

BEST PRACTICES, University Advancement

Title: Imaging of Donor Records **#** 38

Source: Baylor University **Co Area:** FAU Foundation

Addl Info: http://www.sacubo.org/sacubo_resources/best_practices/2003.html

Abstract: Baylor University has implemented the scanning of paper donor records and indexing of those scanned images to data records in the University's alumni/development enterprise database. This process has been integrated into the daily work of the Gift Accounting and University Development offices and provides Web-based access to these images to appropriate staff located at the main campus as well as development officers traveling across the country. Queries within the imaging system provide for retrieval of images by constituent name or ID, gift/pledge designation account number, gift date, and document type. This new application has made critical information immediately available to multiple University staff without searching for or tracking physical folders, and, for the first time, has given access to this data to fund raisers working off campus.

The primary system software involved is Nolij Web from Nolij Corporation and the SCT Banner Alumni/Development System. Data is stored in an Oracle database on an IBM RS/6000 and images are stored on a Dell NT server.

Title: How to Reach the New Donors **#** 256

Source: Chronicle of Higher Education **Co Area:**

Addl Info: <http://chronicle.com/weekly/v47/i43/43b01301.htm>

Abstract: There are at least two compelling reasons why we in higher education should review our fund-raising methods in the wake of the high-tech boom. One is that aggressive and substantial donors from the high-tech sector are still with us and are likely to remain so, even as the shakeout eliminates some of the less viable dot-com enterprises. The second reason is that many, if not most, of the new high-tech donors are also baby boomers.

Certainly part of what we learned as fund raisers during the boom was gratifying rather than earthshaking: Many of our best practices were indeed important. But, sometimes to our own chagrin, we also were reminded of the need to remain true to the basics: conduct thorough research on prospects; ensure that, despite a desire for speed, both donor and institution can deliver on promises; and seek gifts that are aligned with the institution's mission.

But other aspects of the new donor challenge us to think differently about how our colleges and universities raise money. New approaches will become more important as institutions anticipate a growing reliance on private support in the face of increased competition for private funds and a continuing decline in public financing.

The article discusses how the traditional donor differs from the new donor

Contact Dianne Parkerson if User ID/Password is needed to access article

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Title: Faculty Staff Fund Drive (100% Participation) # 307

Source: Clayton College & State University **Co Area:** FAU Foundation

Addl Info: [Taken Off Line - Contact Institution](#)

Abstract: The faculty/staff fund drive serves as the kickoff for the entire Clayton State Foundation Annual Campaign. The success of the fund drive is inspiring to trustees, donors and potential donors. 2004 culminated with a 100% participation rate from approximately 410 full time faculty and staff members.

The above website outlines their program

Old URL - <http://www.usg.edu/bestpractices/current/index.phtml?inst=ccsu&time=2004.05.19.142856&area=advancemt&year=2004>

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Title: Ethical Standards

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Source: Council for Advancement and Support of Education

Co Area:

Addl Info: <http://www.case.org/Content/AboutCASE/Display.cfm?contentItemID=5520>

Abstract: Headquartered in Washington, DC, with an office in London, the Council for Advancement and Support of Education is the professional organization for advancement professionals at all levels who work in alumni relations, communications, and development.

Ethical Standards and Principles Developed or Endorsed By CASE - the following are links -

General

- * CASE Statement of Ethics
- * Independent Sector Statement of Values and Code of Ethics for Nonprofit and Philanthropic Organizations PDF Icon (PDF)

Alumni Relations

- * CASE Principles of Practice for Alumni Relations Professionals at Educational Institutions

Communications and Marketing

- * CASE Principles of Practice for Communications and Marketing Professionals at Educational Institutions
- * CASE Principles of Practice for University and College Periodicals Editors

Fund Raising

- * CASE Principles of Practice for Fund-Raising Professionals at Educational Institutions
- * CASE Donor Bill of Rights
- * CASE Statement on Commission-based Compensation
- * ePhilanthropy Code of Online Philanthropic Practices

Other CASE Tools to Assist Advancement Professionals

- * CASE Management Checklist for Development
- * CASE Management Checklist for Institutionally Related Foundations
- * CASE Management and Reporting Standards

Also see Ethical Standards entries for the advancement disciplines under the CASE Index:

- * Alumni Relations
- * Development
- * Communications & Marketing
- * Advancement Services
- * Advancement Management

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Title: SUNY Best Practices Search Facility

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Source: State University of New York

Co Area: Development / Publications

Addl Info: <http://www.suny.edu/BestPractices/Best.Practices.2004.01.27.pdf>

Abstract: As part of the Task Force on Efficiency and Effectiveness, campus presidents were asked to provide initiative they believe they carry out better than any other campus, along with those innovative ideas that have saved or avoided spending resources. The "Best Practices" reported in this document have resulted in significant savings throughout SUNY and, when shared with other campuses, have the potential to realize even greater savings within the system.

Page 34 of the above PDF Document

DEVELOPMENT

Web Donation

In-house Graphic Design and Printing

Automated Donor Mailing

Page48 of the above PDF Document

PUBLICATIONS

Electronic Annual Report

Online Daily Newspaper

Out-sourcing Media Buying

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Title: Improving Methods for Continuous Improvement # 522
Source: University of West Georgia **Co Area:**
Add Info: http://www.sacubo.org/sacubo_resources/best_practices/2006.html
Abstract: introduced Business Process Redesign (BPR) in August 2000. Having already identified seventy-five business processes and redesigning nine, we continue to prioritize and promote the remaining processes within our division by incorporating it into our annual goals and objectives, promoting cross-functional committees, and conducting monthly staff reviews.

BPR is divided into three distinct phases:

Phase I: Discover – Build sponsorship, lay the foundation for change, identify and prioritize opportunities to improve the institution's administrative process radically, and create the business case for change.

Phase II. Redesign – Analyze the selected processes in detail, identify technological solutions to enable change, innovate, redesign, and develop implementation plans.

Phase III. Realize – Finalize implementation plans, and then implement the redesigned process, including changes in policies, organization, work procedures, staff assignments, training, and technology.

Retrospect

The success of this effort is attributed to two key proponents – leadership support and the willingness of the organization to change. With decreased state funding including salary freezes, attitudes in the workforce can become stagnate and the willingness to try something new gets defeated before it's ever introduced. To be effective, leadership must initiate and support this effort, and it must be able to inspire and make the organization believe that change is pivotal for future success.

Title: Code of Ethics and Standards of Professional Conduct for College and University Business Officers # 551
Source: Illinois Institute of Technology **Co Area:**
Add Info: <http://ethics.iit.edu/codes/coe/nat.assoc.college.university.business.officers.html>
Abstract: In keeping with the purpose stated in Section 1, Article I I I, of the bylaws of the National Association of College and University Business Officers, "to develop and maintain interest on a nationwide basis in continuous improvement of principles and practices of business and financial administration in higher education, and to foster and maintain educational business and financial administration as a profession with professional ideals and standards," the association endorses the following statements of ethics and standards of professional conduct for college and university business and financial officers.

The above originates from NACUBO, the site they have on line from 1993 is
<http://www.nacubo.org/documents/about/NACUBOCODEofEthics.pdf>

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Title: 50 Smart Business Improvements for 2003 # 557

Source: University Business - Mag for College & Univ Admin

Co Area:

Addl Info: <http://www.universitybusiness.com/page.cfm?p=161>

Abstract: Ever wonder what your fellow college and university administrators around the country consider their most urgent business improvement for the coming year? We did, so we asked them to tell us precisely which planned or instituted initiatives they believe will pay outstanding dividends in 2003. Their responses run the gamut from practical, human resource solutions, to the realms of high technology. Perhaps one school's solution will spark an idea for improvement at your own. Read on and find out!

Title: Proactive Media Relations Handbook # 639

Source: Mohawk College

Co Area:

Addl Info: http://www.mohawkcollege.ca/_shared/assets/Media_Relations_Guide1818.pdf

Abstract: The media relations guide you're about to read also offers best practice strategies and advice for working with the media. This is a guide for the staff.

Title: Policies & Procedures # 657

Source: San Francisco State University

Co Area:

Addl Info: http://www.sfsu.edu/~ppg/alpha_index.htm

Abstract: Lengthy list of the University's Policy & Procedures

Title: A Better Method for Analyzing the Costs and Benefits of Fundraising at Universities # 688

Source: Nonprofit Management and Leadership

Co Area:

Addl Info: <http://www3.interscience.wiley.com/cgi-bin/fulltext/104546654/PDFSTART>

Abstract: This article develops a new methodology for a more comprehensive and useful analysis of the costs and benefits of fundraising, as well as the total costs and net benefits associated with development efforts in general. This approach does a better job of linking the timing of return of fundraising efforts and measuring the actual return on investments in fundraising (as opposed to the reported return) than the widely used guidelines from the Council for Advancement and Support of Education and the National Association of College and University Business Officers (CASE/NACUBO) (1990). The implications are a better methodology for practitioners that they can use to enhance internal decision making and a better methodology for boards to use in evaluating performance and accountability. Recently, other large, public universities have begun using several of these concepts in the assessment of their development offices

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Title: Showcase: Sharing Our Best Practices, 2006 # 692

Source: University of Wisconsin - Madison **Co Area:**

Addl Info: <http://www.oqi.wisc.edu/showcase/CampusBestPractices/tabid/109/Default.aspx>

Abstract: The annual UW-Madison Showcase is for those on campus who have a desire to SHARE best practices and LEARN from each other in order to IMPROVE work processes, learning environments, and the campus climate in both academic and administrative areas. The Showcase logo (Share, Learn, Improve) was created in 2005 and illustrates the connectivity that serves as the foundation for Showcase. The first Showcase was in 2000 and has become an annual campus tradition.

View the 2006 winners - <http://www.oqi.wisc.edu/showcase/CampusBestPractices/2006BestPractices/tabid/127/Default.aspx>

Title: 10 Best Practices for Netting and Keeping Donors # 777

Source: Fund Raising Success Magazine **Co Area:**

Addl Info: <http://www.fundraisingsuccessmag.com/story/story.bsp?sid=50054&var=story&publication=FundRaising%20Success>

Abstract: Attracting new donors is harder than keeping the ones you've got. But keeping the donors you have is easier said than done. Site covers 10 best practices starting with -
1. Be accountable - Accountability builds trust with donors. Be forthcoming in financial audits and make sure that you use the money you raise for the purposes you outline in your solicitations, and communicate this to your donors. "Once a donor is lost due to a lack of trust, rarely do they return," Burton said. "Being accountable for the funds you raise will keep your organizational integrity intact and your donors contributing to your cause."

The site also has an Education/Schools category.

<http://www.fundraisingsuccessmag.com/search/category/category.bsp?linkdata=Education/Schools&linkvar=category>

http://www.fundraisingsuccessmag.com/story/story.bsp?sid=50054&var=story&publication=FundRaising%20Success&publicationDate=3/27/07&slug=Advisor3%2F27%2F07_Strategy+Session&category=None§ion=Unknown&swd=best%20practice

<http://www.fundraisingsuccessmag.com/story/sstory.bsp?SMContentIndex=2&SMContentSet=0>

<http://www.fundraisingsuccessmag.com/story/sstory.bsp?SMContentIndex=11&SMContentSet=0>

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Title: Branding Best Practices and Pitfalls to Avoid # 836

Source: Fund Raising Success Magazine **Co Area:**

Addl Info: <http://www.fundraisingsuccessmag.com/story/story.bsp?sid=69560&var=story&publication=FundRaising%20Success>

Abstract: Most nonprofits understand the necessity of having a strong brand. It's knowing how to create a strong brand that's the hard part. Quite a few sessions at the Bridge Conference in Washington, D.C. last week focused on the topic of branding and proved that a little guidance can go a long way.

In her session, "Brand and Loyalty Marketing: A Creative Approach," Catherine M. Shaw, president of branding agency Mediastudio, reviewed the following three branding best practices that organizations can put to use to create a more effective branding strategy.

Title: 10 Best Practices to Increase Email Response Rates for Fundraising # 862

Source: FastTrack Fundraising Corp **Co Area:**

Addl Info: <http://www.fasttrackfundraising.com/fundraisers/fundraising-tips/10-best-practices-to-increase-email-response-rates-for-fundraising/>

Abstract: We asked an expert for his top 10 tips on the nuances of email marketing for nonprofits and ways to increase conversion rates. One simple change he made lifted response 66%. Nonprofit organizations have different relationships with their members than businesses do with their customers. Those differences need to carry over into their email programs. "Part of the whole overall fundraising program is realizing that your newsletter that's keeping people aware of your activities is really fundraising. Nobody will consider it that, but it really is the cultivation side of a fundraising program, not just asking for money once a month," says Jeff Herrity, Internet fundraising professional.

When your list is ready for an appeal — or a donation request — Herrity follows a long list of best practices he has developed over the years for clients, including Amnesty International and the American Red Cross.