University Advancement Orientation
Advancement Services

2013
Advancement Services

Vision

- To be among the leading providers of excellent and innovative services in the Advancement Field.

Mission

- To provide accountable, efficient, effective and integrated biographical, donations, research and systems services in support of the McMaster University Advancement mission, our alumni and donors.

Goals

- To maximize the accuracy of our database, to expedite tax receipts, to provide comprehensive research services along with leading edge system support and programming.
Bio

The primary purpose of the Biographical unit of Advancement Services is to provide maintenance of the university and alumni association's records which include McMaster alumni, donors, parents and friends of the McMaster community…..

- There are over 10,000 organizations including organizations, corporations and foundations.
- There are over 200,000 person records including Alumni (nearly 150,000) parents, students, individuals, faculty, staff, etc.
- We perform over 150,000 address updates annually.
- Advance is populated by a bi-annual grad transfer - approximately 5,000 new grads added annually.
- Tracing.
Donations

Accept charitable donations, acknowledge these gifts with charitable tax receipts, thank our donors for their support and to forward these funds to the donor-designated Faculty, department or program……

- Enter donations in Advance System
- Produce tax receipts and acknowledgement letters
- Produce weekly reports and donations
- Produce monthly reports and charts on donations
- Produce pledge reminders and handle pledge collection
- Matching gifts
- We process over 17,000 donation transactions each year
- We process donation transfers to departments
- Reconcile our totals with Financial Services
Research

Research implements a proactive research program by analyzing financial, social and business sources critical to the identification, cultivation, solicitation, stewardship and management of prospects, donors and volunteers…….

- Prospect Identification
- In-depth biographical, corporate/foundation and financial research
- Prospect Clearance and Management
- On-line Database Research
- Resource material management and acquisition (collection development)
- Database Management
Implement and support innovative and cutting-edge technologies through Advance, Report Generation, System Enhancements, Database Administration and McMaster @lumni Community…….

- Advance Web
- Imodules
- User group meets quarterly to assign priorities
- Custom Programming
- Consult with Ellucian regarding system enhancements and bugs
- Installation of new versions of Advance System
- Graduation Transfer
- Advance support and system security
- Phonathon Sub-System
Systems cont…

- Report generation and development
  - Public Relations - Mac Times Mailings
  - Alumni - branches, reunions, services and benefits mailings
  - Development - donations reports
  - Ad Hoc Report Request
  - External Report Request
Advancement Services Org Chart

Director
John McKay

Administrative Assistant
Diane Francella

Systems Coordinator
Anna Meleca
Senior Programmer
Marco Greco
Programmer
Christina Cooper
Programmer
Mark Patel

Donations Coordinator
Dale Poole

Donations Coordinator
Dale Poole

Data Entry Supervisor
Debbie Passa

Associate Director Research
Stephanie Hilson

Advancement Services Clerk
Susan Wilson
Advancement Services Clerk
Marlene Ernst

Advancement Services Clerk
Silvia Berlingieri

Senior Research Officer
Jeff Wahn