INTRODUCTIONS

Tiffany Morris

Co-chair, DEI Community of Practice

Assistant Director, Donor Relations

Cate Liverman

Co-chair, DEI Community of Practice

Director, Constituent Relations at the UVA Medical Alumni Association

AGENDA

- What brings you here?
- Goals
- Survey results
- Data & Ethical Practices: Dos and Don'ts
- Breakouts: Surfacing our Business Needs and Pain Points
- Sharing & Questions

Speakers:

- **Tara Telfair**, Chief Learning Officer
- **Laura Phillips**, Senior Manager for Stakeholder Relations

WHAT BRINGS YOU HERE?

I work directly with data

I have a personal interest in DEI

We have an upcoming project or event that requires DEI data

I've been frustrated when trying to access DEI data

I just want to learn more

GOALS OF THE DEI CoP

BRING AWARENESS AND ATTENTION

- Share resources and collaborate
- Help colleagues set goals related to DEI

CREATE OPEN FORUM FOR DISCUSSION

- Peer-to-peer connections
- Facilitating difficult conversations

ENACT CHANGE

- Get feedback to the right sources
- Change our daily habits
- Help establish best practices to support colleagues in this work

SURVEY FEEDBACK

Some survey responses

"Trying to address ways to make our events more diverse"

"What are some metrics that go beyond the standard fundraising performance metrics that can capture the fuller picture to understand diversity successes and gaps?"

"Cleaning up alumni information related to race, focus on requesting preferred pronouns on registration forms, collection of pronunciation of names from current students (for correct announcement during student awards/graduation ceremonies)"

"The data is inconsistent in Advance. Our area also does events for residents and fellows. Ethnicity is not listed in their record in Advance."

"I would love to find ways in which we can be more intentional in making sure that we (DOs) are including diverse groups in our outreach, discovery work, and portfolios."
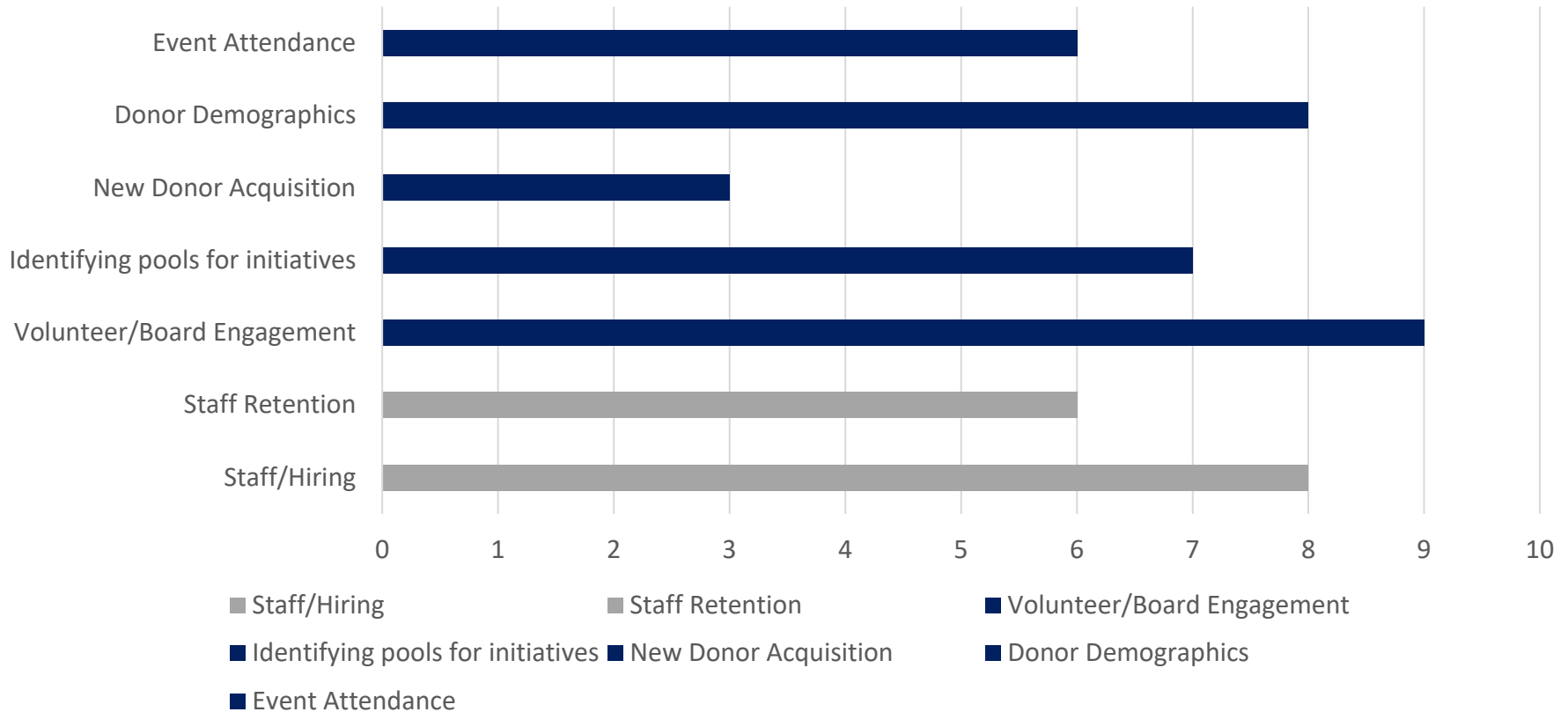
"Assessing whether we reach everyone and how identity impacts demand for services/programming we offer."

"Why are diverse staff leaving UA?"

OVERALL THEMES

1) There's **inconsistent effort** out there to capture new data points.
2) There's **frustration** from people relying on existing data in Advance.
3) No one is gathering or storing data in a consistent or s**harable** way. (shadow databases)
4) Whatever we are, or aren't, doing right now is not the best way… **and we are collectively interested in new solutions.**

DEI DATA CURRENTLY BEING TRACKED

Category	Value
Event Attendance	6
Donor Demographics	8
New Donor Acquisition	3
Identifying pools for initiatives	7
Volunteer/Board Engagement	9
Staff Retention	6
Staff/Hiring	8

Legend:
- Staff/Hiring
- Staff Retention
- Volunteer/Board Engagement
- Identifying pools for initiatives
- New Donor Acquisition
- Donor Demographics
- Event Attendance

Number of responders out of 49 total responses.

SETTING THE STAGE

- **We aren't going to solve all our problems today.** There is a lot of work to be done and there will be future opportunities to dive deeper into much more specific areas of discussion.

- **Some are just beginning this journey** and figuring out where to start.

- **Focusing on data points related to our alumni/student constituencies**: HR-related concerns (hiring and retention of staff/faculty) will be tabled for another discussion.

DEI Data

Guidance & Considerations for Ethical Collection, Storage, & Use

To what end, data?

- Diversity
- Equity
- Inclusion
- Access

Guidance for your consideration

1. Business purpose
2. Appropriate data points
3. Collecting data appropriately
4. Establishing routine business practices
5. Using proxies
6. Privacy considerations
7. Data usage
8. Best practices

The key ethical concern in DEI data collection is that it must be self-identified/self-disclosed.

Recommended methods

- Alumni surveys
- Event registrations
- Solicitation response devices
- Website update forms
- Alumni portal profile updates
- Patient information which is HIPAA compliant
- Direct contact or conversation with frontline colleagues

Some data points to consider

Race

Ethnicity

Age

Native language

Disability or other
limitations

Gender identity and pronouns

Education level

Veteran status

Religious affiliation

Political affiliation

Best practice: include a free-form field option in case none of the provided options fit, option to multi-select, and option to not disclose

UVA Advancement

Routine data collection practices

- Routine surveys

- Graduating class surveys

- Patient surveys

- Web update forms

- Link inviting our constituents to update their information, provided as part of our email signature

- Event registration (pronouns, disability/impairments, etc.)

Proxies

- Another option for collecting DEI data is utilizing **proxies** as indicators.

- Proxies are groups or organizations related to a person's identity, so the individual has self-identified by being a part of this group or has an interest in this group.

- Caution: affiliation does not necessarily equate with self-identification; but this information can be used when building out giving interests, invitation lists, affinity.

UVA Advancement

Privacy Considerations

- Health Insurance Portability & Accountability Act (HIPAA)
- Family Educational Rights & Privacy Act (FERPA)
- California Consumer Privacy Act (CCPA)
- General Data Protection Regulation (GDPR)

When more than one law applies, you must comply with both

DEI Data Usage

Lists for prospecting, appeals, events

- Avoid having details visible to all recipients of any prospect list which includes sensitive identity data

- Avoid funding interest assumptions based solely on an individual's presumed identity

Profiles

- Including sensitive DEI data in research profiles should be avoided unless there is a specific business interest

- When this information is needed in a profile, ensure that the profile is kept confidential and securely shared

- Some identity data, such as military status and age, are necessary to further specific cultivation activities

- Additional best practices also include utilizing pronouns in profiles and phonetic pronunciation of names

DEI data usage (continued…)

Alternatives to using identity information

- DEI data translated into funding interest codes or research lists in lieu of actual, specific DEI data points
- Use data in aggregate form to maintain individuals' confidentiality

Conversations with frontline fundraisers and leadership

- Be sure data is used in aggregate form to maintain confidentiality

Algorithms, AI, and Segmentation

- Algorithmic bias

UVA Advancement

Credits

- The DEI Data Guide was initially created on June 1, 2021, by the **Apra Ethics and Compliance Committee**

- Special thanks to the **Apra Diversity, Equity and Inclusion Committee** for their valuable input, and the **Apra Board of Directors** for the initial idea for this Data Guide's creation.

- Refer also to **AFP** for more on their definitions and guidance on DEI (or IDEA) issues

DEI Data & The New CRM

Opportunities for Improvement

Modern technology

- Old database not built with foresight of the business issues you are grappling with; nor was it very adaptable to modern business needs.

- New CRM should provide opportunity for:
  - review & cleanup of core data
  - improved data security
  - refined permissioning
  - improvement of business processes

But technology does not necessarily solve all of your data problems

CRM transformation -> Business transformation

- With tool changes we expect business process changes
- Establish high-need business objectives now
- What can we do? What should we do?
- Brainstorm on "how we get there" – who is responsible for what?
- Communities of Practice key stakeholders in these initiatives

What do you see as critical business need(s)?

Let us know!

AdvancementCRM@virginia.edu

BREAKOUTS

- What data fields are the **most important** to capture for the work you are doing?

- What are your **current pain points** with collecting/storing/using data? (Do you have a solution, or bandaid, to someone else's struggle?)

- How could your **problem be solved**?

- What are the **reporting gaps**?

REPORTING BACK

EVENTS

DONOR RELATIONS

DATA COLLECTION & REPORTING

WHAT CAN WE TAKE AWAY FROM TODAY'S MEETING?

THANK YOU FOR JOINING!

The Next DEI CoP will be in August 2023.

UNIVERSITY *of* VIRGINIA