

2009 PA BUG Conference Agenda

Advancement

Tuesday, November 24, 2009

<u>Session Title / Description</u>	<u>Presenters/ Institutions</u>	<u>Time / Room</u>	<u>Cross List</u>
Implementing a Dynamic Management Reporting Environment Utilizing basic MS tools, implementing management reports that are dynamic, flexible, & robust to give up to date status of upfront discovery of new prospects, active & current prospect pipeline, and financial results.	Tom Chaves <i>Lehigh University</i>	8:30 - 9:30 Royale I	
Implementing Document Imaging Scranton will describe our processes involved with implementing imaging of documents for Advancement. The presentation will include information on use of Application Xtender software including Image Capture, Document Manager and WebXtender.	Carl O'Neil <i>University of Scranton</i>	8:30 - 9:30 Winner's Circle	
Planned Giving Scranton will share our procedures for coding and reporting Planned Gifts. This presentation will include the use of Banner forms for coding and MS Access for reporting. Our Advancement Office provides reports to Finance showing planned gifts and the anticipated year of receipt, based on the Social Security Life Expectancy table, along with recorded and present value.	Andrea Mulrine <i>University of Scranton</i>	9:40 - 10:40 Royale I	
Prospect Research and Prospect Management BOF Bring your questions and best practices for a discussion on Prospect Research and Prospect Management.	Andrea Mulrine <i>University of Scranton</i>	11:10 - 12:10 Royale I	
New in Advancement Come see what the future holds for Banner Advancement. A Sungard Higher Ed representative will talk about the future of the Banner Advancement product	Fred Weiss <i>SunGard Higher Education</i>	1:15 - 2:15 Royale I	Vendor
Advancement BOF Bring your Questions and your Tips and Tricks!	Robert VanBlargan <i>Lafayette College</i>	2:30 - 3:30 Royale I	