University Advancement
Data Issues Summary

History: UNCG was the first UNC campus to adopt the Ellucian Banner Alumni/Advancement module, converting to the Banner platform in 2000, following the initial adoption of Banner for Student, and Financial Aid in 1998. The Banner Advancement software was primarily implemented to meet the needs of the gift processing and prospect management functions. The reports that were part of the Banner Alumni product were not adequate to meet University Advancement's needs and custom reports were developed using PowerBuilder technology, adopted only by Advancement. Additional data maintenance programs were also developed by Advancement Services in SQR, the then-standard ITS programming language.

Through the years, the Advancement software and systems have been modified to meet immediate needs on a case-by-case basis. The University embraced other modules within the Ellucian Banner enterprise resource planning system (e.g. Finance in 2006, Human Resources in 2008). While there are benefits to an enterprise-wide system, there are also challenges involved. Examples include agreement on the definition and usage of common fields (e.g. “name” field) and duplicate entries (Registrar, HR, UA can all add people). In 2006, the University selected WebFocus as the campus standard reporting tool for IT. Also in 2006, ITS began to author new programs in languages other than SQR with the objective of phasing out SQR to standardize onto more current technologies and reduce licensing costs.

At this juncture, the software and systems do not easily lend themselves to providing detailed donor information to personalize and tailor communication for fundraising and stewardship purposes. For various reasons, including budget cuts and a lack of focus on systems and processes over the years, UA is faced with multiple data issues that need to be addressed if it is to successfully launch a campaign with key information in hand. A comprehensive re-evaluation of business practices within Advancement and resulting standardization of reporting and data maintenance programs onto long-term University supported technologies (WebFocus and Java) in lieu of division specific (PowerBuilder) and soon-to-be obsolete (SQR) technologies requires significant effort above-and-beyond current staff capacity.

Scope: University Advancement (UA) has identified 38 data issues to be resolved that require IT resources in order to be ready for a campaign. In addition, there are 15 work items that may or may not require IT resources that need to be addressed for the effectiveness and efficiency of the division.

Time-frame: It is estimated that it will take 2+ years to complete the necessary campaign critical work. To meet this deadline will require additional temporary resources in the form of 1.5 Banner developers, 2 WebFocus developers and the equivalent of 1 FTE skilled clerical temporary position.

Cost: ITS does not have the resources available to address this work. The largest financial investment is in the procurement of Banner and WebFocus development resources. Multiple options exist. The estimate of hiring contract employees from the Ellucian and IBI (parent) firms would total $2.25 million
over 2 years, assuming no travel costs. Hiring contract employees from IT firms, if available, would bring that cost down to $1.35 million over two years, again, assuming no travel costs.

If three employees were hired along with one part-time contractor, the estimate becomes $930,000 for two years of work. However, there are HR issues with this solution as the intention would not be to keep the employees long-term. This approach would also extend the time-frame, as the annual number of available project hours for a contractor is higher than available hours for an employee.

In addition, there is an estimate of $119,500 over two years for temporary assistance and small project non-IT contract assistance.

This does not include any overtime or assistance for the existing employees who would be heavily involved in the evaluation and development of business rules, solutions and testing while performing their day-to-day jobs. It also does not include any assistance to reduce the backlog of duplicate records.