

# Advance Notice

Volume 1, Number 6

November 24, 2003

## *Passing the Torch*

On October 16, we learned that **Paul Matijevic**, our BSR Senior Applications Consultant since August of 2002, had resigned his position at SunGrad BSR. Paul has returned to Northwestern University as the Director of Information Services for Development. We have accomplished a great deal with Paul over the last 14+ months and will miss his professionalism and wit. His last day with us and BSR was November 14.

We are pleased to announce that **Deb Cunningham** is our new BSR Senior Applications Consultant. Deb brings with her an enormous wealth of knowledge, having worked with BSR for over seven years. Prior to her position at BSR, Deb managed the development research efforts at the University of Vermont and managed the Corporate Research Department at the Harvard Business School.

*Happy Thanksgiving!*



Deb is an active member of the higher education and nonprofit community, having served as faculty and speaker for the Council for the Advancement and Support of Education (CASE) and the New England Research Association (NEDRA). Adept in strategic planning and organizing the infrastructures which support successful advancement information management systems, Deb brings a senior level perspective to Notre Dame. This tremendous perspective will be of great benefit in meeting our Phase II implementation schedule.

Please join us in welcoming Deb to the Notre Dame team!

## *The Countdown has begun...*

**Carol Hennion** has been charged with leading the gift data conversion. She and **Paul Matijevic** worked very hard to complete the gift mapping before Paul's departure. We are happy to announce that this task was completed October 31 – two weeks ahead of schedule! The gift mapping spreadsheets are now in the hands of BSR to write the conversion scripts. This will take around eight weeks. It appears that Carol timed this just right for year-end! Beginning December 1 through the end of January, Carol's involvement on the BSR project will be limited to attending weekly Core Team meetings and a few other tasks, such as the finance interface. This will allow Carol to lead the year-end gift processing.

Although the gift mapping has been completed, Carol's work is far from finished. More work is needed on the allocations (accounts), which is dependent on the Finance Team finalizing the FOAPAL

**141 WORKING DAYS LEFT!!**



**Phase II Completion**

**November 24, 2003.....June 30, 2004**

(Fund, Organization, Activity, Program, Activity, Location). Bi-weekly meetings are being held with the Finance Team to discuss interfaces and to develop future automated processes. Both the Development and Finance Teams plan to go live July 1, 2004, so these discussions are critical.

# Report Facilitation Recap

We have completed two sessions of report facilitations with BSR consultants; these sessions took place October 8-12 and November 10-12. Together, we reviewed 160 current ND development reports, which consisted of ACT! reports and HP operational reports (i.e., monthly, nightly, and menu reports). We discussed these reports in great detail to determine the best methodology for creating and accessing reports in Advance. In addition, we established target completion dates for the majority of reports. There remain a handful of reports that need additional research and assigned due dates, which we are working on.

As a follow-up to the facilitation, BSR is preparing a synopsis of our discussions. This document will include reporting recommendations, which will be a key component in our strategic plan. While we await BSR's recommendations, we are preparing a prioritization plan for spec'ing, creating and deploying prospect management reports, since several of these reports do not require detailed gift transaction data. Detailed gift transaction data will not be available in Advance until Phase II goes live.

Strategically, we want to take full advantage of Advance's reporting tools. There will be several approaches for creating and accessing reports – to name just a few, reports hanging from an Advance Reports tab, Entity Profile Reports, and Ad-hoc reporting. Reports

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At the Phase I completion celebration, **Mark Houseman**, Development Systems Application Support Manager, was recognized for his many contributions on the Advance project thus far. **Craig Brummel**, the project manager for Renovare, described Mark in one word: *stealth*. "Mark has made significant contributions to the Development project, often without the recipients being aware of the thought and effort that he has put into making Development Phase I a success." Mark has been a key player and gone about his work in a quiet way, never asking for recognition. Mark was responsible for ensuring that all data in DIS was mapped and translated into Advance, which has been no small task. Mark was also instrumental in ensuring that the BSR system was set up effectively.

Most Development colleagues see Mark only periodically, because he does most of his work in the ITC building. Those working directly on the BSR project get to see and work with Mark on a regular basis. When there is a problem, you can always count on Mark to jump in and find solutions. If he is unable to resolve the issue himself, he knows who to contact in OIT to assist the team.

Mark has been employed at Notre Dame for over 10 years. He is a native of Michigan, having grown up in Decatur and now living in Niles. He has an associate degree of applied science in computer information systems from Southwestern Michigan College and a bachelor of science degree in business administration/computer information systems from Western Michigan University. Mark is very active in his church.

**Biggest Asset of Advance:** "Oracle as database environment."

**Biggest Challenge of Advance:** "I'm claiming the Fifth Amendment."

**Favorite Music:** "Contemporary Christian."

**Favorite Food:** "Shawarma."

**Three Adjectives Used to Describe Me:** "Large, nappy, Q.T."

**Three Adjectives Never Used to Describe Me:** "Skinny, patient, rowdy."

**Hobbies:** "Work, and I like to watch football and hockey games."

**Animal you'd like to be:** "A Beagle dog."

## ENTITY IDENTITY

## Phase I Update

We have completed the conversion of all 13 Prospect Management ACT! databases. This would not have been possible without the dedicated efforts of the entire project team and all those whose databases have been converted. The complete conversion list follows:

June 27: **John Hannan**  
August 27: **Bill Doyle** and **Chris Bonwit** (Atlanta)  
August 29: The Office of Planned Giving  
September 3: **Glenn Rosswurm**  
September 5: **Pat Krueger**  
September 18: **Tim Rippinger**  
September 25: **Pat Hickey** and **Tom Gibbons**  
October 2: **Seán Farrell**  
October 27: **Dan Crossen** and **George Duke**  
October 29: **Mark Irving**  
October 30: **Chuck Schnur**

The process of manually converting the Corporate ACT! database has made great progress – thanks to the hard work of all those involved. Corporate Relations' key contacts have been converted into Advance. This process associated the individual contacts with the companies they represent by assigning them as Prospect Entities for the company's prospect record. In many cases, these individuals were not entities in Advance as they had no specific relationship (alumni, parent or friend) to Notre Dame and were not part of the DIS database. Also, since a given company may be represented by a number of DIS records due to multiple operating locations, all Advance organization entities representing the company were combined into a single Prospect Record, also using Prospect Entities.

While the key contact conversion into Advance is complete, the historical information maintained by Corporate Relations in their ACT! database (notes, history and attached documents) will be migrated into Advance over the next few weeks. Our student worker will complete this task.

## Richard's Training Corner

With my traveling over for the time being, most of you are seeing me around the office again. My goal is to visit each of you here on campus every one or two days. For those off campus, I will continue to bug you about your goal statements and anything else that might be useful to you. Again, please feel free to contact me anytime with your questions or concerns. I am here to serve you, the customer.

Phase I is nearly complete, and Phase II planning is well underway. Soon you will receive a training survey from me. I am trying to establish a baseline of our department's knowledge of Microsoft Office Suite. This will help me to focus future training on such products as Microsoft Excel and Word, so I would appreciate your input on this subject.

There has been some confusion lately about Entities in Advance. The question – and I have heard it a few times – is “Who is the solicitor for this Entity?” or “Why isn't there a solicitor for this Entity?” Let me start by giving you this information. There are approximately 475,000 Entities in Advance, but there are only about 20,000 Prospects. Only Prospects will have a solicitor assigned to them. The difference here from the past is that everyone on the HP was a Prospect, and as such had a default solicitor assigned to them based on the region where they lived. Now to be honest, am I really a prospect? Not bloody likely with my salary, but on the HP I had a solicitor assigned to me. In Advance I am only an Entity, and therefore do not show up on the solicitor's “radar” screen as a potential donor. I think you will agree that this is a more realistic approach to how we look at our donors.

That's all I have room for this month. I'll be seeing you soon. If you have any topics or article suggestions, please email them to me at [rkohler1@nd.edu](mailto:rkohler1@nd.edu) or just call me at 1-0993.

Thanks!

*Richard Kohler*

## Thanks for the Memories!

Last month, **Donna Adams**, **Carol Hennion** and **Beth Schneider** shared their memories of the last time the University underwent a systems conversion. This month, **Dan Reagan** tells us about his memories of that time.

Dan, who is now the associate vice president for University Relations and the executive director for principal gifts and campaign administration, was then the director of the Annual Fund. He says the impact of the last conversion on his staff at that time was minimal, as the conversion was done on a more basic level. The system did not penetrate all of the individual systems used within the various areas of the Development Department. Dan was personally involved in the conversion, attending transition meetings to discuss what was needed from a fund-raising perspective. At the time, this particular DIS system had been purchased only by Harvard and Notre Dame. It was thought to be state-of-the-art; however, the OIT Department had to rewrite nearly the entire system to fit our needs.

The actual development of and programming for the HP-DIS system began in 1984, according to Dan. Training was provided only to the few who had access to the system. Basic inquiry training was provided for everyone else. Dan commented on how the BSR Advance system is more user-friendly – he remembers a number of frustrating moments during the last conversion!

Dan concluded by saying, “As big and as difficult a project as this new conversion from the HP-DIS system to BSR Advance may be, the new system offers so much more in terms of its abilities. Once we get through the arduous tasks, hopefully everyone will be encouraged. It will be hard work to get to the other side, but it will be so valuable once that task is achieved. In the last twenty years, we’ve gone from a basic system, to a modern system, and now to a state-of-the-art system.”

### Report Facilitation Recap, *continued from page 2*

can be accessed and executed by the end user from an Advance Reports tab. This functionality is currently being used for the Entity at a Glance Report. End users can generate reports at their desktops using a combination of Advance’s Lookup and Entity Profile capabilities. The Entity Profile Report functionality is available for immediate use. Short term, the end user can use the “out of the box” data windows to build reports from his/her desktop. However, long-term report specialists will be able to create Entity Profile Report data windows tailored to our department’s needs. As for Ad-hoc reporting, we plan to have BSR create denormalized reporting tables – a consolidation of pertinent reporting data extended across many data tables into one data table – to be used by the report specialist. This will improve efficiencies for creating report.

Overall, the reporting facilitation was a great foundation for establishing our reporting strategy. Stay tuned for future “reports.”

Due to  
year-end “madness,”  
**AdvanceNotice**  
will not be published  
in December.  
Stay tuned for  
a January update.