

This newsletter was created to keep the university community informed about “Ali,” the University’s Advancement CRM system. The system is intended to be ‘the single source of truth’ about alumni, donors and friends of the university. It was named for Aletheia, the Greek Goddess of Truth.

KEY DATES

MAY 2016	JUNE 2016	JULY 2016
<ul style="list-style-type: none"> Change Requests Due for Alumni, Donor and Friend Records; Gift Processing and Events May 13 CRM Team Training for Prospect Management, Marketing, Stewardship and Memberships May 24 - 25 	<ul style="list-style-type: none"> Software Developer Training June 1 - 3 and June 13 - 17 Review Business Processes Around Prospect Management, Marketing, Stewardship and Memberships June 6 - 10 	<ul style="list-style-type: none"> Change Requests Due for Prospect Management, Marketing, Stewardship and Memberships July 8 CRM Development for Prospect Management, Marketing, Stewardship, and Memberships Complete July 22

Ali CRM TIMELINE

Jan. 2016 Project Kickoff	March – Sept. Design the System	July – Aug. Data Testing	Nov. – Dec. Data Testing	Jan. – March 2017 User Testing	May 2017 Go Live
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INSIGHTS

Ali CRM Q&As

You have questions about the new Ali CRM, and we want to answer them.

Q: Why was Blackbaud CRM selected?

A: A team of individuals from the university, foundation and alumni associations reviewed several products and met with vendors. Options considered were Blackbaud CRM, Ellucian, Agilon and Salesforce. Blackbaud CRM was selected as the clear choice because it’s a mature product widely used throughout higher education with positive feedback from schools. While meeting the complicated accounting/financial needs of the foundation, Blackbaud CRM offers the required functionality. This includes web and mobile accessibility, a customizable application interface and strong constituent management features.

Q: Who will have access to Ali CRM?

A: Anyone on staff at the university, foundation and alumni associations who is involved in advancement activities or interacts with advancement constituents could have access to Ali. Those with a job function that includes access to advancement information will be required to attend training. This training will be specific to each staff member’s advancement role.

Q: How will Ali CRM handle donor and gift confidentiality? Who will decide what information they will see?

A: The issue of CRM access is complex and impacts staff across the university system. The goal of a shared CRM system is to have one source of truth, recognizing our constituents have relationships across the entire university system — with the foundation, campuses and alumni associations.

The service agreement between the foundation and the university states that the foundation owns and maintains confidential records on gifts, alumni and donor biographical information, and provides the data, as appropriate, to the university. While creating this shared CRM system, we must respect privacy and confidentiality agreements and at the same time determine how to share information with all users. Balancing all of this is one of the largest and most critical components of the Ali CRM project. It will require discussions among several key groups including legal and IT. Representatives of both the foundation and university are meeting soon to begin to discuss these issues, well in advance of the July period when security roles for those who use the system will be designed and addressed.

There is great value in sharing advancement information across the university system so staff can identify areas of opportunity to better serve our donors, alumni and friends. But it will require thoughtful planning to ensure we are respecting all privacy and confidentiality requirements. Ali CRM has a great deal of flexibility, and we will leverage that for the benefit of all users.

Q: What training will be available?

A: Our contract with our CRM vendor, Blackbaud, includes extensive training before the product goes live. Training will be provided that will be specific to each user’s role. Beyond the contracted training hours with Blackbaud, we are currently exploring other training options for staff across the university system to determine what will best meet our needs once the CRM implementation is complete.

To read CRM Q&As, view them at nebraska.edu/ali under links. Please send your questions to alicrm@unfoundation.edu.

CRM Will Improve Events for IANR

Jill Brown, external relations director for UNL Institute of Agriculture and Natural Resources and a member of the Ali CRM design team, is excited about the opportunity the new CRM system presents. “We consistently strive to make sure our stakeholders have the best possible experience every time they interact with the university,” Brown said. “Whether that’s a donor event, an extension workshop or a campus visit, IANR team members want to ensure they are best serving university alumni, donors and friends. The new CRM system will help IANR be more inclusive.”

CRM information will ensure that as the IANR team offers programming in specific areas of the state and country, they are reaching out to all of the key constituents in that area. “We have the best stakeholders in the country,” Brown explains. “My personal goal is to make sure they know how much they are known, heard and appreciated.”

One event IANR knows the new CRM will help them with is their annual gathering at the Nebraska State Fair. This event includes prospective students, current students, college alumni and stakeholders. CRM data will help staff know exactly who to invite and what their relationship is with the university. Last year’s State Fair celebration involved more than 400 people enjoying UNL Dairy Store ice cream. This event, and follow-up correspondence, could be greatly enhanced with Ali’s shared access to information.



ALI ALETHEIA CRM
Single Source Of Truth

CRM Offers More Collaboration

Randall Roberts, University of Nebraska Foundation’s director of development for the UNO College of Arts and Sciences, has personal experience with the new CRM. She was a development officer at the University of North Carolina at Chapel Hill in 2013 when the university moved to Blackbaud CRM.

The CRM brought collaboration across campus. With enhanced transparency, UNC fundraising teams learned many donors were receiving a substantial amount of solicitations in one year. The new CRM helped UNC reach out to key donors with a few coordinated fundraising efforts.

“We could see how UNC looked from a donor’s perspective,” Roberts said. “With all data — solicitations, gifts and conversations — in one place, it was easier to determine next steps and the donor’s true interests. This helped us strengthen donor relationships with all university partners.”

Some of Robert’s favorite CRM features include an easy-to-navigate program, online access and clear portfolio tracking. Roberts appreciated the ability to add donor photos, create event seating charts, and track revenue from solicitations and events.

UNC’s CRM conversion was an enormous move for its decentralized and large fundraising operation. Roberts explained, “Once everyone completed substantial hours of training, we all realized the capabilities and how with it in place we could become a more unified team.”

QUOTABLE

“With enhanced transparency, UNC fundraising teams learned a top donor received more than two dozen solicitations in one year. The new CRM helped UNC streamline fundraising to focus on fewer, more targeted appeals.”

Randall Roberts, University of Nebraska Foundation director of development for UNO College of Arts and Sciences talking about the CRM conversion process during her time at University of North Carolina - Chapel Hill

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