

Business Practices

<u>ORGANIZATION</u>	<u>DEPARTMENT</u>	<u>PROCESS</u>	<u>ACTIVITY</u>
1	1	Institutional Advancement	
1.1	1.1 Alumni Relations (Contact:)		
1.1.1	1.1.1 Programs / Events		
1.1.1.1		1.1.1.1	Student Group
1.1.1.2		1.1.1.2	Affinity Cards (MBNA)
1.1.1.3		1.1.1.3	Sale of Merchandise
1.1.1.4		1.1.1.4	Homecoming/Reunion
1.1.1.5		1.1.1.5	Commencement
1.1.1.6		1.1.1.6	Convocation
1.1.1.7		1.1.1.7	Travel
1.1.1.8		1.1.1.8	Lectures
1.1.1.9		1.1.1.9	Dinners/Luncheons
1.1.2	1.1.2 Data Management		
1.1.2.1		1.1.2.1	Basic Demographic Data Updates (Advancement Services)
1.1.2.2		1.1.2.2	Employment History
1.1.2.3		1.1.2.3	Relationship cross references
1.1.2.4		1.1.2.4	New student mailings
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1.1.3.2		1.1.3.2	Alumni Update
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1.1.3.4		1.1.3.4	Alumni Directory
1.2	1.2 Alumni Association (Board of Directors)		
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1.2.1.1		1.2.1.1	Geographic Region based chapters
1.2.2	1.2.2 Alumni Services/Programs		
1.2.2.1		1.2.2.1	Career Mentoring
1.2.2.2		1.2.2.2	On-Campus Access
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1.2.3.1		1.2.3.1	Alumni Chapter Handbook
1.3	1.3 Development (Contact:)		
1.3.1	1.3.1 Fundraising and Reporting		
1.3.1.1		1.3.1.1	Campaign Solicitations and Special Appeals

1.3.1.2	1.3.1.2 Gift Societies
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1.3.2.1	1.3.2.1 Prospect Ratings
1.3.2.2	1.3.2.2 Contact/Trip Reports
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1.3.3.1	1.3.3.1 Various Events
1.3.4	1.3.4 Fund Management
1.3.4.1	1.3.4.1 Distribution of Funds
1.3.4.2	1.3.4.2 Stewardship
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1.4.2.1	1.4.2.1 Student Calling
1.4.3	1.4.3 Personal Solicitations
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1.4.4	1.4.4 Parents Program
1.4.4.1	1.4.4.1 Student Calling
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1.5.1.4	1.5.1.4 Process Receipts
1.5.1.5	1.5.1.5 Process Reminders
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1.5.1.7 Process Pre-authorized Checking Gifts
1.5.1.8 Donor Reports
1.5.1.9 Reconciliation with Finance Reports
1.5.1.10 Employment History
1.5.1.11 Biographic Information

ORG: Institutional Advancement	ORG.# 1
DEPARTMENT: Alumni Relations	DEPT.# 1.1
PROCESS: Programs/Events	PROC.# 1.1.1

ACTIVITY:

1.1.1.1 (student group)

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
Approx. 20 to 60 members	1 year	

TASK:

- A. Meet with student executive once a week.
- B. Students perform support services for the Institutional Advancement Office.
- C. Setting a campus tour program.
- D. Meetings with the entire group about once a month.

ISSUES:

- A. Would like to track by an activity activity code and be able to send mailings to former students.
- B. Would like to track participation via Advancement database.

FORMS USED:

- A. Will begin using an application form this year.

**REPORTS/LETTERS
GENERAL**

- A. Labels/Letters

NOTES:

- A. Student Alumni Association - used to develop good alumni.
- B. New program (2 or 3 years)
- C. Tracking manually.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Alumni Relations **DEPT.#** 1.1
PROCESS: Programs/Events **PROC.#** 1.1.1

ACTIVITY:

1.1.1.3 Sale of Merchandise

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
approx. 300-400	1 year	

TASK:

- A. Advertisement is placed in the alumni news.
- B. Orders are made via the mail or the phone.
- C. Merchandise is sent.
- D. Deposits are handled through the Finance office.

ISSUES:

- A. Would like to be able to track who orders merchandise.

FORMS USED:

- A. Order form (orders can also be called/faxed/emailed).
- B. Convocation order form (same as in alumni news)

REPORTS/LETTERS GENERATED:

- A. Labels to send merchandise.

NOTES:

- A. Merchandise is advertised in the alumni news.
- B. Stock of supplies is kept on campus, orders are placed directly through through campus bookstore and not the actual supplier of the merchandise.
- C. Information on who orders merchandise is not currently tracked.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Alumni Relations **DEPT.#** 1.1
PROCESS: Programs/Events **PROC.#** 1.1.1

ACTIVITY:

1.1.1.4 Homecoming/Reunion

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
1 4-600 attendees	1 year	

TASK:

- A. Use alumni news to advertise homecoming/reunion.
- B. Targeted mailings are sent to reunion year classes.
- C. Class representatives work with Alumni Relations to plan events.
- D. Analysis of events and processing of event charges.

ISSUES:

- A. Would like to do pre-registrations via web.
- B. No record of who attended for historical purpose or to plan for the future.
- C. Getting people to pre-register.

FORMS USED:

- A. None currently

REPORTS/LETTERS GENERATED:

- A. Labels for targeted mailings (sort by reunion year; sort by region).

NOTES:

- A. No pre-registration is currently done - prefer to set up pre-registrations.
- B. Targeted mailings include hotel and class contact information.
- C. Classes work with Alumni Relations to plan their events.
- D. All offices on campus are involved in homecoming/reunion.
- E. Alumni Relations office is the primary coordinator.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Alumni Relations **DEPT.#** 1.1
PROCESS: Programs/Events **PROC.#** 1.1.1

ACTIVITY:

1.1.1.9 Dinners/Luncheons

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
10-15 attendees	3-4/year	

TASK:

- A. Menu selection with designated catering company.
- B. Room selection; work with campus environment services for set-up and breakdown of tables and chairs.

ISSUES:

- A. Would like to track attendees in database.
- B. Design of standard invitations to be used with all luncheon or dinner mailings.

FORMS USED:

- A. Invitations.
- B. Contact reports.

REPORTS/LETTERS GENERATED:

- A. Labels (invitees hand - selected by VP).

NOTES:

- A. Need to determine which staff to participate (prospect managers?0.
- B. Contact reports to be submitted.

ORG: Institutional Advancement ORG.# 1
DEPARTMENT: Alumni Relations DEPT.# 1.1
PROCESS: Publications PROC.# 1.1.3

ACTIVITY:

1.1.3.3 Alumni Update

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
4	1 year	

TASK:

- A. Alumni Relations office collects and edits articles.
- B. Advancement Services produces export file for mail house.

ISSUES:

- A. Work with mail house on deadlines and distribution costs.

FORMS USED:

- A.

**REPORTS/LETTERS
GENERATED:**

- A. Mailing list (export delimited).

NOTES:

- A. Faculty to be included for writing of future articles.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Alumni Association **DEPT.#** 1.2
PROCESS: Alumni Services/Programs **PROC.#** 1.2.2

ACTIVITY:

1.2.2.1 Career Mentoring

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
40-50		

TASK:

- A. Potential Mentors identified through volunteers.
- B. Mentors and Mentees fill out application forms.
- C. Those accepted are matched up and a quarterly email correspondance is expected.
- D. Evaluations are done by mentors and students at end of the year.

ISSUES:

- A. Would want to track mentors, mentees and what mentor had what student.

FORMS USED:

- A. Mentor Application
- B. Mentee Application
- C. Evaluation Form

REPORTS/LETTERS GENERATED:

- A. Labels for potential career mentors (update criteria).
- B. Labels for current career mentors.

NOTES:

- A. New Program - will start with about 50 students and 80-90 alumni mentors.
- B. Has not been through a cycle; final process is still to be determined.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Development **DEPT.#** 1.3
PROCESS: Fundraising and Reporting **PROC.#** 1.3.1

ACTIVITY:

1.3.1.1 Campaign Solicitations and Special Appeals

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
3-4	1 year	

TASK:

- A. Communications to draft appeal letters; final review by VP.
- B. Confirm signatory staff and volunteers.
- C. Advancment Services to provide mail merge data.

ISSUES:

A. Coordinating signing of letters to adhere to scheduled drop dates.

FORMS USED:

REPORTS/LETTERS GENERATED:

A. Mailing list (delimited export)

NOTES:

A. Determination to be made whether to handle mailing in house or via mail house.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Development **DEPT.#** 1.3
PROCESS: Development Events **PROC.#** 1.3.3

ACTIVITY:

1.3.3.1 Various Special Events

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
5 to 10	1 year	

TASK:

- A. Advancement Services to provide mailing and merge data for invitations.
- B. Asst. to VP will coordinate with President's Office to determine event theme, space utilization, and catering.

ISSUES:

- A. Coding to be assigned for gifts sent in lieu of (or in addition to) event attendance.

FORMS USED:

REPORTS/LETTERS GENERATED:

- A. Mailing lists (delimited export)

NOTES:

- A. Need to develop tracking and reporting system for event attendance.

ORG: Institutional Advancement	ORG.# 1
DEPARTMENT: Development	DEPT.# 1.3
PROCESS: Fund Management	PROC.# 1.3.5

ACTIVITY:

1.3.4.2 Stewardship

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
100	1 year	

TASK:

- A. Information from Finance and Financial Aid is sent to the donors for each scholarship fund.
- B. Personal Notes from recipients are included.

ISSUES:

- A. Interfaces will need to be created with non-Development database systems.
- B. Will want to continue to personalize stewardship letters.

FORMS USED:

REPORTS/LETTERS

GENERATED:

- A. Letters to donors.
(Manually by recipient students)

NOTES:

A.	Need reports from Finance system regarding endowed fund amounts.
B.	Will need access to scholarship recipient information.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Development **DEPT.#** 1.3
PROCESS: Campaign **PROC.#** 1.3.5

ACTIVITY:

1.3.5.2 Prospect Research

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
Varies		

TASK:

A.	Information is acquired regarding a potential prospect.
B.	Information is entered into Advancement database for the briefing notes.

ISSUES:

A. No external ratings are being done at present.

FORMS USED:

A. None

REPORTS/LETTERS GENERATED:

A. Profile Report from Access
 B. Briefing Notes
 C. Prospect Screening and Rating Form

NOTES:

A. Up and coming -- active prospect research started about 9 months ago.

B. Sources include newspapers, directories, people, CDs and web.

C. Board of Director Information - who knows whom from sitting on the same organizational boards.

D. Giving Criteria (including giving to other organizations.

E. Application guidelines or procedures from foundations and corporations.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Development **DEPT.#** 1.3
PROCESS: Campaign **PROC.#** 1.3.5

ACTIVITY:

1.3.5.3 Volunteer Management

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
80 solicitors		

TASK:

- A. A key solicitor is assigned through either research or a volunteer screening and rating meeting.
- B. After the appropriate solicitor has been determined, the solicitor name is entered into the Key Solicitor field in the Advancement database.
- C. Determination gets made over time as to whether a person with a solicitor is really a prospect and will actually be solicited for the Campaign. Cultivation determined by established prospect level.
- D. Prospect Research staff to produce briefing notes and cultivation strategy recommendations.

ISSUES:

- A. Would like to customize reports to cross reference information.
- B. Would like to do advanced queries in Advancement database.

FORMS USED:

- A. Call Report
- B. Prospect Screening and Rating Form.

REPORTS/LETTERS

GENERATED:

- A. Briefing Notes
- B. Prospect Screening and Rating Review Form
- C. Pledge Status Report by Solicitor, area, giving level or constituency. (new report)

NOTES:

- A. This is the first year for this process. How cultivation/solicitation results are returned to Advancement database is still being worked out.
- B. A call report form for solicitors to complete and return has been designed.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Annual Fund **DEPT.#** 1.4
PROCESS: Phonathon **PROC.#** 1.4.2

ACTIVITY:

1.4.2.1 Student Calling

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
10,000 Cards	1 year	

TASK:

A.	Produce Solicitation List
B.	Produce Solicitation Letter and Envelopes
C.	Produce Prospect Cards
D.	Letters Sent
E.	Two weeks later Calls are made -- students get random "prospects"
F.	Results: Pledge, No Pledge, Handle by Mail, Call back, Special Card
Fa.	Pledge: Card goes to records for entry into system.
Fb.	No Pledge: Refusal numbers entered - notation made of refusal reason.
Fc.	Handle by Mail: Send a package with information to donate.
Fd.	Call Back: Filed away by date to call back.
Fe.	Special Card: Usually complaints handled case by case.
G.	Address Changes are made that come from the Phonathon Card.
H.	Class notes information copied and forwarded to Communications.
I.	A student does a manual, personalized thank you letter.
J.	Phonathon card is filed in donor's file.
K.	Reminder Calling to people who pledged but have not paid.

ISSUES:	
A.	Historic giving information to be cleaned up.
FORMS USED:	
A.	Phonathon Card/Prospect Card
B.	Pledge Confirmation (with note from student)
REPORTS/LETTERS GENERATED:	
A.	Solicitation Lists
B.	Solicitation Letter/Envelope
C.	Prospect Card
D.	Nightly & Weekly Stat Report
E.	Caller Performance
F.	Comparasion with prev. year

NOTES:	
A.	Information contained on the prospect card includes name, id, address, degree, class year, phone number, business information, previous two years of giving, spouse information, matching gift information, next of kin, ask amount.
B.	Ask amount to be manually entered on the pledge form.
C.	Would like to automate phonathons - have screen up and caller can make call and enter info.
D.	Nightly and Weekly Stat reports tracks gift type, call back, refusals, commitments - done at the caller level
E.	Caller stat report is really 4 reports. Caller performance to year to date, weekly caller performance, program caller performance, lifetime caller performance.
F.	Nightly pledge reports, weekly pledge report, daily pledge report, weekly day and weekly night and to date.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Annual Fund **DEPT.#** 1.4
PROCESS: Parent's Program **PROC.#** 1.4.4

ACTIVITY:

1.4.4.1 Student Calling

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
3,500 Cards	1 year	

TASK:

A.	Produce Solicitation List
B.	Produce Solicitation Letter and Envelopes
C.	Produce Prospect Cards
D.	Letters Sent
E.	Two weeks later Calls are made -- students get random "prospects"
F.	Results: Pledge, No Pledge, Handle by Mail, Call back, Special Card
Fa.	Pledge: Card goes to records for entry into system.
Fb.	No Pledge: Refusal numbers entered - notation made of refusal reason.
Fc.	Handle by Mail: Send a package with information to donate.
Fd.	Call Back: Filed away by date to call back.
Fe.	Special Card: Usually complaints handled case by case.
G.	Address Changes are made that come from the Phonathon Card.
H.	Class notes information copied and forwarded to Communications.
I.	A student does a manual, personalized thank you letter.
J.	Phonathon card is filed in donor's file.
K.	Reminder Calling to people who pledged but have not paid.

ISSUES:	
A.	Historic giving information to be cleaned up.
FORMS USED:	
A.	Phonathon Card/Prospect Card
B.	Pledge Confirmation (with note from student)
REPORTS/LETTERS GENERATED:	
A.	Solicitation Lists
B.	Solicitation Letter/Envelope
C.	Prospect Card
D.	Nightly & Weekly Stat Report
E.	Caller Performance
F.	Comparasion with prev. year

NOTES:	
A.	Information contained on the prospect card includes name, id, address, degree, class year, phone number, business information, previous two years of giving, spouse information, matching gift information, next of kin, ask amount.
B.	Ask amount to be manually entered on the pledge form.
C.	Would like to automate phonathons - have screen up and caller can make call and enter info.
D.	Nightly and Weekly Stat reports tracks gift type, call back, refusals, commitments - done at the caller level
E.	Caller stat report is really 4 reports. Caller performance to year to date, weekly caller performance, program caller performance, lifetime caller performance.
F.	Nightly pledge reports, weekly pledge report, daily pledge report, weekly day and weekly night and to date.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Advancement Services **DEPT.#** 1.5
PROCESS: Data Management **PROC.#** 1.5.1

ACTIVITY:

1.5.1.1 Pledge and Gift Entry

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
6,500 gifts	1 year	
5,000 pledges	1 year	

TASK:

- A. Entry of gifts and pledges from Phonathon Forms
- B. Entry of gifts received via postal service (AS Coordinator opens mail).
- C. Gift Processor enters gifts and runs the batch report.
- D. Gift Processor completes batch transmittal report including list of gifts by purpose code (by batch number) -- summary by account.
- E. Finance records a total to each account number in the General Ledger.

ISSUES:

- A. More reports needed to analyze information that is fed into the system.
 - Comparative
 - Data Verification

FORMS USED:

- A. Phonathon Form (Prospect Card)
- B. Pledge Confirmation Card

REPORTS/LETTERS

GENERATED:

- A. Batch report - lists individuals and gift amounts and fund/purpose.
- B. Summary by Account report -- by batch number.
- C. Pledge Report - lists name, amount, balance and fund.
- D. Yearly Pledge Reconciliation Rpt.
- E. Monthly Gift Reconciliation Report.

NOTES:

- A. Crediting issues: alum-alum or alum-other donor couples. Current system splits the gift - need to address split crediting post-conversion.

ORG: Institutional Advancement ORG.# 1
DEPARTMENT: Advancement Services DEPT.# 1.5
PROCESS: Data Management PROC.# 1.5.1

ACTIVITY:

1.5.1.3 Address Updates

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
10,000	1 year	

TASK:

A. Update to current address and change old address to "former" status.

ISSUES:

A. Don't want to keep hard copy of changes -- imaging may be an option to help deal with this.

FORMS USED:

- A. Returned Mail
- B. Self Reported, mail or phone
- C. Research (no special form)
- D. Prospect Card
- E. Home Page and Email

REPORTS/LETTERS GENERATED:

NOTES:

A. Current system maintains a primary and secondary address. Previous addresses are not maintained.

B. Hard copy of information sent from the individual gets filed.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Advancement Services **DEPT.#** 1.5
PROCESS: Data Management **PROC.#** 1.5.1

ACTIVITY:

1.5.1.4 Processing Receipts

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
5,500	1 year	

TASK:

- A. Run report to produce receipts - prompts for start and end date.
(Cummulative total is printed and the first 2 purpose codes are printed.)
- B. Four copies printed -- first two to the donor, second two for internal filing
(Alpha and Numerically)

ISSUES:

A. Current receipts are generated via mail merge (post-conversion plan to automate all receipts).

FORMS USED:

REPORTS/LETTERS GENERATED:

A. Receipt

NOTES:

A. Currently done once a year at the end of the year but will be changed to after each batch.

B. Receipt is issued for both spouses for joint gifts.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Advancement Services **DEPT.#** 1.5
PROCESS: Data Management **PROC.#** 1.5.1

ACTIVITY:

1.5.1.7 Process Pre-authorized Checking Gifts

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
150-200	1 year	

TASK:

- A. Advancement Services receives notification of gift from Finance Office.
- B. Same process as gift entry - separate batch report sent to Finance.

ISSUES:

FORMS USED:

- A. Pre-authorized Checking Form

REPORTS/LETTERS GENERATED:

- A. Gift Batch Report

NOTES:

- A.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Advancement Services **DEPT.#** 1.5
PROCESS: Data Management **PROC.#** 1.5.1

ACTIVITY:

1.5.1.9 Reconciliation with Finance Reports

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST
12	1 year	

TASK:

- A. Run monthly detail by line account summary report and submit to Finance Office.
- B. Contact Business Office to verify accuracy of figures (if out of balance, check for discrepancies by batch, make necessary adjustments and re-run report).
- C. Distribute report to President's Office, Business Office, and internal Institutional Advancement departments as requested.

ISSUES:

A. Would like to build an interface to the Finance system to update the general ledger automatically.

FORMS USED:

A. Info recorded from gift batches.

REPORTS/LETTERS GENERATED:

B. Monthly summary - line detail by account report

NOTES:

A. Monthly detail line by account run regularly; quarterly summaries generated, as well.

B. Business Office (general ledger) is being updated manually.

ORG: Institutional Advancement **ORG.#** 1
DEPARTMENT: Advancement Services **DEPT.#** 1.5
PROCESS: Data Management **PROC.#** 1.5.1

ACTIVITY:
 1.5.1.11 Biographic Information

QUANTITATIVE MEASUREMENT:

NUMBER PROCESSED	TIME PERIOD	COST

TASK:	
A.	Activity Codes for sports, service and other activies entered as attributes.
B.	Birthdates.
C.	Marital Status.
D.	Relationship links.

ISSUES:

FORMS USED:
 A. Constituent Profile form or self-reported via phone, email or mail.

REPORTS/LETTERS GENERATED:
 A. Labels/Lists by activities.

NOTES:

A.

B.