

## EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	February 12, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Sandy Wheeler, Tami Babbs, Kim Harris, Lori Creek, Cris Ealy, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### Agenda and discussion items

- ☞ Reporting Subcommittee
  - ODS consulting begins on February 13<sup>th</sup>. Team members will be writing reports during the session.
- ☞ Online giving and membership dues payments
  - Libby did not have an update on the status of the cashiering system at this time. She did ask Tami about how ADS interfaces with the A/R system. Scholarship checks are processed through Financial Aid to A/R and then to Finance. It was determined that for ADS processes, we use the cashiering system but do not interface with A/R.
- ☞ Matching gifts and supplemental organizations
  - The subcommittee has met a few times. They are ready to begin drafting procedures documentation for “normal” matching gift scenarios.
  - Procedures still need to be determined for situations when the actual employer of the donor is not known and when a non-person record has a match.
  - There will be separate procedures for each type of matching gift scenario.
- ☞ Procedures documentation
  - Matching Gift Information
    - See above.
  - Premium Gifts
    - Mike provided us with 3 options during a consulting session. The subcommittee has determined option 2 utilizing separate designations for premiums will be our procedures. New designations for premiums need to be created in Banner.
  - Memberships
    - Documentation is being drafted but has not been completed yet.
  - Event Management
    - Documentation has not been drafted yet.
  - 2<sup>nd</sup> draft
    - Tami indicated that she would be working on this with Lori during the PopSel consulting.
- ☞ Combined mailing names and salutations
  - We are ready to move forward with this. Libby stated that a fix is needed for to add prefixes for records previously loaded into Banner prior to our conversion.
- ☞ Timeline and Test 3 conversion
  - The third test load will be after February 26<sup>th</sup>. There may still be time for a fourth load if needed/wanted.
  - David is working on conversion programs for legacy membership data.

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- Prospect management legacy conversion work is still on Libby's desk. Cris is going to review the timeline to make sure all prospect management related items that are completed are checked off on the timeline.
- Libby has updated the status of several items on the timeline and will resend it to everyone.
- Libby received the "OK" for us to clone PROD to PPRD during our go-live conversion.
- ☞ "After the Conversion" checklist
  - Kim began a list and it is stored on the repository.
- ☞ Next consulting session
  - 2/20-22—Population Selection, Letter Generation, Job Submission

### **Decisions Made**

### **Decisions for referral**

### **Tabled/Future discussion Items**

#### **Ongoing Task List, Action Items**

Item Identifier	Item Description	Owner	Target Completion Date	Status

#### **New Action Items**

Item Identifier	Item Description	Owner	Target Completion Date	Status

### **Attachments and/or meeting Handouts listed:**