

Advancement Services

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Purpose/Mission

- ✦ Support Advancement Division
 - ✦ Clean & robust database of contact & bio information
 - ✦ Accurately process gifts and record pledges
 - ✦ Provide prospect research for Major Gifts Team
 - ✦ Provide reports to Division, Foundation, University
 - ✦ Identify software & processes to enhance efficiencies
- ✦ Support Foundation Accounting & other University areas involved in Fundraising



Accomplishments since April 2016

- ✦ Self-Service for Advancement Officers – implementation and training
- ✦ Prospect Assignments to 7 new Advancement Officers
- ✦ Obtained Additional Degrees on our Graduates from the National Student Clearinghouse
- ✦ Obtained Employment information on our Alumni from a company working directly with Linked-In



Accomplishments since April 2016

- ✦ Obtained contact & other information updates on **all** constituents for phon-a-thon, email & mail solicitation, and general database clean-up
- ✦ New divisional report – Analysis of Net Production & Philanthropic Cash
- ✦ Implemented Banner Membership module for Alumni Association membership program
- ✦ Addressed some IRS compliance issues



Plans for 2016-2017 Academic Year

- ✦ Complete the execution of clean data loads (electronic & manual) of screenings referenced
- ✦ Implement document imaging (BDMS)
- ✦ Design coding & a process for addition of prospect research info into our database
- ✦ Enhance our ability to meet the division's reporting needs - Argos cross-training and eventual deployment of self-service features



Plans for 2016-2017 Academic Year

- ✦ Exploring the opportunity to share contact information (prospect visits) with athletics – and athletics with Advancement for a more collaborative approach to major gift solicitations
- ✦ Collaboration with Mass Marketing professor & class on analytics project

Feedback/Questions?



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