Business Practices

	ORGANIZATION DEPARTMENT	PROCESS	<u>ACTIVITY</u>								
1	1 Institutional Advancement										
1.1	1.1 Alumni Relations (Contact:)									
1.1.1	1.1.1 Pro	grams / Events									
1.1.1.1		1.1.	.1.1 Student Group								
1.1.1.2		1.1	.1.2 Affinity Cards (MBNA)								
1.1.1.3		1.1.1.3 Sale of Merchandise									
1.1.1.4		1.1.	.1.4 Homecoming/Reunion								
1.1.1.5		1.1.	.1.5 Commencement								
1.1.1.6		1.1.	.1.6 Convocation								
1.1.1.7		1.1.	.1.7 Travel								
1.1.1.8		1.1.	.1.8 Lectures								
1.1.1.9		1.1.	.1.9 Dinners/Luncheons								
1.1.2	1.1.2 Dat	a Management									
1.1.2.1		1.1.	.2.1 Basic Demographic Data Updates (Advancement Services)								
1.1.2.2		1.1.	.2.2 Employment History								
1.1.2.3		1.1.	.2.3 Relationship cross references								
1.1.2.4			.2.4 New student mailings								
1.1.3	1.1.3 Put	olications									
1.1.3.1			.3.1 Alumni Magazine								
1.1.3.2			.3.2 Alumni Update								
1.1.3.3			.3.3 Monthly E-Newsletter								
1.1.3.4			.3.4 Alumni Directory								
1.2	1.2 Alumni Associatio	•	etors)								
1.2.1	1.2.1 Mei	mbership									
1.2.1.1			.1.1 Geographic Region based chapters								
1.2.2	1.2.2 Alu	mni Services/Pro	—								
1.2.2.1			.2.1 Career Mentoring								
1.2.2.2			.2.2 On-Campus Access								
1.2.3	1.2.3 Put	olications									
1.2.3.1			.3.1 Alumni Chapter Handbook								
1.3	1.3 Development (Con	•									
1.3.1	1.3.1 Fur	ndraising and Re _l									
1.3.1.1		1.3	.1.1 Campaign Solicitations and Special Appeals								

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1.3.1.2	1.3.1.2 Gift Societies
1.3.1.2	1.3.1.3 Annual Report
1.3.1.3	1.3.1.3 Allitual Report
1.3.2	1.3.2 Prospect Management
1.3.2.1	1.3.2.1 Prospect Ratings
1.3.2.2	1.3.2.2 Contact/Trip Reports
1.3.2.3	1.3.2.3 Moves Management
1.3.3	1.3.3 Development Events
1.3.3.1	1.3.3.1 Various Events
1.3.4	1.3.4 Fund Management
1.3.4.1	1.3.4.1 Distribution of Funds
1.3.4.2	1.3.4.2 Stewardship
1.3.5	1.3.5 Campaign
1.3.5.1	1.3.5.1 Volunteer Screening and Ratings
1.3.5.2	1.3.5.2 Prospect Research
1.3.5.3	1.3.5.3 Volunteer Management
1.3.5.4	1.3.5.4 Solicitations for the Campaign
1.3.5.5	1.3.5.5 Strategic Fundraising Meetings
1.4	1.4 Annual Fund (Contact:)
1.4.1	1.4.1 Pledge and Gift Reporting
1.4.1.1	1.4.1.1 Annual Fund Solicitations and Special Appeals
1.4.2	1.4.2 Phonathon
1.4.2.1	1.4.2.1 Student Calling
1.4.3	1.4.3 Personal Solicitations
1.4.3.1	1.4.3.1 Production
1.4.4	1.4.4 Parents Program
1.4.4.1	1.4.4.1 Student Calling
1.5	1.5 Advancement Services (Contact:)
1.5.1	1.5.1 Data Management
1.5.1.1	1.5.1.1 Pledge and Gift Entry
1.5.1.2	1.5.1.2 Pledge and Gift Adjustments
1.5.1.3	1.5.1.3 Address Updates
1.5.1.4	1.5.1.4 Process Receipts
1.5.1.5	1.5.1.5 Process Reminders
1.5.1.6	1.5.1.6 Process Credit Card Gifts

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1.5.1.7	1.5.1.7 Process Pre-authorized Checking Gifts
	<u> </u>
1.5.1.8	1.5.1.8 Donor Reports
1.5.1.9	1.5.1.9 Reconciliation with Finance Reports
1.5.1.10	1.5.1.10 Employment History
1.5.1.11	1.5.1.11 Biographic Information

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DEPAR	ORG: Institution	nal Advancement	ORG.# _ DEPT.#	1.1	ISSUES A.	S: Would like to track by an activity	NOTES	:
	ROCESS: Program		PROC.#	1.1.1	,	activity code and be able to send	A.	Student Alumni Association - used
			_			mailings to former students.		to develop good alumni.
ACTIVIT	Y :						B. C.	New program (2 or 3 years)
					B.	Would like to track participation	C.	Tracking manually.
1.1.1.1	(student group)					via Advancement database.		
	TATIVE MEASURE							
	ER PROCESSED	TIME PERIOD		COST				
	Approx. 20 to 60	1 year						
	members							
TASK:	1							
		executive once a week.					-	
Л. В.		support services for the Ins	titutional Adv	vancement Office	FORMS	S USED:	-	
C.	Setting a a campu		itational 7 tav	variociniciti Onioc.	A.	Will begin using an application		
D.	Meetings with the	entire group about once a n	nonth.			form this year.		
	J	<u>J</u>		_		,	-	
						RTS/LETTERS		
					GENER			
					A.	Labels/Letters		
				_				
								•

ORG: Institutional Advancement	ORG.# <u>1</u>	ISSUES:	NOTES:
DEPARTMENT: Alumni Relations	DEPT.# 1.1		
PROCESS: Programs/Events	PROC.# 1.1.1		A. Mastercard program through the
			Bank of America.
ACTIVITY:			
1.1.1.3 Affinity Cards			
QUANTITATIVE MEASUREMENT:			
NUMBER PROCESSED TIME PERIOD	COST		
1 1 year			
TASK:			
A. MBNA requests information electronically for a	ıll alumni		
B. Extract is done providing names and addresse		FORMS USED:	
		A. None just the contract.	
		1	
		REPORTS/LETTERS	
		GENERATED:	
		A. ASCII File is created and given to	
		MBNA.	

		ORG.# <u>1</u>	ISSUES:	NOTE	:S:
DEPARTMENT: Alumni R PROCESS: Programs		DEPT.# 1.1 PROC.# 1.1.1	A. Would like to be able to track who orders merchandise.	A.	Merchandise is advertised in the
1 100200. <u>1 10grame</u>	S/EVOITES			/ (.	alumni news.
ACTIVITY:				B.	Stock of supplies is kept on campus,
Ĭ					orders are placed directly through
1.1.1.3 Sale of Merchandis	Se				through campus bookstore and not the
•			-		actual supplier of the merchandise.
QUANTITATIVE MEASURE	MENT:			C.	Information on who orders
NUMBER PROCESSED approx. 300-400	TIME PERIOD 1 year	COST	7		merchandise is not currently tracked.
	·				
TASK:					
A. Advertisement is p	laced in the alumni news.		_		
B. Orders are made v	ia the mail or the phone.		FORMS USED:		
C. Merchandise is ser			A. Order form (orders can also		
D. Deposits are handl	ed through the Finance office) .	be called/faxed/emailed).		
			B. Convocation order form (same		
			as in alumni news)		
			_		
			_		
			_		
			REPORTS/LETTERS		
			GENERATED:		
			A. Labels to send merchandise.		
			_		
			_		
			_		
			_		
			_		+

	al Advancement	ORG.# <u>1</u>	ISSU	ES:	NOTES	:
DEPARTMENT: Alumni Re		DEPT.# 1.1	A.	Would like to do pre-		
PROCESS: Programs	s/Events	PROC.# 1.1.1		registrations via web.	Α.	No pre-registration is currently done -
						prefer to set up pre-registrations.
ACTIVITY:			B.	No record of who attended	В.	Targeted mailings include hotel and
				for historical purpose or		class contact information.
1.1.1.4 Homecoming/Reur	nion			to plan for the future.	C.	Classes work with Alumni Relations to
						plan their events.
QUANTITATIVE MEASURE	MENT:		C.	Getting people to pre-register.	D.	All offices on campus are involved in
NUMBER PROCESSED	TIME PERIOD	COST				homecoming/reunion.
1	1 year				E.	Alumni Relations office is the primary
4-600 attendees						coodinator.
TASK:						
A. Use alumni news to	o advertise homecoming	reunion.				
B. Targeted mailings a	are sent to reunion year	classes.	FORM	MS USED:		
C. Class representativ	es work with Alumni Rel		Α.	None currently		
D. Analysis of events	and processing of event	charges.		•		
		•				
					-	
			REPO	ORTS/LETTERS	-	
			GENE	ERATED:		
			A.	Labels for targeted mailings	-	
				(sort by reunion year; sort	-	
				by region).	-	
				, · - g ,·		
					-	
					-	
						
I						

DEDAE	ORG: Institution RTMENT: Alumni R	nal Advancement	ORG.# DEPT.#	<u> </u>	_ ISSUES:	NOTE	S:
	ROCESS: Programs		PROC.#	1.1.1	-	A.	Non-significant responsibilities.
					_	B.	Alumni Office Assistant serves on
ACTIVIT	Y :						the committee.
1.1.1.5	Commencement				_		
QUANTI'	TATIVE MEASURE	MFNT.					
	R PROCESSED	TIME PERIOD	1 (COST	7		
''''''	1	1 year	ì				
		,					
	•				_		
TASK:					_		
		hosts a reception for senio	r students.				
В.	Publicity covered	in Alumni News.			FORMS USED:		
					A. Invitations to senior class.		_
					-		
					-		
					-		
					=		
					REPORTS/LETTERS		
					GENERATED:		
					A. Mailing lists for invitations.		
					_		
					-		_
					-		
					-		_
					-		
							-

ORG: Institution		ORG.#1	ISSUES:	NOTE	S:
DEPARTMENT: Alumni Re PROCESS: Programs		DEPT.# 1.1 PROC.# 1.1.1		A.	Non-significant involvement.
				B.	Exit package sent to graduates.
ACTIVITY:				<u>C.</u>	Special invitation sent to parents.
				D.	No pre-registation currently required -
1.1.1.6 Convocation					may be necessary in the future.
QUANTITATIVE MEASURE	MENT:				
NUMBER PROCESSED	TIME PERIOD	COST			
1	1 year				
6-800 attendees					
					
TASK:					
A. Alumni Association	hosts a breakfast for all o	raduates and their pa	rents		
after convocation.			FORMS USED:		
			A. Invitations.		
			DEDODTO# ETTERO		
			REPORTS/LETTERS GENERATED:		
			A. Labels for invitations.	-	
				-	
	<u> </u>				

ORG: Institutional Advancement DEPARTMENT: Alumni Relations		ORG.#1 DEPT.# 1.1		ISSUE A.	ES: Would like to track	NOTES:		
	ROCESS: Programs		PROC.#	1.1.1	Α.	travel participants in	A.	New program.
• • •	Trograms	5/EVC110				Development database.	<u>л.</u> В.	Possible need to survey constituents
ACTIVIT	Υ:							to determine interest in participation.
1.1.1.7	Travel Program							
QUANTI	TATIVE MEASURE	MENT:					l —	
NUMB	ER PROCESSED	TIME PERIOD	С	OST			-	
	1 tour	1 year						
TASK:	I						l —	
A.		Company arranges the to	ur in conjunction	n with the			-	
	Alumni Office.	- 1 7 3	<u> </u>		FORM	MS USED:		
В.	Targeted mailings	are sent and trip is adverti	sed in alumni n	ews.	A. Applications handled	-		
B. C.		e through the Institutional a				through the travel		
	info to the tour con					company.		
D.		manually through a paper		_				
E.	Attendees are sen	t an evaluation form after t	he trip.					
-							-	
					PEDO	ORTS/LETTERS	_	
						ERATED:		
				_	A.	Targeted mailing.		
					B.	Labels for attendees.		
							-	

ORG: Institutional Advancement DEPARTMENT: Alumni Relations PROCESS: Programs/Events ACTIVITY: 1.1.1.8 Lectures QUANTITATIVE MEASUREMENT:		ORG.# 1 ISSUES: DEPT.# 1.1 HANDER AND AND ADDRESS AND		A. Need for better followup with attend B.		
NUMBER PROCES up to 100		COST speaker honorarium				
A. Arrange for	lecture space. ker; make travel and accomodation	n arrangements as needed.	FORMS USED: A. Invitations			
			REPORTS/LETTERS GENERATED: A. Email and home address lists (sort by region; sort by major if topical interest a factor for participation).			

		nal Advancement	ORG.#	1	ISSUE		NOTES	S:
	RTMENT: Alumni R ROCESS: Programs		DEPT.# _ PROC.#	1.1.1	A.	Would like to track attendees in database.	A.	Need to determine which staff to
			_					participate (prospect managers?0.
ACTIVIT		_			B.	Design of standard invitations to be used with all luncheon	B.	Contact reports to be submitted.
1.1.1.9	Dinners/Luncheon	S				or dinner mailings.		
QUANTI	TATIVE MEASURE	MENT:						
NUMBE	R PROCESSED	TIME PERIOD		COST				
	10-15 attendees	3-4/year						
TASK:	I							
		h designated catering cor	nnany					
 В		ork with campus environn	•	or set-up	FORM	NS USED:		
	and breakdown of			<u> </u>	Α.	Invitations.	-	
					B.	Contact reports.		
						·	•	
				_				
					DEDO	DRTS/LETTERS		
						ERATED:		
				_	A.	Labels (invitees hand -		
						selected by VP).		
						,		

ORG: Institutional Advancement DEPARTMENT: Alumni Relations PROCESS: Data Management		ORG.# DEPT.# PROC.#	1 1.1 1.1.2	ISSUES:	NOTES:			
	ACTIVITY: 	nographic	Data Updates					
Q	QUANTITATIVE M	EASUREN	MENT:					
	NUMBER PROCI		TIME PERIOD		COST			
							-	
	TASK: SEE INFO	DRMATIO	N UNDER ADVANCEMEN	T SERVICE	<u> </u>			
						FORMS USED:		
						 A. Returned Alumni publications 		
						and mail.		
_								
_								
					_			
						DEDODTO# ETTEDO		
_						REPORTS/LETTERS		
_						GENERATED:		
					_		-	
_							-	
							-	
_								
_								

ORG: Institutional Advancement ORG.# 1 DEPARTMENT: Alumni Relations DEPT.# 1.1		ISSUES:	NOTES:			
PR	ROCESS: Data Ma	nagement	PROC.# 1.1.2			
ACTIVIT	Y:					
1.1.2.2	Employment Histo	ory				
OLIANITI	FATILE MEAGUE	-AAFAIT.				
	TATIVE MEASURE		0007			
NUMBE	ER PROCESSED	TIME PERIOD	COST			
					-	
		<u>I</u>			-	
TASK:	SEE INFORMATION	ON UNDER ADVANCEME	NT SERVICES			
				FORMS USED:		
				A. Data change questionnaire.		
				REPORTS/LETTERS		
				GENERATED:		
	1					

ORG: Institutional Advancement ORG.# 1		ISSUES:	NOTES:		
DEPARTMENT: Alumni Relations	DEPT.#1.1				
PROCESS: Data Management	PROC.# 1.1.2				
ACTIVITY:					
1.1.2.4 Relationships/Cross References					
QUANTITATIVE MEASUREMENT:					
NUMBER PROCESSED TIME PERIOD	COST				
TACK- OFF INFORMATION LINDER ADVANCEME	NT CED 40E0		l 		
TASK: SEE INFORMATION UNDER ADVANCEME	NI SERVICES				
			l ————		
		FORMS USED:	d 		
	_		l - 		
		A. Data change questionnaire.			
	_		l - 		
	_				
-					
		REPORTS/LETTERS			
		GENERATED:			
		CENERALED.			

	RTMENT: Alumni F		ORG.# 1 DEPT.# 1.1	ISSUES: A. Will want to track attendees.	NOTES	
ACTIVIT		nagement lings (Registrar Database)	PROC.# 1.1.2	_	A.	Currently no pre-registration or tracki of attendees.
	TATIVE MEASURE ER PROCESSED	EMENT: TIME PERIOD	COST	¬		
TASK:	Poguest is made t	to the registrat's effice		」 _		
 A. Request is made to the registrar's office. B. Both electronic and printed lists are provided by registrar's office. C. Students and alumni attend events. 		FORMS USED: A. Registrar data request form.				
				_ _ _		
				REPORTS/LETTERS GENERATED: A. List of new students with name,		
				address and phone numbers		

		ORG.# 1	_ ISSUES:	NOTES:		
	RTMENT: Alumni F		DEPT.#1.1	_ A. Conflict with data format		
PROCESS: Publications PROC.# 1.1.		_ PROC.#1.1.3	and standards in database	<u>A.</u>	Pre-print check to verify Alumni	
				vs. postal recommendations.		information i.e. Class year.
ACTIVIT	Y:				<u>B.</u>	Sent to alumni, friends, faculty/staff.
4404	A l N N	amin a NA ailin a				
1.1.3.1	Alumni News Mag	azine Mailing		-		
QUANTI	TATIVE MEASURE	EMENT:				
	ER PROCESSED	TIME PERIOD	COST	7 		
	2 issues	1 year				
12,000	pieces per issue	ĺ				
				⁻		
TASK:				_		
A.				_		
B.		vices produces export file fo		FORMS USED:		
C.	Alumni Relations of	office collects and edits artic	les.	A. Address update forms put in		
				Magazine.		
				B. BREs for Annual Fund		
				_ solicitation.		
				-		
-				-	-	
				-		
				REPORTS/LETTERS		
				GENERATED:		
				A. Mailing list (delimited).		
				_		
				_		
				_		
				_		
				_		

ORG: Institutional Advancement DEPARTMENT: Alumni Relations		ORG.# 1 1 1.1	ISSUES: A. Work with mail house on	NOTES:		
	ROCESS: Publication		PROC.# 1.1.3	deadlines and distribution costs.	<u>A</u> .	Faculty to be included for writing of future articles.
1.1.3.3	Y: Alumni Update					Tuture articles.
QUANTI [*]	TATIVE MEASURE	MENT:				
NUMBI	ER PROCESSED 4	TIME PERIOD 1 year	COST			
			1			
TASK:		office collects and edits artic				
В.		vices produces export file for		FORMS USED: A.		
				REPORTS/LETTERS GENERATED: A. Mailing list (export delimited).		
						
					·	

ORG: Institutional Advancement DEPARTMENT: Alumni Relations			ORG.# DEPT.#	1.1	ISSUES: A. Working with IT to re-set		NOTES:	
	ROCESS: Publication		PROC.# 1.1.3		email distribution so	A.	Consider having current students	
						SPAM issues will not prevent		write "mini-articles".
ACTIVIT	Y :					distribution.		
1.1.3.4	Monthly E-Newslet	tter			В.	Set opt-out functionality.		
QUANTI [*]	TATIVE MEASURE	MENT:						
	ER PROCESSED	TIME PERIOD		COST				
	12	1 year						
TASK:								
		ffice writes message.						
B.		vices provides email list.			FORMS	S USED:		
C.	Request submitted	I to IT for assistance with d	istribution.		A.	IT work request form.		
					DEDO	RTS/LETTERS	-	
						RIS/LETTERS RATED:		
					A.	Email list.		
					Λ.	Liliali list.		
				_				
							-	
							-	

		nal Advancement	_ORG.# <u> </u>	_ ISSU	ES:	NOTE	S:
DEPAR	RTMENT: Alumni R	telations	DEPT.# 1.1	A.	Setting up import of data		
PF	ROCESS: Publication	ons	PROC.# 1.1.3	_	from Harris.	A.	Previous issues with adherence to
	-			_			deadlines.
ACTIVIT	Y :			В.	Assurance to alumni of		
	Ī				information confidentiality.		
1.1.3.5	Alumni Directory				•		
	. ,			_		-	
QUANTI	TATIVE MEASURE	MENT:				-	
	ER PROCESSED	TIME PERIOD	COST	7			
l Itoliib.	ERT ROOLOGED	3 years	300.				
		o youro					
				_		-	
TASK:	1						
		I to Publications for design s	necifications	_		-	
<u> В.</u>		vices to provide all data for h		- FOR	MS USED:		
<u>D.</u>	Advancement och	vices to provide all data for i	iams.	- 1,011	Alumni data questionnaire.	-	
				— Г. В.	Contract with Harris.		
				— ^{5.}	Contract with Harris.	-	
				_			
-				-			
				_		-	
-				-			
				_		-	
				PEDO	ORTS/LETTERS		
					ERATED:		
				A.	All alumni data (sort and		
				– ſ^·	export to custom form).		
-				_	export to edistorn form).		
				-			
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				-			
	<u> </u>			_			L

DEPATIMENT: Alumin Association DEPT.# 1.2 PROCESS: Membership PROC.# 12.1 ACTIVITY: 1.2.1.1 Geographic Region Based Chapters QUANTITATIVE MEASUREMENT: NUMBER PROCESSED Approx. 10 Active 25 Contacts A Chapters requests information (labels & lists) from Advancement Services. B. Advancement Services produce labels and lists. C. Labels and lists distributed through Alumni Relations office. A Mailing list request form. PROMS USED: A. Mailing list request form. REPORTS/LETTERS GENERATED: A Mailing labels by chapter B. Will need to target mailings in the future. A No charge for lists/labels. B. Institutional subsidizes chapters — ma (C. Events are fee-based. A No charge for lists/labels. B. Institutional subsidizes chapters — ma (C. Events are fee-based. A No charge for lists/labels. B. Will want to start tracking event alterndance. FORMS USED: A. Mailing list request form. REPORTS/LETTERS GENERATED: A Mailing labels by chapter B. Will need to target mailings in the future. A No charge for lists/labels. B. Institutional subsidizes chapters — ma (C. Events are fee-based. FORMS USED: A. Mailing list request form. REPORTS/LETTERS GENERATED: A Mailing labels by chapter B. Mill want to start tracking event alterndance. FORMS USED: A. Mailing list request form.	ORG: Institutional Advancement		ORG.#1		ISSU	ISSUES:		NOTES:	
ACTIVITY: 1.2.1.1 Geographic Region Based Chapters QUANTITATIVE MEASUREMENT: NUMBER PROCESSED A Display 1 Active 25 Contacts TASK: A. Chapters requests information (labels & lists) from Advancement Services. B. Advancement Services produce labels and lists. C. Labels and lists distributed through Alumni Relations office. FORMS USED: A. Mailing list request form. FORMS USED: A. Mailing list request form. REPORTS/LETTERS GENERATED: A. Mailing labels by chapter	DEPARTMENT: Alumni Association		DEPT.# 1.2	A.	Will need to target mailings in				
ACTIVITY: 1.2.1.1 Geographic Region Based Chapters QUANTITATIVE MEASUREMENT: NUMBER PROCESSED Approx. 10 Active 25 Contacts TASK: A. Chapters requests information (labels & lists) from Advancement Services. B. Advancement Services produce labels and lists. C. Labels and lists distributed through Alumni Relations office. FORMS USED: A. Mailing list request form. FORMS USED: A. Mailing list request form. REPORTS/LETTERS GENERATED: A. Mailing labels by chapter	PROCESS: Membership PROC.i		PROC.#	OC.# 1.2.1		the future.	A.	No charge for lists/labels.	
A. Chapters requests information (labels & lists) from Advancement Services. B. Advancement Services produce labels and lists. C. Labels and lists distributed through Alumni Relations office. FORMS USED: A. Mailing list request form. FORMS USED: A. Mailing labels by chapter REPORTS/LETTERS GENERATED: A. Mailing labels by chapter							B.	Institutional subsidizes chapters ma	
NUMBER PROCESSED Approx. 10 Active 25 Contacts TASK: A. Chapters requests information (labels & lists) from Advancement Services. B. Advancement Services produce labels and lists. C. Labels and lists distributed through Alumni Relations office. FORMS USED: A. Mailing list request form. REPORTS/LETTERS GENERATED: A. Mailing labels by chapter	ACTIVITY: 1.2.1.1 Geographic Regi	on Based Chapters			В.		C.	Events are fee-based.	
Approx. 10 Active 25 Contacts TASK: A. Chapters requests information (labels & lists) from Advancement Services. B. Advancement Services produce labels and lists. C. Labels and lists distributed through Alumni Relations office. FORMS USED: A. Mailing list request form. REPORTS/LETTERS GENERATED: A. Mailing labels by chapter	QUANTITATIVE MEASUR	EMENT:							
A. Chapters requests information (labels & lists) from Advancement Services. B. Advancement Services produce labels and lists. C. Labels and lists distributed through Alumni Relations office. A. Mailing list request form. REPORTS/LETTERS GENERATED: A. Mailing labels by chapter	Approx. 10 Active			соѕт					
B. Advancement Services produce labels and lists. C. Labels and lists distributed through Alumni Relations office. FORMS USED: A. Mailing list request form. A. Mailing list request form. REPORTS/LETTERS GENERATED: A. Mailing labels by chapter									
C. Labels and lists distributed through Alumni Relations office. A. Mailing list request form. A. Mailing list request form. REPORTS/LETTERS GENERATED: A. Mailing labels by chapter		` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` `	,	ement Services.					
A. Mailing list request form. REPORTS/LETTERS GENERATED: A. Mailing list request form.									
REPORTS/LETTERS GENERATED: A. Mailing labels by chapter	C. Labels and lists of	listributed through Alumni F	Relations office) .	FORM	NS USED:			
GENERATED: A. Mailing labels by chapter					A.	Mailing list request form.			
GENERATED: A. Mailing labels by chapter									
GENERATED: A. Mailing labels by chapter									
GENERATED: A. Mailing labels by chapter									
GENERATED: A. Mailing labels by chapter									
GENERATED: A. Mailing labels by chapter									
GENERATED: A. Mailing labels by chapter									
GENERATED: A. Mailing labels by chapter									
GENERATED: A. Mailing labels by chapter							·		
GENERATED: A. Mailing labels by chapter				_			-		
GENERATED: A. Mailing labels by chapter					PEDC	DTS/I ETTERS	-		
A. Mailing labels by chapter								<u> </u>	
				_	A				
B. Lists by chapter					Α.				
					В.	Lists by chapter			
								 	

		nal Advancement	_ORG.# <u> </u>	ISSUES:	NOTES:	1
	RTMENT: Alumni A		_DEPT.#1.2	A. Would want to track mentors,		
PI	ROCESS: Alumni S	Services/Programs	PROC.# 1.2.2	mentees and what mentor had	A.	New Program - will start with about 50
				what student.		students and 80-90 alumni mentors.
ACTIVIT	Υ:				В.	Has not been through a cycle;
						final process is still to be determined.
1.2.2.1	Career Mentoring					
QUANTI	ITATIVE MEASURE	EMENT:				
NUMB	ER PROCESSED	TIME PERIOD	COST			
Ī	40-50					
TASK:	.I					
A.		identified through volunteers				
B.		ees fill out application forms		FORMS USED:		
C.		re matched up and a quarte		A. Mentor Application		
<u>U.</u>	is expected.	To materiou up and a quarte	ny email derrespondance	B. Mentee Application	-	
D.		one by mentors and students	s at end of the vear.	C. Evaluation Form		
		,	,			
					-	
				REPORTS/LETTERS		
				GENERATED:		
				A. Labels for potential career		
				mentors (update criteria).		
				B. Labels for current career		
				mentors.		
					-	
-						<u> </u>

ORG: Institutional Advancement ORG. DEPARTMENT: Alumni Association DEPT PROCESS: Alumni Services/Programs PROC ACTIVITY: 1.2.2.2 On-Campus Access	1.2	ISSUES: A. Would want to track usage of campus facilities by alumni and guests. B. Would want to keep a record of attendance in database.	A.
QUANTITATIVE MEASUREMENT: NUMBER PROCESSED TIME PERIOD	COST		
A. Development of brochure listing all alumni benefits. B. Advancement Services produce labels and lists. C. Set up registration logbooks for Library, Athletic Center. D. Manual attendance records are kept.	er, etc.	FORMS USED: A. Registration log pages (reprinted as needed).	
		REPORTS/LETTERS GENERATED: A.	

		nal Advancement	ORG.# 1	ISSUES:	NOTES:
	TMENT: <u>Alumni A</u>		DEPT.# <u>1.2</u>		
PR	OCESS: Publication	ons	PROC.# 1.2.3		
ACTIVITY	' :				
1.2.3.1	Alumni Chapter Ha	andbook			
QUANTIT	ATIVE MEASURE	MFNT:			-
	R PROCESSED	TIME PERIOD	COST		
NOMBL	10	1 year	0031		
	10	i yeai			
TASK:					
	Sent to chanter pre	esidents and board members	<u> </u>		
B. Alumni Relations office responsible for generating supplemental updates.				FORMS USED:	-
- '	, admin residuorio o	mee responsible for general	ing supplemental apacies.		
			_		
			_		
			_		
			_		
				REPORTS/LETTERS	
			_	GENERATED:	
				A. Mailing labels.	

	ORG: Institution	nal Advancement	ORG.#	1 ISS	UES:	NOTES	:
DEPAR	RTMENT: Develop	ment	DEPT.# 1.3	3 A.	Coordinating signing of letters	A.	Determination to be made whether
PF	ROCESS: Fundrais	ing and Reporting	PROC.# 1.3. ²	1	to adhere to scheduled drop		to handle mailing in house or via
					dates.		mail house.
ACTIVIT	Y :						
1.3.1.1	Campaign Solicita	tions and Special Appeals					
	TATIVE MEASURE						
NUMBI	ER PROCESSED	TIME PERIOD	COST				
	3-4	1 year					
TASK:	1						
	Communications t	o draft appeal letters; final	roviou by VD				
B.			Teview by VF.	FOI	RMS USED:		
C.					RIMS USED.	-	
<u>U.</u>	Advancinent Servi	ces to provide mail merge	uata.			-	
						-	
-						-	
				REI	PORTS/LETTERS		
				GE	NERATED:		
				A.	Mailing list (delimited export)		

DEPAR	ORG: Institution	nal Advancement	ORG.# 1 1.3	ISSUE A.	ES: Will need to revisit gift	NOTE	S :
	OCESS: Fundrais		PROC.# 1.3.1	, v.	gift society levels.	A.	Based on all fiscal year gifts.
• •	<u> </u>	ing and responding			giit edelety levele.	B.	Campaign societies separate from
ACTIVIT	Y:			B.	Will want to track Campaign	-	regular Annual Fund honor roll.
					gift societies exclusive of		-
1.3.1.2	Gift Societies				present/face gift amounts.		
	TATIVE MEASURE						
	R PROCESSED	TIME PERIOD	COST				
	Approx. 800	1 year					
TASK:						-	+
	Meeting between \	VP for Development, VP for	Finance and President				
	to redefine gift soc		Timarice, and Freedom	FORM	MS USED:		
	to roughing gire oo		_	Α.	None	-	
						-	
			_				
				DEDA	NDTO# ETTERO		
					ORTS/LETTERS	<u> </u>	
				GENE ∧	ERATED: Letters to solicit targeted		
-			 -	^	gift amounts.		
				В.	Donor Report	l —	
			_	J	2 chair respon	<u> </u>	
			_			-	
				L			

DEPAR	ORG: Institution TMENT: Developr	nal Advancement	ORG.# 1 DEPT.# 1.3	ISSUI A.	ES: Will need to revisit gift	NOTE	S:
	OCESS: Fundrais		PROC.# 1.3.1	• [``	gift society levels.	A.	Based on all fiscal year gifts.
		3 1 3	<u> </u>	-	3	B.	Campaign societies separate from
ACTIVITY	′ :			B.	Need to reconsider current		regular Annual Fund honor roll.
					methods for verifying		
1.3.1.3	Annual Report				list name format.		
QUANTIT	ATIVE MEASURE	MENT:					
NUMBE	R PROCESSED	TIME PERIOD	COST	1		-	
	12,000+	1 year					
]			
TASK:							
Α.		form to send to donors bei					
	Advancement Services to provide donor reports and lists.				MS USED:		
	Communications Office to coordinate with printer for final production. Asst. to VP scheduling transport of reports to mail house.				None		
		<u> </u>		-			
E.	Submit purchase of	order for postage to be sen	to mail nouse.	-			
				-			
				•			
				-			
				•		-	
				REPO	ORTS/LETTERS		
				GENE	ERATED:	-	
				Α	Mailing list (delimited export)		
				B.	Donor Report		
				-			

ORG:Institutional Advancement1DEPARTMENT:DevelopmentDEPT.#1.3PROCESS:Prospect ManagementPROC.#1.3.2	ISSUES: A. New rating system needs to be designed and implemented. NOTES: A. A.
ACTIVITY: 1.3.2.1 Prospect Ratings	B. Will need to create reports based on ratings.
QUANTITATIVE MEASUREMENT: NUMBER PROCESSED TIME PERIOD COST All prospects to be rated at some point	
A. Staff, past presidents or core committee determine a prospect's rating. B. Information is entered into a comment field.	FORMS USED: A. Prospect Review Form
	REPORTS/LETTERS GENERATED: A. To be defined.

DEDAG	ORG: Institution	nal Advancement	ORG.# <u>1</u> DEPT.# 1.3		SUES: Security and confidential	NOTES	S:
	OCESS: Prospect		PROC.# 1.3.2		information	A.	Currently all hard copy and filed.
	1 100pool	Managomont	1100	'	mormatori		Approx. 500 top prospects
ACTIVITY	Y:					B. C.	Contacts increasing due to the
							upcoming Campaign.
1.3.2.2	Contact/Trip Repo	rts					
QUANTI	TATIVE MEASURE	EMENT:					
NUMBE	R PROCESSED	TIME PERIOD	COST				
	2,500	1 year					
	Ì					-	
TASK:	Contact is made w	ith a was a sat by a staff w	anahan an a valuntaan				
		rith a prospect by a staff mined and Contact Report			DRMS USED:		
		s entered from the Contact		A.	Contact Report Form		
<u>U.</u>	into the Advancem		i Neport Form		Contact Neport Form	-	
	Contact Forms are						
						-	
					PORTS/LETTERS		
					ENERATED:		
				A.	Briefing Reports		
							
				 [-	

	ORG: Institution	nal Advancement	ORG.#	1	ISSUES:	NOTES:	
	RTMENT: Develop		DEPT.#	1.3	A. Post-conversion design of		
PF	ROCESS: Prospect	Management	PROC.#	1.3.2	moves management via	A.	
					usage of tasks and followup		
ACTIVIT	Υ:				fields and links.		
1.3.2.3	Moves Manageme	ent					
QUANTI	TATIVE MEASURE	MENT:				l - 	
	ER PROCESSED	TIME PERIOD		COST			
Pi-							
TASK:							
A.	Not formally using	but will want to design and	d implement in	post-			
	conversion Advan	cement database.			FORMS USED:		
					REPORTS/LETTERS		
					GENERATED:		
-							
						1	

	ORG: Institution	nal Advancement	_ORG.# <u>1</u>	ISSUES:	NOTES	
DEPAR	RTMENT: Developr	nent	DEPT.# 1.3	 A. Coding to be assigned for 		
PF	ROCESS: Developr	nent Events	PROC.# 1.3.3	gifts sent in lieu of (or in	Α.	Need to develop tracking and
				addition to) event attendance.		reporting system for event
ACTIVIT	Y:			· ·		attendance.
1.3.3.1	Various Special Ev	vents				
	•					
QUANTI	TATIVE MEASURE	MENT:				
NUMB	ER PROCESSED	TIME PERIOD	COST			
	5 to 10	1 year				
TASK:						
A.		ces to provide mailing and r	nerge data for invitations.			
B.		ordinate with President's Off		FORMS USED:		
-		ation, and catering.				
	,, -p					
-						
-						
-						
-						
-				REPORTS/LETTERS	-	
-				GENERATED:	-	
				A. Mailing lists (delimited export)		
-					-	
					· ———	<u> </u>

ORG: Institutional Advancement	ORG.# 1	ISSUES:	NOTES:	:
DEPARTMENT: Development	DEPT.# 1.3	A. Potential need for tracking		
PROCESS: Fund Management	PROC.# 1.3.4	account details in current	A.	Development Office raises the funds
		Advancement database.		and enters information into the system
ACTIVITY:				(all expenditure are done by Finance).
1.3.4.1 Distribution of Funds			<u> </u>	
			l	
QUANTITATIVE MEASUREMENT:				
NUMBER PROCESSED TIME PERIOD	COST		l	
1				
TASK:				
A. Done through the Finance Office in conjunction	on with Admissions Office			
and Financial Aid Office.		FORMS USED:		
			l ——	
			l ——	
		REPORTS/LETTERS		
	_	GENERATED:	—	
	_	GENERATED:	—	
			I —	
			I —	
			I —	

ORG: Institutiona		_ORG.# <u> </u>	ISSU		NOTES:	
DEPARTMENT: Developme		DEPT.# 1.3	A.	Interfaces will need to		
PROCESS: Fund Mana	agement	PROC.# 1.3.5		be created with non-	A.	Need reports from Finance system
				Development database systems.		regarding endowed fund amounts.
ACTIVITY:						
			B.	Will want to continue	B.	Will need access to scholarship
1.3.4.2 Stewardship				to personalize		recipient Information.
OUANTITATIVE MEAGUIDEM	ITAIT.			stewardship letters.		
QUANTITATIVE MEASUREN		2007	 -			
NUMBER PROCESSED	TIME PERIOD	COST				
100	1 year					
						+
TASK:						
	ance and Financial Aid is	sent to the donors for				
each scholarship fur			FORM	MS USED:		
	recipients are included.					
			_			
				ORTS/LETTERS		
			— GENE	ERATED:		
			— A.	Letters to donors.		
				(Manually by recipient students)		+
						
			—			
			-			
-						•

DEPAR	ORG: Institution	nal Advancement	_ORG.# DEPT.#	1.3	ISSUES A.	S: Training - time frame	NOTES	:
	OCESS: Campaig			1.3.5	л. В.	Reports - driven from data in	Α.	Need to update forms post-
	.00_00. <u>00pa</u> g	,. <u> </u>			ļ	Comment fields.		conversion.
ACTIVITY	/ :				C.	Security in Comment field - very		
						confidential information.		
1.3.5.1	Volunteer Screening	ng and Ratings						
	TATIVE MEASURE							
	R PROCESSED	TIME PERIOD	CC	DST				
	Approx. 20	1 year						
- 4 O. 6								
TASK:	Dragnast Daview F	Tarres mate mandaged by many						
		Form gets produced by geog	rapnic region d)[FORMS	S USED:		
	for corporations.	d to prospect managers on	d valuntaar aali	oitoro				
		ed to prospect managers and after screening and informa			A.	Prospect Review Form		
		ermined after cultivation visi						
υ.	ASK amount is uct	errimed after cultivation visi	is or based on	giving chiena.				
				_				
				_	REPOR	RTS/LETTERS		
					GENER	RATED:		
					A.	Prospect Review Form		

ORG: Institutional Advancement		ORG.# <u>1</u>		ISSUES:		NOTES:	
DEPARTMENT: Developn	nent	DEPT.#	1.3	A.	No external ratings are being		
PROCESS: Campaig	n	PROC.#	1.3.5		done at present.	A.	Up and coming active prospect
		_	_				research started about 9 months ago.
ACTIVITY:							
						В.	Sources include newspapers,
1.3.5.2 Prospect Research	1						directories, people, CDs and web.
QUANTITATIVE MEASURE	MENT:					C.	Board of Director Information - who
NUMBER PROCESSED	TIME PERIOD		COST			<u> </u>	knows whom from sitting on the
Varies	TIME PERIOD		0031			•	same organizational boards.
varios							Same organizational boards.
						D.	Giving Criteria (including giving to
							other organizations.
TASK:							
A. Information is acqu	ired regarding a potential ر	orospect.				E.	Application guidelines or procedures
B. Information is enter	red into Advancement data	abase for the l	briefing notes.	FORM	S USED:		from foundations and corporations.
			_	A.	None		
						•	
							
							+
							+
				REPO	RTS/LETTERS	-	
					RATED:		†
				Α.	Profile Report from Access	-	
				B.	Briefing Notes		
				C.	Prospect Screening and Rating	_	
	_	-			Form		
							<u></u>

DEPARTMENT: Development DI PROCESS: Campaign PI			ORG.# DEPT.# PROC.#	1 1.3 1.3.5	A. B.	Would like to customize reports to cross reference information. Would like to do advanced queries in Advancement	A.	This is the first year for this process. How cultivation/solicitation results are returned to Advancment database is still being worked out.
QUANT	Volunteer Manage ITATIVE MEASURE ER PROCESSED 80 solicitors			COST		database.	В.	A call report form for solicitors to complete and return has been designed.
TASK A. B. C.	TASK: A key solicitor is assigned through either research or a volunteer screening and rating meeting. B. After the appropriate solicitor has been determined, the solicitor name is entered into the Key Solicitor field in the Advancement database. C. Determination gets made over time as to whether a person with a solicitor is really a prospect and will actually be solicited for the Campaign. Cultivation determined by estaliblished prospect level. Prospect Research staff to produce briefing notes and cultivation strategy recommendations.				FORN A. B.	IS USED: Call Report Prospect Screening and Rating Form.		
						PRTS/LETTERS ERATED: Briefing Notes Prospect Screening and Rating Review Form Pledge Status Report by Solicitor, area, giving level or constituency. (new report)		

	ORG: Institutional Advancement ORG.# 1	ISSUE		NOTES	3: _.
	RTMENT: Development DEPT.# 1.3	A.	Wants to track frequency of	l <u> </u>	
F	ROCESS: Campaign PROC.# 1.3.5		pledge reminder distribution.	<u>A.</u>	Leadership Gift and Major Gift job
OT!! //					descriptions to be written and poste
CTIVI	IY: I	B.	Wants a way to track special		
4 2 E	4 Solicitations for the Campaign		Circumstances - sick child, deceased spouse.	<u>B.</u>	Pledge forms will be different for ea
1.3.3.	4 Solicitations for the Campaign		deceased spouse.		constituency type.
≀UAN1	TTATIVE MEASUREMENT:				
NUM	BER PROCESSED TIME PERIOD COST				
	To be determined Over the campaign				
TASK					
	Process depends on prospect's level of potential giving.				
	Proposal amounts are segmented by prospect rating codes.	FORM	NS USED:		
	Proposals are personalized in the upper 4 tier levels.	A.	Prospect Contact Forms		
	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect.	А. В.	Prospect Contact Forms Pledge Cards		
·	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge.	A. B. C.	Prospect Contact Forms Pledge Cards Prospect Cards (AF)		
· · ·	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge. A pledge is either obtained or the prospect refuses.	А. В.	Prospect Contact Forms Pledge Cards Prospect Cards (AF) Confirmation Card (confirms		
	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge. A pledge is either obtained or the prospect refuses. A pledge is received: Thank you letter sent, pledge entered, installments	A. B. C.	Prospect Contact Forms Pledge Cards Prospect Cards (AF)		
a.	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge. A pledge is either obtained or the prospect refuses. A pledge is received: Thank you letter sent, pledge entered, installments entered, gift society information entered, possible press coverage.	A. B. C.	Prospect Contact Forms Pledge Cards Prospect Cards (AF) Confirmation Card (confirms		
a. o.	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge. A pledge is either obtained or the prospect refuses. A pledge is received: Thank you letter sent, pledge entered, installments entered, gift society information entered, possible press coverage. Refused: Want a refusal code entered and why refused.	A. B. C.	Prospect Contact Forms Pledge Cards Prospect Cards (AF) Confirmation Card (confirms		
· · · · · · · · · · · · · · · · · · ·	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge. A pledge is either obtained or the prospect refuses. A pledge is received: Thank you letter sent, pledge entered, installments entered, gift society information entered, possible press coverage.	A. B. C. D.	Prospect Contact Forms Pledge Cards Prospect Cards (AF) Confirmation Card (confirms phonathon pledge)		
a. b.	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge. A pledge is either obtained or the prospect refuses. A pledge is received: Thank you letter sent, pledge entered, installments entered, gift society information entered, possible press coverage. Refused: Want a refusal code entered and why refused.	A. B. C. D.	Prospect Contact Forms Pledge Cards Prospect Cards (AF) Confirmation Card (confirms		
a. b.	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge. A pledge is either obtained or the prospect refuses. A pledge is received: Thank you letter sent, pledge entered, installments entered, gift society information entered, possible press coverage. Refused: Want a refusal code entered and why refused.	A. B. C. D.	Prospect Contact Forms Pledge Cards Prospect Cards (AF) Confirmation Card (confirms phonathon pledge) DRTS/LETTERS		
a.	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge. A pledge is either obtained or the prospect refuses. A pledge is received: Thank you letter sent, pledge entered, installments entered, gift society information entered, possible press coverage. Refused: Want a refusal code entered and why refused.	A. B. C. D.	Prospect Contact Forms Pledge Cards Prospect Cards (AF) Confirmation Card (confirms phonathon pledge) PRTS/LETTERS ERATED:		
a. b.	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge. A pledge is either obtained or the prospect refuses. A pledge is received: Thank you letter sent, pledge entered, installments entered, gift society information entered, possible press coverage. Refused: Want a refusal code entered and why refused.	A. B. C. D.	Prospect Contact Forms Pledge Cards Prospect Cards (AF) Confirmation Card (confirms phonathon pledge) PRTS/LETTERS ERATED: Letters for some		
a. b.	Proposals are personalized in the upper 4 tier levels. Solicitor's hand-delivered or mailed to the prospect. Solicitor(s) meets with a prospect (possibly multipe times) to obtain a pledge. A pledge is either obtained or the prospect refuses. A pledge is received: Thank you letter sent, pledge entered, installments entered, gift society information entered, possible press coverage. Refused: Want a refusal code entered and why refused.	A. B. C. D.	Prospect Contact Forms Pledge Cards Prospect Cards (AF) Confirmation Card (confirms phonathon pledge) PRTS/LETTERS ERATED: Letters for some Envelopes for some		

ORG: Institution	nal Advancement	ORG.#	1	ISSUE	ES:	NOTES:	
DEPARTMENT: Developn	nent	DEPT.#	1.3	A.	Should Campaign donors get		
PROCESS: Campaign	n	PROC.#	1.3.5		excluded from AF Solicitations?	Α.	All donors are in the system - campaig
							gifts entered by Advancement Service
ACTIVITY:				B.	May want to develop separate		
					recognition for Campaign donors.	B.	Solicitations and acknowledgments
1.3.5. Campaign Progran	n/Fundraising						to be drafted and distributed by
				C.	Would like to track event		Campaign staff.
QUANTITATIVE MEASURE	MENT:				attendees.		
NUMBER PROCESSED	TIME PERIOD		COST			C.	Donors are primarily individuals,
750 Donors	1 year			E.	Will be setting up a volunteer		religious, community groups, gov't
	·				structure and using prospect		and foundations.
					management functionality.		
TASK:							
A. New Fundraising p	rocess - hired new position	n for Campai	ign fundraising				
				FORM	MS USED:		
				A.	Same as for the Annual Fund		
				REPO	ORTS/LETTERS		
				GENE	RATED:		
				A.	Reports: Monthly reports		
					(cummulative) of Campaign		
					Giving - Donor/Amt/Date/Fund		
				B.	Labels/Letters		
				C.	Geographic Region Reports		

ACTIVIT	RTMENT: Annual F ROCESS: Pledge a Y:		ORG.# 1 DEPT.# 1.4 PROC.# 1.4.1	A.	ES: Need to plan new solicitation code strategy to improve annual comparison reporting.	NOTES:	
	TATIVE MEASURE ER PROCESSED	MENT: TIME PERIOD	COST				
A. B.	Annual Fund Direct	tor to draft appeal letters; fi		FORM	MS USED:		
				- - - -			
				-	DRTS/LETTERS ERATED: Mailing list (delimited format) Letters to solicit targeted gift amounts.		

ORG:	Institutional Advancement	ORG.#	1
DEPARTMENT:	Annual Fund	DEPT.#	1.4
PROCESS:	Phonathon	PROC.#	1.4.2
ACTIVITY: 1.4.2.1 Student (Calling		

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
10,000 Cards	1 year	

TASK:	
A.	Produce Solicitation List
B.	Produce Solicitation Letter and Envelopes
B. C. D. E.	Produce Prospect Cards
D.	Letters Sent
E.	Two weeks later Calls are made students get random "prospects"
F.	Results: Pledge, No Pledge, Handle by Mail, Call back, Special Card
Fa.	Pledge: Card goes to records for entry into system.
Fb.	No Pledge: Refusal numbers entered - notation made of refusal reason.
Fc.	Handle by Mail: Send a package with information to donate.
Fd.	Call Back: Filed away by date to call back.
Fe.	Special Card: Usually complaints handled case by case.
G.	Address Changes are made that come from the Phonathon Card.
Н.	Class notes information copied and forwarded to Communications.
l.	A student does a manual, personalized thank you letter.
J.	Phonathon card is filed in donor's file.
K.	Reminder Calling to people who pledged but have not paid.

		•	
SSUI	≣S:	NOTES:	
۹.	Historic giving information		
	to be cleaned up.	A.	Information contained on the prospect
			card includes name, id, address,
			degree, class year, phone number,
			business information, previous two
			years of giving, spouse information,
			matching gift information, next of kin,
			ask amount.
		B.	Ask amount to be manually
			entered on the pledge form.
		C.	Would like to automate phonathons -
			have screen up and caller can make
			call and enter info.
FORM	MS USED:		
۹.	Phonathon Card/Prospect Card	D.	Nightly and Weekly Stat reports tracks
З.	Pledge Confirmation (with note		gift type, call back, refusals,
	from student)		commitments - done at the caller level
		E.	Caller stat report is really 4 reports.
			Caller performance to year to date,
			weekly caller performance, program
			caller performance, lifetime caller
			performance.
REPC	ORTS/LETTERS		
GENE	RATED:	F.	Nightly pledge reports, weekly pledge
۹.	Solicitation Lists		report, daily pledge report, weekly
В.	Solicitation Letter/Envelope		day and weekly night and to date.
С.	Prospect Card		
D.	Nightly & Weekly Stat Report		
Ε.	Caller Performance		
_			

Comparasion with prev. year

	RTMENT: Annual F		ORG.# 1 DEPT.# 1.4	ISSUES: A. Clean up codes - separate into	NOTES:	
PF	ROCESS: Personal	Solicitations	PROC.# 1.4.3	do not solicit and personal	A.	
				solicitation.		
ACTIVIT	Y :				В.	
1.4.3.1	Production			.		
OLIANITI	TATIVE MEAGUE	MATAIT.				
	TATIVE MEASURE		0007	1	<u> </u>	
NOMB	ER PROCESSED	TIME PERIOD	COST		<u> </u>	
	Very Few	1 year			l - 	
				·		
TASK:	1				· · · · · · · · · · · · · · · · · · ·	
A.		ctor to draft special solicitat	ion letter to pool of	·	- 	
		ected high end donors.	·	FORMS USED:		
		<u> </u>				
				.		
-						
				REPORTS/LETTERS		
				GENERATED:	l — —	
				A. Mail merges as/if needed.	-	
				- [
				-		
				• [
				•		
				· [
	1			<u> </u>	<u> </u>	

ORG:	Institutional Advancement	ORG.#	1	
DEPARTMENT:	Annual Fund	DEPT.#	1.4	
PROCESS:	Parent's Program	PROC.#	1.4.4	
ACTIVITY:				

AC

1.4.4.1 Student Calling

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
3,500 Cards	1 year	

TASK:	
A.	Produce Solicitation List
B.	Produce Solicitation Letter and Envelopes
C. D. E. F.	Produce Prospect Cards
D.	Letters Sent
E.	Two weeks later Calls are made students get random "prospects"
F.	Results: Pledge, No Pledge, Handle by Mail, Call back, Special Card
Fa.	Pledge: Card goes to records for entry into system.
Fb.	No Pledge: Refusal numbers entered - notation made of refusal reason.
Fc.	Handle by Mail: Send a package with information to donate.
Fd.	Call Back: Filed away by date to call back.
Fe.	Special Card: Usually complaints handled case by case.
G.	Address Changes are made that come from the Phonathon Card.
H.	Class notes information copied and forwarded to Communications.
l.	A student does a manual, personalized thank you letter.
J.	Phonathon card is filed in donor's file.
K.	Reminder Calling to people who pledged but have not paid.

ISSUES:

Historic giving information to be cleaned up.

FORMS USED:

Phonathon Card/Prospect Card Pledge Confirmation (with note from student)

REPORTS/LETTERS GENERATED:

- Solicitation Lists Solicitation Letter/Envelope **Prospect Card**
- Nightly & Weekly Stat Report Caller Performance
- Comparasion with prev. year

NOTES:

A.	Information contained on the prospect
	card includes name, id, address,
	degree, class year, phone number,
	business information, previous two
	years of giving, spouse information,
	matching gift information, next of kin,
	ask amount.
B.	Ask amount to be manually
	entered on the pledge form.
C.	Would like to automate phonathons -
	have screen up and caller can make
	call and enter info.
D.	Nightly and Weekly Stat reports tracks
	gift type, call back, refusals,
	commitments - done at the caller level
E.	Caller stat report is really 4 reports.
	Caller pe <u>rformance to year to date,</u>
	weekly caller performance, program
	caller performance, lifetime caller
	performance.
F.	Nightly pledge reports, weekly pledge
	report, daily pledge report, weekly
	day and weekly night and to date.

	RTMENT: Advance ROCESS: Data Mar		ORG.# 1 DEPT.# 1.5 PROC.# 1.5.1	ISSU A.	More reports needed to analyze information that is fed into the system. - Comparative - Data Verification	A.	Crediting issues: alum-alum or alum- other donor couples. Current system splits the gift - need to address split crediting post-conversion.
QUANTI	Pledge and Gift En TATIVE MEASURE ER PROCESSED 6,500 gifts 5,000 pledges		COST				
TASK: A. B. C. D.	Entry of gifts and p Entry of gifts receiv Gift Processor ente Gift Processor com purpose code (by b	oatch number) summary	Coordinator opens mail). report. port including list of gifts by	FORI A. B.	MS USED: Phonathon Form (Prospect Card) Pledge Confirmation Card		
					DRTS/LETTERS ERATED: Batch report - lists individuals and gift amounts and fund/purpose. Summary by Account report by batch number. Pledge Report - lists name, amoun balance and fund. Yearly Pledge Reconciliation Rpt.		
				E	Monthly Gift Reconciliation Report		

ORG: Institution DEPARTMENT: Advancer	nal Advancement	ORG.# <u>1</u> DEPT.# 1.5	ISSUES: A. An audit report for pledges	NOTES:	I
PROCESS: Data Mar		PROC.# 1.5.1	and gifts to track what changes	Α.	Pledges reconciled once a year -
			have been made and why.	<u></u>	recorded on spreadsheet and then
ACTIVITY:			,		removed from the system. A code
Ī					is given to that record that indicates
1.5.1.2 Pledge and Gift Ad	ljustments				a journaled/cancelled pledge.
QUANTITATIVE MEASURE	MENT:				
NUMBER PROCESSED	TIME PERIOD	COST			
6,500 for gifts	1 year			-	
2,500 for pledges	1 year				
TASK:	 				
	ated on the system by the D				
	change in the fund, write-o	ff of the pledge or	FORMS USED:		
journal and/or reen	itry of gift).		A. None officially, could be info		
			from the bank for returned		
			checks.	-	
			•		
			•		
			REPORTS/LETTERS		
			GENERATED:		
			A. Manual report for reconciliation	-	
			with the Business office.		
			.		
			.		

ORG: Institution	al Advancement	_ORG.# <u> </u>	ISSUES:	NOTES	S:
DEPARTMENT: Advancen	nent Services	DEPT.# 1.5	 A. Don't want to keep hard copy 		
PROCESS: Data Man	agement	PROC.# 1.5.1	of changes imaging may be	A.	Current system maintagins a primary
	-		an option to help deal with this.	-	and secondary address. Previous
ACTIVITY:				-	addresses are not maintained.
1.5.1.3 Address Updates				B.	Hard copy of information sent from
					the individual gets filed.
QUANTITATIVE MEASUREI	MENT:			-	
NUMBER PROCESSED	TIME PERIOD	COST			
10,000	1 year				
·	Ž				
TASK:				-	
	ddress and change old add	ress to "former" status.			
·			FORMS USED:	-	
			A. Returned Mail		
			B. Self Reported, mail or phone	-	
			C. Research (no special form)		
			D. Prospect Card		
			E. Home Page and Email		
			Ğ		
				-	
			REPORTS/LETTERS	-	
			GENERATED:		
				-	
<u>.</u>					•

	ORG: Institution	nal Advancement	_ORG.# <u> </u>	ISSUES:	NOTES	
DEPART	MENT: Advance	ment Services	DEPT.# 1.5	 A. Current receipts are generated 		
PRO	CESS: Data Mar	nagement	PROC.# 1.5.1	via mail merge (post-conversion	A.	Currently done once a year at the
	<u> </u>			plan to automate all receipts).		end of the year but will be changed
ACTIVITY:						to after each batch.
1.5.1.4 Pr	ocessing Receip	ots			B.	Receipt is issued for both spouses
					-	for joint gifts.
QUANTITA [*]	TIVE MEASURE	MENT:			-	
NUMBER	PROCESSED	TIME PERIOD	COST			
	5,500	1 year				
		•				
TASK:						
	un report to prod	uce receipts - prompts for s	art and end date.			
		l is printed and the first 2 pu		FORMS USED:		
,		•	<u> </u>			
B. Fo	our copies printed	d first two to the donor, se	cond two for internal filing			
	Alpha and Nume					
	•	,				
				REPORTS/LETTERS		
				GENERATED:		
				A. Receipt		
				· ·		
						•

ORG: Institutiona		DRG.# <u> </u>	_ ISSUES:	NOTES	: <u> </u>
DEPARTMENT: Advancement		DEPT.# 1.5	A. Need to implement a regular	<u> </u>	
PROCESS: Data Mana	gement F	PROC.# 1.5.1	and well-defined schedule	Α.	Current system creates installments
			for generating pledge		the due date is what is chosen when
ACTIVITY:			reminders.		pledge reminders are produced.
1.5.1.5 Processing Pledge R	Reminders				
QUANTITATIVE MEASUREM	ENT:				
NUMBER PROCESSED	TIME PERIOD	COST	7	-	
				-	
1,200	1 year			-	
,	, i			-	
<u> </u>	-		-	-	
TASK:				-	
	e reminders - prompts for st	art and end date.	-	-	
, i tall open to produc	р. ор. о. о.		FORMS USED:		
			- · · · · · · · · · · · · · · · · · ·	-	
			-		
			-	-	
			-	-	
			-	-	
			-	-	
			-	-	
			-	-	
			REPORTS/LETTERS		
			GENERATED:	-	
			A. Pledge Reminder	-	
			_	-	
			-	-	
			-	-	
			-		
			-		
			-		
				.	

		nal Advancement	_ORG.# <u> </u>	_ ISSUES:	NOTES	: <u>.</u>
	RTMENT: Advance		DEPT.#1.5	A. Need to consider establishing		
PF	ROCESS: Data Mar	nagement	PROC.# 1.5.1	ability by Gift Processor to	A.	Credit card information is not
				process charges within the		maintained in database.
ACTIVIT	<u>Y</u> :			Advancement Office.		
1.5.1.6	Process Credit Ca	rd Gifts		_	<u></u>	
QUANTI	TATIVE MEASURE	MENT:		_		
NUMB	ER PROCESSED	TIME PERIOD	COST	1 1		
	1,000	1 year				
				<u> </u>		
				<u> </u>		
TASK:						
A.	Charges processe	d by Finance Office.				
B.	Same process as	gift entry, but done in a sepa	arate batch.	FORMS USED:		
				A. Pledge Confirmation Card		
				B. Pledge Reminder		
				_		
				_		
				_		
				_		
				_		
				REPORTS/LETTERS		
				GENERATED:		
				A. CC batch transmittal report.		
				-		
				<u> </u>		
				<u> </u>		
				<u> </u>		
				<u> </u>		
				-		
				_		1

	nal Advancement	ORG.#	1	ISSUES:	NOTES:
DEPARTMENT: Advance	ment Services	DEPT.#	1.5	_	
PROCESS: Data Mai	nagement	PROC.#	1.5.1		A.
ACTIVITY:					
1.5.1.7 Process Pre-autho	orized Checking Gifts				
OLIANITITATIVE MEAGUE	MENT.				
QUANTITATIVE MEASURE			COST	1	
NUMBER PROCESSED 150-200	TIME PERIOD		COST		-
150-200	1 year				l -
				.	
TASK:					
	vices receives notification o	of gift from Fin	ance Office.	-	
	gift entry - separate batch r			FORMS USED:	1
	•	•		A. Pre-authorized Checking Form	
				_	
				_	
				_	
				-	
					4 —
				REPORTS/LETTERS	
				GENERATED:	
				A. Gift Batch Report	l -
				-	
				•	
				-	
				-	
				-	
				<u> </u>	<u> </u>

DEPARTME	NT: Advancer		ORG.# 1 DEPT.# 1.5	ISSUES: A. Creation of new Crystal reports	NOTES:	
PROCE	SS: Data Man	agement	PROC.# 1.5.1	(post-conversion process).	<u>A.</u>	
ACTIVITY:						
1.5.1.8 Annu	ual Poport					
1.5.1.6 Anno	uai ixeport				-	
QUANTITATIV	VE MEASURE	MENT:				
NUMBER PI	ROCESSED	TIME PERIOD	COST			
	fiscal year	1 year				
8,00	0 names					
TAOK					l ————	
TASK: Run	donor dotail ro	port by total fiscal year givi	ng amount of all denors		l —	
		for review and revision of		FORMS USED:	l 	
		nmary giving report by each		I OKNIO COLD.	l —	
C. Distr	ribute reports to	internal Insititutional Adva	ncement staff for review			
	editing.					
				DEDODTO# ETTERO		
				REPORTS/LETTERS GENERATED:		
-				A. Annual Report	<u> </u>	
				A. Allida Report	l —	
-			_			
			_			
					J	

DED	ORG: Institution ARTMENT: Advance	nal Advancement	ORG.# DEPT.#	1 1.5	_ ISSU	ES: Would like to build an interface	NOTES	: - I
PROCESS: Data Management		PROC.# 1.5.1		- A.	to the Finance system to	A.	Monthly detail line by account run	
						update the general ledger		regularly; quarterly summaries
ACTIV	TY:					automatically.		generated, as well.
1.5.1	9 Reconciliation with	r Finance Reports			_		В.	Business Office (general ledger) is
QUAN ⁻	ΓΙΤΑΤΙVE MEASURE	EMENT:			_			being updated manually.
NUM	BER PROCESSED	TIME PERIOD		COST	1			
	12	1 year						
]			
TASK					_			
A.		I by line account summary	report and su	ubmit to				
	Finance Office.				FORM	MS USED:		
B.		Office to verify accuracy o			_ A.	Info recorded from gift batches.		
	-	ncies by batch, make nec	essary adjust	ments and	_			
	re-run report).				-			
C.		President's Office, Busine		nd internal	-			
	Institutional Advan	cement departments as re	equested.		-			
					-			
					-			
					REPO	ORTS/LETTERS		
					GENE	ERATED:	-	
					В.	Monthly summary - line detail	-	
						by account report		
					_			
			•		_			
					_			

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DEPAR	ORG: Institution	nal Advancement ment Services	ORG.# DEPT.#	1 1.5	_ ISSUES:	NOTES	:
	OCESS: Data Mar		PROC.#		-	A.	Will want to track previous and
			_		-		multiple employment information in
ACTIVITY	/ :						Advancement database.
1.5.1.10	Employment Histor	rv				B.	Link is made in the current system
	1 7	,			-		between an employee and a
QUANTIT	TATIVE MEASURE	MENT:					company through both a relationship
	R PROCESSED	TIME PERIOD		COST	7 1		link and also possibly through
	#####	1 year					matching gifts.
<u> </u>					<u> </u>		
TASK:					_		
		ent information is tagged as			_		
		company name job title and	mailing add	lress, email,	FORMS USED:		
	fax and business p	hone number.			A. Constituent Profile form		
					B. Class notes		
					C. Email/mail/phone updates		
					D. Research/Staff		
					-		
					-	-	_
					-	-	
					REPORTS/LETTERS		
					GENERATED:	-	
					A. None	-	
					-		
					-		
					<u> </u>		
					_		
					_		
					_		

		nal Advancement	ORG.#	1	ISSUE	S:	NOTES:	
	RTMENT: Advance		DEPT.#	1.5				
PF	ROCESS: Data Mar	nagement	PROC.#	1.5.1			Α.	
ACTIVIT	Y:						В.	
4 5 4 44	Dia amandria Jufanna	-4'						
1.5.1.11	Biographic Informa	auon						
QUANTI	TATIVE MEASURE	MENT:					-	
	ER PROCESSED	TIME PERIOD		COST				
	•							
TASK:								
<u>A</u> .		sports, service and other a	activies entered	l as attributes.				
В.	Birthdates.					S USED:		
<u>C.</u>	Marital Status.				Α.	Constituent Profile form or		
D.	Relationship links.					self-reported via phone,		
-						email or mail.		
							-	
							-	
-				_				
-					REPO	RTS/LETTERS		
				-	GENE	RATED:		
					A.	Labels/Lists by activities.		