

Advance Notice

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July 30, 2004

We are LIVE!!

After many months of planning, converting, testing and therapy, Phase II of the BSR Advance project was successfully deployed at 9 a.m. June 28th, a few days earlier than scheduled. Team members and all of the Development staff need to give themselves a pat on the back for their many hours of hard work and dedication to the success of this huge task. As with any conversion, clean up of data exists and that task is already under way. A special thanks goes to Project Lead Katherine Rosswurm who led the team through her management skills, patience and persistence. Thank you to Jennielea Vidrich who so bravely has taken on the task to continue work on Phase 3 as the new Project Lead.

Celebrate Success

“Did you here the news? We are live!” became the BSR Advance Project core team’s mantra toward the end of June. Along with the mantra were several happy hours and go-live celebrations. The successful completion of the biographical and gift conversions was the result of the dedication and hard work of many. Special thanks go to **Donna Adams** and **Mark Houseman**, who supported our team and made the conversion happen. Huge kudos go to **Carol Hennion** and **Jamie Barry** who led the gift and bio conversions. We also want to recognize **Richard Kohler** who not only worked tirelessly with Carol and Jamie on policy and procedure manuals but also spent endless hours preparing curriculum and providing training for our gift processors and alumni files staff. The entire core team came together as a joint force to meet the huge milestone of a high-quality conversion that came in ahead of schedule and within budget. We would like to applaud their efforts as well as the report testers and all those in the department who have given of their time, especially the overtime hours. Last but not least, thanks to **Libby Schleiffarth** for providing comic relief and motivation for our overtime workers. A million thanks to all! Take a moment to celebrate this joint success story before we launch into the next phase of the project.



Important: Please notify the help desk at 631-2772 or by email at devhelp@nd.edu if you come across any discrepancies while working in Advance. Your assistance is greatly appreciated.

Go Live Facts...

The first gift entered into Advance took place at 8:28 a.m. on June 28th. It was a check for \$50.00 from a resident of Dekalb, Illinois.

Carol Hennion ENTITY IDENTITY

Known as the 'Grace Hall Goddess' to someone special, **Carol Hennion** has definitely found her home at Grace in Development. When she came to the Development Office in 1978 as a temp, Carol had not worked outside her home in 15 years. She was busy raising her sons and loving every minute of it. In fact, Carol was not looking for a job and did not plan to work then, but a friend from Holy Cross Grade School, where she volunteered in their library, talked her into coming here by telling her it would only be for 2 months!

Well those two months have turned into several years and Carol is currently the Director of Development Donor Services. As director she oversees gift processing, alumni files, and the letter shop. The area establishes all the new accounts, reconciles with accounting and answers questions from all departments on Campus as well as from donors calling in many times a day. All gifts to the University flow through the Donor Services area and are processed and acknowledged through the letter shop. Many major reports, including the nationally published CAE report, are produced by Donor Services. Her responsibilities on the BSR project included everything dealing with gifts or pledges. She will continue to work on developing reports for the new campaign, and setting up all the necessary codes required for campaign reporting.

Carol was born in Indianapolis and has a great affinity for racing cars. She grew up mainly in Niles, Michigan and has lived in South Bend for many years. She and her husband Bob have been married for 42 years. She is the mother of two sons, Michael who resides in South Bend, and Joe who passed away at the age of 22.

Biggest Asset of Advance: "Sharing of information is so much easier! Also, it is so easy to move around in Advance - you can check addresses, relationships, gifts, prospect information, spousal information, etc., all by accessing one id number and drilling down or using hyperlinks."

Biggest Challenge of Advance: "Learning to re-think the way we work, letting go of the old familiar ways and finding new more efficient processes."

Favorite Music: "I love classical - all Puccini's operas especially La Bohem & Madame Butterfly and I also love country. I really enjoy musical productions (Les Miz, Phantom of the Opera, etc.)"

Favorite Food: "White asparagus and white chocolate."

Three Adjectives Used to Describe Me: "Loyal, hard working, focused."

Three Adjectives Never Used to Describe Me: "Careless, unreliable, shoeless (I love going barefoot, but no one has ever thought of me as shoeless!)."

Hobbies: "I love to knit and to read."

Who in your life has inspired you: "My grandmother who was able to overcome great adversities (widowed and penniless with a small child in the 1930's) and was still able to make life such a great enjoyable adventure."

When she was asked about activities besides work, she answered, "why, is there supposed to be life outside of work and why didn't someone tell me this before now!!!" She is a very dedicated member of the Development team and has been instrumental in the completion and conversion of gift and bio data during Phase II of the project. Carol, Grace Hall Goddess, a big thanks for all you do.

PHASE 3 BEGINS



Phase 3 Completion

July 1, 2004.....June 30, 2005

Richard's Training Corner

How is everyone doing out there in Advance world? Well as I sit here writing this, I'm looking back at the past year and thinking.....where did all my hair go?

We are Live people!!

For the first time in a long time we are unified under a single system for Development. Bio, Gift, and Prospect all living in one big happy house. Ok, so maybe it isn't "The Walton's" or the "Brady Bunch" probably more like "Growing Pains." That is ok though, we will get thru this as I have said all along. Each day brings us closer to that goal. Bio and Gift data is being entered every day now in Advance and I have to give credit to those hard working folks up there. This conversion would not have been possible without their dedication to getting the job done. They Rock!

Since some seem to have missed it in an earlier article, there is a training website out there for all to use. It is at www.nd.edu/~advance/training please go check it out. It contains all the training materials I use in class along with the most current versions of the Policy and Procedure manuals. Bookmark it; it will be growing in the near future.

Lastly, we have a Help Desk now. Many of you may be frustrated by how it is going so far. If you tried calling my number and couldn't get me directly I apologize. We have some additional growing pains in that area too, but we will come out of this better. The help desk is a necessary function that we have needed in this department for a long time. The larger we grow, the more of a need it became. I will still respond to your concerns that have to do with Advance and training. It's just that now you will put your request in thru the help desk and they will inform me. This way we can track problems and issues for the betterment of the department.

Well that's all I have for now, gotta go mow my mother's lawn. For those of you who inquire as to her condition, I thank you and my family thanks you. We got great news this week; her recent chemo and radiation have shrunk the main tumor over 40%. All of those prayers of yours and the many trips to the Grotto are paying off. Thank you all; your kindness never ceases to amaze me.

Thanks!

Richard Kohler



From the Project Lead

Katherine Rosswurm

As you know, I am stepping down as project lead to assume my new role within the development department. To say the last year was challenging would be quite an understatement...to say the last 12 months were devoted to professional growth and extremely rewarding would be politically correct...to say that I wish I could stay on the project indefinitely would be an untruth. So from the heart, let me simply say thank you to this exceptional core team of unique individuals who I have learned to respect and admire greatly. This is a group of people who are totally dedicated to our department and the mission of Notre Dame. A year ago I wasn't so sure I wanted to join this group; now I would walk through fire for this team! I am humbled to be associated with this extraordinary group and their success. I will be rooting (from the sidelines this time) for all of you during phase III. You can do it...even without a contingency plan!

A Word from Our Sponsor

The successful completion on June 28, of Phase II of the Development conversion project to BSR *Advance*, was a significant occurrence for the department, University Relations division, and the entire University. Beginning last November 1, Phase II provided numerous challenges throughout the process. And the Core Team, led admirably by **Katherine Rosswurm**, met each challenge along the way. Key objectives were achieved on time and within budget.

Since taking on the responsibility a little more than one year ago as “sponsor” for the conversion project, I have gained a better understanding of and appreciation for the technology aspect of our advancement mission. I am learning more about the opportunities and important role technology will play in our future work. However, my most rewarding realization has been seeing a group of talented individuals with differing skills come together as a team to accomplish a difficult but extremely important task.

With Phase III now underway, the challenge will be to fully implement and enhance the work done in the first two phases. The overall success of our efforts on the project will be measured ultimately by whether our division can carry out its mission more effectively and efficiently in the future. I am confident that with the leadership of **Jennielea Vidrich**, and the dedicated efforts of her team in the project’s final phase, this will occur.

My sincere thanks to everyone who has worked so tirelessly and with such a strong commitment to ensure the project’s success.

Dave Morrissey

DEVELOPMENT BSR PHASE II CORE TEAM members: **Bill Bosler, Kimberly Umbaugh, Augie Freda, Jamie Barry, Richard Kohler, Scott Siler, Sharyl Dippel, Carol Hennion, Mike Brach, Donna Adams, Katherine Rosswurm, Jennielea Vidrich, Kate Kujawski, Mark Houseman, Dana Bare**(not pictured).



Changing of the Guard

The BSR Advance Project will have new leadership for phase III of the project as both **Katherine Rosswurm**, project lead, and **Deb Cunningham**, BSR senior consultant, have stepped down from their leadership positions. As you know, Katherine will assume her new duties as senior director of development marketing, communications and stewardship. Deb, who served as our lead BSR consultant since last November, has resigned from her position with SunGard BSR to work for Harvard University, which is undergoing a huge conversion and implementation project. **Jennielea Vidrich**, who has just recently begun her duties as the phase III project lead, was very involved in the selection of our new BSR representative **Howard Chow**. Howard is currently serving SunGard BSR as their technical services manager and oversees the operations of the conversion group and reporting group, as well as coordination of resources with other SunGard BSR teams. Most recently, Howard has been involved with conversion projects at Carnegie Mellon and Auburn University. He is based at SunGard’s headquarters in Waltham, Massachusetts. We want to thank Deb and Katherine for contributing to the success of phase II and at the same time welcome and support Jen and Howard in their new roles. Congratulations all around.



Advance Notice articles are written by BSR Project Core Team members. Sharyl Dippel serves as *Advance Notice* editor.