended beyond ADAPT to benefit other parts of the university</small></p>
<p>PHASE 3 Included in ongoing operations</p>	<p>Optimize New Ecosystem <i>by addressing the multiple systems needs beyond replacing PostGrads.</i></p>		<p>Phase 3 is needed to meet critical business needs beyond Postgrads</p>	

ADAPT Phase 2 Roadmap | Significant Scope and Complexity





Chapter 2:
**What we
learned**



ADAPT Lessons Learned *Don't underestimate complexity and scope!*

Governance and Planning

It is critical to have executive sponsorship in order to drive decisions and mitigate risks:

- Exec Steering- VP Level (bi-monthly)
- Program Sponsors - AVP Level (by-weekly)
- Business Stakeholder Groups, facilitated by Business Owner and Product Lead. (monthly)

Program roadmap planning was a frequent exercise:

- During replanning in 2018, we reset scope, time and budget...budget stayed firm
- Chunked it up, and chunked it up, and chunked it up again
- Multiple interdependencies and parallel efforts
- MVP approach and then enhanced that stream
- Unforeseen challenges (Covid, great resignation)
- Only critical scope changes were considered (compliance, campaign readiness)
- Solutions weren't all known up front, so we had to plan for discovery/poc

ADAPT Lessons Learned *Don't underestimate complexity and scope!*

Staffing

- Shift from locally driven SAAS implementation (consultants working directly with business) to a centrally managed enterprise IT ecosystem partnered with the local Business Technology team that had significant business expertise.
- Team expanded through fixed term positions, many positions converted to ongoing funding over time, others moved to other programs
- Start up feel ...lots of unknowns. Needed to build expertise as we went.
- Bring in data/reporting, instructional designers, change management, and support teams in at beginning of each workstream. For external facing products, work with marketing teams early to determine the go to market strategy.

ADAPT Lessons Learned *Don't underestimate complexity and scope!*

Architecture and Data Management

- Immature product landscape – we couldn't buy everything. Went with best of breed where we could.
- Stitching together SAAS solutions is challenging (not just from a user experience perspective, but also from a data and roadmap perspective).
- Data (hub,model, governance, and integration) remains the most complex part of our project. Huge shout out to the data and gift reporting team. You will hear more about this stream in the infrastructure symposium.
- Data migration and integration (DMI) to keep business needs met (this meant throw away work to keep PostGrads whole where needed for the business). Data cleanup should be part of the planning process.

ADAPT Lessons Learned *Don't underestimate complexity and scope!*

Change Management

- ADAPT fatigue- 2 types. First, had to overcome the unfulfilled promises, then once we started delivering solutions (and then enhancements), then we had a different type of fatigue around constant change.
- Adoption is a challenge while the legacy system is still hanging around.
- Change management is extra hard when you take an MVP approach. It's not a one-and-done experience related to rollout. It's ongoing and iterative
- Went with an LMS and instructional designers vs traditional in-person training. This allowed us to scale training and create personal learning paths
- We are focusing on practical change management support that facilitates ongoing adoption of technology (process, training, identification of and support of internal change advocates, etc)



Chapter 3:
**What we did
and how
we did it**



Mind the Gaps

1. Business functional gaps
2. Data model misalignment
3. Compliance gaps
4. Vendor/product maturity gaps
5. Custom user experience required to connect the ecosystem together

BOUGHT (with extension)

Salesforce
GiveGab
Oracle IDCS
Cvent
Hivebrite
Marketo
Overture
Drupal 9 on Acquia Cloud Site Factory

BUILT

Oracle Gift Processing
My Account
Alumni Directory
Data Hub
Storyblok/Netlify

Technology Profile: Salesforce

Description: Primary tool to track alumni and other constituents data. Tracks engagement as well as other fundraising activities

Selection Process: Original plan was to have a single solution for all of our alumni and advancement needs

Build Process: Using a base of Salesforce EDA data model; additional customization required to fit specific Stanford needs

Current State: Live in 2019

Benefits

- Salesforce updates are automatic
- New functionality/changes can be iterated on quickly
- AppExchange packages can be leveraged for additional functionality

Challenges/Limitations

- Due to the scope of the legacy system, PostGrads, two way integration was required which limited certain architectural design decision in Salesforce. Big bang release was not possible
- Keeping two systems in sync has been challenging with bidirectional integration

Lessons Learned

- **E**ducation **D**ata **A**rchitecture (Student Lifecycle) vs **N**onprofit **S**uccess **P**ack (Fundraising) decision should be carefully thought out
- AppExchange packages requires due diligence to make sure product will work with any customizations present in your org
Be mindful of other products to make sure they integrate well with each other

Technology Profile: Gift Processing

Description: A custom gift processing platform that streamlines the transacting and recordkeeping for all donations to Stanford and its affiliates

Selection Process: No software solution met our needs

- Affinaquest
- Ascend
- GEM

Build Process: 100% custom using Oracle APEX

Current State: Live in 2019

Benefits

- Meets complex business needs
- Integrates with university general ledger (Oracle EBS)
- Flexible hard/soft credit model

Challenges/Limitations

- All upgrades must be triggered by us

Lessons Learned

- Data conversion and integration
- Reporting should have been considered much earlier

Technology Profile: Alumni Directory and MyAccount

Description: Platforms to support the connection of students and alumni and management of data, privacy, and preferences

Selection Process: No software solution met our needs; Looked at a number of packages, including Hivebrite; key drivers for custom

- User experience
- Complexity of data, authorization model, and privacy rules

Build Process: Custom + Coveo Search

Current State: To be launched Spring '23

Benefits

- Launching with My Account removed legacy platform constraints
- Meets complex business needs with room to grow
- User experience
- Powerful search and learning through Coveo

Challenges/Limitations

- Support and future releases is done in house

Lessons Learned

- Stakeholder management requires strong business leadership
- Alignment and collaboration with data and adjacent product teams is critical for success
- User research important for transformation

Technology Profile: Digital Transformations

Description: Websites and web applications where SaaS tools not purchased, including registration and account management.

Selection Process:

- Detailed evaluation of Content Management System POCs

Build Process:

- Stanford's SaaS-style website builder (Drupal 9 on Acquia Cloud Site Factory)
- Headless/API-driven website builds (Storyblok/Netlify)

Current State: All websites live, many custom web applications still in development

Benefits

- Connect the user experience of our multiple SaaS tools by custom-making the users' "homebase"
- Solutions can be tailored exactly to our requirements. Accessibility, load-times and up-time skyrocketed.

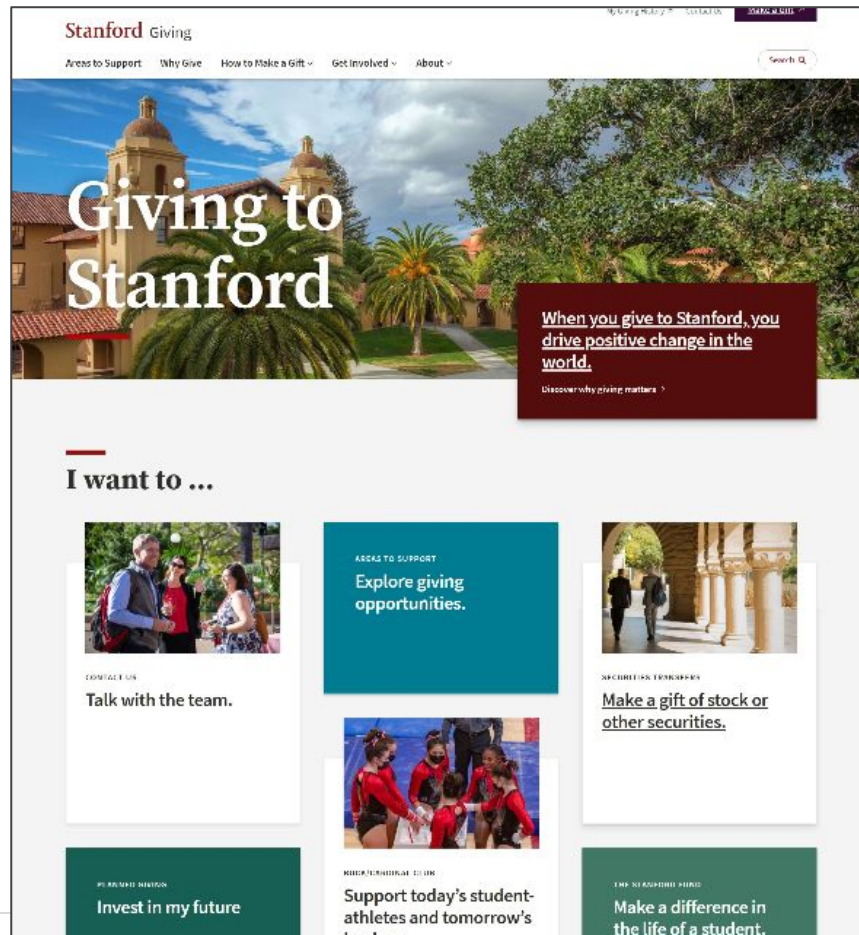
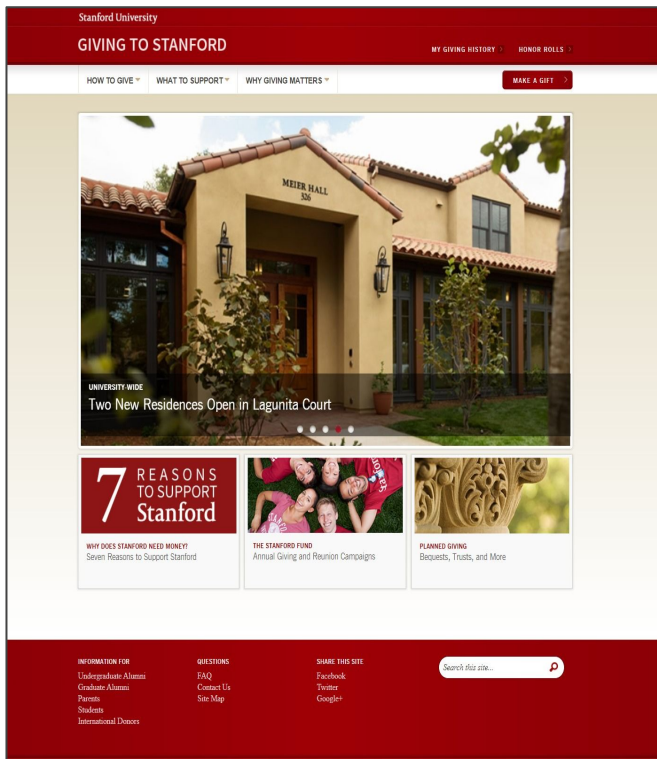
Challenges/Limitations

- Custom builds can be costly and time consuming.

Lessons Learned

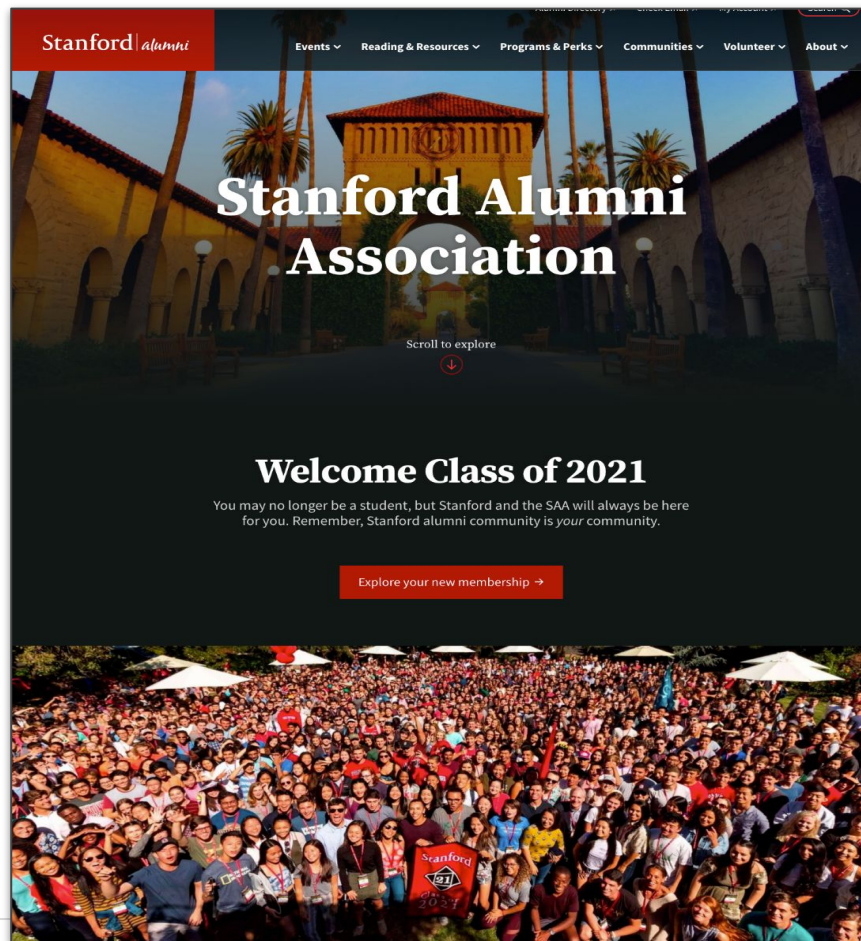
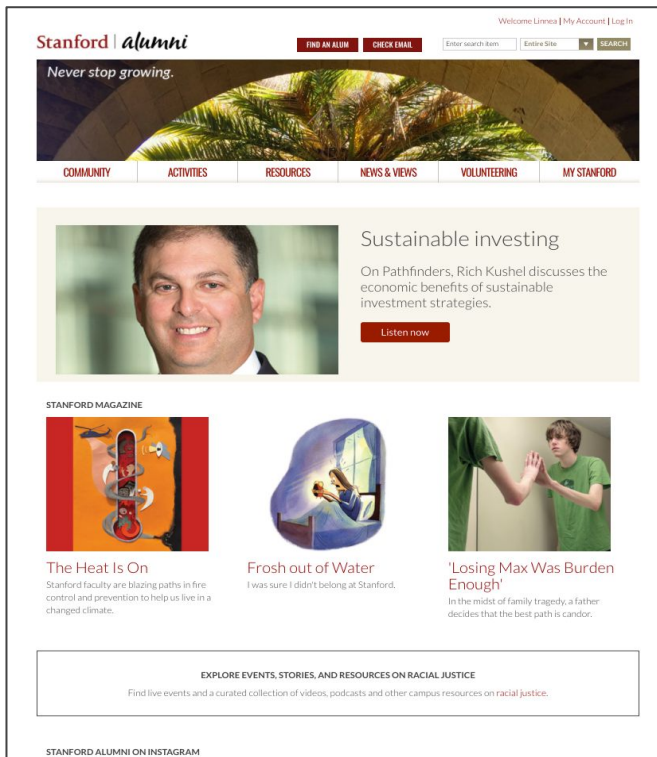
- Leading API-driven CMS (Contentful) difficult for editors.
- Custom digital scope grew as SaaS solution gaps became evident.
- It's harder to manage scope when anything is possible.
- Transformation is only possible when data structures can change at the same time.

Transformational changes: **New Giving website and forms**

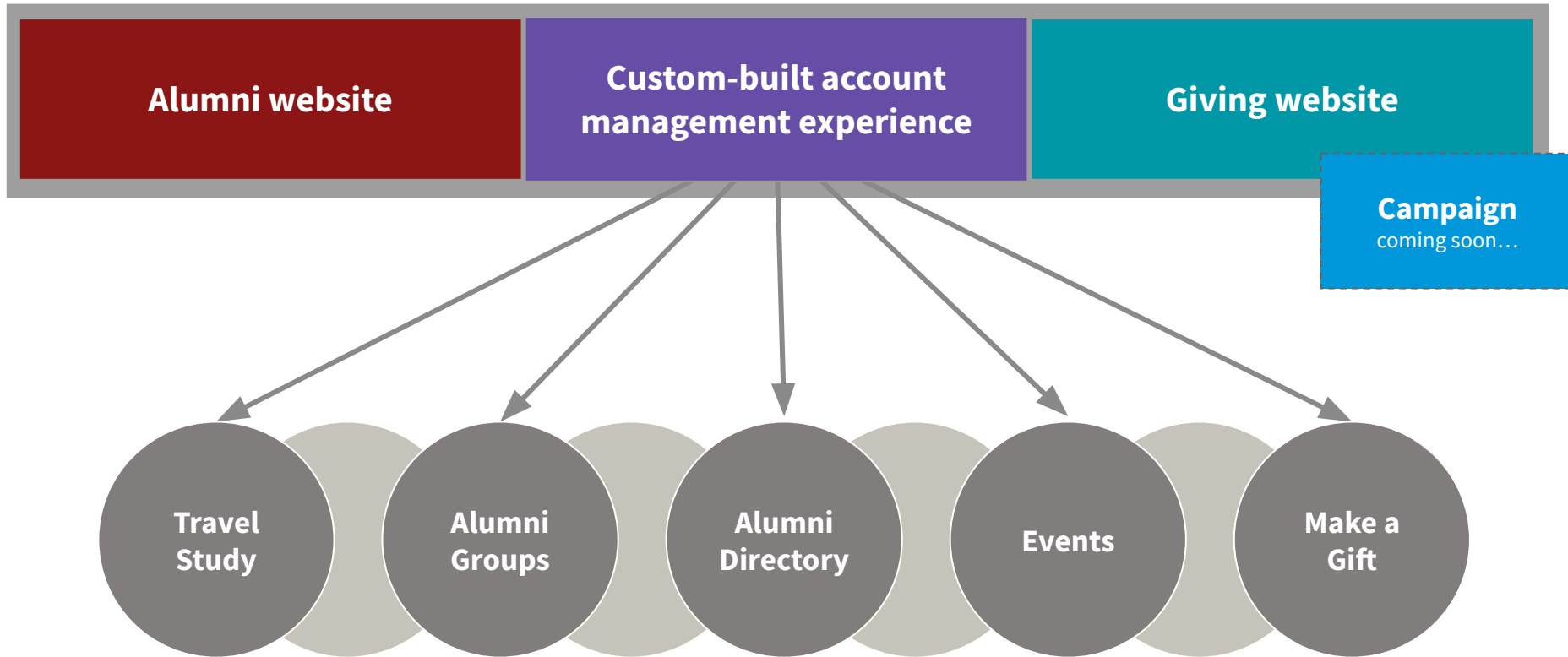


Before

Transformational changes: **New Alumni homesite**



Transformational changes: **Alumni, Giving, and Account**



Open questions and discussion



Poll Everywhere

Go to your mobile device or open another browser window, go to pollev.com/suzoom

Please do not add questions to Zoom chat

You will be able to type in your questions

You will also be able to upvote/  other people's questions

This will **rank order** the questions, and we will answer them in order (as much as possible)

Upcoming session topics

Visit uit.stanford.edu/enterprise-systems-symposium-2022 to stay tuned on dates for these upcoming sessions

Infrastructure: Best practices for business intelligence, reporting (business and operational), middleware, identity management, data management, and data governance

Finance: Lessons learned during the product selection journey, system integrator selection process, and implementation challenges

Thank you for attending today's session!

WIT+ Conversations with Extraordinary Leaders:

A Discussion around Women
Working In Technology In
Higher Education

Moderated by Steve Gallagher

**Learn more and register:
uitcommunity.stanford.edu/events**



NOV 8

1:00 - 2:00 p.m.

Klara Jelinkova

CIO, Harvard University

Jenn Stringer

CIO, UC Berkeley

Ruth Marinshaw

CTO, Stanford
Research Computing

Annie Rota

Director of Academic
Technology, Harvard



Final Thoughts



The background is a solid teal color. In the top-left and bottom-right corners, there are clusters of gear icons in various shades of blue and teal, some overlapping. The text is centered in the middle of the slide.

**Thank you for
attending today**