

# Advancement Data Enrichment and Maintenance

Summer 2018



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# Data Management

- Critical to successful fundraising
- All constituency types (alumni, friends, organizations)
- Needed to keep constituency engaged:
  - Informed
  - Invited
  - Solicited
- Do our best not to lose track of our constituency



# Data Management

- We need to understand our constituent's
  - Gift capacity
  - Interests
  - Wealth indicators
  - Readiness
- Data Management Responsibility
  - Advancement Operations
  - Entire division through data sharing



# Data Maintenance Projects Completed Over the Last Few Years

- Wealth screenings, giving capacities, life phases and predictive modeling
- Annual Data enrichment using a vendor (should be performed annually)
  - 2,451 new addresses for alumni that we already had addresses for
  - 2,346 new addresses for alumni that we had no active addresses for (Lost Alumni)
  - 12,510 new phone numbers for alumni that we had no active landline numbers for
  - 31,758 new cell phone numbers that we had no active cell phone numbers for
  - 28,838 new alumni email address that we had no active emails addresses for
  - 350 alumni determined to be deceased manually verified by staff



# Data Maintenance Projects Completed Over the Last Few Years

- Loyal Donor programming

A weekly automated coding of donors into different “loyal donor” categories such as “5 years of giving”, “10 years of giving”, etc. This allows annual giving and donor relations to segment UNCG’s donor population for targeted communications.

- Planned Gift Restructuring

Based on best practices, using the system to its fullest capabilities, and re-coding past planned gifts to industry standards.

- Donor Relations Support

Provide leadership and system support to the office of donor relations for data and data storage expertise to enhance the accuracy and efficiency of producing annual endowment reports.



# Data Maintenance Projects Completed Over the Last Few Years

- Employment Data Enrichment

- Developed better integration between our telefund software and our official system of record (Banner) as it relates to employment data gleaned from student calling
- Manual research for our top-rated prospects

- School/College Affiliation

When a new school/college is developed (e.g. College of Visual and Performing Arts) information on alumni who graduated from the school/college must be updated to show that their degree now is part of the new school/college but not lose the information as to where that degree used to exist. This sounds simple but is quite complicated. These alumni could be targeted for communications based on the new or the old structure



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# Data Maintenance Projects Completed Over the Last Few Years

- Advancement Data Visualization

Currently implementing an advancement data visualization project using software from an Ellucian partner called ADVIZOR. This product is a highly interactive visual interface using large and complex data sets making it easier to see the stories hidden in our data, and then explore, “muck around”, “slice and dice” to get answers. This software will also be used for gift officer visual metrics and the software comes with predictive modeling algorithms.





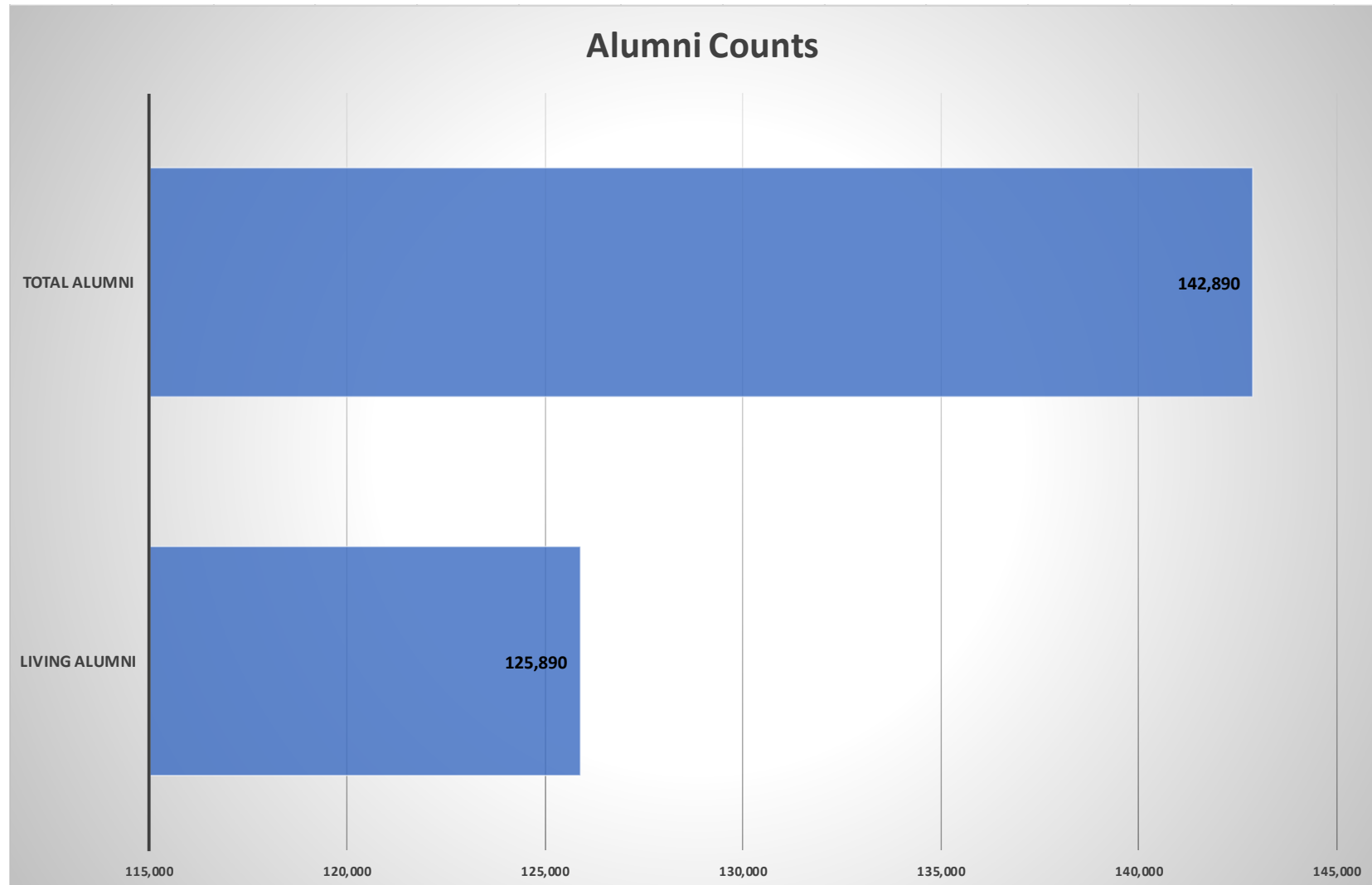
# Data Maintenance Projects Going Forward

- Continue performing the processes previously implemented
- Create a committee on advancement data integrity bringing in key stakeholders to brainstorm and prioritize current and future data maintenance issues
- Work closer with the registrar's office and the student affairs office on data collection on students that are important for alumni engagement and giving opportunities after the students become alumni

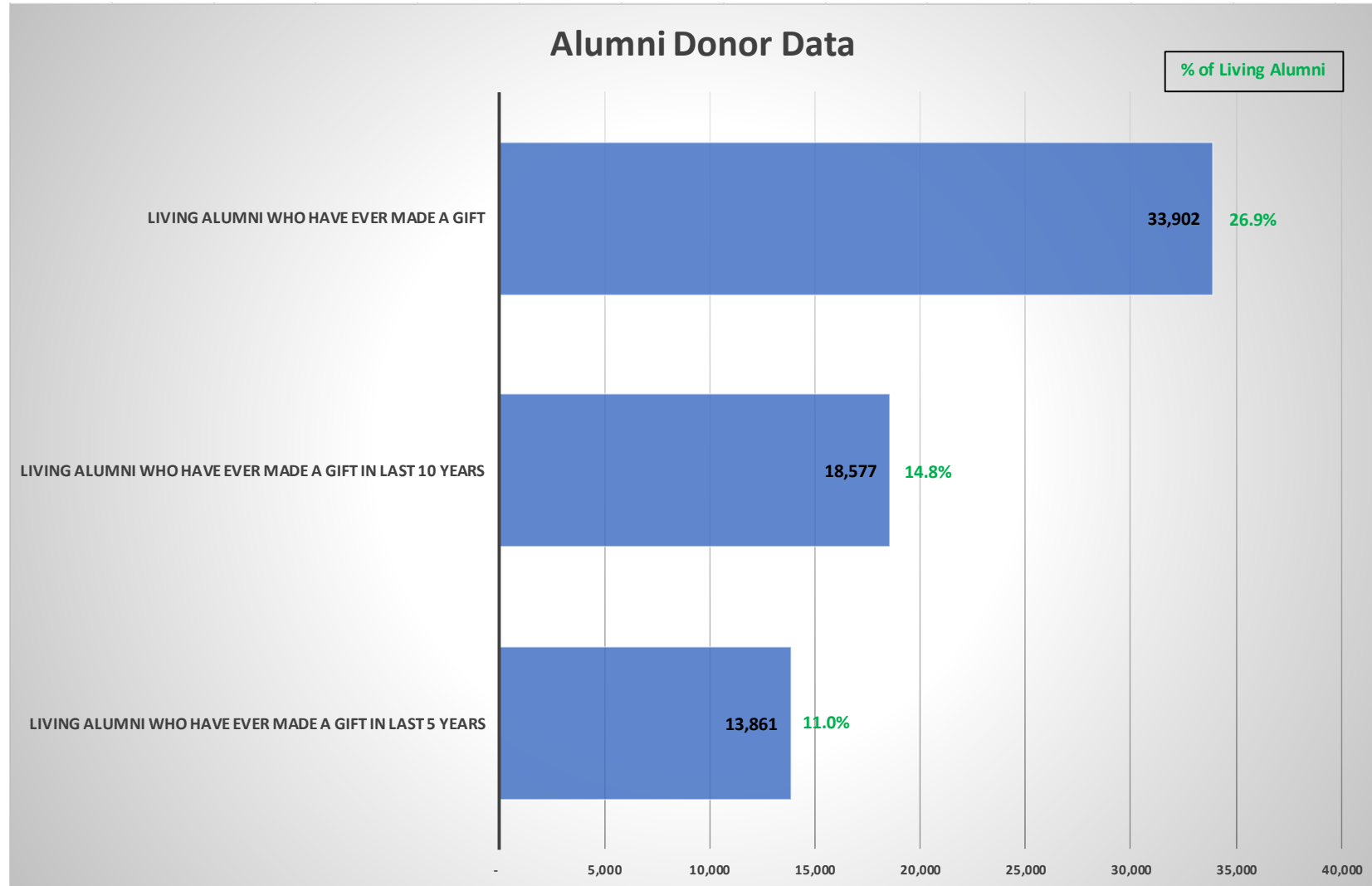
# Sources of Data

- Apart from staff there are other avenues to increasing the amount and the accuracy of data stored. Other internal UNCG purchased software and vendor purchased services are the sources of advancement data:
  - iModules - web giving and event registration software
  - Ruffalo Noel Levitz - student call center software
  - NeuLion - athletics ticketing and giving software
  - Banner's student module - graduated student data and parent data
  - Banner's financial aid module – scholarship awardee data
  - Banner's HR module – type of staff (faculty, staff, retiree, former)
  - Wealth screening and gift capacity vendors
  - Gift and pledge documents – scan documents for updated biographical data
  - Reports from gift officers summarizing meetings and visits with prospects/donors
  - Data enrichment vendors - addresses, emails, phone #'s, deceased data
  - National Change of Address (NCOA) data from the USPS – alum and donor moves

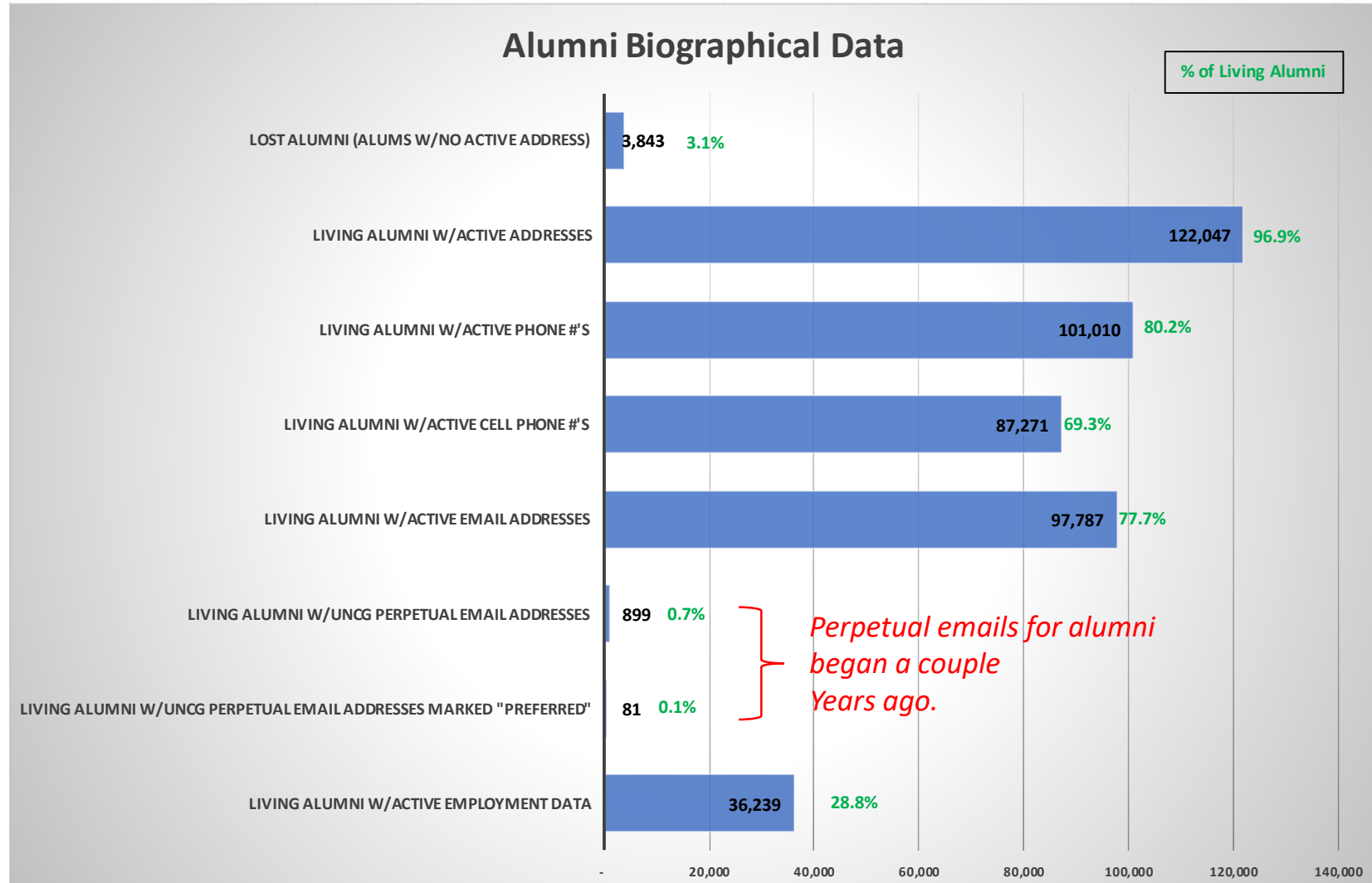
# Key Data Statistics – July 2018



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# Key Data Statistics – July 2018

## Gift Capacity Data

### Households

HOUSEHOLDS WITH GIFT CAPACITY RATINGS (INCL NON-ALUMS)

% of Living Alumni

131,738 NA

HOUSEHOLDS WITH VERIFIED GIFT CAPACITY RATINGS (INCL NON-ALUMS)

24,182 NA

HOUSEHOLDS WITH VERIFIED GIFT CAPACITY RATINGS (>=\$25K)

16,890 NA

### Living Alumni

LIVING ALUMNI HOUSEHOLDS WITH GIFT CAPACITY RATINGS

85,419 67.9%

LIVING ALUMNI HOUSEHOLDS WITH VERIFIED GIFT CAPACITY RATINGS

21,264 16.9%

LIVING ALUMNI HOUSEHOLDS WITH VERIFIED GIFT CAPACITY RATINGS (>=\$25K)

14,036 11.1%

**Gift Capacity Ratings:** The objective estimate of the amount a constituent can give, based upon their public assets and/or philanthropic history typically over a five-year period.

**Verified Gift Capacity:** When staff verify vendor supplied gift capacities through manual verification of data such as address, assets, property value, marital status, real estate once owned but sold, recently acquired real estate missed by the vendor, crusty vendor data – stock sales of long ago, etc.



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# Data Maintenance Custom Programming

- Creation of automated programs (approx. 50) that detect potential data discrepancies
  - Detect and Fix
  - Detect and Notify
- Samples
  - Detecting parents of students and coding them as parents of freshmen, parents of sophomores, etc. for more effective parent giving strategies.
  - Reads data from the nightly telefund calls so that the main system is updated for new addresses and phone numbers.
  - Integrating with HR information, the coding of constituents as faculty/staff or retired faculty/staff for more effective targeted communication.

# Data Maintenance Custom Programming

- Samples

- Creates home addresses for students that graduate and are rolled into the Advancement system.
- Changing marital status when spouses are coded as deceased.
- Population of the “county” data field when the county was neglected to be added.
- Updating of the prefix field (Ms., Mr. Mrs. Etc.) based on other data when the prefix field is not populated. When it is populated, another program that updates the spelling if entered wrong (e.g. “Mr” to “Mr.”)
- Inactivation of emails that belong to deceased individuals.



# Procedure Documentation and Training

- Documentation
  - Approximately 250 documented procedures
  - Approximately 1,000 pages
  - Living document
- Training
  - New Employee
  - Refresher
  - Job Specific
  - Canned Reporting

# Questions

