Bryant
UNIVERSITY

University Advancement

Strategic Plan for Advancement Services
Fiscal Year 2011

MISSION STATEMENT

The mission of the Advancement Services department is to provide an information infrastructure and *quality* data services in support of the division of University Advancement.

VISION STATEMENT

By partnering with the Development, Alumni Relations, and University Relations departments, Advancement Services provides professional services, resources, and solutions to our internal and external constituents, incorporating accountability, flexibility, and confidentiality as we work to continuously improve systems and procedures.

OBJECTIVES

The ongoing objectives of the Advancement Services department include the following:

Focused Data Integrity	Timely and Efficient Gift Processing
Innovative Information Support Services	Proficient Prospect Identification, Research and Analysis
Comprehensive Data Coordination	Coordinated Prospect Mgt., including Tracking and Moves Mgt.
Multi-faceted Direct Mail Services	Thorough Budget Analysis
Proactive Administrative Support	Inclusive Donor Records Management
Analytical and Practical Report-Writing Services	Thoughtful Strategic Planning

Goal	Action Item	Who	Timeline
1) Partner with Alumni Relations	a) Provide support for data files/mailings	ML/SN	Ongoing
	b) Continue to encourage proactive discussion re: variables associated with alumni engagement	LC	Ongoing
	c) Create/implement schedule for overhaul of alumni web pages	EED/LC	Ongoing
	d) Implementation and maintenance of class pages	EED	1st/2nd quarters
	e) Research/Planning for implementation of I-Modules OLC	EED/LC	Throughout FY11
	f) Pursue aggressive data collection via social media channels	EED/RC	Throughout FY11
	g) Encourage VP and ED attendance at Alumni Relations staff meetings	LC	Through FY11
2) Partner with Annual Fund	a) Support aggressive segmentation efforts	ML/SN/GP	Ongoing
	b) Encourage/Support matching gift solicitation effort	ML/SN/GP	3rd and 4th quarter
	c) Collaborate to refine R/C data	GP	Ongoing
	d) Explore data mining to identify new segments/donors	LC/JA/NM/AL	Ongoing
3) Partner with Donor Relations/ Stewardship	a) Provide avenue for immediate recognition of new donors	ML/SN	2nd quarter
	b) Reinstate student thank you card for donors via OLG	ML/SN/GP	2nd quarter
	c) Support online honor roll	ML/SN	1st and 2nd quarters
	d) Train CD to run acknowledgement letters (word merge)	JA	3rd quarter
4) Partner with Planned/Major Giving	a) Continued review and presentation of newly identified $25K+ prospects (using GG&A data and other sources)	NM/AL	ongoing
	b) Record all planned giving transactions on Banner	GP/LC	ongoing
	c) Proactive/regular review and maintenance of Top 250 prospect list	AL	ongoing
	d) Identify freshmen parent prospects	NM/AL	1st quarter
	e) Considering presenting AF summary stats at P.M. meetings; Revamp suite of reports according to need, utility	NM/LC	2nd quarter
	f) Manage assignments/unassignments/reassignments	AL/KB	ongoing
5) Partner with Corps/Founds/Sponsorships	a) Support effort to implement invoice system	SP	ongoing
	b) Collaborate in effort to record all athletic sponsorships	SP	ongoing
6) Partner with University Relations	a) Collaborate with UR on University mailings (AB, Magazine)	ML/SN	ongoing
	b) Collaborate with UR on class notes for AB, Magazine	ML/SN/AL	ongoing
7) Enhance Advancement Services operations	a) Development and implementation of research request form	AL	1st quarter
	b) Develop and implement sound plan to ensure that biographical updates are completed in < 5 days	ML/RC	1st and 2nd quarter

Goal	Action Item	Who	Timeline
	c) Host regular meetings with other departments, e.g., athletics, CSI	Ops	ongoing
	d) Pursue earlier identification of changes in spending plans in order to better accommodate immediate budget needs	ZH	2nd and 3rd quarters
8) Host Training	a) For Assistants: completion of GAFs, Banner refresher, prospect management, report generation and formatting	LC/Assistants	1st quarter
	b) For Alumni Relations/Development Officers: Native Banner, prospect management, retrieval of indexed documents, MapPoint, budget-related (purchase orders, etc.)	LC/Others	1st quarter
	c) For AS staff: Banner refresher, report generation and formatting	LC/Others	1st quarter
9) Ensure campaign preparedness	a) Prepare campaign operations document	LC/GP	3rd quarter
	b) Define campaign budget needs	InitiatEED by ZH	3rd quarter
	c) Encourage funding of AS audit	LC	ongoing
10) Aspirant Goals	a) Ensure optimal organization of staff	LC	1st quarter
	b) Refine productivity measures (focus on metrics)	LC/Others	Throughout FY11
	c) Proactively pursue new resources and latest technology and trends, i.e., Employer Find and other data integrity resources, data mining/predictive modeling, bar code technology	All	Throughout FY11
	c) Regular meetings: Assistants – every 3 weeks to share ideas; GP staff meetings	All	Throughout FY11
	d) Development/Implementation of UA calendar	LC	1st and 2nd quarters
	e) Encourage funding of AS audit to ensure campaign preparedness	LC	Ongoing