Analysis Questions and Analysis Answers

For Administrative Support and Student Support Units

Informed by your assessment activities, what changes have you made in your unit in the last three to five years? Describe the changes, the general results that prompted the changes, and the impact on your unit's clients/customers that you might attribute to these changes.

Beginning in 2011, Advancement Services instituted an internal review of the stewardship reports that are delivered annually to major gift donors. As a result of the internal review, Advancement Services instituted a new process in conjunction with Financial Accounting to notify colleges at the outset of each semester if they had scholarship funds that had not been awarded. This new process provides another opportunity for Advancement to help ensure funds are awarded each semester in accordance with donor wishes. In 2013, Advancement Services led a complete redesign of the stewardship reports and implemented a brand new report design. The reports have been well received by donors and represent UA in a more fitting manner.

Mission / Purpose

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

OthOtm 1: Gift accounting, acknowledgments, personalized letters

Record all gift commitments, mail gift acknowledgment receipts to donors, and prepare personalized letters of acknowledgment to donors whose gift exceeds $5k from the president.

Connected Document

Advancement Service Timetable

Related Measures

M 1: Verify daily gift activity via restriction reports, batch logs and reporting environment

Verify daily gift activity via restriction reports, batch logs and reporting environment to determine if all gifts received were posted and receipted within three working days, and acknowledgment letters were prepared for signature within five days of recording gifts.

Source of Evidence: Administrative measure - other

Target:

Record all gift commitments within one working day of receipt, mail gift acknowledgment receipts to donors within three working days of recording gift, and prepare personalized letters of acknowledgment to donors whose gift exceeds $5k from the president within five working days of recording gifts.

Finding (2013-2014) - Target: Met

Summary of Results: Gifts were monitored and reconciled as part of Gift Accounting's standing procedures for reconciliation. Gift Accounting follows all applicable IRS, CASE and UA BOT guidelines for private giving.

Interpretations and Conclusions: Gift activity increased at UA both in the number of donors and transactions. As a result, it was imperative that Advancement Services add an additional staff member to assist with the increased volume. This was accomplished during the year.

M 17: Monthly Gift Summary Reports

Gift summary reports are produced by Gift Accounting each month that encapsulate the month's gift activity. These reports are reconciled and reviewed before distribution to ensure proper accounting and allocation. A report of $5k and above gifts is included in the reporting and these receive letters from the President.

Source of Evidence: Administrative measure - other

Target:

Review monthly gift summary reports to ensure reconciliation and proper allocation.

Finding (2013-2014) - Target: Met

Summary of results: Gifts were entered and reconciled and deposited to the appropriate funds. The campus community was notified of fundraising progress via the monthly gift summaries.

Interpretation and Conclusions: Gift activity across campus has increased resulting in the need for additional staff. That was accomplished during the past year.
OthOtcm 2: Maintain and enrich database
Maintain and enrich database that supports University Advancement and related activities by housing current and relevant data on UA alums and constituents.

Connected Document
[Advancement Service Timetable]

Related Measures

M 4: Monitor State of the Database report
Monitor State of the Database report to ensure optimal performance and data quality.
Source of Evidence: Administrative measure - other
Target:
Review monthly

Finding (2013-2014) - Target: Met
Summary of Results: Report indicated acceptable level of good data in the fundraising database.

Interpretations and Conclusions: Land line phone numbers continue to decrease. Identified areas where improvement could be made by getting good data into the system in a more efficient fashion. Work is taking place in those areas.

M 6: Reconciliation to Advancement Services calendar of deliverables for updates and upgrades
Reconciliation to Advancement Services calendar of deliverables for updates and upgrades.
Source of Evidence: Administrative measure - other
Target:
No target established.

Finding (2013-2014) - Target: Met
Summary of Results: Data updates to the system occurred in a timely fashion for some areas and on schedule.

Interpretations and Conclusions: Data--from some areas--needs to evaluated and processes refined in order to increase efficiency of operations. Work is being done in those areas.

OthOtcm 3: Annual stewardship reports
Provide donors and donor representatives' annual stewardship reports on endowments and other major gifts. Incorporate the new look for Alumni Association stewardship reports. The Alumni stewardship reports are scheduled for December delivery.

Connected Document
[Advancement Service Timetable]

Related Measures

M 7: Compare Advancement database
Compare Advancement database with records from Financial Accounting to ensure completion and inclusion of all funds in need of stewarding.
Source of Evidence: Evaluations
Target:
Compare Advancement database with records from Financial Accounting to ensure completion and inclusion of all funds in need of stewarding

Finding (2013-2014) - Target: Met
Summary of Results: The Advancement database has been compared to records from Financial Accounting to ensure completion and inclusion of all funds in need of stewardship, and reconciliation has occurred.

Interpretations and Conclusions: This process of review and reconciliation continues to work well.

M 8: Reconciliation to Advancement Services calendar of deliverables
Reconciliation to Advancement Services calendar of deliverables
Source of Evidence: Client satisfaction survey (student, faculty)
Target:
No target established.

Finding (2013-2014) - Target: Met
Summary of Results: The redesigned Alumni Association stewardship reports were delivered to donors in December.

Interpretations and Conclusions: Feedback from donors has been very positive.

OthOtcm 4: Resolutions for endowed funds to President's office
Submit resolutions for endowed funds to President's office for further submission to The Board of Trustees of The University of Alabama.

Connected Document
[Advancement Service Timetable]

Related Measures

M 9: Reconciliation to Financial Accounting report of funds at endowment level
Reconciliation to Financial Accounting report of funds at endowment level.
Source of Evidence: Administrative measure - other
Target:
No target established.
Finding (2013-2014) - Target: Met
Summary of Results: Received regular reports from Accounting for funds at endowment level.

Interpretation and Conclusions: Information from Accounting was acted upon and resolutions were prepared and delivered to the BOT for official approval. Resolutions are produced by Advancement Services in a timely manner.

M 11: Reconcile to Advancement Services calendar of deliverables
Reconciliation to Advancement Services calendar of deliverables
Source of Evidence: Administrative measure - other

Target: No target established.

Finding (2013-2014) - Target: Met
Summary of Results: All BOT deadlines were adhered to in accordance with established schedule.

Interpretations and Conclusions: Resolutions are being delivered in a regular, consistent fashion to the UA BOT for formal approval. Deadlines are adhered to. Rush resolution jobs are accomplished when and where needed by the UA VP for Advancement or the President.

OthOtcm 5: Identify qualified major gift prospects
Research and identify qualified major gift prospects equipped to support fundraising efforts of the University

Connected Document
Advancement Service Timetable

Related Measures

M 12: Monthly evaluation of total research output via transaction log
Monthly evaluation of total research output via transaction log.
Source of Evidence: Evaluations

Target: No target established.

Finding (2013-2014) - Target: Met
Summary of Results: Prospect research is identifying and distributing a large number of potential major gift prospects and responding to reactive requests from fundraisers as well.

Interpretations and Conclusions: Number of prospects identified by research is above an acceptable level and tools and resources at their disposal are being used as intended. Data is being given to the fundraisers and added to the main fundraising system.

M 14: Quarterly development officer meetings
Attend periodic development officer meetings and share prospects that have been identified via research.
Source of Evidence: Discussions / Coffee Talk

Target: No target established.

Finding (2013-2014) - Target: Met
Summary of Results: Prospects are being identified and information provided to fundraisers.

Interpretations and Conclusions: Research is actively identifying major gift prospects and delivering information on them to fundraisers via electronic communication or attendance at meetings.

OthOtcm 6: Gift and fundraising reports
Provide detailed reports of gifts and fundraising results to internal and external audiences as well as advancement related reporting agencies.

Connected Document
Advancement Service Timetable

Related Measures

M 15: Reconcile to calendar of deliverables
Reconciliation to Advancement Services schedule of deliverables.
Source of Evidence: Administrative measure - other

Target: No target established.

Finding (2013-2014) - Target: Met
Summary of Results: Fundraising reports are being prepared in a timely fashion after the month's close and distributed to appropriate personnel. The reports are accurate and the vetting process is sound. The appropriate reports are also being prepared for outside agencies.

Interpretations and Conclusions: Execution in this area is sound and the campus community is quickly informed regarding fundraising performance. Ad hoc analysis is provided throughout the year when requested and certain areas are reviewed more closely.

M 16: Advancement daily and monthly reconciliation
Advancement daily and monthly reconciliation of gifts.
Source of Evidence: Evaluations

Target: No target established.
**Finding (2013-2014) - Target: Met**

Summary of Results: Reconciliations continue to be sound and accounting principles adhered to.

Interpretations and Conclusions: Reconciliations provide abundant time for educating the gift accounting staff regarding challenging gift accounting issues.

Details of Action Plans for This Cycle (by Established cycle, then alpha)

**Endowed Fund Awards Tracking**

When evaluation outcome 3, measurement 7, we discovered unspent funds and a need for a more efficient tracking process. In conjunction with Financial Accounting, design and implement process for creating a real-time notification system that will notify Stewardship of endowed funds that have not been awarded. The goal for this process should be to identify funds not awarded as early as possible and then take necessary action to address these funds with each college so they may be awarded and stewarded accordingly.

- **Established in Cycle:** 2011-2012
- **Implementation Status:** Finished
- **Priority:** High
- **Implementation Description:** Implement in conjunction with Financial Accounting.
- **Projected Completion Date:** 11/2012
- **Responsible Person/Group:** Kevin S. Nunnally/Tru Livaudais

**Add Law to Advancement Services umbrella of support**

Begin writing all gift agreements for the Law School Foundation as well as incorporate them in the stewardship process for major gift stewardship reports. Initial meetings have taken place and plan is in motion. Law School has--until now--drafted their own agreements. We will take over that responsibility as well as create meaningful major gift stewardship reports for significant Law School donors.

- **Established in Cycle:** 2012-2013
- **Implementation Status:** In-Progress
- **Priority:** High
- **Implementation Description:** Advancement Services will draft all Law School gift agreements as well as incorporate them in our stewardship report process.
- **Projected Completion Date:** 07/2014
- **Responsible Person/Group:** Kevin S. Nunnally/Tru Livaudais
- **Additional Resources:** Additional cost to Advancement in extra stewardship reports.
Mission / Purpose
The Office of Advancement Services' mission is to provide information, infrastructure, and services to support University Advancement activities in the area of development and constituent relations. The department provides comprehensive services of private gift accounting, information services, research, donor relations, and stewardship to support fundraising efforts of the Office of University Advancement. As a team, we ensure that Advancement documents and processes are in compliance with the policies and procedures of The Board of Trustees of The University of Alabama; IRS regulations; federal, state, and local laws; and Council for Advancement and Support of Education (CASE) standards. Our staff is dedicated to providing information in a timely, efficient, and ethical manner while maintaining a high level of accuracy, confidentiality, and security to meet the diverse needs of University donors, faculty, staff and reporting agencies.

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

OthOtcm 1: Gift commitments, acknowledgments, personalized letters
Record all gift commitments within one working day of receipt, mail gift acknowledgment receipts to donors within three working days of recording gift, and prepare personalized letters of acknowledgment to donors whose gift exceeds $5k from the president within five working days of recording gifts.

Related Measures
M 1: Verify daily gift activity via restriction reports, batch logs and reporting environment
Verify daily gift activity via restriction reports, batch logs and reporting environment to determine if all gifts received were posted and receipted within three working days, and acknowledgment letters were prepared for signature within five days of recording gifts.

Source of Evidence: Administrative measure - other
Target: No target established.
Finding (2012-2013) - Target: Met
Summary of Results: Gifts were entered, receipted and thanked in a timely fashion.

Interpretations and Conclusions: Gifts were monitored and reconciled as part of Gift Accounting's standing procedures of reconciliation. Gift Accounting follows all applicable IRS, CASE and UA BOT guidelines for private giving. Gift activity increased at UA both in the number of donors and transactions. As a result, it was imperative that Advancement Services add an additional staff member to assist with the increased volume. This was accomplished during the year.

M 18: Monthly Gift Summary Reports and Reconciliation
Gift Summary reports are produced by Gift Accounting each month that encapsulate the month's gift activity. These reports are reconciled and reviewed before distribution to ensure proper accounting and allocation. A report of $5k and above gifts is included in the reporting and these receive letters from the President.

Source of Evidence: Administrative measure - other
Target: Review monthly gift summary reports to ensure reconciliation and proper allocation.
Finding (2012-2013) - Target: Met
Summary of Results: Gifts were monitored and reconciled as part of Gift Accounting's standing procedures of reconciliation. Gift Accounting follows all applicable IRS, CASE and UA BOT guidelines for private giving.

Interpretations and Conclusions: Gift activity increased at UA both in the number of donors and transactions. As a result, it was imperative that Advancement Services add an additional staff member to assist with the increased volume. This was accomplished during the year.

OthOtcm 2: Maintain and enrich database
Maintain and enrich database that supports University Advancement and related activities by housing current and relevant data on UA alums and constituents.

Related Measures
M 4: Monitor State of the Database report
Monitor State of the Database report on a monthly basis to ensure optimal performance and data quality.

Source of Evidence: Administrative measure - other
Target: No target established.
Finding (2012-2013) - Target: Met
Summary of Results: Database monitoring indicated an acceptable level of good data in the system.
Interpretations and Conclusions: Land line phone numbers continue to decrease. Identified areas where improvement could be made by getting good data in the system in a more efficient fashion. Work is taking place in these areas.

**M 6:** Reconciliation to Advancement Services calendar of deliverables for updates and upgrades
Reconciliation to Advancement Services calendar of deliverables for updates and upgrades.
Source of Evidence: Administrative measure - other

**Target:**
No target established.

**Finding (2012-2013) - Target: Met**
Summary of Results: Updates and improvements to database were implemented as scheduled/planned.

Interpretations and Conclusions: Data--from some areas--needs to be evaluated and processes refined in order to increase efficiency of operations. Work is being done in these areas.

**OthOtcm 3:** Annual stewardship reports
Provide donors and donor representatives' annual stewardship reports on endowments and other major gifts by July each year.

**Connected Document**
Advancement Service Timetable

**Related Measures**

**M 7:** Compare Advancement database
Compare Advancement database with records from Financial Accounting, Student Receivables, and Admissions to ensure completion and inclusion of all funds in need of stewarding.

Source of Evidence: Evaluations

**Target:**
No target established.

**Finding (2012-2013) - Target: Met**
Summary of Results: Reconciliation assured all funds in need of stewarding were entered in the stewardship cycle and stewarded accordingly. Funds in need of attention were brought to the respective college's attention.

Interpretations and Conclusions: Some funds were not spent or underspent. Advancement Services undertook a project to help remedy this issue and began notifying departments across campus if they had scholarship funds that had not been awarded. This process helps and has stirred activity to accomplish the desired objective.

**M 8:** Reconciliation to Advancement Services calendar of deliverables
Reconciliation to Advancement Services calendar of deliverables.

Source of Evidence: Client satisfaction survey (student, faculty)

**Target:**
No target established.

**Finding (2012-2013) - Target: Met**
Summary of Results: Stewardship reports were completely redesigned and updated to provide a more professional looking report.

Interpretations and Conclusions: New, revamped stewardship reports were delivered to major gift donors. They were well received based on donor feedback. Stewardship provided donor's stewardship reports on schedule and ahead of schedule in many cases.

**OthOtcm 4:** Resolutions for endowed funds to President's office
Submit resolutions for endowed funds to President's office for further submission to The Board of Trustees of The University of Alabama.

**Connected Document**
Advancement Service Timetable

**Related Measures**

**M 9:** Reconciliation to Financial Accounting report of funds at endowment level
Reconciliation to Financial Accounting report of funds at endowment level.

Source of Evidence: Administrative measure - other

**Target:**
No target established.

**Finding (2012-2013) - Target: Met**
Summary of Results: Reconciliation assured funds in need of BOT approval were submitted in a timely manner dependent on associated factors that are often out of the control of Advancement Services personnel.

Interpretations and Conclusions: Resolutions continue to be delivered to the BOT in a timely fashion. Deadlines are being adhered to and followed. Advancement Services is employing the report from Financial Accounting in the correct manner and notifying the colleges once they have a fund reach endowment level.

**M 11:** Reconcile to Advancement Services calendar of deliverables
Reconciliation to Advancement Services calendar of deliverables.

Source of Evidence: Administrative measure - other

**Target:**
No target established.
Finding (2012-2013) - Target: Met
Summary of Results: Schedule was adhered to and deadlines were met in accordance with President's office schedule and BOT meeting schedule.
Interpretations and Conclusions: Advancement Services continues to meet all applicable BOT deadlines. Rush jobs are handled with skill and efficiency.

OthOtcm 5: Identify qualified major gift prospects
Research and identify qualified major gift prospects equipped to support fundraising efforts of the University

Related Measures

M 12: Monthly evaluation of total research output via transaction log
Monthly evaluation of total research output via transaction log.
Source of Evidence: Evaluations
Target:
No target established.
Finding (2012-2013) - Target: Met
Summary of Results: Transaction log indicated a large number of prospect research was compiled and distributed to Advancement staff. A large number of new prospects were identified and presented.
Interpretations and Conclusions: Number of prospects identified by research is above an acceptable level and tools and resources at their disposal are being effectively employed. Data is being provided to the fundraisers and added to the fundraising system.

M 14: Quarterly development officer meetings
Attend periodic development officer meetings and share prospects that have been identified via research.
Source of Evidence: Discussions / Coffee Talk
Target:
No target established.
Finding (2012-2013) - Target: Met
Summary of Results: Meetings were attended and major gift prospects presented to development staff. Prospects also assigned via email.
Interpretations and Conclusions: Research is actively identifying major gift prospects and delivering information on them to fundraisers via electronic communication or attendance at meetings.

OthOtcm 6: Gift and fundraising reports
Provide detailed reports of gifts and fundraising results to internal and external audiences as well as advancement related reporting agencies.

Related Measures

M 15: Reconcile to calendar of deliverables
Reconciliation to Advancement Services schedule of deliverables.
Source of Evidence: Administrative measure - other
Target:
No target established.
Finding (2012-2013) - Target: Met
Summary of Results: Deadlines were met in all cases of monthly and special reporting of UA's fundraising activities. Reports were reconciled and presented to administrative and fundraising staff.
Interpretations and Conclusions: Donors and transactions are up and impact Gift Accounting. Addressed via additional staff.

M 16: Advancement daily and monthly reconciliation
Advancement daily and monthly reconciliation of gifts.
Source of Evidence: Evaluations
Target:
No target established.
Finding (2012-2013) - Target: Met
Summary of Results: Reconciliation indicated accurate and timely performance from Gift Accounting. Transactions continue to increase and Gift Accounting is managing to stay abreast of the increase.
Interpretations and Conclusions: Gift reconciliation is sound. New staff member was added to Gift Accounting to assist with the volume of transactions.

M 17: Annual survey
Annual customer service survey
Source of Evidence: Service Quality
Target:
No target established.
Finding (2012-2013) - Target: Met
Summary of Results: Survey was discontinued. After two straight years of completing, response rate was poor.
among audience.
Interpretations and Conclusions: Survey needed to be discontinued.

**Details of Action Plans for This Cycle (by Established cycle, then alpha)**

<table>
<thead>
<tr>
<th>Endowed Fund Awards Tracking</th>
</tr>
</thead>
<tbody>
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<tr>
<td>Priority: High</td>
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<tr>
<td>Implementation Description: Implement in conjunction with Financial Accounting.</td>
</tr>
<tr>
<td>Projected Completion Date: 11/2012</td>
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<td>Responsible Person/Group: Kevin S. Nunnally/Tru Livaudais</td>
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Other Outcomes, with Any Associations and Related Measures, Targets, Findings, and Action Plans

OthOtcn 1: Gift commitments, acknowledgments, personalized letters
Record all gift commitments within one working day of receipt, mail gift acknowledgment receipts to donors within three working days of recording gift, and prepare personalized letters of acknowledgment to donors whose gift exceeds $5k from the president within five working days of recording gifts.
Connected Document
Advancement Service Timetable

Related Measures

M 1: Verify daily gift activity via restriction reports, batch logs and reporting environment
Verify daily gift activity via restriction reports, batch logs and reporting environment to determine if all gifts received were posted and receipted within three working days, and acknowledgment letters were prepared for signature within five days of recording gifts.
Source of Evidence: Administrative measure - other
Target:
No target established.
Finding (2011-2012) - Target: Met
Gifts were entered, receipted and thanked in a timely fashion.

M 2: Annual customer service survey and donor feedback
Annual customer service survey and donor feedback.
Source of Evidence: Service Quality
Target:
No target established.
Finding (2011-2012) - Target: Met
Survey and donor feedback indicated gifts were received, receipted and thanked in accordance with established goals.

M 3: Departmental monthly report that tracks gift accounting output and acknowledge letters
Departmental monthly report that tracks gift accounting output and acknowledge letters
Source of Evidence: Administrative measure - other
Target:
No target established.
Finding (2011-2012) - Target: Met
Statistics revealed the largest number of gift transactions in the history of Advancement and these were processed and stewarded accordingly.

OthOtcn 2: Maintain and enrich database
Maintain and enrich database that supports University Advancement and related activities by housing current and relevant data on UA alums and constituents.
Connected Document
Advancement Service Timetable

Related Measures

M 4: Monitor State of the Database report
Monitor State of the Database report on a monthly basis to ensure optimal performance and data quality.
Source of Evidence: Administrative measure - other
Target:
No target established.
Finding (2011-2012) - Target: Met
Database monitoring indicated an acceptable level of good data in the system.

M 5: Annual customer service survey
Annual customer service survey.
Source of Evidence: Client satisfaction survey (student, faculty)

Target:
No target established.

Finding (2011-2012) - Target: Met
Feedback and survey indicated acceptable level of quality data in fundraising system.

M 6: Reconciliation to Advancement Services calendar of deliverables for updates and upgrades
Reconciliation to Advancement Services calendar of deliverables for updates and upgrades.
Source of Evidence: Administrative measure - other

Target:
No target established.

Finding (2011-2012) - Target: Met
Updates and improvements to database were implemented as scheduled/planned.

OthOtcm 3: Annual stewardship reports
Provide donors and donor representatives' annual stewardship reports on endowments and other major gifts by July each year.

Connected Document
Advancement Service Timetable

Related Measures

M 7: Compare Advancement database
Compare Advancement database with records from Financial Accounting, Student Receivables, and Admissions to ensure completion and inclusion of all funds in need of stewarding.
Source of Evidence: Evaluations

Target:
No target established.

Finding (2011-2012) - Target: Met
Reconciliation assured all funds in need of stewarding were entered in the stewardship cycle and stewarded accordingly.

M 8: Reconciliation to Advancement Services calendar of deliverables
Reconciliation to Advancement Services calendar of deliverables.
Source of Evidence: Client satisfaction survey (student, faculty)

Target:
No target established.

Finding (2011-2012) - Target: Met
Stewardship provided donor’s stewardship reports on schedule and ahead of schedule in many cases.

OthOtcm 4: Resolutions for endowed funds to President's office
Submit resolutions for endowed funds to President's office for further submission to The Board of Trustees of The University of Alabama.

Connected Document
Advancement Service Timetable

Related Measures

M 9: Reconciliation to Financial Accounting report of funds at endowment level
Reconciliation to Financial Accounting report of funds at endowment level.
Source of Evidence: Administrative measure - other

Target:
No target established.

Finding (2011-2012) - Target: Met
Reconciliation assured funds in need of BOT approval were submitted in a timely manner dependant on associated factors that are often out of the control of Advancement Services personnel.

M 10: Customer service survey
Annual customer service survey.
Source of Evidence: Service Quality

Target:
No target established.

Finding (2011-2012) - Target: Met
Response from clientele served and donors indicated acceptable performance.

M 11: Reconcile to Advancement Services calendar of deliverables
Reconciliation to Advancement Services calendar of deliverables.
Source of Evidence: Administrative measure - other

Target:
No target established.

Finding (2011-2012) - Target: Met
Schedule was adhered to and deadlines were met in accordance with President's office schedule and BOT meeting schedule.

OthOtcm 5: Identify qualified major gift prospects
Research and identify qualified major gift prospects equipped to support fundraising efforts of the University.
Related Measures

M 12: Monthly evaluation of total research output via transaction log
Monthly evaluation of total research output via transaction log.
Source of Evidence: Evaluations
Target: No target established.
Finding (2011-2012) - Target: Met
Transaction log indicated a large number of prospect research was compiled and distributed to Advancement staff.

M 13: Service survey
Annual customer service survey.
Source of Evidence: Service Quality
Target: No target established.
Finding (2011-2012) - Target: Met
Response was positive to leads generated by prospect research.

M 14: Quarterly development officer meetings
Attend periodic development officer meetings and share prospects that have been identified via research.
Source of Evidence: Discussions / Coffee Talk
Target: No target established.
Finding (2011-2012) - Target: Met
Meetings were attended and major gift prospects presented to development staff.

OthOtcm 6: Gift and fundraising reports
Provide detailed reports of gifts and fundraising results to internal and external audiences as well as advancement related reporting agencies.

Related Measures

M 15: Reconcile to calendar of deliverables
Reconciliation to Advancement Services schedule of deliverables.
Source of Evidence: Administrative measure - other
Target: No target established.
Finding (2011-2012) - Target: Met
Deadlines were met in all cases of monthly and special reporting of UA's fundraising activities.

M 16: Advancement daily and monthly reconciliation
Advancement daily and monthly reconciliation of gifts.
Source of Evidence: Evaluations
Target: No target established.
Finding (2011-2012) - Target: Met
Reconciliation indicated accurate and timely performance from Gift Accounting.

M 17: Annual survey
Annual customer service survey
Source of Evidence: Service Quality
Target: No target established.
Finding (2011-2012) - Target: Met
Results indicated quality performance.

Details of Action Plans for This Cycle (by Established cycle, then alpha)

Endowed Fund Awards Tracking
When evaluation outcome 3, measurement 7, we discovered unspent funds and a need for a more efficient tracking process. In conjunction with Financial Accounting, design and implement process for creating a real-time notification system that will notify Stewardship of endowed funds that have not been awarded. The goal for this process should be to identify funds not awarded as early as possible and then take necessary action to address these funds with each college so they may be awarded and stewarded accordingly.
Established in Cycle: 2011-2012
Implementation Status: Planned
Priority: High
Implementation Description: Implement in conjunction with Financial Accounting.
Projected Completion Date: 11/2012
## Timetable: What Assessment Measures will be Administered When for Each Expected Outcome

<table>
<thead>
<tr>
<th>Month</th>
<th>Outcome #1 Gift Accounting</th>
<th>Outcome #2 Database/IT</th>
<th>Outcome #3 Stewardship</th>
<th>Outcome #4 Resolutions</th>
<th>Outcome #5 Research</th>
<th>Outcome #6 Fundraising Reporting</th>
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