

## **Optimize the Management of Resources at the University of Kentucky**

Maximize and marshal support of external stakeholders to contribute to the success of the University of Kentucky's Dream and Challenge

### Improvement Opportunities:

- Ability to identify and capture relationship management data from internal and external sources for utilization in increasing participation of external stakeholders in strategic areas of support for the University of Kentucky
- Forecasting numbers and dollars
- Direct general ledger feed from Alumni Membership accounting and Development Gift Receiving Office to Controller's financial reporting system to eliminate shadow data bases
- Access for multiple units to input data and retrieve reports from data
- Ability to track source and fulfillment of requests for volunteers
- Ability to track impact of volunteer efforts by students, faculty, staff, and alumni
- Ability to track effect of participation in student organizations on student measures of success (retention, satisfactory progress toward a degree, on or off campus housing, etc.) and future participation as alumni
- Ability to track parent participation in university
- Ability to measure diversity of campus experience
- Ability to show investments, productivity, and outcomes for programming initiatives

### Performance Measures:

- Budgeted and actual expenditures — total and as percentage of budget, by function and category (Objectives 1.4, 1.5)
- Membership numbers and dollars (compare monthly, quarterly and annually)
- Private giving received by campaign and donor characteristics (Objectives 1.3, 1.4, II.1) (compare monthly, quarterly and annually)
- Outstanding pledges and payment forecasts for private giving (Objectives 1.3 and I.D) alumni membership
- Research Challenge Trust Fund commitments by characteristics (Objectives III.1, III.5, IV.2, IV.4)
- Planned gift commitments and forecasts of future income (Objectives I.3, I.D)
- Percentage of total costs to raise \$1 of gifts and membership dues (Objectives I.4, I.5)
- Percentage of alumni who make a gift
- Percent of change in total dollars raised and the number of donors (Objectives I.3, I.5)
- Survey response analysis of programs
- Anecdotal feedback
- Newspaper clippings and other measures of media contacts (compare monthly, quarterly and annually)
- Web hits and unique visitor traffic (compare monthly, quarterly and annually)
- Relationship management measures (compare monthly, quarterly and annually)

- Volunteer participation of students, faculty, staff, alumni and parents (numbers, hours, economic value of volunteer services provided by type, unit, group and category)
- Number of volunteer agencies and individuals receiving volunteer services compared to number of requests for services
- Parent participation in university-related activities (Parent Weekend, UKAN, etc.), annual giving, alumni affairs, and athletics
- Community participation in university-related activities (Art Museum, WUKY, Children's Miracle Network, Hospital volunteers, etc.)
- International interaction of students, faculty, staff and alumni (American students studying abroad, international students studying at UK, UK faculty as guest faculty, conference presenters, etc. in other countries; international faculty as guest faculty, conference presenters, etc. at UK)

#### Business Questions:

- What is the ROI (return on investment) by program? (anecdotal, survey, numbers, dollars)
- What is the ROR (return on relationship) by program? (anecdotal, survey, numbers, dollars)
- What are the trends in Membership and Giving (numbers, dollars, average gift)
- What is the forecast for growth (1 yr., 3 yr. 5 yr.) in Membership and Giving?
- Where are we this year as compared to last year in income and counts?
- What is our budget vs. actual expenses?
- Are outgoing contacts increasing?
- Are incoming contacts increasing?
- Is commitment to specified programs increasing? (numbers, dollars, survey feedback)?
- Who are our alumni i.e. individual alumni with ability and inclination to participate and/or give to the university and/or join/participate in alumni initiatives?
- How and where do volunteers participate in support of UK?
- What is the profile of students who participate in student organizations?
- What is the profile of parents involved in the university and how does that relate to giving, alumni membership, campus events?
- What is the profile of alumni involved in the university and how does that relate to giving, alumni membership, campus events, college committees, guest lecturing, etc.?
- What is the profile of donors involved in the university and how does that relate to giving, alumni membership, campus events, college committees, etc.?
- How do students, faculty, staff and alumni interact with other cultures and diversity factors?

#### Data Sort/Aggregation Criteria:

- By college, major, department, organization
- By degree level and type
- By gpa
- By demographic factors
- By biographical parameters
- By economic parameters
- By Alumni/Development category

- By student participation attributes
- By alumni participation attributes
- By donor participation attributes
- By parent participation attributes
- By volunteer donor attributes
- By date (daily, weekly, monthly, quarterly, annually, by selected date range)
- By alpha
- By comparison timeframe (year-to-date, daily, weekly, monthly, quarterly, annually, by selected date range)
- By financial reporting system accounts; Account detail and aggregates
- By program-specific status codes
- By statistically significant variables among data elements

Critical issues:

- History/Archive integrated access with RMDM
- One source for accounting (eliminate need for shadow systems)
- Access for data entry and for report retrieval
- Information collected at most efficient access point even though that data may not be needed by that particular unit
- Establish system of data collection for tracking of volunteer impact (some exist on campus; some benchmarks have system)

RMDM 8/24/04