



CASE STUDY

Purdue cuts Giving Days processing time from weeks to days with Kindsight's *ascend*.

How the university foundation had its biggest giving day yet while dramatically reducing its manual data processing time by 95%.



Giving Days are a core part of many advancement team's fundraising strategies. The volume of donations and community involvement during giving days are exciting and heartening; they can inspire a huge amount of generosity in a very short period of time. But with all that momentum comes an immense workload in subsequent weeks for the advancement team behind the giving day. The amount of processing and record cross-referencing that needs to be done in order to report to your board and supporters cannot be underestimated – it can be all-consuming and stressful. Not to mention that all this reviewing of donor and transaction lists has to be done during the crucial period when you'd rather be thanking your supporters.

This was the exact situation the Purdue for Life Foundation was in before their conversion to *ascend*. The Purdue University organization in West Lafayette, Indiana, includes multiple groups such as the Purdue Alumni Association, University Development Office, John Purdue Club, and President's Council. Its mission is to bring together all those who love Purdue, want to stay connected, get involved, and give back to the University. The Purdue for Life Foundation is the cornerstone for engagement, development, and stewardship at Purdue.

The Challenge:

Labour-intensive giving day with a tight timeline.

Every year, Purdue holds an event called "Purdue Day of Giving," or PDOG for short. It is their biggest fundraising push of the year and traditionally falls on the last Wednesday in April. The initiative has been extremely fruitful, with increasing total PDOG donations year over year – and in 2024, it reached an impressive \$76.5M in one day. "It is such a successful campaign; many people wait all year until PDOG to make their annual gift. We look forward to the event every year", says Becky Johnson, Director of CRM systems at Purdue For Life Foundation.

With such a high volume of donations coming in within a 24-hour period, it's not hard to see that processing, follow-up activities, and reporting would be an undertaking. Historically it took the team a week or so to complete these essential tasks, working overtime to get it all done as soon as possible.

The process was very manual. The team would download a master list, do some initial matching against a day-behind reporting database (which of course didn't catch new donors), divide it among staff, and painstakingly go through it line by line, matching donor data and transaction details from their giving day vendor's platform to their CRM system. This took multiple days and involved multiple teams and manual processes like Excel macros and Access databases.



PURDUE FOR LIFE
FOUNDATION

BECKY JOHNSON,
DIRECTOR OF CRM SYSTEMS

"If you don't have the right tech and tools in place, you can reach a point where you aren't able to grow anymore. *ascend* allows us to keep growing our giving days."



Through the back and forth of processing, there was a lot of room for human error. With all the data manipulation happening by multiple people, there was an increased risk of duplicate records and errors in the matching process. This impacted the accuracy of reports, sometimes leading to skewed results.

PDOG was such a successful campaign and became one of the biggest giving days in the nation, but processing was inefficient. As we progressed, it became difficult to execute the full campaign in such a short time frame. It put a strain on what should have been an extremely exciting event," said Johnson.

Although this process took longer than they wished and resulted in increased errors, it was doable. But that was before their day of giving landed three days before the end of the month... and the gifts needed to be a part of the month end reporting.

The Solution:

Automated data matching and processing with Kindsight's *ascend*.

That's where Kindsight's *ascend* came in. Purdue had been a new user of *ascend*, and with the month-end deadlines, they knew they should start taking advantage of even more of the purpose-built CRM's time-saving features—namely, "Interims" and "Review Transactions."

Interim records are like temporary holding places for new information coming into the *ascend* CRM system. Imagine them as waiting rooms where data hangs out before getting assigned a permanent spot. This information could be about a person (contact) or an organization.

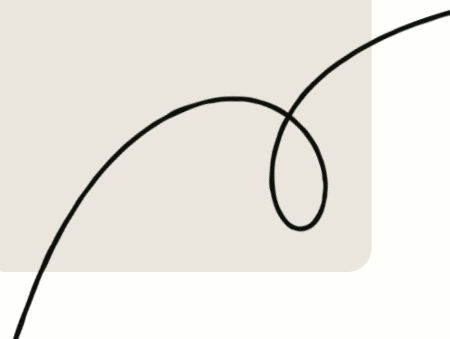
So, before the new PDOG information was added to the system, it needed to be checked for errors and duplicates of contacts already in the system. This checking process was important because it made sure the information brought into *ascend* was correct and there weren't any unnecessary repeats. The system also did a duplicate check ("deduping") by comparing the new donor transactions to the existing donors. If the system thought the information might have been a duplicate, it flagged it for human review. Once in use, interims helped the Purdue team to keep their database organized and accurate by making sure new information was checked before it was added to the system.

Similarly, they simplified the processing of PDOG donations by using the "Review Transactions" (RTv2) feature in *ascend*. When a donation was ready for review, instead of having to gather in information – like the donor's information, the type of transaction (gift, pledge, or payment), the amount, any special instructions, et cetera – scattered across various forms and databases, RTv2 streamlined processing by consolidating all that information about a donation into a single record automatically. Once a complete record was created, the system automatically initiated the processing of the transaction.

This was in stark contrast to Purdue's previous manual gift-processing methods, where they had to navigate multiple spreadsheets. RTv2 and Interims eliminated the need for manual intervention at each step and allowed for more efficient bulk processing of gift records.

BECKY JOHNSON,
DIRECTOR OF CRM SYSTEMS

"The resources that we used to have to pull in, we didn't have to pull. **That made a huge ROI for us.**"



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Kindsight

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The Outcome:

Reduced data processing time, increased data accuracy, and resource optimization.

Using *ascend*'s Interim-to-Interim matching and Review Transactions features, Purdue went from a very manual process to one that was almost fully automated.

Manual data processing time was dramatically reduced. Out of 24,847 Interims (donor records) created during the 2024 giving day, only 1,215 required manual review. That is a 95% decrease in manual lookups. In addition, there were 31,108 donation RTv2 transactions that were reviewed by *ascend* during those few days. The result? \$76,519,913 raised and processed in just a day and a half.

Purdue also benefited from improved data accuracy. The automated matching significantly reduced the risk of duplicate records, greatly reducing the opportunity for human error during processing. All this led to more accurate reporting and insights for decision-making.

Purdue was also able to optimize their human resources, cutting the number of staff involved in data processing in half. With less manual work, IT and donor services teams could focus on their core responsibilities, leading to greater efficiency and productivity overall.

And since the processing was done so quickly, staff were also able to send their thank you follow-ups much quicker. They could see the transaction insights, know who had given large gifts, and follow up with them sooner. Instead of having to pore over all the data, they could focus on the human side of fundraising, deepening relationships with their biggest supporters.

There was a growing concern at Purdue that the more their PDOG days grew, the less effective it would become as a fundraiser, due to processing constraints. Luckily, *ascend* enabled Purdue to keep growing and improving their PDOG days, while continuing to tighten their timelines and increase efficiencies.



24,847

Interims created
in 24 hours

95%

Reduction in
manual matches

31,108

Transactions
processed

\$76.5M

Dollars raised in
one day

Ready to take your fundraising to the *next level*?

Learn more about *ascend*

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