

University of North Carolina Wilmington—Advancement

In University of North Carolina Wilmington's (UNCW) advancement office, the time savings created by using Perceptive Content allow staff to focus less on filing and copying and more on meaningful, student-centered tasks, which has resulted in greater employee satisfaction. In addition to streamlining gift processing and routine audits, University Advancement has expanded the solution to Gift In Kind processing, where electronic documents that previously took several days to process are now often sent and processed on the same day.

Challenge

University Advancement at UNCW is a cornerstone for the university's fundraising efforts, and includes advancement services, annual giving, alumni relations, donor relations and development staff. In 2005, University Advancement was tasked with a challenge to improve paper-based inefficiencies in its department, and reduce its environmental footprint on campus. At that time, staff members spent countless hours making copies of gift checks and cycling files through lateral storage cabinets, year in and year out. Advancement services was also squeezed by a reduction in physical space, due to a series of office moves over the past several years.

The department quickly realized that one of the fastest ways to ease workflow bottlenecks, address limitations on storage space and support campus green initiatives was to explore a process and content management solution. The University Advancement staff did not have to look far: the Office of Financial Aid and the Graduate School at UNCW already used software solutions from Lexmark, including Perceptive Content, to meet similar workflow and budget challenges in their departments. After talking to their colleagues about the solution, University Advancement also chose the solution to connect staff and administration to relevant information in the department and across campus.

Solution

Making audits straightforward

When advancement services received requests to review gift backup, staff members stopped work to locate and retrieve files, make copies, fax documents and return files to their proper location. It was a cumbersome and time-consuming process that caused frustrating delays for processors who received the requests and university personnel waiting on the information. Routine audits required anywhere from 25 to 50 separate documents per request, and staff members often spent the better part of a day gathering the information needed for a single audit.

Meet University of North Carolina Wilmington

The University of North Carolina Wilmington (UNCW), the state's coastal university, is dedicated to learning through the integration of teaching and mentoring with research and service. UNCW offers Bachelor's degrees in 52 majors and 31 master's degrees to more than 13,000 students.

- ▶ **Main Campus:** Wilmington, NC
- ▶ **Undergraduate programs:** 52
- ▶ **Students:** 13,000

Products in use: Perceptive Content

Integration: Banner by Ellucian

Along with paperwork inefficiencies, security was also a concern for the University Advancement department. Staff members were aware that an open file cabinet, unlocked door or a stray form left on a fax machine could cause a security breach and compromise sensitive donor information.

According to Karen Brown, assistant director of advancement gifts at UNCW, “We were very cognizant of the responsibility we had towards keeping donors’ information safe. That was something we considered when we looked at imaging products.”

Perceptive Content protected sensitive donor information from unauthorized access, and powerful workflow technology allowed staff to greatly reduce turnaround time for loading forms and processing gifts.

Results

Saving time and the planet

In six years, University Advancement at UNCW moved offices three times—and with each move came a reduction in available office space. In addition, the department generated more than 35,000 paper copies a year in backup alone for gift processing. Staff members knew they could do more to support green initiatives on campus, and Perceptive Software was a natural choice to help achieve this goal.

“We weren’t very efficient with our resources, our time management or the space we had available,” says Brown. “We were looking for an application where we could be greener, which in turn would save us more money, and be more efficient with our gift processing and our resources.”

After implementing solutions from Lexmark, University Advancement was able to significantly reduce paper usage in the department, and also save hundreds of hours of staff time that was previously devoted to cycling files in and out of large lateral file cabinets on an annual basis.

“It has been a more efficient use of our resources, and it certainly has been a greener and more earth-friendly process, which supports our goals here at UNCW,” says Brown.

A customizable process & content management solution

Powerful functionality within Perceptive Content allows users to easily customize the solution to fit the business process needs of a particular department or campus. For University Advancement at UNCW, that meant real-time collaboration, simplified processing of donor gifts and instant access to information for audit purposes. According to Brown, “We loved the fact that you can access information anywhere on or off campus, and you have the ability to assign roles to individuals to view and access donor information. ” University Advancement has since expanded the solution to Gift in Kind processing. Staff members had previously routed gift paperwork from one office to another through traditional inter-office mail, where it might take up to a week for a document to reach its intended destination.

“After we implemented Perceptive Content on our campus, we were just thrilled how it revolutionized the way we do business.”

Karen Brown

Assistant Director of Advancement Gifts,
UNCW

Same day processing

With Perceptive Content, electronic documents are often sent and processed on the same day. In addition to significant improvements in collaboration and workflow, Perceptive Content connects users to the task at hand with a single click, regardless of when the information was captured or archived.

“Document retention and access are not determined by space limitations, so I can pull back information from three years ago and it's right there—I can pull it up just as quickly as I can something I put in yesterday,” says Brown. “I just don't understand why more folks are not using this solution for gift processing, because it has been a huge time saver for us—and everyone who uses it just loves it.”

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