Alumni/Development Database
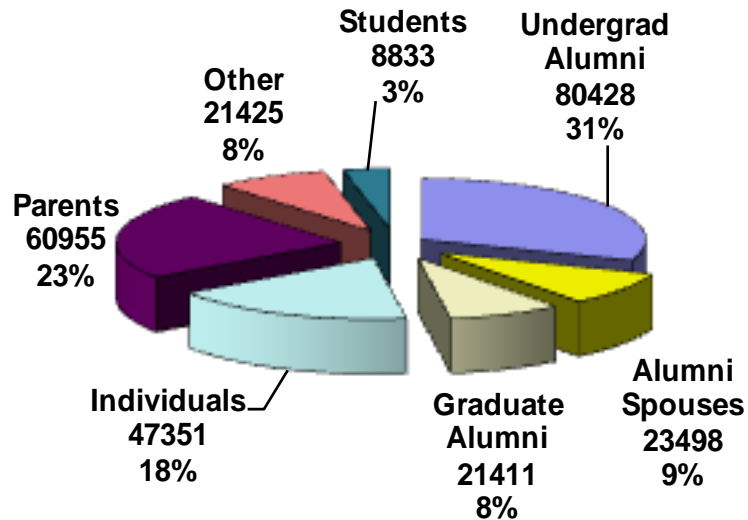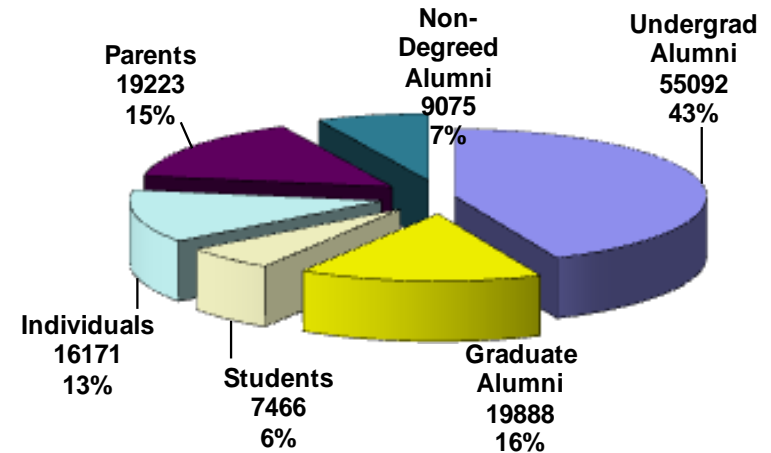
Presentation to the Board of Visitors
February 5, 2009

The Alumni/Development Database

All Records – 263,000

Students 8833 3%
Other 21425 8%
Undergrad Alumni 80428 31%
Parents 60955 23%
Individuals 47351 18%
Graduate Alumni 21411 8%
Alumni Spouses 23498 9%

Records of Focus – 127,000

Parents 19223 15%
Non-Degreed Alumni 9075 7%
Undergrad Alumni 55092 43%
Individuals 16171 13%
Students 7466 6%
Graduate Alumni 19888 16%

RESPONSIBILITIES

Development
- Donor Gift Entry and Maintenance
- Prospect Data Entry and Maintenance
- Database Hardware/Software Management
- Parents, Corporations and Foundations
- Limited Bio Maintenance (gift)

Alumni Association
- Biographical Data Entry and Maintenance
- Alumni, Students, & Parents records
- Address/contact info, Employment, Degrees, Committees, Relationships, B-D-M, Status Updates, Activities

Jointly
Search, Research, Coordinate Mass Updates, Coordinate Bulk Data Loads, Set Entry Standards, Coordinate System Upgrades

Current State

	A&S	BUS	EDU	LAW	VIMS	Other*	Total	Confidence
Number of Living	60,213	10,997	5,085	5,958	601	1,201	84,055	
Number of Lost	2,904	330	392	138	46	123	3,933	
Lost Rate	**5%**	**3%**	**8%**	**2%**	**8%**	**10%**	**5%**	
Home Address	57,208	10,650	4,678	5,553	555	1,058	79,702	
Home Address %	**95%**	**97%**	**92%**	**93%**	**92%**	**88%**	**95%**	High[1]
Home Phone	37,362	6,626	3,060	3,908	338	549	51,843	
Home Phone %	**62%**	**60%**	**60%**	**66%**	**56%**	**46%**	**62%**	Med[2]
Home Email	24,715	5,277	945	2,395	125	594	34,051	
Home Email %	**41%**	**48%**	**19%**	**40%**	**21%**	**49%**	**41%**	High[3]
Business Address	23,254	5,658	1,826	4,497	386	235	35,856	
Business Address %	**39%**	**51%**	**36%**	**75%**	**64%**	**20%**	**43%**	Low[4]
Business Phone	15,215	3,948	1,298	3,977	299	136	24,873	
Business Phone %	**25%**	**36%**	**26%**	**67%**	**50%**	**11%**	**30%**	Low[4]
Business Email	10,246	3,206	370	2,816	130	61	16,829	
Business Email %	**17%**	**29%**	**7%**	**47%**	**22%**	**5%**	**20%**	Low[4]
Employer	29,720	7,161	2,136	4,741	393	171	44,322	
Employer %	**49%**	**65%**	**42%**	**80%**	**65%**	**14%**	**53%**	Low[4]
FAX	2,336	523	39	837	13	2	3,750	
FAX %	**4%**	**5%**	**1%**	**14%**	**2%**	**0%**	**4%**	None[5]
Cell Phone	184	75	2	37	1	0	299	
Cell Phone %	**0%**	**1%**	**0%**	**1%**	**0%**	**0%**	**0.36%**	High[6]

*This is includes those coded Blank, Associate Alumni, Honorary Alumni, W&M Honorary Degree Recipients, Consortium,and Law Honorary Degree for the school code.

Challenges to Better Data

- ## Data Volatility, Technological Changes, Employment Data Acquisition
  - Emails in particular have currency issues and change often
  - Cell phones not readily identified as such; multiple for family now; area codes no longer indicator of address
  - Social networking applications and research tools changing rapidly
  - No solid search tool for cell phones, emails or employment

- ## No Culture of Updating
  - Resistance to giving updated information
  - Updates not solicited or shared
  - Contacts & updates might be obtained but not entered into Advance, i.e., kept separately

- ## Volunteer Expectation Management
  - Volunteer frustration with database

- ## Data Volume
  - Slight data entry delays with bulk lists of updates provided for manual input
  - Necessitates automated loading of data
  - Additional resources help

Action Steps to Improve Data

Alumni Directory

- February to June data collection
- Significant impact on business data and phone numbers

Web Services

- My1693 web site
- Reunion year focused effort on class pages education & competition.
- Online donation, event registration and contact forms with required update information
- Non-login update forms

Postal/Mail

- National Change of Address (NCOA) processing subscription 'in-house.'
- Follow-up survey form/process that will mail a follow-up on received changes.

Fee Services/Vendors

- Development of application interfaces (APIs) that share data between external sites and the alumni web site.
- Phone Screening program that 'scrubs' phoning file prior to phoning.

Action Steps to Improve Data

Intra-campus Collaboration

- Single-Sign-on between My1693 and Experience Career network
- Update-Your-Information links on College web pages
- Departmental update forms feed to Alumni Association records office
- Conducting "Other Database" analysis to determine other unknown sources for information
- Alumni/Development database becoming the database of record for parent information

Reallocation of Resources

- WMAA adding data entry position through reassignment
- WMAA adding web community manager to grow and drive traffic to group pages; additionally will perform data analysis/research – through reassignment of staff member
- Development and WMAA sharing cost of additional programmer for data analysis, research, and clean up

Engaging Volunteers

- Data update/overview presentations to volunteer boards

How Its' updated

What Data Gets Fixed	**Tools Employed**
Home	NCOA on Bulk Mail (fee)
	ACS (address correction svc)
	Harris Lost Search (fee)
	AlumniFinder.com (fee)
	White Pages.com
	My1693 Online Community
	Online Giving Form
	Event Registrations
	Alumni Directory
	Follow-up Survey Process
	Web Update Forms (departmental)
	APIs for Social Networks
Business	Event Registrations
	Alumni Directory
	Follow-up Survey Process
	Web Update Forms (departmental)
Email	My1693 Online Community
	Event Registrations
	Alumni Directory
	Follow-up Survey Process
	Web Update Forms (departmental)
	APIs for Social Networks
	Email ListServes
	Email finderPro Online Service (fee)
Phone	Phone Append Service (fee)
	Whitepages.com
	AlumniFinder.com (fee)
Miscellaneous Data	Clipping Service (fee)
(Degrees, Awards, Names, Marriage,	Magazine Class Notes
B-Day, Anniv, Relations, Student Info)	My1693 Online Community

New Tools/Procedures

Conclusion

• Proactively secure, update and maintain the alumni/development database

• Direct additional resources (human & financial) toward database integrity matters

• Invest in new technologies and services to assist in acquisition of information

• Increase alumni and College community awareness and collaboration in regard to updating and sharing information

• Increase opportunities for individuals to update their personal information

• Engage and assist volunteers in the process

• Continue to measure progress against peer and industry benchmarks

All Alumni Footnotes

Attachment 1 Footnotes:

1 Home address information is the most reported data element and there is non-voluntary source data available with the National Change of Address system, Address Correction System, returned mail, commercial Internet sources, and for-fee lost search services.

2 Significant volatility exists with phone numbers, including changes in area codes, changing service providers, and the proliferation of cell phones in place of traditional land lines. We currently use for-fee phone append services and have the ability to verify accuracy through the student phon-a-thon program.

3 The College has a relatively low bounce rate of 7.3% on our email services. This low rate is because the acquisition of email addresses has been through voluntary electronic submissions such as event registrations and online contributions. There is no known source to accurately acquire email addresses other than through voluntary submission.

Also, in looking at email figures, we must combine home and business into a "preferred email" listing that becomes what we email to in an "all alumni" email list. Our Preferred email count is at almost 39,000 emails representing a 46% contact email figure.

 4 Business information is not readily reported voluntarily. Business data for the Law School is more complete because an involuntary source data for lawyers is available (Martindale-Hubbell). Over 75% of employment addresses are older than 5 years and most based on last alumni directory.

5 Fax numbers are rarely reported, and they are not used or tested; usually entered because they are listed on a business card or website.

6 For documented cell phone numbers there is a high confidence level. All web forms and directory surveys now ask for this information.

Current State Undergraduate

	A&S	BUS	Other*	Total
Attachment 2				
Current State - Undergraduate Alumni				
Number of Living	48,715	6,161	216	55,092
Number of Lost	1,320	106	12	1,438
Lost Rate	**3%**	**2%**	**6%**	**3%**
Home Address	47,329	6,049	204	53,582
Home Address %	**97%**	**98%**	**94%**	**97%**
Home Phone	30,797	3,837	60	34,694
Home Phone %	**63%**	**62%**	**28%**	**63%**
Home Email	22,919	3,454	83	26,456
Home Email %	**47%**	**56%**	**38%**	**48%**
Business Address	20,641	3,105	22	23,768
Business Address %	**42%**	**50%**	**10%**	**43%**
Business Phone	13,407	2,053	9	15,469
Business Phone %	**28%**	**33%**	**4%**	**28%**
Business Email	9,357	1,819	18	11,194
Business Email %	**19%**	**30%**	**8%**	**20%**
Employer	26,453	4,062	33	30,548
Employer %	**54%**	**66%**	**15%**	**55%**
FAX	2,102	271	0	2,373
FAX %	**4%**	**4%**	**0%**	**4%**
Cell Phone	177	43	0	220
Cell Phone %	**0%**	**1%**	**0%**	**0%**

* Includes those with blanks for school codes and Divisional Alumni

Current State Graduate Alumni

	A&S	BUS	EDU	LAW	VIMS	Other*	Total
Attachment 3							
Current State - Graduate Alumni							
Number of Living	3,359	4,822	5,056	5,929	583	139	19,888
Number of Lost	272	223	390	136	46	39	1,106
Lost Rate	8%	5%	8%	2%	8%	28%	6%
Home Address	3,081	4,588	4,651	5,526	537	84	18,467
Home Address %	92%	95%	92%	93%	92%	60%	93%
Home Phone	1,903	2,787	3,051	3,896	330	41	12,008
Home Phone %	57%	58%	60%	66%	57%	29%	60%
Home Email	942	1,816	940	2,382	122	14	6,216
Home Email %	28%	38%	19%	40%	21%	10%	31%
Business Address	1,216	2,548	1,820	4,492	376	54	10,506
Business Address %	36%	53%	36%	76%	64%	39%	53%
Business Phone	847	1,891	1,295	3,973	290	24	8,320
Business Phone %	25%	39%	26%	67%	50%	17%	42%
Business Email	596	1,384	368	2,813	129	11	5,301
Business Email %	18%	29%	7%	47%	22%	8%	27%
Employer	1,473	3,095	2,130	4,734	383	50	11,865
Employer %	44%	64%	42%	80%	66%	36%	60%
FAX	159	251	39	836	13	1	1,299
FAX %	5%	5%	1%	14%	2%	1%	7%
Cell Phone	4	32	2	37	1	0	76
Cell Phone %	0%	1%	0%	1%	0%	0%	0.38%

* Includes those with blank and Consortium codes in the school code, and W&M Honorary Degree Recipients

Current State - Parents

	Attachment 4
	Current State - Parents

	Current Parents	Parents of 2008 Graduates	Donor Parents	Total	Confidence
Number of Living	9,967	3,105	6,151	19,223	
Number of Lost	129	67	50	246	
Lost Rate	**1%**	**2%**	**1%**	**1%**	
Home Address	9,755	2,944	6,088	18,787	
Home Address %	**98%**	**95%**	**99%**	**98%**	**High** [1]
Home Phone	8,615	2,504	5,285	16,404	
Home Phone %	**86%**	**81%**	**86%**	**85%**	**High** [1]
Home Email	7,406	754	1,182	9,342	
Home Email %	**74%**	**24%**	**19%**	**49%**	**High** [1]
Business Address	3,097	1,281	1,896	6,274	
Business Address %	**31%**	**41%**	**31%**	**33%**	**Med** [2]
Business Phone	2,870	1,178	1,602	5,650	
Business Phone %	**29%**	**38%**	**26%**	**29%**	**Med** [2]
Business Email	987	199	310	1,496	
Business Email %	**10%**	**6%**	**5%**	**8%**	**Med** [2]
Employer	4,244	1,537	2,405	8,186	
Employer %	**43%**	**50%**	**39%**	**43%**	**Med** [2]
FAX	2	0	8	10	
FAX %	**0%**	**0%**	**0%**	**0%**	**Low** [3]
Cell Phone	0	3	10	13	
Cell Phone %	**0%**	**0%**	**0%**	**0%**	**High** [4]

Parents Footnotes

Attachment 4 Footnotes:

1 Parents have a high level of interest in keeping their contact information up-to-date so they can receive information about the College and be reached on behalf of their students. We have in place a very effective process of sharing changes with the Student Affairs Office.

2 Business information is collected from parents through use of a survey during the summer prior to a new student's freshman year. Confidence in this data becomes lower as this data ages.

3 Fax numbers are rarely reported, and they are not used or tested; usually entered because they are listed on a business card or website.

 4 For documented cell phone numbers there is a high confidence level. All web forms and directory surveys now ask for this information.

Current State - Individuals

	Attachment 5 Current State - Individuals

	Individual Donors	Membership/ Volunteers	Total	Confidence
Number of Living	9,496	6,675	16,171	
Number of Lost	102	718	820	
Lost Rate	**1%**	**11%**	**5%**	
Home Address	9,116	4,767	13,883	
Home Address %	**96%**	**71%**	**86%**	**Med** [1]
Home Phone	5,047	3,119	8,166	
Home Phone %	**53%**	**47%**	**50%**	**Med** [1]
Home Email	854	154	1,008	
Home Email %	**9%**	**2%**	**6%**	**High** [1]
Business Address	894	1,436	2,330	
Business Address %	**9%**	**22%**	**14%**	**Med** [2]
Business Phone	558	574	1,132	
Business Phone %	**6%**	**9%**	**7%**	**Med** [2]
Business Email	306	298	604	
Business Email %	**3%**	**4%**	**4%**	**High** [2]
Employer	831	1,044	1,875	
Employer %	**9%**	**16%**	**12%**	**Med** [2]
FAX	28	38	66	
FAX %	**0%**	**1%**	**0%**	**Low** [3]
Cell Phone	21	12	33	
Cell Phone %	**0%**	**0%**	**0%**	**High** [4]

Individuals Footnotes

Attachment 5 Footnotes:

1 Individual records are not used for communication in the same systematic way as Alumni and Parents. Those groups such as membership lists and volunteer committee rosters have a higher confidence level related to addresses and phone numbers than lesser used groups. In this group, e-mails are more often self-reported than solicited, usually because the individual prefers e-mail for their communications with the College. We have higher confidence in the accuracy of the e-mails of this group.

2 Similar to e-mails in item 1, this information is self-reported by the individual. If we have business information on these individuals, we feel confident it is correct when fairly recent, but lose confidence as the information ages.

3 Fax numbers are rarely reported, and they are not used or tested; usually entered because they are listed on a business card or website.

 4 For documented cell phone numbers there is a high confidence level. All web forms and directory surveys now ask for this information.

Comparative Data

CAAE 2007 Survey	Addressable	% E-Mail
	Alumni	Of Total
School Name	Total	On File
University of Virginia (June 2007)	95%	55%
Virginia Tech	92%	75%
*The University of North Carolina	99%	52%
*Boston College	94%	49%
*University of California, Irvine	94%	12%
*UC Santa Barbara	0%	
*University of Georgia	94%	30%
William & Mary	94%	48%

*W&M Peers

CAAE ALL - 80 Schools in survey

High	99%	75%
Average	87%	31%
Low	65%	9%
Median	90%	29%

Comparative Data

January email discussion thread on Advance (database) users listserve

School Name	% Email
Purdue	28%
Queens College	46%
Wyoming	18%
Utah	33%
Pitt	45%
William & Mary	46%

Private Colleges & University Alumni Directors (PCUAD)

	Mailable	%Email
High	95%	55%
Average	88%	44%
William & Mary	95%	46%

Other Database Analysis

Dept	Contact	Subject/Purpose	Feeds to ADV	Man / Auto	Comments
Christopher Wren Assoc	Don Berg	Track membership and participation	Yes	Man	Alumni Assoc. Completing 07-08 coding project; starting on 08-09; repeats annually.
Muscarelle Museum	Browen Watts	Track membership renewals	Yes	Man	Dues receipts are captured through Advance so updates are captured
Career Services (1/28/09)	Sandy Turnage Mary Schilling	eRecruiting - employers database; tracks companies and employer participants	No		Not all employers listed in development database; those without matching gifts, or development purposes
Career Services (1/28/09)	Sandy Turnage	Experience.com career networking site. Career networking database website with student and alumni networking profiles.	Yes (Mar.)	Both	Single-sign-on and application interface being established with My1693 alumni website to capture updates.
VIMS Gift Information (2/2/09)	Lisa Phipps	Tracking VIMS donors listing	Yes	Man	Need to establish why held separately and how many donors are there that are not related to the College and ways to assure their exclusive solicitation if in db
VIMS Newsletter Listing (2/2/09)	Dave Malmquist	Invitations and PR to VIMS external audiences	No		Built from event attendance and self-subscribe lists/entries
Omohumdro Institute (1/16/09)	Shawn Holl (A&S)	Track Associates and subscribers to the W&M Quarterly	Alums-Yes	Man	OIEAHC members maintained on an Access db that contains alumni and non-alumni; alumni info updated in Adv db; non-alumni records created if gift over $1000 received
Omohundro Institute (1/16/09)	Shawn Holl	Institute conference registration and event management	No		
Center for Conservation Biology	Carla Schneider	Newsletter subscribers list, Primarily non-college colleagues for their newsletter	No		A&S to identify as part of larger pool of centers w/ newsletters

Other Database Analysis

Dept	Contact	Subject/Purpose	Feeds to ADV	Man./ Auto	Comments
MBA Career Services		Simplicity system for career mentoring	No		Stand alone system not implemented, being re-evaluated
Bus. Undergraduate Program	Peggy Gesing	ePortfolio – career building tool	No		Not yet implemented
Executive MBA Program		Contact database	Yes	Man	Appears to be duplicate tracking/maintenance; updates obtained at school are forwarded for entry
Executive Partners		Contact database	Yes	Man	Data in Advance but updates tracked and received externally in EP program
Athletics Ticket Office	Spencer Milne	Track/contact ticket buyers	No		Possible overlap. Need to determine capture methods and sharing possibilities
Courtroom XXI (1/15/09)	Celeste Vaughn	Names of court contacts nationwide	No		Not donor or alumni oriented; professional affiliations only
Law Summer School Students (1/15/09)	Nancy Archibald	Track student information on program students	No		Check to see if these students feed thru Banner student system; usually students from other law schools for 6 hours – not alumni.
Litigators Marketing Lists ; Law Participating Company (1/15/09)	Nancy Archibald	Professional contacts for information	No		Not alumni or donor oriented; professional affiliations only
Institute of Bill of Rights Law (1/15/09)	Melody Nichols	Names and emails of inquirers and participants in IBRL programs	No		Not alumni or donor oriented
W&M DC Office	Adam Anthony Morgan Oakes				Working through WMAA Program assistant to incorporate remaining alumni data management into Advance

Examples

At Issue, Data Acquisition, Research & Validation

Ex 1:

190 Novemer Trial
White Stone, VA 22578
804/435-0665
Mobile 804/761-7156
xxxxx.xxx@escdv.org

Ex 2:

9026 Devon Drive
Middletown, OH 45044
(513) 755-1465

Ex 3:

Gary Williams, C.P.M. Started a discussion on "Alumni Magazine: Winter 2008 - W&M Alumni Association" from ©2008 William & Mary Alumni Association: "thanks for posting this - I hadn't noticed, but I'm sure my Alumni magazines have been piling up on..." More »