Strategies for Supporting Advancement and Development

Thoughts *for* Advancement

Manifesto for Sharing Institutional Data

The benefits. The Challenges.

What's On!

## Manifesto for Sharing Institutional Data

An "off the wall" idea, but one we might want to think about.

Over the years there's been a number of attempts at sharing institutional data.

The most notable successes are campaign and similar surveys undertaken by CASE and other organizations that use standards to collect and compare benchmarking data.

While these attempts are laudable, we need to re-think this collection and sharing of data between institutions.

We need to start sharing at the entity level as opposed to the summary level. This doesn't mean we compromise anyone's identities, but that we share detailed information.
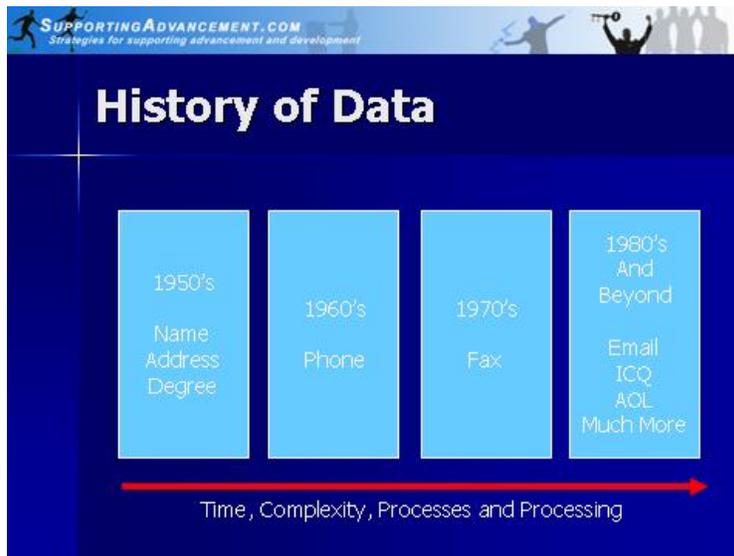
At one time, it was difficult to format data. Disk space was expensive, processing was slow and it was almost impossible to move information easily between different computers.

We now have technology to make large scale data sharing possible. It's time to formulate a strategy to do this on a national and international basis.

Data warehousing, business intelligence, ubiquitous network connectivity, adequate bandwidth, intelligent search engines and much more. We are all capable of participating in such an initiative.
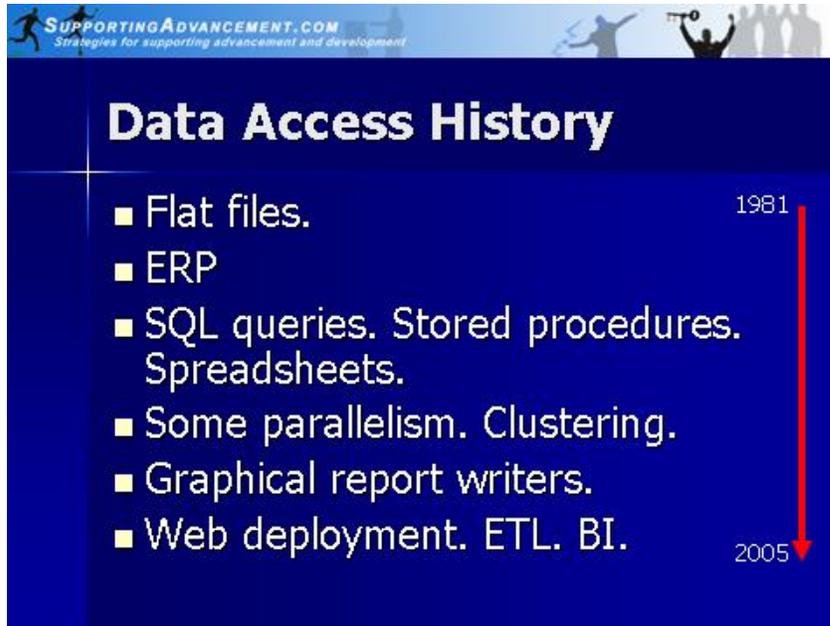
Benefits of Sharing Comparative Data

The most obvious is to provide comparative benchmarking. By expanding the number of key performance indicators and providing greater details, we can analyze own programs in greater depth.

This will improve our outreach and revenue generation.

Other information we can glean from more granular data:

- Individual "consumer" behavior through data mining and business intelligence techniques such as the propensity of alumni to acquire an affinity card or other product. The ability to broker this information with vendors so they can help us target.
- Comparison of solicitation and other contact methods between institutions and greater understanding of effectiveness. i.e. Which institution has an effective email strategy and how we improve our own.
- Improvements in cultivation and stewardship strategies.
- Understanding of opt-out behaviors broken down by geographic and other demographics such as institution types.
- Benefits of large scale volume discounts when purchasing geo demographic and other data enhancements.

You could incorporate many standard industry demographics and data enhancements into this piece so you can only imagine how far you could go.

Practical Considerations

There are unfortunately a number of barriers.

- Cost and other resources.
- Coordination efforts even at what initially would be a small scale project.
- Privacy concerns, although the model would preclude the sending of personal data where a constituent's record could actually be verified or traced directly by any other institution, organization or individual.
- The need to have independent audit verification of information.
- Security concerns for data transfers, storage, maintenance and backup.
- Competition among institutions in the same markets. Some organizations might feel it would not be in their best interests because of existing or perceived advantages/disadvantages.
- Technical complexities of standardizing and collecting large amounts of data from various institutions particularly when institutions use different software and databases to record and store advancement data.
- Larger and better funded institutions may have this type of analysis in place and may not wish to participate due to their competitive advantage.
- Designing and agreeing on the right contractual agreements between data providers, data miners and other parties.
- Finding the key institutions, leaders and project managers with the wherewithal to drive the project forward.

What Would we Collect and Share?

Data that could be used in robust data mining models.

- Preferred year
- Age
- Gender
- Number of family members
- Undergrad/graduate degree or both
- Lifetime giving, largest gifts, number of years of consecutive giving
- Address information and indicators such as state/province, city, zip/postal code, phone area codes and other related information that could also be tied to outside data enhancement vendors.

The model could be expanded and every addition would become even more useful.

Steps to Make it Happen

- Co-opt institutions to start the project. It should be a cross section of public, private, large and small organizations.
- Set up a common data repository managed by an independent third party. Organizations would pay a membership fee with some relationship to their size, capability or other factors. There might be fees for system usage and data storage.

- A committee would define data elements collected, methods of collection and reporting standards. The independent third party would be responsible for implementation.
- Involve vendors from the onset so that future versions of their software have the elements and structure that would make this easier.
- Purchases of analytical services, tools or other resources would be done as a group to create economies of scale.

Still Crazy after all These Years

Far fetched idea? Yes, but not entirely. Pie in the sky? Maybe, maybe not.

We have the technology and strong umbrella organizations like CASE. We are used to doing summaries for them and we and/or our vendors have adapted our systems and data models to collect and send this information. We just need to increase the granularity in a model we already understand and manage.

At a minimum there are vendors with large installed client bases that could initiate this as a paid service. Their customers have common data models which would make amalgamation of the information easier.

Something to think about, especially on those late Friday afternoons …

More Information

Supporting Advancement
http://www.supportingadvancement.com

Under the reporting and systems pages you'll find additional information on reporting, data warehouses, business intelligence and related links.