

2021 Administrative and Support Services Customer Satisfaction Survey

Development Services				
PRIMARY OPPORTUNITIES			ACTIONS TAKEN/IN PROCESS	OUTCOME/HIGHLIGHTS
Prior Year 2021	Current Year 2022	PO Identified		
3.72		Moving in a positive direction	Encourage and assist with program efforts, and not dictate expected outcomes/deliverables. Reiterate roles within the DS team as well as external stakeholder responsibilities.	
3.67		Facilitates Problem Resolution	Following up with inquiries to see if the clients questions were answered effectively. Update website content and format.	
3.67		Approval Workflow Progress	Automate gift processing with CE/REC/Program offices & BOC	
3.64		Approval Time	Working with BOC to ensure that gifts on the aging report are addressed withing a 90-day window and not fall thru the cracks and end up beyond the 90-day target date. <b>We have established monthly training with BOC to help train new staff on the gift processing policies/procedures.</b>	Addressed aging reports with UC Davis gift team, and we have been able to mitigate entry errors that triggered an "exception" and resulted in an automatic delay. <b>We have currently reduced the aging report by 36% by ensuring all required information is correctly furnished prior to submission. Most errors have been reduced as a result of training of DS and BOC staff, and having final audits before the gift data is moved to campus for final disposition of funds. We are still working on reducing the backlog on the aging report. We have seen a slight decrease in gifts being added to the aging report, but it will take until Jun 2024 to clear</b>
3.61		Understands my needs and requirements	Following up with inquiries to see if the clients questions were answered effectively. Update website content and format.	<b>Updated DS web page hosted on L&amp;D home page to include most recent ORG chart of current roles/functions. As of Jan 9, 2023, the unit is 100% staffed. Implemented a "less than 24-hr" response time on all voice messages/emails. Staffing remains at 100% with no turnover. There are no pending inquiries from internal stakeholders.</b>

ADDITIONAL OPPORTUNITIES IDENTIFIED (e.g. verbatim/themed comments, secondary opportunities)	ACTIONS TAKEN/IN PROCESS	OUTCOME/HIGHLIGHTS
Help to identify new donors/sponsorships	Focus on retention of existing donors and encourage greater stewardship. <b>Enroll advancement team for Mid-level Donor Retention Certification course with Veritus training.</b>	Annual giving and advancement are scheduled for Oct 2022 external training to focus on mid-level donor retention and acquisition. <b>Four members of the advancement team are currently enrolled in certification training with a completion date on/before March 1, 2023.</b> All staff have completed their training as of April 2023, including the latest hire on the major gifts team.
More training on strategies and donor relations	More specific trainings on stewardship.	
Notify us when a donation is made.	Rollout of quarterly gift reports that show all gifts made to the division.	Quarterly gift reports have been completed and will be made available for access to all ANR employees via Box file. Reports will be available at the end of the 3rd week following QE. <b>Quarterly reporting is completed and available to all ANR employees via UC Box file.</b> Quarterly reporting is active and available to all ANR staff via Box.