

## Case Study – Pomona College

Pomona kept all its existing BI tools with Theia making all reports accessible from a single user console.

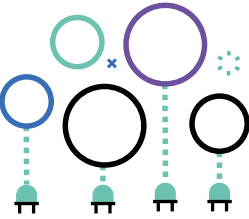
Pomona College’s fundraising operation, the Advancement Office, had been humming along nicely for several years, unfailingly meeting its annual goal to raise \$30 million from generous alumni, parents and friends. In mid-2018, however, change was brewing. With a new VP set to join and raise the team’s target by up to 25 percent, Nadine Francis, Senior Director of Advancement Services & Information Systems, knew it was time to address growing issues with its business intelligence (BI) reporting.

Pomona College’s Advancement Office employs about 60 people working across eight departments on or in support of fundraising. Although the team was successfully meeting targets, accessing BI reports had become increasingly unwieldy over the years. Not only were there four systems in use - Cognos, Tableau, PowerBI and SQL Server Reporting Services (SSRS) - reports were proliferating all over the network.

Nadine explained how the situation developed: *“We started out as a Cognos shop and later brought on Tableau for other types of reports. The tipping point came when we integrated a new data warehouse with roughly 400 Microsoft SQL Reporting Services reports that we wanted to use. That took the tally up to three different BI platforms.”*

Increasingly people were complaining about having to keep track of multiple links and difficulties with locating reports when needed. This created extra work for Nadine’s team, whose people wound up spending considerable time building specially curated report dashboards for individual users.

Nadine needed a solution, but was very reluctant to retire any of its BI systems, each of which provided valuable reports and visualisations for different scenarios. To migrate all the data and rebuild all the necessary reports would have been a massive project requiring considerable internal change management and interfering with fundraising efforts.





## The decision

Nadine explained Pomona's problem to a business analytics consultancy, which agreed with her approach of wanting to continue using the most appropriate BI tool for the job instead of standardising on one. However, to manage the potential complexity of this, the consultancy recommended Theia software. Theia would allow Pomona to keep using all its existing BI tools but dramatically improve the user experience by making all reports accessible from a single user console. After watching several videos about Theia, Nadine became convinced it would be the right solution.

## Deploying Theia

Nadine led the effort to create the Advancement Office's Theia-based system, which her team branded "ConnectTo". The work included defining the scope, design philosophy, and all of the key deliverables. Over a three-month period, consultants from Motio, a Theia Partner, guided Nadine's team through the Theia installation and helped with technical and support issues. Motio also provided examples of other Theia Gameboards.

ConnectTo is now up and running successfully in the Advancement Office, which its people use to find and launch reports from Tableau, Cognos, Microsoft SQL and PowerBI. The system also serves an Intranet for storing all of Pomona College's policies, procedures and training videos. Currently all employees share the same view of fundraising information through what's known in Theia as a 'Gameboard'. This includes a section of new reports and files called 'Recently Hatched' inspired by the College's bird-mascot "Cecil the Sagehen".

Nadine's team set up another Gameboard in ConnectTo called "ASIS," through which employees in the Advancement Office can submit help desk requests. Now people no longer have to log requests through a completely separate, cumbersome and opaque system. In the future, the Office plans to create custom Gameboards for different workflows and initiatives.



*"With ConnectTo, we now have the best of two worlds. Our people have an 'intranet on steroids' that's easy to use and access reports and other policy documents and information from"*



## More data- and goal-driven

Theia proved to be the ideal solution for ConnectTo. Since the platform is integrated with the College's Central Authentication Service (CAS), employees have Single Sign-On and no longer need to log into multiple systems. Everyone can easily bookmark their own favourite reports without relying on Nadine's team to curate custom dashboards. People can now seamlessly interact with dashboards and reports directly in the platform or quickly export the data to analyze or present in other applications.

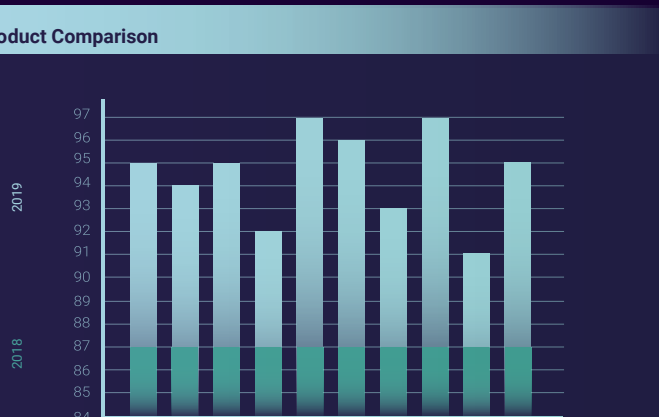
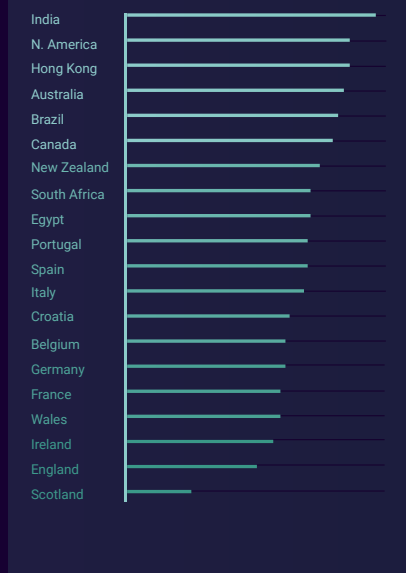
Thanks to all the improvements in ConnectTo, the number of team members now actively using BI tools and resources has more than quadrupled to 90+ percent. Only 20 percent were actively using the previous intranet, which was near the end of its lifecycle. The help desk and ticket support system that has been centralized through ASIS Gameboard reports has dramatically improved user transparency, collaboration, completion, and timeliness rates over previous methods.

The most important benefit of the ConnectTo system, however, is that everyone in the Advancement Office is becoming more data- and goal-driven. *"Now Major Gift Officers will log into the system regularly to get updated reports on the status of people's portfolios. Every morning, Pomona's Annual Giving Director views the report that shows the current alumni participation rate. And ConnectTo is fired up at every board meeting to show members a real-time view of how Pomona is faring against its overall and departmental goals."*

As Nadine concludes:

*With ConnectTo, we now have the best of two worlds. Our people have an 'intranet on steroids' that's easy to use and access reports and other policy documents and information from. At the same time, we maintain our strategy of using the most suitable BI tool for each job. I now believe the department is in a stronger position to meet more aggressive targets and any new challenges that appear on the horizon."*





## About Pomona College

Established in 1887, Pomona College is a private liberal arts college in Claremont, Calif., near Los Angeles. The College offers degrees in arts, humanities, social sciences and natural sciences. Pomona educates approximately 1,670 students who come from 59 nations and all 50 U.S. states, as well as the District of Columbia, Guam and Puerto Rico.

Pomona College currently boasts an endowment of roughly \$2B, made possible in part by a successful fundraising program and the generosity of alumni, parents and friends. The Advancement Office at Pomona College raises an average of \$30 million per year in philanthropic contributions.



Most organisations standardise on one BI tool and then rewrite everything to fit that. But that can be inefficient and not honour the principle of using the best tool for the right purpose. It's like if someone said: you can only use Word so everything that you've written in Excel and Access and PowerPoint has to be converted to a Word document. I believe Theia is on the cutting edge of solving a really huge problem."



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