AFFILIATIONS
CONSTITUENT SCORES

Affiliations are calculated scores for an individual, household, and organization record that aim to align a constituent’s interests with the relevant unit(s) across the University of Illinois system. This “gamification” of constituent engagement incorporates a traditional model—awarding points for past behavior with and interest in UI, as well as awarding points for constituent interest and activity outside of the relationship with UI, to pair donor passions with the greatest opportunity for impact at the University. Constituents receive points for University of Illinois degrees, giving, volunteering, event attendance, employment, survey responses, and opt-ins. As of May 18, 2019, TED will also award points for parent interests, personal interests, and philanthropic giving to others.

Uses for Affiliation Scores
Affiliations can be used in a variety of ways:

Unit pool development: Even with as few as one point, affiliations can identify whether a constituent has an interest in a unit. Once included in that unit’s “pool” of related constituents, the constituent can be included in marketing efforts, be eligible for portfolio management by advancement officers in that unit, or be included in unit counts / reports about affiliated prospects, etc.

Quick snapshot of constituent engagement: The affiliations tab on a constituent’s record provides a one-screen view of that constituent’s affiliations with the university, rather than the user having to click to the revenue tab, relationships tab, events tab, volunteer tab, etc. to get an overview of the constituent’s relationship with the university.

Identification of appropriate unit(s) to manage prospects: As outlined in the Plan and Prospect Management Procedures, affiliation scores drive portfolio management procedures, including which unit or regional advancement officers can manage which prospects and when, as well as what collaboration and communication is expected of advancement officers between affiliated units.

Pool/unit capacity assessments: Unit-affiliated constituents will appear in capacity assessments, analyses, and reports, including campaign pyramids and projection reports, unit demographic analyses, etc. To limit the number of constituents included in these analyses for a unit, often a baseline affiliation threshold is used. For example, a minimum of 500 points may be used to mimic the level of a degree affiliation.
Event invitations: Where event invitation strategies often include total lifetime giving criteria, among others, affiliation scores can be used to layer in an element of recency to the invitation criteria or to include highly engaged, lower-level donors, for example.

Marketing and annual giving segmentation and personalization: Affiliations can be used to split a marketing or annual giving audience into smaller sets of records—for example highly engaged vs. non-engaged constituents, faculty/staff, graduates, etc.—to better adjust messaging or designation options (funds available on a remit) to reflect that niche part of the audience.

Affiliations
Affiliations are heavily influenced by data that is representative of work across the advancement program. All areas within advancement play a key role in adding information to TED, which plays a part in increasing a constituent’s affiliation for that unit.

The Affiliations tab is updated at 5 am every day to reflect additional data entered. Affiliations scores reset every Sunday to include deleted/removed data.

The Affiliations tab is viewable from both the individual constituent record and the constituent’s household record.

Affiliations Sub-Tabs
The Affiliations tab is divided into three sub-tabs: Individual, Household & Individual Detail.
**Individual Sub-Tab**

The Individual sub-tab was designed to display the Affiliations for the relevant member(s) of the household.

When viewed from the individual record the individual sub-tab will only display the individual constituent’s affiliations.

<table>
<thead>
<tr>
<th>Contact</th>
<th>Updates</th>
<th>Affiliations</th>
<th>Memberships</th>
<th>Prospect</th>
<th>Documentation and Interactions</th>
<th>Relationships</th>
<th>Personal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td>Household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Multi-University Prospect**
- contact UIF Research
- Multi-Unit Urbana Prospect - contact UIF Research
- Multi-Unit Chicago Prospect - contact UIF Research
- Multi-Unit Springfield Prospect - contact UIF Research

**Affiliations By University (4)**

<table>
<thead>
<tr>
<th>University Code</th>
<th>University Desc...</th>
<th>Rank</th>
<th>Total Score</th>
<th>Percentage</th>
<th>Degree</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>U CAMP</td>
<td>University of Illin...</td>
<td>1</td>
<td>4,486</td>
<td>56.01%</td>
<td>1,000</td>
<td>400</td>
</tr>
<tr>
<td>UN CAMP</td>
<td>University of Illin...</td>
<td>2</td>
<td>3,334</td>
<td>41.63%</td>
<td>0</td>
<td>600</td>
</tr>
<tr>
<td>C CAMP</td>
<td>University of Illin...</td>
<td>3</td>
<td>137</td>
<td>1.71%</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>S CAMP</td>
<td>University of Illin...</td>
<td>4</td>
<td>52</td>
<td>0.65%</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Affiliations By Advancement Unit (25)**

<table>
<thead>
<tr>
<th>Advancement Unit...</th>
<th>Advancement Unit Desc...</th>
<th>Rank</th>
<th>Total Score</th>
<th>Percentage</th>
<th>Degree</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>A UIAA</td>
<td>Alumni Association</td>
<td>1</td>
<td>2,675</td>
<td>33.40%</td>
<td>0</td>
<td>600</td>
</tr>
<tr>
<td>U LAS</td>
<td>Liberal Arts and Sc...</td>
<td>2</td>
<td>1,433</td>
<td>17.89%</td>
<td>500</td>
<td>0</td>
</tr>
<tr>
<td>U BUSN</td>
<td>Business</td>
<td>3</td>
<td>1,103</td>
<td>13.77%</td>
<td>500</td>
<td>0</td>
</tr>
<tr>
<td>F UIF</td>
<td>Foundation</td>
<td>4</td>
<td>659</td>
<td>8.23%</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>U VCIIA</td>
<td>Vice Chancellor f...</td>
<td>5</td>
<td>550</td>
<td>6.87%</td>
<td>0</td>
<td>400</td>
</tr>
</tbody>
</table>
When viewed from the household record the individual sub-tab will display affiliations for each member of the household.

<table>
<thead>
<tr>
<th>Constituent</th>
<th>University Code</th>
<th>University Description</th>
<th>Rank</th>
<th>Total Score</th>
<th>Percentage</th>
<th>Degree</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lisa B. Wilson</td>
<td>U CAMP</td>
<td>University of Illinois...</td>
<td>1</td>
<td>3,152</td>
<td>76.30%</td>
<td>1,000</td>
<td>0</td>
</tr>
<tr>
<td>Lisa B. Wilson</td>
<td>UN CAMP</td>
<td>University of Illinois...</td>
<td>2</td>
<td>950</td>
<td>23.00%</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Lisa B. Wilson</td>
<td>C CAMP</td>
<td>University of Illinois...</td>
<td>3</td>
<td>29</td>
<td>0.70%</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Affiliations By University (7)**

<table>
<thead>
<tr>
<th>Constituent</th>
<th>University Code</th>
<th>University Description</th>
<th>Rank</th>
<th>Total Score</th>
<th>Percentage</th>
<th>Degree</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matthew J. Wilson</td>
<td>U CAMP</td>
<td>University of Illinois...</td>
<td>1</td>
<td>4,486</td>
<td>56.01%</td>
<td>1,000</td>
<td>400</td>
</tr>
<tr>
<td>Matthew J. Wilson</td>
<td>UN CAMP</td>
<td>University of Illinois...</td>
<td>2</td>
<td>3,334</td>
<td>41.63%</td>
<td>0</td>
<td>500</td>
</tr>
<tr>
<td>Matthew J. Wilson</td>
<td>C CAMP</td>
<td>University of Illinois...</td>
<td>3</td>
<td>137</td>
<td>1.71%</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Matthew J. Wilson</td>
<td>S CAMP</td>
<td>University of Illinois...</td>
<td>4</td>
<td>52</td>
<td>0.65%</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Household Sub-Tab
The Household sub-tab displays the total aggregated affiliation points for both members of the household. The information on the household sub-tab is the same on both the individual and the household record.

<table>
<thead>
<tr>
<th>Contact</th>
<th>Updates</th>
<th>Affiliations</th>
<th>Memberships</th>
<th>Prospect</th>
<th>Documentation and Interactions</th>
<th>Relationships</th>
<th>Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td>Household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Multi-University Prospect - contact UIF Research
Multi-Unit Urbana Prospect - contact UIF Research
Multi-Unit Chicago Prospect - contact UIF Research
Multi-Unit Springfield Prospect - contact UIF Research

Affiliations By University (4)  More ▼

<table>
<thead>
<tr>
<th>University Code</th>
<th>University Desc...</th>
<th>Rank</th>
<th>Total Score</th>
<th>Percentage</th>
<th>Degree</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>U CAMP</td>
<td>University of Illin...</td>
<td>1</td>
<td>5,636</td>
<td>55.70%</td>
<td>2,000</td>
<td>400</td>
</tr>
<tr>
<td>UN CAMP</td>
<td>University of Illin...</td>
<td>2</td>
<td>4,284</td>
<td>42.34%</td>
<td>0</td>
<td>600</td>
</tr>
<tr>
<td>C CAMP</td>
<td>University of Illin...</td>
<td>3</td>
<td>147</td>
<td>1.45%</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>S CAMP</td>
<td>University of Illin...</td>
<td>4</td>
<td>52</td>
<td>0.51%</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Affiliations By Advancement Unit (2.5)  More ▼

<table>
<thead>
<tr>
<th>Advancement Unit...</th>
<th>Advancement U...</th>
<th>Rank</th>
<th>Total Score</th>
<th>Percentage</th>
<th>Degree</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>A UIAA</td>
<td>Alumni Association</td>
<td>1</td>
<td>3,342</td>
<td>33.03%</td>
<td>0</td>
<td>600</td>
</tr>
<tr>
<td>U LAS</td>
<td>Liberal Arts and S...</td>
<td>2</td>
<td>1,966</td>
<td>19.43%</td>
<td>1,000</td>
<td>0</td>
</tr>
<tr>
<td>U BUSN</td>
<td>Business</td>
<td>3</td>
<td>1,119</td>
<td>11.06%</td>
<td>500</td>
<td>0</td>
</tr>
<tr>
<td>F UIF</td>
<td>Foundation</td>
<td>4</td>
<td>942</td>
<td>9.31%</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>U VCIA</td>
<td>Vice Chancellor f...</td>
<td>5</td>
<td>550</td>
<td>5.44%</td>
<td>0</td>
<td>400</td>
</tr>
</tbody>
</table>
Individual Detail Sub-Tab

The Individual Detail sub-tab displays a Subcategory breakdown of all Affiliation categories at the individual level.

<table>
<thead>
<tr>
<th>Category</th>
<th>SubCategory</th>
<th>Total Points</th>
<th>SiteName</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree</td>
<td>Major Degree</td>
<td>500</td>
<td>1KV710-Political Science</td>
</tr>
<tr>
<td>Degree</td>
<td>Major Degree</td>
<td>500</td>
<td>1KUB53-Law</td>
</tr>
<tr>
<td>Degree</td>
<td>Degree - Total</td>
<td>1,000</td>
<td></td>
</tr>
<tr>
<td>Event Attendee</td>
<td>Past Event</td>
<td>17</td>
<td>9AM637-UI Alumni Alliance</td>
</tr>
<tr>
<td>Event Attendee</td>
<td>Past Event</td>
<td>217</td>
<td>9AM813-U of I Foundation</td>
</tr>
<tr>
<td>Event Attendee</td>
<td>Past Event</td>
<td>8</td>
<td>1KV-Liberal Arts &amp; Sciences</td>
</tr>
<tr>
<td>Event Attendee</td>
<td>Past Event</td>
<td>8</td>
<td>2-University of Illinois at Chicago</td>
</tr>
<tr>
<td>Event Attendee</td>
<td>Past Event</td>
<td>17</td>
<td>1KM-Gies College of Business</td>
</tr>
<tr>
<td>Event Attendee</td>
<td>Recent Event</td>
<td>650</td>
<td>9AM637-UI Alumni Alliance</td>
</tr>
<tr>
<td>Event Attendee</td>
<td>Recent Event</td>
<td>50</td>
<td>9AM813-U of I Foundation</td>
</tr>
<tr>
<td>Event Attendee</td>
<td>Recent Event</td>
<td>25</td>
<td>1KV-Liberal Arts &amp; Sciences</td>
</tr>
<tr>
<td>Event Attendee</td>
<td>Recent Event</td>
<td>25</td>
<td>1KV895-Spurlock Museum</td>
</tr>
<tr>
<td>Event Attendee</td>
<td>Event Attendee - Total</td>
<td>1,017</td>
<td></td>
</tr>
</tbody>
</table>

Affiliations by University

**Affiliations by University** – Affiliations scores based on the university.

- **University Code**: University short code used in reporting
- **University Description**: Identifies the University by full name
**Affiliations by Advancement Unit**

**Affiliations by Advancement Unit** – Affiliations scores based on campus, college, department, sub-department or a grouping thereof.

- **Advancement Unit Code**: Advancement Unit abbreviation used in reporting
- **Advancement Unit Description**: Identifies the Advancement Unit by full name

---

**Affiliations by Site**

**Affiliations by Site** – Affiliations scores based on Sites from each data set. Sites follow the Banner Systems hierarchy of campus (1 digit), college (3 digits) and department (6 digits).

- **Site ID**: Site identification number used in reporting.
- **Site Name**: Identifies the Site by full name

---

**Affiliation Ranking**

**Rank**

Determined by the total score column, ranks are displayed by University, Advancement Unit, and by Site. If more than one unit shares identical affiliations scores, then their ranks will be the same. Use the Household Affiliations to determine primary unit ranking.

---

**Total Score**

Total affiliations scores are calculated based on a combination of the following Affiliation categories: Degree, Employment, Engagement, Giving, Event Attendance, Student Involvement, and Interests.

---

**Percentage**

Displays the amount of affiliation to that university, unit, or site based on percentage totals.

In the example below U DIA holds 47.62% of the constituent’s total affiliation based on Advancement unit.
## Multi-Unit Prospect Flags

The Multi-Unit Prospect flag is calculated by University, and labeled as Multi-Unit Chicago, Multi-Unit Springfield or Multi-Unit Urbana. When a constituent’s top advancement unit affiliation per University is less than 65% of the total points to that University, the constituent will have a Multi-Unit flag for that University. A constituent has the potential to have more than one Multi-Unit Prospect flag. This is a better indicator of whether a prospect should be managed by a University’s Central Major Gift Team. The Multi-Unit Prospect flag no longer needs to be coupled with the primary affiliated Advancement Unit.

Multi-Unit Prospect flags are calculated both on the individual and household level. Since we are managing households in TED (via Plans), not individuals, prospect management decisions regarding Multi-Unit Prospects are based on the household. Multi-Unit prospects are allocated to regional or central fundraising staff as determined by the Vice Chancellors for Advancement for each university.
Questions can be directed to the UIF Research and Portfolio Management team, regarding prospect management best practices for these constituents.

**Multi-University Prospect Flag**

When a constituent’s top University affiliation is less than 65% of total affiliation points, the constituent will have a Multi-University Prospect Flag. The Multi-University Prospect flag is calculated both on the individual and household level. Since we are managing households in TED (via Plans), not Individuals, prospect management decisions regarding Multi-University Prospects, should be based on the household.

Multi-University prospects, where actively managed toward a major gift by more than one university, are assigned a prospect manager at the discretion of the UIF President, in consultation with the Executive Operations Team. Questions can be directed to the UIF Research and Portfolio Management team, regarding prospect management best practices for these constituents.

**Affiliation Points by Column**

Affiliations scores are determined using the following University of Illinois involvement categories: Degree, Employment, Engagement, Giving, Event Attendance, Student Involvement, and Interests. Each numbered column is defined in the following sections of this document.

1. **Degree**

Degree information is the most fundamental building block of affiliation scoring. Degree information is displayed on the Education tab of the constituent record and is imported from the University of Illinois Banner System.
Points are awarded as follows:

**Degree (major)**
500 points to unit per major. Awarded upon graduation to the site and to the current advancement unit, not the granting advancement unit when a department or college has moved; includes 500 points to each major within a double major.

**Degree UIC Honors College**
250 points to unit per degree. Awarded to the UIC Honors College, for Honors College participants.

**Known Issue:** Honors programs display in the Educational Involvement field of the Education tab on an individual record. Unit-based honors programs begin with the unit's acronym.

**Unit-Based Honors Programs**
250 points to unit per degree. Awarded to the relevant advancement unit for the unit-based honors programs.

**Known Issue:** Currently, departmental honors programs will only be awarded points at the unit level, as there is no current way to tag an honors program participation in TED with a departmental level site.

**University of Illinois Chicago Graduate College**
250 points to unit per degree awarded to the UIC Graduate College, for all Graduate and Professional programs.

Medicine, MBA, MEng, MPH, and MSW degrees are not awarded Graduate College Points.

2G and 2P programs are Graduate and Professional degree levels. The degree level is found in the Degree Information of the degree record on the constituent’s Education Tab.
Current Students
100 points to unit per degree awarded for current students with a status of Currently Attending.

Attendees
100 points to unit per degree awarded to all previous attendees with a status of Incomplete.

Minors
0 points per minor.

Known Issue: Minor data in TED does not include a site to which to award affiliation points. Should data become available; the Affiliations team will revisit awarding points to units where the minors are offered.

2. Employment

Employment information is displayed on the Relationships tab of the constituent record and is imported from the University of Illinois Banner System. University Appointments data import process is scheduled to run monthly by the UIF AIMS department.

Points are awarded for University Appointments in the units in which the appointments are held.

<table>
<thead>
<tr>
<th>Affiliations By Advancement Unit (20)</th>
<th>More</th>
<th>Advancement Unit</th>
<th>Advancement Unit Description</th>
<th>Rank</th>
<th>Total Score</th>
<th>Percentage</th>
<th>Degree</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>U INFOS</td>
<td></td>
<td>School of Information Science</td>
<td>1</td>
<td>18,780</td>
<td>40.56%</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>U LAS</td>
<td></td>
<td>Liberal Arts and Sciences</td>
<td>2</td>
<td>19,076</td>
<td>21.78%</td>
<td>500</td>
<td>1,600</td>
<td></td>
</tr>
<tr>
<td>U FAA</td>
<td></td>
<td>Fine and Applied Arts</td>
<td>3</td>
<td>9,147</td>
<td>19.78%</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>U IPM</td>
<td></td>
<td>Illinois Public Media</td>
<td>4</td>
<td>5,535</td>
<td>11.93%</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>U VCIA</td>
<td></td>
<td>Vice Chancellor for Institutions</td>
<td>5</td>
<td>1,150</td>
<td>2.48%</td>
<td>0</td>
<td>900</td>
<td></td>
</tr>
<tr>
<td>F UIF</td>
<td></td>
<td>Foundation</td>
<td>6</td>
<td>800</td>
<td>1.73%</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>U EDUC</td>
<td></td>
<td>Education</td>
<td>7</td>
<td>166</td>
<td>0.36%</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Points are awarded as follows:
Residents/Interns
500 points once per site with the following classifications: House Staff (Medical Residents and Interns). The point total for Residents is intended to equal that of a degree.

Fellows
500 points once per site with the following classifications: Fellow, Postdoctoral; Postdoctoral Intern. The point total for Fellows (postdoc) is intended to equal that of a degree.

Faculty/Staff (Excluding Fellows/Residents/Interns and Students)
100 points per fiscal year per site. This includes zero percent appointments with the following classifications:

- Academic Hourly
- Academic Professional
- Academic Unpaid
- Administrator, Other
- Library Faculty, Other
- Library Faculty, Tenured
- Library Faculty, Tenure-track
- Nonacademic, Established
- Department Head
- Faculty, Other
- Faculty, Tenured
- Faculty, Tenure-track
- Nonacademic, Negotiated
- Nonacademic, Open range
- Nonacademic, Prevailing
- RAMP Administrator
Student Employment
50 points per fiscal year per site with the following classifications:
- Fellow, Predoctoral
- Fellow, Trainee
- Graduate Assistant, Pre-professional
- Graduate Clinical Assistant
- Graduate Teaching Assistant
- Graduate/Undergraduate Other
- Undergraduate Student Employee, Part-time Hourly
- Graduate Teaching Assistant, Required

Retirees/Annuitants/Special Pay Employee/ Day Worker
0 points for any employees with these classifications.

3. Engagement
Critical engagement with the University may occur outside events. Some examples are participation in a board or committee, speaking in a classroom, and advocating through Illinois Connection on behalf of the institution. All associated committees must have a group type of UI Involvement.

Points are awarded as follows:
Committee

University of Illinois Governing Boards
200 points per fiscal year for each year of participation in any of the following boards: UI Board of Trustees, UI Foundation Board, UI Alumni Alliance Board. Governing Board committees must have the following committee type attributes: Participant, Volunteer, Board/Committee, and Governing. The following group member roles are excluded: Prospect or Declined Membership. The following attribute is excluded: Student.

University of Illinois Campaign Committees
100 points per fiscal year for each year of participation. Campaign committees must have the following committee type attributes: Participant, Volunteer, Board/Committee, Development, and one of With Illinois, Ignite, Reaching Stellar, Brilliant Futures, Campaign Illinois, or Campaign for Illinois. The following group member roles are excluded: Prospect or Declined Membership. The following attribute is excluded: Student.

Alumni Association/Alliance Alumni Club Leadership
100 points per fiscal year for each year of participation. Alumni Association/Alliance Alumni Club Leadership committees must have the following committee type attributes: Participant, Volunteer, Board/Committee, Alumni, and Alumni Club. The following group member roles are excluded: Prospect or Declined Membership. The following attribute is excluded: Student.
University Unit Board or Committee
75 points per fiscal year for each year of participation. University Board committees must have the following committee type attributes: Participant, Volunteer, and Board/Committee. Points are awarded for governing boards, campaign committees, and alumni club leadership; however, they are not awarded a second time under the unit board or committee category. The following group member roles are excluded: Prospect or Declined Membership. The following attribute is excluded: Student.

University Faculty/Staff Award
100 points per award received. University Faculty/Staff Award committees must have the following committee type attributes: Honoree/Recipient, Award, and Faculty/Staff. The group member role must be Recipient.

University Constituent Award
100 points per award received, beyond faculty/staff or student awards. University Constituent Award committees must have the following committee type attributes: Honoree/Recipient, and Award. Group member role must be Recipient. The following attributes are excluded: Faculty/Staff, and Student.
Volunteer

Individual Volunteer Activity
20 points per hour of activity with the University.

The volunteer types considered are Illinois Connection Advocate (UIAA), Mentor & Speaker/Facilitator. These chosen types have not changed since Affiliations were accessible in TED.

4. Giving

Previous giving - specifically recent giving - is the largest contributing factor in affiliations scores. Points are awarded using household giving; therefore, each household member’s affiliation points will be the same and reflective of giving for the entire household. This is the only affiliation calculation that is not individually calculated.

Points are awarded as follows:

Recent Giving -> 1 point per dollar within the current year and the five most recent fiscal years, with no maximum number of points.

Past Giving -> 0.33 points to unit per dollar for all years before the most recent five fiscal years, with no maximum number of points.

5. Events

Events are one of the most common forms of engagement for constituents with the university system.

Points are awarded as follows:
**Recent Event** -> 25 points per event attended for the current fiscal year, plus the previous five fiscal years.

**Past Event** -> 8.33 points per event attended for all years before the most recent five fiscal years, with no maximum number of points. Past events (like past giving), are worth one-third the points of recent events.

6. **Student Involvement**

Highly engaged students are often highly engaged alumni. All associated committees must have a group type of UI Involvement.

<table>
<thead>
<tr>
<th>Affiliations By Advancement Unit (5)</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advancement Unit...</td>
<td>Advancement Unit Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>U DIA</td>
<td>Division of Intercollegiate Athletics</td>
</tr>
<tr>
<td>U AHS</td>
<td>Applied Health Sciences</td>
</tr>
<tr>
<td>C ATHL</td>
<td>Intercollegiate Athletics</td>
</tr>
<tr>
<td>U VMED</td>
<td>Veterinary Medicine</td>
</tr>
<tr>
<td>A UIAA</td>
<td>Alumni Association</td>
</tr>
</tbody>
</table>

Points are awarded as follows:

**Student Athletics**

100 points per fiscal year of participation in a University of Illinois varsity athletics team, awarded to athletics. Student Athletics committees must have the following committee type attributes:
- Participant
- Extracurricular/Community, Athletics, Varsity, and Student.

**Student Awards**

100 points per award for each award received. This is not to be confused with financial awards or scholarships. Student Awards (Non-Financial) must have the following committee type attributes: Honoree/Recipient, Award, and Student. Constituents must have a group member role of Recipient.
**Student Marching/ Pep Band**

100 points per fiscal year of participation in a marching or pep band, awarded to the unit where band activity is managed, typically within the music department at the university. Student Marching/Pep Band must have the following committee type attributes: Participant, Extracurricular/Community, Marching band, Arts/Creative, Performing Arts, and Student.

25 points per fiscal year of participation in a marching or pep band, awarded to Athletics. Student Marching/Pep Band Athletics association must have the following committee type attributes: Participant, Extracurricular/Community, Marching Band, Arts/Creative, Performing Arts, and Student. These points are awarded at the same time to both units due to the nature of pep/marching bands and their participation with athletics programs.

**Performing Arts**

50 points per fiscal year of participation in a University performing arts program. Performing Arts committees must have the following committee type attributes: Participant, Extracurricular/Community, Arts/Creative, Performing Arts, and Student. The following attribute is excluded: Marching Band.

**Services Received**

50 points per fiscal year of participation in a service offered by the University. Services Received committees must have the following committee type attributes: Participant, Miscellaneous/Other, Services Received, and Student. The following group member roles are excluded: Prospect or Declined Membership.
Student Advancement or Leadership Committee
50 points per fiscal year of participation in any University Advancement or Leadership Committee/Program. Student Advancement or Leadership committees have the following committee type attributes: Participant, Volunteer, Board/Committee, Development or Alumni, and Student. The following roles are excluded: Prospect or Declined Membership.

Student Registered or Official Student Organization (SRO)
50 points per fiscal year of participation in any other University registered or official student organization. SRO committees have the following committee type attributes: Participant, Extracurricular/Community or Volunteer, and Student. The following group member roles are excluded: Prospect or Declined Membership. Committees counting in other Student Involvement subcategories will not also receive points as an SRO. Affiliation is based on the site on the committee record (located on the site sub-tab).

7. Interests
These points reflect primary (Self-Identified Opt-Ins, Surveys) and secondary sources (Unit-Identified Opt-Ins, Personal Info Interests, Philanthropic Giving to Others, Parent Interests) of personal interest level detail, in an attempt to slowly shift the Advancement program towards being able to execute more interest-based engagement and qualification activities, which is pivotal in the new age of philanthropy.

Points are awarded as follows:
Self-Identified Opt-Ins
10 points once for each opt-in a constituent has completed, including annual purchases of tickets or utilizing an Urbana Vet Med clinic. In TED these are referred to as mail preferences.

Known Issue: Ticket buyer and client data is being addressed in another project, ITG-430 External Data Integration, and once housed/structured can be re-addressed to more accurately award affiliations points for things like repeat client’s visits, single ticket buyers vs. season ticket buyers, two-seat purchases vs. 10-seat purchases, etc.

Unit-Identified Opt-ins
1 point once for each opt-in a unit has added to a constituent’s record to move him/her into that unit’s "pool." In TED these are referred to as mail preferences.

Units may request to have an opt-in mail preference code for his/her unit added to a constituent under the following circumstances:

- Evidence of constituent interest in that unit exists (giving to others, field of employment, publicly stated interest, grateful patients, etc.)
- Unit staff wants to engage constituent in marketing initiatives

Surveys
5 points for each survey to which a constituent has responded. Survey information can be found on the Surveys sub-tab of the Documentation and Interactions tab of a constituent’s individual record.

Note: As of October 2018, only the C CAMP 2018 Alumni Survey has been added to the TED system. An example of this can be found on TED record ID 10710121.
Personal Interest
10 points per interest for each personal info interest. Personal interest areas were reviewed, and appropriate sites were applied to each, if applicable. To receive Personal Interest affiliation points, the constituent must have at least 500 affiliation points to that University in other areas; a constituent meeting these criteria for multiple universities can have applicable sites across Universities. Personal Interest may not be directly associated with a constituent’s relationship with UI, but it may start to tell the story of what a potential donor has a passion for, and it could align with a current (or future) UI cause or initiative.

Philanthropic Giving
10 points per category for each philanthropic gift category to other organizations (philanthropic giving to others). Philanthropic Giving categories were reviewed, and appropriate sites were applied to each, if applicable. To receive Philanthropic Giving affiliation points, the constituent must have at least 500 affiliation points to that University in other areas: a constituent meeting these criteria for multiple Universities can have applicable sites across Universities. Philanthropic Giving may not be directly associated with a constituent’s relationship with UI, but it may start to tell the story of what a potential donor has a passion for, and it could align with a current (or future) UI cause or initiative. When Philanthropic Giving is rolled-up to the household, it is only reflected once per Category.

Parent Interest
Parent Interest Athletics, Degree, Marching Band, Marching Band Athletics, Performing Arts and Services Received) uses areas of affiliations that already exist, and points are awarded to parents, when there is a parent to child relationship in TED. Parents will receive 50% of a child’s points, for each Parent Interest mentioned above. Generally, there is only a parent to child relationship in TED, when both a parent and a child have an 'affiliation' to UI and were linked from research performed or was made aware by advancement staff. The family connection could be a strong engagement opportunity. When Parent Interests is rolled-up to the household, it is only reflected once, if it is a two-member household.