

Advance Notice

Volume 2, Number 1

January 27, 2004

BSR REPRESENTATIVES COMING TO NOTRE DAME

Three BSR representatives will be on campus Tuesday, January 27, through Thursday, January 29. These representatives include **Deb Cunningham**, our senior applications consultant; **Tom Scarlett**, senior technical consultant; and **Pat Salzillo**, application support specialist. Deb will be working closely with core team and steering committee members on important issues, including crediting of gifts, acknowledgment processes, batch proof and transactional reporting, labels in Advance, resources before and after conversion, gift summary information and conversion needs.

Pat will be working in tandem with **Richard Kohler** to initially train our Gift Processing and Alumni Files' staffs on Advance. They will also be working on future training curriculum and policy and

procedures. Tom will devote his time to the reporting team. In addition to allowing for one-on-one time with the report writers to answer questions and teach techniques, Tom will be assisting with

the ongoing analysis of the reporting inventory and the strategy of reporting in general. The core team will be thoroughly engaged during these three days, so please use email to contact them about any concerns. We look forward to reporting lots of progress stemming from this visit in the February newsletter.



A Progress Report

RATING OUR PROSPECTS

In December 2003, the Development Officers were challenged with completing prospect ratings for each of the donors and prospects identified in their annual Goal Statement and Action Plan. The target date to complete these ratings was January 15, 2004. Assigning ratings is a critical component in the Development Officer's management of his/her portfolio of prospects. Of equal importance is the value of this information to the campaign planning process, as it helps us to estimate the value of the "market" for our fund-raising efforts.

At press time, several of the Development Officers had completed rating their Goal Statement prospects. Kudos go to **Chris Bonwit, Patrick Brennan, George Duke, John Hannan, Dave Morrissey, Tim Rippinger, and Dan Reagan**. Honorable mentions were earned by **Roger Aiello, Dan Crossen, Connie Dillon, Bill Doyle, and**

Seán Farrell for making significant progress. In fact, several of these honorable mentions will likely have completed their assignment by the time this issue hits the newstands (and inboxes!). The Fickle Finger of Fate points at those who have yet to complete the task!

Once this rating task is completed, the project team can perform the final "cleanup" step by resetting the major prospect checkbox to indicate only those rated prospects. This will be done by adding the "Top 150" flag to the prospect record, enabling the Development Officers to focus more easily on their top 150 prospects.

The project team would like, once again, to offer our assistance to those who have not yet completed this task. Please contact **Sharyl Dippel** (1-5301) or **Augie Freda** (1-4390) if you need assistance entering your rating information.

We have come a long way since the initial conversion began for the “bio” (biographical data) conversion back in the fall of 2002. Initially, just enough data was converted to facilitate the transfer of data from the regional directors’ ACT databases to the prospect portion of the new Advance system. Once all regional offices were live with Advance and Phase I was considered complete, the final mapping of the remaining portions of bio began. **Jamie Barry** was asked to lead this segment of the project.

In fall 2003, high-level mapping was completed for all the remaining attributes and those portions of the prospect tracking and gift modules that were incomplete. There is no one place in Advance that correlates exactly to our legacy system attributes. Therefore, this data can be found on numerous screens in Advance: activities, awards and honors, committees, field of specialty, special handling, mailing lists, sports, student activities, and volunteer activities. With input from various offices – including the Alumni Office, Stewardship, Annual Fund and Athletics – the necessary decisions were made and new codes were devised. Just before Christmas, the remaining bio data was sent to BSR to write the data conversion scripts. We will be testing the data conversion throughout the rest of the winter and much of the spring with a “go live” goal of June.

Someone looked at the report specialist group the other day and realized there was a new face there. Yes – a new report specialist has been hired. **Dana Bare** began working with the other Development report specialists on January 9. Primarily responsible for creating reports, he will be working full-time on the BSR project and joins the core team as a regular member. Dana has a strong background in SQL (structured query language) and previously worked as a programmer/analyst for Partner Health Plan, where he was most recently a senior programmer/analyst. Raised in what he describes as the “thriving metropolis” of North Liberty, Dana and his wife, Diane, currently live in South Bend. He graduated from Purdue University with an A.S. in computer technology.

Dana’s keyboard skills extend beyond the computer, however. He *plays* the keyboard in a contemporary Christian group – no wonder his favorite music is contemporary Christian, especially Third Day and FFH. In addition to playing this music, Dana enjoys writing music. He also likes to play video games and watch the History Channel. Wondering if this sounds a little boring, Dana says, “Hey, I’m a geek. I admit it!”

Biggest Asset of Advance: “I’m kind of new, so it’s hard to say.”

Biggest Challenge of Advance: “My personal challenge will be creating the reports.”

Favorite Food: “Pizza!”

Three Adjectives Used to Describe Me: “Kind, helpful, friendly”

Three Adjectives Never Used to Describe Me: “Hurtful, uncaring, mean”

**Welcome to the team, Dana.
Good times await you!**

Dana Bare
ENTITY IDENTITY

Richard's Training Corner

Aloha, y'all. Who knew I was bilingual? Actually, I am Southern Hawaiian or, as we prefer to call those who reside south of the Kanapalani-Lolafalana line, Rebels with Lei's. This month, I want to talk about **notes**. They come in three very distinct flavors: **entity**, **prospect** and **proposal**. There is a lot of confusion regarding them, as well as inconsistency in their use, and I hope to try to limit this and bring us all on the same page. So, when I do use notes, the rules are...If the person is just an entity (empty prospect summary window), I'll use entity notes. If the person is a prospect (data in the prospect summary window), I'll use prospect notes. If you are adding proposal documents, such as a scholarship agreement, use a proposal note. Hopefully, that will settle this discussion!

During my recent survey of regional offices, I came to the following conclusions concerning the use of contact reports and notes. Most people had a pretty good idea of how and which area to use. The points of confusion were gift acknowledgments and mailings. I'm going to try to clear this up:

CONTACT REPORTS: We have said throughout training that contact reports document *contact* with the donor. This does not mean each and every contact. The contact reports should be used for substantial contact. A brief "hello" at a football game does not constitute substantial contact. Sending a personalized gift acknowledgement on a \$20,000 pledge does. System letters do not constitute personalized contact and thus are not documented with a contact report. Contact reports will not be used for mass mailings, mass appeals, form letters, system letters, ticket information, information packets, research reports, and reminders. If it is a personalized contact that has meaning to the donor and the Development Officer, it will be documented in a contact report.

NOTES: It has also been said throughout training that notes are items of information *about* the entity/prospect. Notes may also include documentation of mass mailings or appeals, form and system letters, ticket information, information packets, research reports, and reminders. They will continue to be used to document driving directions and other items located on the drop down menu.

Hopefully this has answered some of your questions. As always, if you need further assistance, feel free to call me. My numbers are 631-0993 (office) or 210-1851 (cell) – that's area code 574 for my friends abroad.

Thanks!

Richard Kohler

110 WORKING DAYS LEFT!!!



Phase II Completion

January 27, 2004.....June 30, 2004

REPORTING UPDATE

January has been an exciting month (as well as a challenging one) for the reporting team. During this month, additional resources were added to the BSR project reporting team. **Dana Bare**, our new reporting specialist, started working with us on January 9, 2004. Dana brings an excellent background in SQL and report writing to the team. He will be working on the project full-time. Additionally, **Diana Seward** and **Sheila McMahon** are now spending 50% of their time on the BSR project and 50% of their time fulfilling report requests on the HP. Their experience with current reporting needs will be a tremendous asset as we begin creating reports for Advance.

Along with the added resources, the reporting team was able to acquire some valuable training for the project. The team participated in two half-day training sessions learning Advanced Lookup (an intricate Advanced query tool) functionality and two full-day sessions of Infomaker (report formatting tool)

training. Also, a few team members participated in a three-day PL/SQL Developer course. The reporting tools have generated much excitement among the team. They are thrilled about the capabilities that are available for creating reports.

The reporting inventory is still a work in progress as we are attempting to confirm and prioritize the list of critical reports for “go live.” Also, we are still in the process of gathering information such as the purpose of the reports, improvement suggestions, and frequency of use. Several individuals – **Jennielea Vidrich, Carol Hennion, Katherine Rosswurm, Donna Adams, Kate Kujawski, Richard Kohler, and Sharyl Dippel** – have been diligently working to research this information.

Lastly, we are hopeful that the upcoming visit from BSR representatives to assist us with completing our report inventory and reporting strategy will help as we make the transition (very soon!) from the research process to writing specifications and coding reports.

...Thanks for the Memories!.....

In November, **Dan Reagan** told us about his experience of Notre Dame’s last systems conversion. **Sandie Schiele** kicks off 2004 with her own memories of the occasion.

Hired as a temporary Alumni File person in November 1986, Sandie Schiele worked on the actual conversion process and was not involved in the planning stages. She became a permanent Alumni File employee in July 1987, and recalls that the department worked on two systems – IBM and HP – for a while during that period. The old IBM system was less than ideal, Sandie remembers, with the ability to retain only partial information. For example, only the year could be input for date of birth. The IBM system also allowed the user to type in his or her own spelling of cities, whereas the HP system provided a specific table for city information. HP’s ability to perform relationship connections was also a plus.

She also told us that around 3:00 p.m. everyday, one could hear the words “address bridge” echoing throughout the office. This was a sign to stop inputting address information to the HP. Every night, the information entered into HP was bridged into the IBM so the systems would be the same. While bridging into IBM, users could only access a portion of the space on their address screen. Post-IBM, the entire field was accessible for a street address.

“There are so many stories about that conversion,” says Sandie. “At one point, some people had two computers on their desks. They had little tiny desks, so it was really funny.” She adds, “If anything, the conversion and ultimate change made everything so much easier. We were able to process our information much faster and could retain more information on a variety of screens that were easier to find and update.”