

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	March 26, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Sandy Wheeler, Lori Creek, Libby Coffey, Cris Ealy, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

- ☞ Matching gifts and supplemental organizations
 - The subcommittee is continuing to work on this.
- ☞ Procedures documentation
 - Matching Gift Information
 - Premium Gifts
 - Memberships
 - Event Management
 - 2nd draft
 - Procedures are still being documented. There is nothing new to report since the last meeting.
- ☞ Timeline and Test 3 conversion
 - David and Cas have completed most of the Test 3 conversion.
 - Duplicate reports are on the repository.
 - Error reports will be posted soon.
 - There are a few items that have not converted yet: emails, memberships, prospect management information.
 - Considerations have been converted as a \$0.01 pledge but a pledge number was not created. IT is looking into this.
 - Libby will verify that we can load to PROD in April as we would like. Should be around the 23rd.
- ☞ Security classes
 - The drafted security classes are ready to be sent to Cathy to set up in TEST for us to test. Jerilyn will send things over to Cathy.
- ☞ Designations
 - Libby reported that during the Finance year-end consulting, the consultant suggested we review the FOPALs we have assigned to our designations. He wasn't sure if they were set up correctly. Sandy indicated that she would check a few of them to see if everything is setup properly.
- ☞ Cashiering
 - We are moving forward with the cashiering system. Storefronts for online giving and online membership dues will need to be rewritten.
- ☞ Next consulting session
 - 3/27-29—Self-Service

Decisions Made

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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: