

ALUMNI ASSOCIATION INVOICING

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Chief Administrative Officer, USC Alumni Association

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UNIVERSITY OF
South Carolina

PURPOSE

- Lack of established, uniformed invoicing process resulting in:
 - Internal confusion
 - Poor customer service
 - Inaccurate financial reporting
- Goals
 - Documented process that could be implemented/followed by all
 - Improved Vendor/Sponsor experience
 - Financial reporting transparency



PEOPLE INVOLVED

Project Sponsor

Tiffany Foxworth, Chief Executive Officer—Alumni Association

Project Team Members

Kate Pollard, Chief Financial Officer—Alumni Association

Haven Quinlan, Sr. Dir. of Business Development/Programming—Alumni Association

Chanell Jackson, Staff Accountant—Alumni Association

Subject Matter Expert

Zechariah Fisher-Coleman, Student Intern—USC Foundations

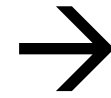


PROJECT PATH

- **Advance Work**
 - Process Improvement Project Charter
- **Improvement Sessions**
 - Discovery
 - Listening Sessions
 - Current Process Map
 - Possibility
 - Immediate/Short/Long Term
 - Future Process Map
 - Planning
 - System Testing
 - Determining Impact
- **Implementation: Next Step**



KEY IMPROVEMENTS



RESULTS

- Documented process for requesting Association invoice
- Standardized invoice template
- Sharepoint spreadsheet accessible by all
- Expedited invoicing of sponsors and partners

- Reduction in invoice request errors
- Uniformity of information collected
- Transparency for invoice life cycle
- Reduced timeline from an average of 3 weeks to 1 week from request to generation to distribution





USC Alumni

Invoice Request

Request to generate invoice to be sent to Association vendor/sponsor

Association Staff Member Requesting Invoice *

First Name

Last Name

Company/Individual to Receive Invoice

Company Name (if applicable)

Contact Name

Contact Email *

example@example.com

Contact Phone Number *

Please enter a valid phone number.

Next

Jotform for Internal Invoice Requests



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Invoice Log

Invoice Information

Date	Invoice #	Bill To	Description	Invoice Amount	Requested By	Sent to Requestor and copy Amie, Kate, & Chanell	Date Paid
3/12/2024	2024001	Smith Currie Oles	Golf Tournament - Carolina Sponsor	\$1,000.00	Laura	3/12/2024	
	2024002						
	2024003						

Sharepoint Spreadsheet for Internal Invoice Tracking



NEXT STEPS

- Implementation by March 29
- Explore automation and integration
- Staff Feedback—User Experience
- Re-evaluation and continuous improvement



REFLECTIONS

How has this program changed how you think about improvement?

- “Wins” go beyond the project improvement itself
- Improvement is everyone’s job



THANKS!

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