Pathway Goal: Community Partnerships

Action Item #                                      Report:
3-1 (a)                                        ☒ Year-End for FY2017 (reported July 2017)

Action Item Description:
Ask the community to network and advocate on UNLV’s behalf for development purposes. This report will focus on the identification of accurate information on UNLV contact in Raiser’s Edge.

Submitted By:

Name                Department
Tiffany Vickers        UNLV Foundation

Working Group Members:

Name                Department
Chad Warren          Division of Philanthropy and Alumni Engagement

Provide a written overview of the process to obtain these data.

Identification of accurate information on UNLV contacts in Raiser’s Edge, tracked by UNLV Foundation, reported annually.
Enter your data below (or reference any attachments you are including with data).

### FY17-5 YEAR Historical $ Raised and Donors

<table>
<thead>
<tr>
<th></th>
<th>[1]</th>
<th>[2]</th>
<th>[3]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total $$ Raised</td>
<td>Total Donors</td>
<td>Total Solicitable Donors</td>
<td>Engaged Constituents</td>
</tr>
<tr>
<td>FY17</td>
<td>$93,027,019</td>
<td>10,103</td>
<td>173,423</td>
</tr>
<tr>
<td>FY16</td>
<td>$75,332,433</td>
<td>9,862</td>
<td></td>
</tr>
<tr>
<td>FY15</td>
<td>$74,885,671</td>
<td>10,976</td>
<td></td>
</tr>
<tr>
<td>FY14</td>
<td>$61,479,367</td>
<td>10,600</td>
<td></td>
</tr>
<tr>
<td>FY13</td>
<td>$37,100,000</td>
<td>10,458</td>
<td></td>
</tr>
</tbody>
</table>

- **[1]** Total donors who gave in the fiscal year, includes those marked 'do not contact'
- **[2]** Total donors in the Raiser's Edge database as of 6/30 that are solicitalbe (not lost, deceased or marked 'do not contact')
- **[3]** Donors who gave + Event Attendees + Attendees to Boards/Advisory Meetings+Meetings w/Development Officers

Community Engagement Goal 3-1 (a) Tracking Sheet-attached

Data Collection Note Sheet – elaborates on reports and data collection efforts
Top Tier Data Collection

*Use of NetCommunity to update information - elaborate how the data collection process works (i.e. event registrations, etc. and how the data flows back to RE)

Donation pages or event registrations are created in NetCommunity. Constituents donate or register for events. NetCommunity has a live link with the Raiser’s Edges. When there is activity on line in NetCommunity a transaction is created and pushed to the NetCommunity plug-in in the Raiser’s Edge where the transactions are matched, reviewed and downloaded in the database.

*NCOA (4 times per year)
We have a subscription through our database vendor Blackbaud for this service. The Raiser’s Edge database had built in functionality to submit the data and once returned to automatically update the addresses.

*Blackbaud - Postal Cass Certification of Addresses –
We have a subscription through our database vendor Blackbaud for this service. The function is built into The Raiser’s Edge database. When an address is being entered manually it can be CASS certified at the time it is being entered. Conversely if we are importing many records at one time, we can globally certify and correct after the import process.

*Use of Hepdata and other vendors to append data 2x a year. Lost Search, Deceased Search, Address Validation, Phone (Home, Cell, Business) Search, Email Search, Social Media Links Search.
Data is exported from the Raisers Edge database and provided to the vendor. Once the vendor returns the data, records are updated in the live database based on the above services provided.

*Prospect Research Contact Verification and Wealth Screenings 10,000 - 15,000 annually
ResearchPoint is the primary application used for this process. It has a direct link to the Raiser’s Edge database. We have the ability to batch screen up to 10,000 records and we have unlimited one off screenings available. Once a record is screened, it is synced back to the Raiser’s Edge with the predetermined fields being updated.

*Ruffalo Noel Levitz Research (Phones)
Ruffalo Noel Levitz also does two phone appends each year. We provided initial upload of data and regular updates to RNL. They update the RNL database Campus Call with new phones. Once phones are verified they are passed back to import for update of Raiser’s Edge.

*Phonathon updates.
Once a constituent is phoned the data is verified or marked as a bad phone number. The data is sent back to us, we format and import the data to update of Raiser’s Edge.

*Gift Processing, Gift Documentation-
When a physical check is received, Records staff update relevant bio information from check and any backup information that comes with the gift. We also update records when provided by Development Officer or campus unit staff.

*From Class Note
Alumni fill out a class notes form. The form is forwarded to our Prospect Research team where the data is verified and Raiser’s Edge relevant bio information is updated and a class noted is recorded in the constituent record.
FY17 Total Solicitable Constituents- Total donors in the Raiser's Edge database as of 6/30 that are solicitable (not lost, deceased or marked 'do not contact')

<table>
<thead>
<tr>
<th>Constituency code</th>
<th>Number of constituents</th>
<th>Percent of total constituents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ahmnn</td>
<td>112,969</td>
<td>85.14%</td>
</tr>
<tr>
<td>Board of Trustees</td>
<td>43</td>
<td>0.25%</td>
</tr>
<tr>
<td>Benefactor Gold Society</td>
<td>3</td>
<td>0.00%</td>
</tr>
<tr>
<td>Benefactor Silver Society</td>
<td>24</td>
<td>0.18%</td>
</tr>
<tr>
<td>Benefactor Society</td>
<td>264</td>
<td>2.01%</td>
</tr>
<tr>
<td>Corporation</td>
<td>9,468</td>
<td>7.24%</td>
</tr>
<tr>
<td>Current Parent</td>
<td>5,808</td>
<td>4.35%</td>
</tr>
<tr>
<td>Estate/Trust</td>
<td>67</td>
<td>0.49%</td>
</tr>
<tr>
<td>Estate/Trust Family</td>
<td>10</td>
<td>0.08%</td>
</tr>
<tr>
<td>Friend</td>
<td>30,263</td>
<td>22.42%</td>
</tr>
<tr>
<td>Former Trustee</td>
<td>22</td>
<td>0.16%</td>
</tr>
<tr>
<td>Former UNLV Staff</td>
<td>494</td>
<td>3.76%</td>
</tr>
<tr>
<td>Foundation - Other</td>
<td>326</td>
<td>2.45%</td>
</tr>
<tr>
<td>Foundation-Corporate</td>
<td>58</td>
<td>0.44%</td>
</tr>
<tr>
<td>Foundation-Family</td>
<td>83</td>
<td>0.64%</td>
</tr>
<tr>
<td>Government</td>
<td>34</td>
<td>0.26%</td>
</tr>
<tr>
<td>Heritage Circle</td>
<td>8</td>
<td>0.06%</td>
</tr>
<tr>
<td>Honor/Memorial</td>
<td>2</td>
<td>0.01%</td>
</tr>
<tr>
<td>Honor/Memorial Acknowledged</td>
<td>98</td>
<td>0.74%</td>
</tr>
<tr>
<td>Matching Gift Co.</td>
<td>2</td>
<td>0.02%</td>
</tr>
<tr>
<td>Other/Service Org.</td>
<td>692</td>
<td>0.51%</td>
</tr>
<tr>
<td>Palladium Society</td>
<td>10</td>
<td>0.07%</td>
</tr>
<tr>
<td>Past Parent</td>
<td>4,904</td>
<td>3.71%</td>
</tr>
<tr>
<td>Prospect</td>
<td>4,940</td>
<td>3.73%</td>
</tr>
<tr>
<td>Reagent</td>
<td>6</td>
<td>0.05%</td>
</tr>
<tr>
<td>Trustee Emeritus</td>
<td>12</td>
<td>0.09%</td>
</tr>
<tr>
<td>UNLV Foundation Advisory Board</td>
<td>28</td>
<td>0.21%</td>
</tr>
<tr>
<td>UNLV Faculty/Staff</td>
<td>2,716</td>
<td>2.02%</td>
</tr>
<tr>
<td></td>
<td>173,423</td>
<td></td>
</tr>
</tbody>
</table>

FY17 Engaged Constituents- Donors who gave + Event Attendees + Attendees to Boards/Advisory Meetings + Meetings w/Development Officers
### Top Tier Initiative
#### Action Item Report

**Constituency code** | **Number of constituents** | **Percent of total constituents**
--- | --- | ---
7/28/2017 |  | 
**Total** | 16,341 |  

#### Engaged Constituents

- **Alumni**: 8,426 (51.57%)
- **Board of Trustees**: 44 (0.27%)
- **Benefactor Gold Society**: 2 (0.01%)
- **Benefactor Silver Society**: 18 (0.11%)
- **Benefactor Society**: 192 (1.18%)
- **Corporation**: 1,044 (0.39%)
- **Current Parent**: 325 (1.99%)
- **Dean**: 1 (0.01%)
- **Estate/Trust**: 8 (0.05%)
- **Estate/Trust-Family**: 37 (0.23%)
- **Friend**: 4,860 (29.79%)
- **Former Trustee**: 18 (0.11%)
- **Former UNLV Staff**: 133 (0.81%)
- **Foundation - Other**: 45 (0.28%)
- **Foundation-Corporate**: 38 (0.23%)
- **Foundation-Family**: 34 (0.21%)
- **Government**: 5 (0.03%)
- **Heritage Circle**: 7 (0.04%)
- **Honors/Memorial Acknowledged**: 8 (0.05%)
- **Matching Gift Co.**: 3 (0.02%)
- **Other/Service Orgs.**: 123 (0.75%)
- **Palladium Society**: 12 (0.07%)
- **Past Parent**: 85 (0.52%)
- **Prospect**: 316 (1.93%)
- **Regent**: 5 (0.03%)
- **Trustee Emeritus**: 14 (0.09%)
- **UNLV Foundation Advisory Board**: 28 (0.17%)
- **UNLV Faculty/Staff**: 501 (3.07%)
Please review the list below and “X” the appropriate box.

☒ Any reports generated by this working group
   Community Engagement Goal 3-1 (a) Tracking Sheet
☐ No additional reference material

Any additional information you wish to share should be included in the box below.
### Top Tier Sub-Committee Goals

<table>
<thead>
<tr>
<th>FY16 DATA</th>
<th>FY17 DATA</th>
<th>Goals</th>
<th>What are we doing?</th>
<th>What can we be doing to improve?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

#### a. Ask the community to network and advocate on UNLV’s behalf for development purposes

- **What are we doing?**
  - Having good data in the database
- **What can we be doing to improve?**
  - List the ways we update and refresh our data and contacts.
  - See Data Collection Note Sheet for detailed information:
    - *Use of NetCommunity to update information.*
    - *NCAA (4 times per year)*
    - *Blackboard - Foundational Certification of Addresses* (Annual)
    - *Use of NCOA to append data 2 times a year - Lost Search, Dead Search, Address Validation, Phone Search, Cell Phone, Business Search, Email Search, Social Media Links Search.*
    - *Prospect Research Contact Verification and Wealth Screenings: 10,000 - 15,000 annually.*
    - *Buffalo Noel Levine Research (Phones).*
    - *Phonathon updates.*
    - *Gift Processing, Gift Documentation.*
  - *From Class Note*

- **Identification of accurate information on UNLV contacts in Raiser’s Edge, tracked by UNLV Foundation, reported annually.**
  - N/A
- **Number of constituents involved in UNLV engagement activities, tracked through Raiser’s Edge, reported annually.**
  - # of constituents involved in UNLV engagement in RE at 6/30/16: 14,265
  - # of constituents involved in UNLV engagement in RE at 6/30/17: 195,665
  - Total Constituents = 16,341 Donors + Event Attendees + Boards/Advisory Bd + Meetings w/DOs
  - Define “UNLV engagement activities” so it can be tracked in RE.
  - Develop strategies for use of net communities by campus.
  - Use of DOs to market the tool.
  - Present to campus communicators.
  - Word of mouth
  - Feedback from DOs:
    - They need a refresher on capabilities and functionality.
    - They would like presentation to campus communicators again, as they have changed.
    - Campus policy to encourage/drive participation with NetCommunity or share information if they don’t.
    - Determine a method for capturing athletic activity as well as other campus events that don’t use NetComm.

- **Invite philanthropy (funds, in-kind services, etc.)**
  - **Amount of funding raised, tracked by UNLV Foundation, reported annually.**
    - # of constituents involved in RE at 6/30/16: 10,585
    - # of constituents involved in RE at 6/30/17: 10,103
    - Total number of donors, tracked by the UNLV Foundation, reported annually:
      - # of constituents in RE at 6/30/16: 10,585
      - # of constituents in RE at 6/30/17: 10,103
  - # of donors in RE at 6/30/16: 10,585
  - # of donors in RE at 6/30/17: 10,103
  - Other questions:
    - What is our response time for lists?
  - **What other methods can we employ to roll this out to campus?**
    - Feedback from DOs:
      - They need a refresher on capabilities and functionality.
      - They would like presentation to campus communicators again, as they have changed.
      - Campus policy to encourage/drive participation with NetCommunity or share information if they don’t.
      - Determine a method for capturing athletic activity as well as other campus events that don’t use NetComm.

  - **What are we doing to improve the data on the reports?**
    - *Making sure that all staff is trained on the importance of consistent data entry; promotes to all staff that enter data in RE, including DOs.*
  - **What ideas do we have for automating the reporting process?**
    - *Utilize Raiser’s Edge SQL Training.*