University of Hartford
Institutional Advancement

Strategic Plan for Advancement Services
Fiscal Year 2009

Advancement Services Mission

Advancement Services supports the operations of Institutional Advancement (Development, Alumni and Parent Relations and Institutional Partnerships and Sponsored Research) and other departments involved with the external mission of the University of Hartford by creating and maintaining information delivery systems and database management processes. The staff is dedicated to delivering quality services and to continuously improve the information that is provided to our customers.

Advancement Services provides services in the area of database management and reporting.

Customers require:

Data to be coded and stored
Access to data
Data extraction

To meet the requirements of our customers, Advancement Services:

Determines appropriate structure for coding and storage
Performs all data entry and ensures data integrity
Assigns security access to customers to access data
Trains customers on how to access information
Works with customers on how to request data to ensure proper extraction
Creates reports and extracts according to specs provided by the customer

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Page 1 of 18

Goal	Objectives	Action Steps	Who	Timeline

Develop and maintain a responsive, customer-oriented Advancement Services team. The following objectives will: help to develop an annual work plan for future years, help with time management and help us to become proactive with repeated requests and questions.				
	Report Request Form	Continue interview process with requestors to discuss their requests	C. Adams	Continuation from FY08 - Ongoing
	Continue to maintain customer base statistics	Track person and/or department requesting information or phoning/emailing with a question	C. Adams	Continuation from FY08 - Ongoing
	Continue to maintain needs of customers	Track type of requests – i.e. labels, list, ad-hoc, etc.	C. Adams	Continuation from FY08 - Ongoing
	Measure productivity and customer service	Track request information: date received, length of time to complete and delivered date	C. Adams	Continuation from FY08 - Ongoing
		Survey at least 5 customers a month for customer satisfaction via email	C. Adams	Continuation from FY08 - Ongoing
		Report results on a monthly basis to VP and EDoD	C. Adams	Continuation from FY08 - Monthly

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Plan, implement, measure and continuously improve gift and biographical data entry with an emphasis on data accuracy and timeliness.				
	Measure and track multiple biographical and gift statistics		T. Morris C. Adams	Continuation from FY08 - Monthly
	Maintain data integrity queries	To be run monthly	C. Adams T. Morris C. Waldo	Will begin in August 2008 and then monthly
	Reduce number of duplicate mailings	Delete duplicate records where records are only located in RE and not in Banner	C. Adams T. Morris C. Waldo	Will begin in October 2008 and then monthly
		Delete duplicate records where records are located in RE and in Banner	T. Morris in conjunction with ITS	Continuation from FY08 - Ongoing
	Use address change service via USPS website	For all Observers and Annual Donor Report	T. Morris	Continuation from FY08 - Ongoing
	Use Pitney Bowes SmartMailer	Use for mailings not being sent thru a mailhouse for NCOA purposes	T. Morris	Continuation from FY08 - Ongoing
	Continue to decrease lost alum percentage	On a daily basis make data changes from alumni@hartford.edu emails and Harris On-Line Community Updates	Adv. Serv.	Continuation from FY08 - Ongoing
		On a daily basis make data changes from returned mail	Adv. Serv.	Continuation from FY08 - Ongoing
		Research lost alums thru files in Registrar's Office with goal of obtaining SSN or last known address to search in Alumnifinder	Adv. Serv. Students	Will attempt to start in September 2008 if we have more than one student
	Track seasonal addresses	Query constituents with more than one valid address (non-business)	C. Adams	Will start research in September 2008
		Send lists to appropriate staff to determine if they know dates that	C. Adams	Initial lists to staff by September 2008

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		constituent is at seasonal address		
		For all unassigned individuals who we believe have seasonal addresses have staff call for correct dates	TBD	By September 2008
		Change reports/data pulls to consider seasonal addresses	C. Adams T. Morris	Begin August 2008
	Reconcile gift revenue with Finance on a monthly basis		C. Waldo J. Paik C. Adams	Continuation from FY08 - Monthly
	Provide requested information to Auditors in a timely manner		C. Waldo C. Adams T. Morris	August 2008 April 2009
	Reduce "non-banner" database by inputting items into RE but also ensuring that items are not fed to Banner and that items can be, when needed, added to appropriate reports and lists.	Research way to enter non-Banner items into RE for information purposes	C. Adams	Discuss with Lucy Ruiz by June 2008 so that appropriate items can be entered into RE
		Input conditional pledges into Raiser's Edge		By September 2008
		Input testamentary pledges into Raiser's Edge		By September 2008
		Include conditional and testamentary pledges in Campaign report, if appropriate		By September 2008

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	Update and maintain Data Entry Standards manual (University Standards created by (CDC) Common Data Committee)	Update Manual for Banner 8.0	C. Waldo	February 2009
		Send updated manual to appropriate departments at University	C. Waldo	Spring 2009

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Plan, implement, measure and continuously improve data extraction and reporting with an emphasis on data accuracy and timeliness.				
	Maintain inventory of reports		T. Morris C. Adams	Continuation from FY08 - Ongoing
	Start to add "favorite" reports/queries to Alumni House staff desktops and train them to run as needed	Determine staff who want this option and then begin training	C. Adams	Begin by October 2008
	Use RE Queue module to send reports electronically	Send Deans their Discretionary Fund reports	T. Morris	Begin by November 2008 and then monthly
		Send monthly reports for external customers	T. Morris	Begin by January 2009 and then monthly

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Improve Gift Stewardship				
	Donor Recognition	Prepare Donor Report lists	C. Adams J. Paik C. Waldo	Final lists to Communication by October 2008 (may be changed based on Communication's timeline)
	Stewardship	Provide receipts for all gifts	S. Sterling	Continuation from FY08 - Ongoing
		Provide acknowledgements for faculty senate, honor/memorial gifts	S. Sterling	Continuation from FY08 - Ongoing
		Provide acknowledgement letters for all gifts $500+	S. Sterling	Continuation from FY08 - Ongoing
		Send pledge reminders	S. Sterling	August 28th November 7th February 27th April 3rd May 15th
		Inactivate Telefund Pledges	T. Morris	August 14th (pledges prior to July 1, 2007)
	Create new pledge thank you template – currently are being done manually		C. Adams T. Morris	By September 2008
	Create new templates for payroll deductions letters – acknowledgements and reminders		C. Adams C. Waldo	By December 2008

Goal	Objectives	Action Steps	Who	Timeline

Assist Annual Fund Office in raising $950,000 in Unrestricted funds and raising Alumni Participation.				
	Provide reporting tools to AF Office	Comparison by Donor Category (compares all Funds raised for Current FY and Previous FY with cash and pledge figures)	C. Adams	End of month and weekly: July- Dec
		Alumni Participation Comparison (compares Current FY and Previous FY with cash and pledge figures)	C. Adams T. Morris	End of Month: July - June
	Meet with Andy and Jenn to discuss AF Fall 2008 plans/needs for mail, telefund and reporting		C. Adams T. Morris	Prior to July 1
	Meet with Andy and Jenn to discuss AF Spring 2009 plans for mail and telefund.		C. Adams T. Morris	Prior to January 2009
	Provide Telefund and Mass Mail downloads	Based on strategic plan of Annual Fund Office	C. Adams T. Morris	Continuation from FY08 - Ongoing
	Develop segment-tracking system for all appeals (mail and telefund)	Ensure that all appeals are tracked on each constituent	C. Adams T. Morris C. Waldo	Will begin with FY09 appeals
	Input all Parents of current students		C. Adams T. Morris	Enter in RE by August 2008
	Input all Parents of incoming students		C. Adams T. Morris	Enter in RE by October 2008
	Add Annual Fund appeals and packages to Raiser's Edge	With input from Annual Fund – add appropriate appeals/packages to output records for Fall mail and telefund	C. Adams T. Morris	By first week of go-live

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Assist Development Officers and Prospect Research				
	Create Self-Service or Intranet Capabilities for UH customers	Design a Website which includes web links, report downloads, and access Advancement Services Request Forms. (Determine security issues)	C. Adams	Implementation determined by hiring of new web designer
	Build reports necessary for prospect researcher to build profiles	Meet with Jill to determine needs	C. Adams T. Morris	Continuation from FY08 - Ongoing

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Assist Alumni & Parent Relations Office				
	Ensure continuous service for Harris Community	Provide downloads of information on a daily/weekly/monthly basis to update information in Harris Community	To be done by Alumni Office with assistance from T. Morris and C. Adams	Continuation from FY08 - Ongoing
		Ensure information additions/changes from Harris are entered into Banner	Adv. Serv.	Continuation from FY08 - Ongoing
	Track various alumni statistics		C. Adams T. Morris	Create baseline statistics on July 1, 2007 and then monthly
	Process all credit cards gifts for events for better reconciliation with Finance Office		J. Paik C. Waldo C. Adams	Continuation from FY08 - Ongoing
	Assist with successful creation of new Harris Directory by meeting all required deadlines	Send alumni database to Harris Connect from RE	T. Morris C. Adams	January 12, 2009

Goal	Objectives	Action Steps	Who	Timeline

Assist Planned Giving Office in ability to track and establish estate gifts.				
	Track Planned Giving Donors and Prospects	Track thru activity screen	C. Adams	Continuation from FY08 - Ongoing
	Update birthdays in Banner via Alumnifinder when researching address updates.		Adv. Serv.	Continuation from FY08 - Ongoing

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Assist Institutional Partnerships and Sponsored Research				
	Create system to track IPSR government and state grants (those that will not be fed to Finance thru RE)	Research functionality used by other RE institutions	C. Adams C. Waldo	Begin in FY08 in preparation to enter grants in FY09
		Enter all grants into RE	C. Waldo C. Adams	To begin for FY09
		Create ability to query and report on these types of grants out of RE	C. Adams T. Morris	To begin for FY09

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Assist WWUH by processing all gifts to facilitate better tracking of their gifts and reconciling with Finance Services				
	Input all WWUH gifts into RE	Meet with John Ramsey to determine best way to receive gifts	C. Waldo J. Paik C. Adams Finance Service rep	Prior to June 30, 2008
		Enter all gifts into RE	C. Waldo J. Paik	To begin for FY09
		Create ability to query and report on these types of gifts out of RE	C. Adams T. Morris C. Waldo	To begin for FY09

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Train and support appropriate staff to setup, do data entry, and extract reports and lists for events from RE				
	Train staff for Event tracking for the following events: Annual Fund Scholarship Luncheon Rogow Lecture Founders' Society Luncheon Hartford Scholars Dinner Others as needed		C. Adams	To begin for FY09
	Enter alumni event attendees into RE Event Module		Advancement Services	Begin in FY09

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Miscellaneous:				
	Submit University survey's in a timely manner	VSE Survey	C. Adams	By December 1, 2008
		CASE Survey	C. Adams	By December 1, 2008
		US News Survey – request received by Stacy Sperrazza, UH Research Analyst in Institutional Research	C. Adams	March 2009
		CHEFA Survey – request received by Tricia Coppolo, Adm. Asst. for Financial Affairs	C. Adams	April 2009
	Provide appropriate technology for Institutional Advancement employees	Ensure that all printers, computers, etc. are on a three-year upgrade cycle	T. Morris C. Adams	Continuation from FY08 - Ongoing
	Advancement Services staff to maintain technology/system education	CASE Conference for Senior Advancement Services Professionals	C. Adams	April 2009
		Raiser's Edge User Conference	T. Morris C. Waldo	October 2008
		Advancement Solutions - Advancement Services Regional Workshop (workshop held on campus)	J. Paik S. Sterling C. Waldo	October 2008
	Subscribe to listserves to maintain contacts and industry standard processes	Advancement Services Fundraising Services Fund List RE Forums	C. Adams C. Waldo	July-June
		RE Forums Advancement Services Fundraising Services Oracle SQL Access	T. Morris	July-June

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	Determine needs and planning for document imaging	Determine what can be imaged with input from Prospect Research, Planned Giving, Donor Relations	C. Adams	Finance needs to be determined initially before beginning implementation
		Determine cost of scanner and workload. Consult with Finance Services and Admissions regarding planning.	C. Adams	

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Successfully continue implementation of new fundraising management software, Raiser's Edge. Go-live date is set for July 28, 2008 with Deploy stage (Final stage) to be completed by August 31, 2008.				
	Deploy Phase			Complete by August 31, 2008
		Conduct end-user training	Raiser's Edge	July 14-18, 2007
		Execute final conversion data	Raiser's Edge	
		Validate final conversion	C. Adams T. Morris ITS	
		Deliver final custom applications	Raiser's Edge	
		Deploy final custom application	Raiser's Edge in conjunction with UH staff	
		Go-Live	All	
		Identify post-conversion clean up	Raiser's Edge in conjunction with UH staff	
		Create engagement summary	Raiser's Edge	
		Conduct close-out meeting	Raiser's Edge in conjunction with UH staff	

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Implement and complete post-conversion clean up activities.				
	Missing Alumni	Change coding on ALM2's from friend to ALM2. Can be done by querying on notes (Category changed from ALM2 to Friend)	C. Adams T. Morris	Complete by August 2008
		Research past commencement programs for alums not in Raiser's Edge	Advancement Services	Begin September 2008 and then ongoing until complete
		Research past alumni directories, with advice from Jill Hodnicki on best directory to begin search	Advancement Services	Begin September 2008 and then ongoing until complete
	Data Integrity – addresses	Ensure that all records have one address marked as primary address	Advancement Services	Complete by September 2008
	Data Integrity – class years	Ensure that all alumni records have a valid class year	Advancement Services	Complete by September 2008
	Data Integrity – alumni status	Add "undergrad" and "graduate" attribute to all Univ. of Hartford alumni records – create education attribute category	Advancement Services	Complete by September 2008
	Import SSN's from Banner into RE	Create import file with SSN from Banner	Advancement Services	Complete by September 2008