Chief Communications Officers Group
Minutes from May 5, 2009

**Branding Committee – Member Joel Steinfeldt** reported that the group reviewed the positioning statement and quickly identified existing stories that fit the statement. The committee identified the need for common messaging resources for the campus and discussed ways to use the half-time commercial to introduce the positioning statement and messaging system to the campus.

**Development Liaison Committee – Members Don Kojich and Julie McMahon** reported that the group met with Executive Associate Vice Chancellor Pat Justice of the Office of Advancement to learn more about communications needs for the remainder of the Brilliant Futures campaign.

**Reputation Building Committee – Chair Charlotte Bauer** reported that the online survey to help identify unit reputational priorities remains open and all CCOs and their colleagues were encouraged to take a couple of minutes to complete this. The Rep. committee has met several times and has identified a couple of preliminary areas of shared opportunity (and potential obstacles) across the campus communications community where we can create some new tools/avenues for promotion of our strengths. How we talk about our international/global impact is shaping up to be a key concern.

**Shared Resources Committee – Chair Melissa Edwards** offered an update on the effort to respond to the Provost’s request to reduce marketing/public relations paper materials being sent to and among units on campus. The Committee is exploring ways to improve mailing lists to remove duplicates and to create a best practices document for marketing events, achievements, etc. on campus.

**Technology Committee – Member Todd Wilson** reported the committee’s intention to imminently distribute a survey seeking input on technological challenges facing unit communicators. This will be used to prioritize the committees work going forward.

**New Illinois in a Box Banners – Bridget Jamieson** is looking for ideas for new banners for Illinois in a Box. Thanks all, for the great idea; new banner should be available in July.

**MBA Externship Porgram – Robin Kaler** suggested that CCOs who have data analysis projects they need completed, the MBA program is offering a free service that puts teams of MBA candidates on such projects. Contact Tracy McCabe for more information.

**Identity Standards Compliance – Joel Steinfeldt** indicated that a new deadline for the Phas II effort will be announced shortly that gives units a bit more time to comply.

**Altman Space Mission – Joel Steinfeldt** asked CCOs to think about ways we can share exciting information, such as the recent space mission led my alumnus Scott Altman, so
that we can expand the reach of our story. We’ll talk more about that in the coming months.

**Alumni Association – Bea Pavia** asked for ideas of any “green” activities/achievements by alumni for a feature in *Illinois Alumni*. 
Constituent Relationship Management (CRM) Tracking

Project Overview

5/4/2009

Project Overview: To collect and document in the Foundation Alumni Constituent Tracking System (FACTS) records of individual alumni and friends the mass communication solicitation and non-solicitation touches by UIAA, UIF, and campus units; for the purpose of tracking contacts over time, and to make this data available in FACTS C/S, and the UIF Enterprise Data Warehouse (EDW); for use by the advancement community. Future use of the data, consist of but are not limited to:

- Data Analysis and aggregation to determine the impact of such touches on alumni and donor behavior
- Better selection and segmentation of Annual Giving populations
- To develop more focused communications
- To enable advancement officers to review past touches with individual major gift prospects

Project Description: A project team will be formed to study the needs and solutions surrounding the gathering and use of new attributes to track contacts. The project team will identify the data items to be collected, provide input into the development of processes and procedures for regularized data collection, and determine needed systems and applications enhancements to be made available within FACTS and the UIF EDW. Stakeholders will also be contacted to obtain input from a broad section of Advancement staff members.

Project Goals: To expand tracking of Advancement (batch) contacts within the FACTS database. To create user friendly software, that captures contact activity data into a central holding file, and to develop the necessary processes to make this data available for online viewing, data analysis, and reporting. Also to develop the necessary support and training to implement these new systems / applications and data features.

Critical Success Factors: The project will be successful when:

- End users are able to quickly and easily tag populations with tracking codes prior to contacting individuals
- Non-solicitation data currently stored in the Solicitation Tracking file has been appropriately converted and stored
- Data analysts have access to detailed data items in the UIF EDW denoting the type of contact, time of contact, purpose of contact, recipient, tracking code, unit or department contacting the individual or household, as well as other identified attributes.
- Populations can easily be removed in mass from the Tracking file when erroneously recorded.

## ROLES AND RESPONSIBILITIES

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
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<tbody>
<tr>
<td><strong>Set project priorities</strong></td>
<td><strong>To form and manage the project team and project tasks</strong></td>
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<td><strong>Approve resources</strong></td>
<td><strong>To develop the project plan</strong></td>
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<td><strong>Finalize (and approve any changes to) the project objectives, scope, and success criteria</strong></td>
<td><strong>To conduct project team meetings</strong></td>
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<td><strong>Ensure that the project team has the time and resources they need to achieve success</strong></td>
<td><strong>To communicate project status with the UIF Business Intelligence Advisory (BIA) and Information Technology Operations Team (ITOT)</strong></td>
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<td><strong>Communicate the project purpose and value to the business management</strong></td>
<td><strong>To work with the sponsor and project team to insure project success</strong></td>
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<td><strong>Commit specific resources from the business community</strong></td>
<td><strong>To assist in communicating project status to other Foundation Management</strong></td>
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<td><strong>Pave the way for change in the affected organizational units</strong></td>
<td><strong>Attend Project Team Meetings</strong></td>
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<tr>
<td><strong>Participate in major project reviews and approve key deliverables</strong></td>
<td><strong>Coordinate activities with end users</strong></td>
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<tr>
<td><strong>Make key project decisions</strong></td>
<td><strong>Assist with requirements gathering and review</strong></td>
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<tr>
<td><strong>Ensure timely resolution of issues affecting project success</strong></td>
<td><strong>Sign off on key deliverables</strong></td>
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### Sponsor:
Gail Snowdon – UIF

### Project Manager:
Susan Restad – UIF
restad@uif.uiuillinois.edu
239-6010

### Project Team Members:
- Katie Blum - Annual Giving / PPA
- Opal Buoy – Research
- Christy Devocelle – Gift Admin (added 1/2009)
- Tyler Fitch – PPA
- Peggy Garrison – Special Events
- Lea Ann Gross – Stewardship (Discontinued 1/2009)
- Janet McGreevy – Communications
- Wendy Petruzello – UIAA BIU
- Maggie Unsworth – Annual Giving

- Attend Project Team Meetings
- Coordinate activities with end users
- Assist with requirements gathering and review
- Sign off on key deliverables
- Assist in testing and implementing applications
- Communicate with their respective departments and with the Project Manager in order to insure project success.
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| Technical Team Members | - Lead or assist in leading requirements gathering  
                               - Participate in Project Team Meetings, as needed  
                               - Conduct technical review of project plans and specifications  
                               - Develop and test software |
| End Users            | - Will assist in gathering and formulating data requirements  
                               - Will assist in reviewing report design requirements, if needed  
                               - Will assist in testing applications |