

Blackbaud's 2008 Higher Ed Forum


Preparing Programs and Advancement Services for Expanding Technology

3:30 - 5:00 PM

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June 19, 2008

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Boston, Massachusetts
June 18 - 20, 2008 | Boston Marriott Copley Place

Preparing Programs and Advancement Services for Expanding Technology 

The Story -

Remember how it began.....?

- ◆ The small shop and database we knew so well
 - Everyone was hands-on
 - Stable and dependable alumni and development programs
 - The introduction of systems - some kind into our programs!
 - In-house systems, automation tools
- ◆ Work began to change
 - Moving from cards and typing to systems of any and all kinds
 - mainframe to mini to desktop and all at the same time
 - So many tools to consider and try
 - The marvel of what systems and technology could do
 - The almost magic results - lists, totals, history
- ◆ We found our go-to person
 - Growing or finding your first technology magician(s) in the team
 - The wizard of language, machines and results (most of the time)

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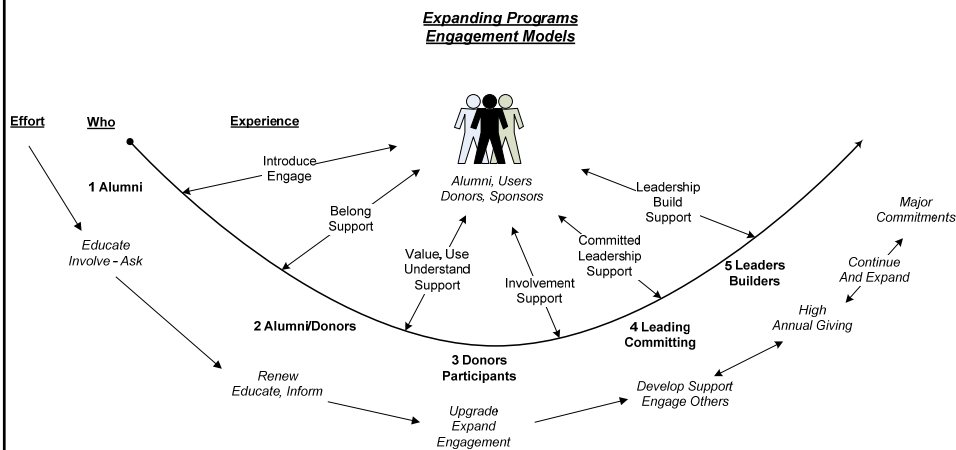
The Story Continues

And then it began to take-off.....

- ◆ Alumni and development programs expanded
 - Information collection and gathering increased
 - Demands on data entry, reporting and production expanded
 - Use and loads on systems and technology expanded
 - The demand for our systems magicians grew
 - The magicians stretched themselves into the data and technology available
 - The technology expanded
- ◆ The records, biographic and gift teams grew
 - We got our first taste of our data, systems and technology coordinator, manager or maybe even a director
- ◆ The campus technology teams started to feel the results of insatiable demand for quickly limited supply.

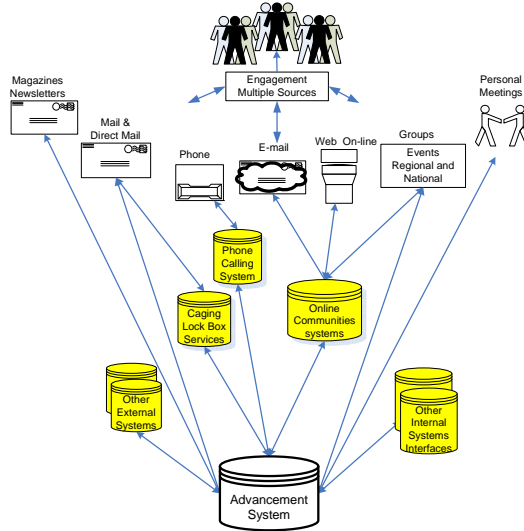


Maturing Programs and Strategies - Advancement

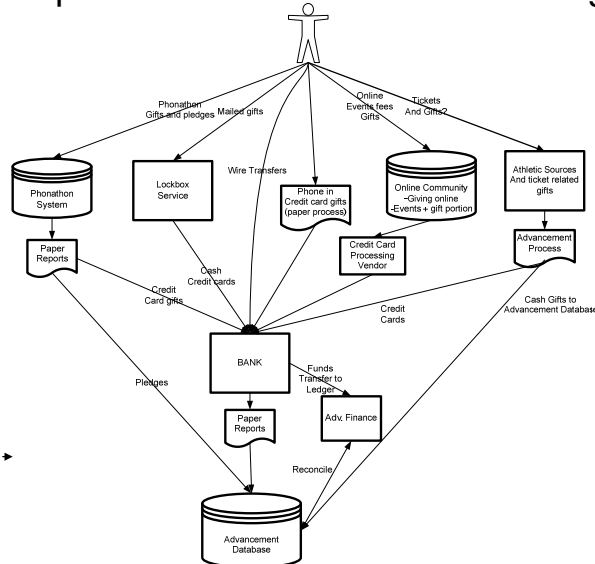




More Complex Engagement and Information Flow

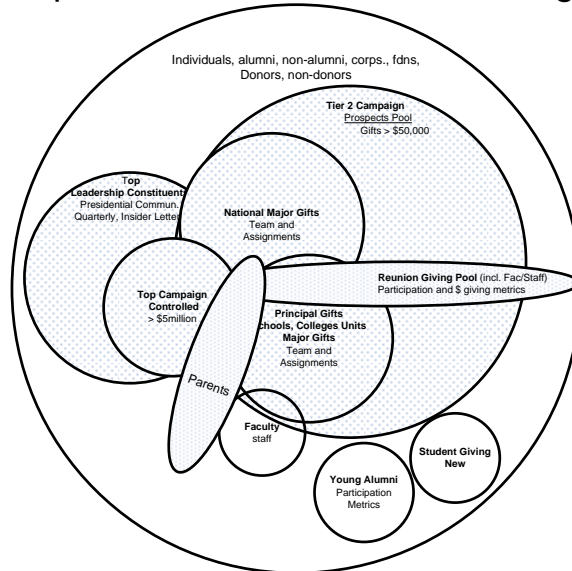


More Complex Processes - Gifts and Giving

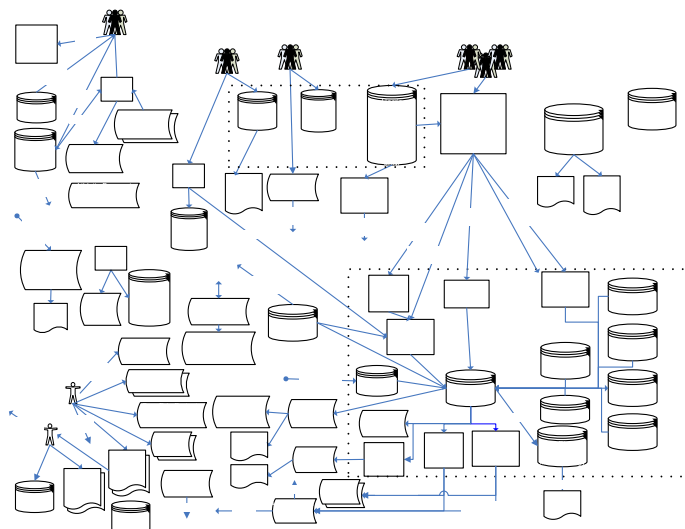




More Complex Data Portfolios and Management

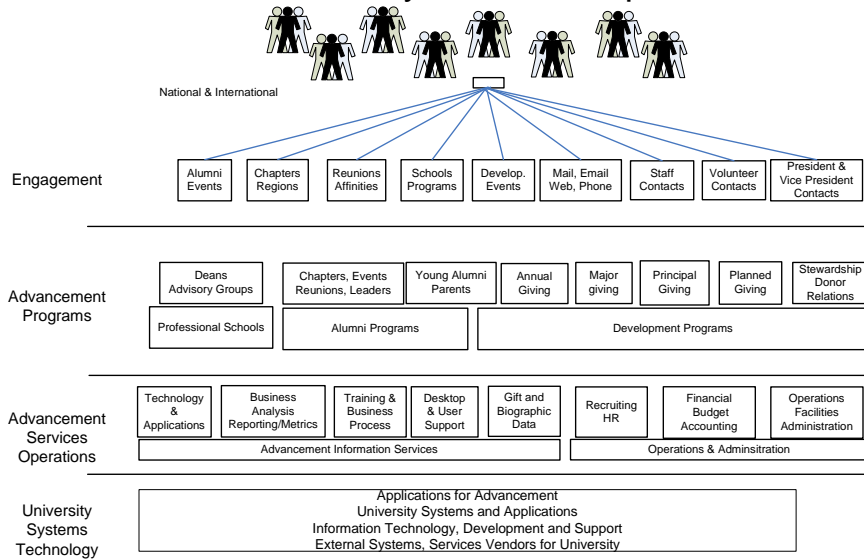


Complex Campus, Advancement - Technology





And Here We Are Today! What a Trip So Far.....



Challenges To Address



- ◆ Expanding advancement programs
 - New strategies and goals to support
 - Maturing and expanding organization and programs
 - Larger demands for comprehensive information
 - Program staff becoming information managers
- ◆ Advancement services stretched
 - Demanding new organization, roles and competencies
 - Growing comprehensive responsibilities business and technology
 - Shifting from collection, access to leverage and impact
 - Stalled on technology, data, access transformations
- ◆ New Technology - an opportunity and challenge
 - More capabilities and combinations of systems
 - More sources and integration of data
 - Higher complexity and combinations of systems and tools
 - Less campus IT support beyond their core responsibilities



Build Advancement Technology Team

1. Challenge and rebuild services and approach
 - Assess level of impact from high to low to dragging
 - Review changes in Advancement programs, success factors, targets and services required

2. Establish key competencies and requirements
 - Leadership, management, collaboration, service
 - Business translation and program support service
 - Enabling tools, self-service, support
 - Constituent knowledge development, management
 - Information access, analysis, measuring, planning



Advancement Services Today - The Big Picture

Business Programs Support	Records and Biographical Data	Gift/Pledge Accounting	Gift Management, Reconciliation & Reporting
<ul style="list-style-type: none"> •Support, Policies, Procedures •Advancement programs •Development – major giving •Alumni Relations •Constituent Prospecting •Annual fund •Stewardship •Planned giving •Corporate/foundation •Communications •Campaign •Athletics, Medicine, Nursing, Research, Law •Boards and advisory groups 	<ul style="list-style-type: none"> •Constituent data collection, storage and management •Quality control management •Enhance & clean up data •Data coding, meaning •Integration of multiple data sources and systems •Data content and standards •Data entry and change controls •User support and training in constituent records •Hard copy constituent records 	<ul style="list-style-type: none"> •Gift sources management •Gift receiving and controls •Batch management •Deposit •Gift review and designation •Entry, proof, quality control •Hard and soft credit support •Pledge and payments mgt. •Receipting and reminding •Standards mgt – IRS, FASB, Univ. Donor Support, •QC and accountability 	<ul style="list-style-type: none"> •Funds received and held •Funds balance and reconciliation •Banks, money, reports •Wire transfers •Merchant Accounts mgt. •Credit card services mgt. •Cash flow forecasts •Hosp. gifts and transfers •Donor gifts reporting •Campaign reporting •Donor giving communications •Endowment Q&A
Advancement Technology, Systems and Services			
Technology and Network Systems	Constituent and Systems Databases	Applications (Including Online systems)	Information Reporting & Analysis
<ul style="list-style-type: none"> •Systems architecture mgt. •Develop and manage infrastructure, systems and servers •Integrate with Univ. Systems •Security mgt. systems, data and users access •Multiple locations •Internal, external and web systems •User Services and Help Desk •Desktop support, setup, fix 	<ul style="list-style-type: none"> •Database architecture •Database administration and management •Integration of •Related databases: phonathon, institutional database interfaces (student, finance, hr, etc) 	<ul style="list-style-type: none"> •Applications architecture, •Core package and custom systems support •Design, build, test and deploy new systems •Data interfaces •Web & Online Systems •Online systems, packages •Integration of all web presence and services •Communications and marketing support 	<ul style="list-style-type: none"> •Reporting for all core systems •Performance and metrics reports for all programs •Sr. Management reports. •End user reporting tools and services for all their programs •Data Analytics support and development of tools, services •Data queries, selections and extracts gift and records •Financial reporting tools and services



Build Advancement Technology Team cont.

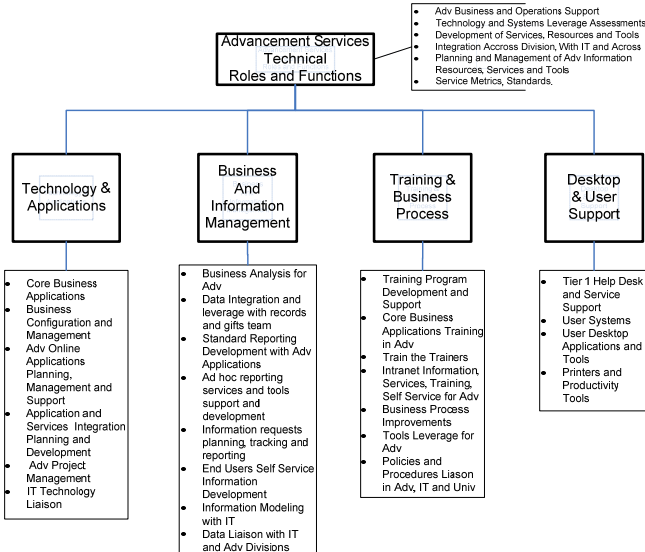


3. Match services to Advancement approach
 - Be bold and challenge our own assumptions
 - Specialists and liaisons for Advancement programs
 - Automation and new roles for data teams
 - New IT collaboration and relationships
 - Detail each service area and the targets
 - Define leadership roles for each service area facing Advancement

4. Pass responsibilities and decisions to our teams
 - Build new ways of doing more business all the time
 - Give more opportunity for staff to grow, serve and lead



Technical Roles Today In Advancement Services





Build Advancement Technology Team cont.



5. Take responsibility for business applications and tools
 - Challenge, review and build knowledge and skills
 - Expect and build expertise in what and how it works
 - Assign and train staff in applications and skills
 - Assign staff in business needs, analysis, processes, workflow
 - Take on management and support of business functions in systems
 - Plan, coordinate and maximize tools and services



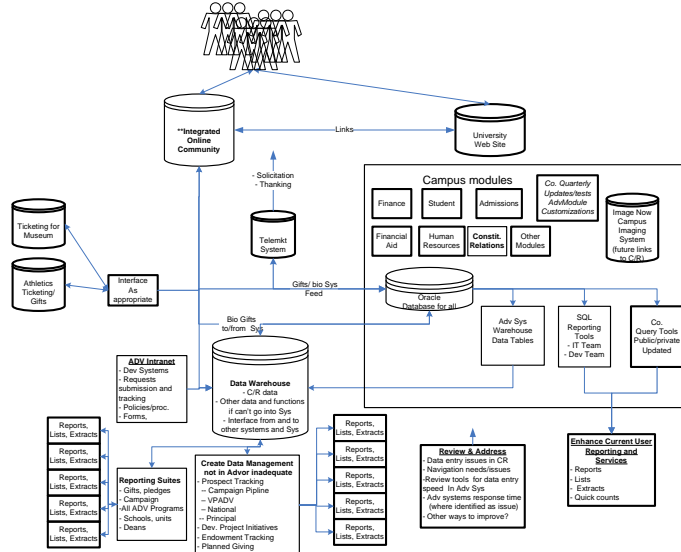
Build Advancement Technology Team cont.



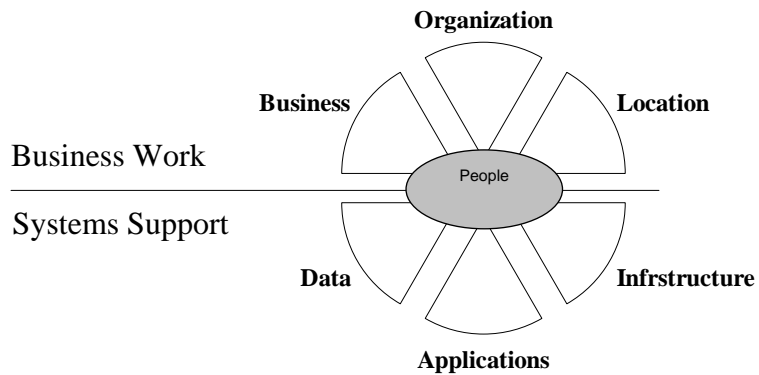
6. Establish peer relationships with IT
 - Be bold and challenge our own assumptions
 - Review and re-assess current and future roles/work with IT
 - Assess IT directions, agendas and/or opportunities to adapt
 - Identify specialists and liaisons to be peers with the IT roles
 - Understand and facilitate with IT to serve Adv. and IT strategies
 - Build teams based on high impact models
 - Business knowledge, workflow and process support
 - Application knowledge expertise - setup, run
 - Data content, access and core tools
 - Expanded or unique tools/services
 - Create collaboration instead of dependence
 - Needs and strategies
 - Joint work and assignments
 - Do not give up and do not go away



Joint Consolidation of Systems - Phase 1 Example



What Makes it Tick - Food for Thought





Questions and Discussion

Thank You



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