University of Louisiana at Lafayette

Detailed Assessment Report
2015-2016 Advancement Services
As of: 11/18/2016 10:55 AM CENTRAL
(Includes those Action Plans with Budget Amounts marked *One-Time, Recurring, No Request*.)

Other Outcomes/Objectives, with Any Associations and Related Measures, Targets, Findings, and Action Plans

O/O 1: Refine Millennium Database

Refine Millennium database in regard to personal and business addresses. Upgrade Millennium database from Version 7.4 to Millennium 2013.

Related Measures

M 1: Mailing Addresses

Utilize Accurint, Correct Address, Correct Call and Correct Zip to research and update personal and business mailing addresses in Millennium.

Source of Evidence: Activity volume

Target:
Lower undeliverable pieces of mail

Finding (2015-2016) - Target: Met
Research and update of 2,910 addresses in the Millennium database. Sources such as Alumni Finder (paid source), returned mail and Alumni online updates provide the most accurate information.

Related Action Plans (by Established cycle, then alpha):

Daily updating and tracking

Daily updating of addresses and tracking of mailings and returns.

Established in Cycle: 2009-2010
Implementation Status: In-Progress
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Mailing Addresses | **Outcome/Objective:** Refine Millennium Database

Install Visual Analyzer
The upgrade was necessary in order to be able to purchase, install, and prepare to add on Visual Analyzer which will produce dashboards and reports. The university administration will be benefit from the dashboards produced by Advancement Services. The Action Plan for 2015-16 is to install Visual Analyzer.

Established in Cycle: 2014-2015
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Mailing Addresses | **Outcome/Objective:** Refine

Millennium Database

O/O 2: Populate Database with Email Addresses

Improve Millennium database by populating email addresses in 75% of active alumni records.

Related Measures

M 2: Email Addresses

Utilize Harris Connect directory to research and populate 10,000 email addresses in alumni records in Millennium.

Source of Evidence: Activity volume

Target:

Utilize Firefly to send email blast to 17,000 emails. Eliminate bounce backs and import valid addresses in Millennium.

Finding (2015-2016) - Target: Met

Emails have continued to be researched and updated in Millennium. Resources such as the Alumni Grad Expo have provided current emails on recent graduates. Alumni who update information online also are a positive source. Emails are manually entered in Alumni/Donor records. Currently 48,062 emails are housed in the Millennium database.

####### Related Action Plans (by Established cycle, then alpha):

Import valid email addresses

Receive findings, remove bounce backs, and import valid email addresses. Continue to discover new avenues to obtain valid email addresses and enter into database.

Established in Cycle: 2009-2010
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Email Addresses | **Outcome/Objective:** Populate Database with Email Addresses

O/O 3: Software Conversion

Conversion from Sage Millennium database to Ellucian Banner Advancement. Involvement of multiple week long site sessions and remote sessions with Ellucian consultants. Mapping of data, clean up data projects, data extractions, completion of online tutorials to learn how to navigate this new system before go-live date.

Related Measures

M 4: Consulting Sessions

Participate in on-site campus and remote sessions with Ellucian consultants to prepare for conversion.

Source of Evidence: Benchmarking

Target:

Schedule meetings to prepare processes which will be converted into the new Banner system.

Finding (2015-2016) - Target: Met

Prepared step-by-step of all major processes necessary for Advancement

Services to perform daily, weekly, monthly and annual duties and responsibilities.

Analysis Questions and Analysis Answers

How were assessment results shared and evaluated within the unit?

Weekly meetings/training sessions are used to communicate ongoing goals and priorities associated with software conversion. User end training sessions will be conducted when actual data is in the Test instance.

Identify which action plans [created in prior cycle(s)] were implemented in this current cycle. For each of these implemented plans, were there any measurable or perceivable effects? How, if at all, did the findings appear to be affected by the implemented action plan?

Action Plan: Refine Millennium database in regard to personal and business addresses. Upgrade Millennium database from Version 7.4 to Millennium 2013.

Personal and business addresses were increased which led to improved communication with Alumni and donors of the University.

The result of the database upgrade to Millennium 2013 allowed the installation and implementation of DRIVE. Abila® Millennium Drive is an easy-to-use and interactive way for users to explore information about their active prospects and about other constituents, about their tasks, and about their portfolio of major gift proposals. Millennium Drive provides an improved user experience for viewing Abila Millennium data. Data is gathered from Biographical, Giving, and Prospect Management, and presented for viewing and analysis in a variety of ways**.**

What has the unit learned from the current assessment cycle? What is working well, and what is working less well in achieving desired outcomes?

A university wide software conversion is a major and intense endeavor which requires support and communication throughout the university. The Advancement Team has taken individual ownership in learning the new software. There has been extreme dedication to this major project.

Having actual data available during training would have been beneficial.