

Advance Notice

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Huddle Up, Team!

On September 25, the campus-wide Renovare team – consisting of approximately 80 people from across the University – held their quarterly Huddle at the Joyce Center. It was a day of pep talks, updates and team building. The members of the BSR Advance Core Team and the BSR Advance Steering Committee were in attendance.

John Affleck-Graves and **John Sejdinaj** addressed the group to thank everyone for all of their hard work and to emphasize how crucial the outcome of this project is to the future of the University. **Chuck Lennon** followed with a rousing, inspirational presentation on the nature of a successful team and how this pertains to Renovare.



Grace and Caitlin Rosswurm display their Irish pride at the Renovare tailgater on September 20!

Several Renovare teams presented to the group in order to bring us up to speed on their progress since the last Huddle. The teams were asked to describe their accomplishments, what has worked well for them, and lessons learned, as well as to give advice to other teams. Of course, the best (though not the glitziest) presenters were our own **Katherine Rosswurm** and **Donna Adams**! **Craig Brummell**, Renovare project manager, provided the group with an overview of the entire project. With some minor exceptions, Renovare is on schedule and progressing well.

Toward the end of the morning, *Birds of a Feather* sessions were held, and each attendee was able to choose two of the four sessions to attend. These sessions enabled Renovare team members to learn more about those aspects of Renovare which they may not have been familiar with. Finally, after a late lunch, team members were divided up for some team-building exercises and competitive activities. (Be sure to ask **Carol Hennion** about her Ryan Newman impersonation!)

Advance Team “Stars” at Quarterly Development Meeting.....

We knew we had a talented staff, but until lately, we didn’t know just how talented! The “Not Quite Ready For Primetime **Rosswurm** Players” stepped up with a terrific, interactive LIVE demonstration of the Advance Prospect module for an engrossed (or was that grossed-out?) Development audience. “Players” included **Bill “Georgia Peach” Doyle**, **Susie “Soccer Mom” Grandin** and **Ken “Ouch – I’m still a Cubs Fan” Hendricks**, with support from **Richard “My Navy Boots Are Made For Walking” Kohler**.

The crew did an amazing job of showing the steps used in Prospect management – incorporating development research, involving key Development staff, and preparing for cultivation.

In other news, **Craig Brummell** gave a presentation

entitled, *Renovare: What is Renovare? Where does Development fit in the Renovare plan?* As you may recall, Renovare (Latin for “We’re changing our computer systems?”) is the project in which Notre Dame will replace four core systems (Student/Faculty Information, Finance, HR/Payroll and Development Information) over the next two and a half years.

As you can imagine, this effort requires a great deal of cooperation, input and interaction from all involved departments. Therefore, several Development BSR Advance team members are also working with Renovare committees (total primary committees number 14 – so far!)

More information on Renovare (which actually means “renewal”) may be found at the project website <http://renovare.nd.edu/>.

System Update: *General Person*

What is *General Person*? It is a collection of data that contains various attributes about entities (people and companies). This information is shared by multiple systems at Notre Dame. Examples of this data include names, addresses and degree information. Although this information is stored in one location, it is shared by different departments within the University (i.e., Human Resources, Financial Aid, etc.). As University Relations converts to the BSR Advance system and other departments convert to the Banner system, we will all continue to require access to this general pool (or *General Person!*) of information.

A core team – with representatives from OIT, the student area, HR/Payroll, Admissions, Finance and University Relations – has been formed to facilitate this transition. One of the charges for this team is to review and consolidate all of the current data entry standards, manuals, policies and processes, which are related to information held in *General Person*. After review by an extended team of individuals representing all of the affected departments, the core team will provide a *Data Integrity Standards Manual* that will be used throughout the University. They will then continue to work towards a smooth transition from our current systems to the BSR Advance and Banner systems.

Jennielea Vidrich has been asked to represent University Relations on the *General Person* Core Team. Please feel free to contact Jen at 1-5198 if you have any questions!

David (Dave) M. Morrissey, the BSR Advance Project Sponsor since July, brings with him over 30 years of experience in higher education and just over 23 years of service to the University of Notre Dame. Dave began his Notre Dame career in 1980 as a director of regional development in Los Angeles, a position he held until 1996 when he was appointed director of the newly created Office of International Advancement and relocated to campus. As part of the recent University Relations reorganization, many of Dave's international responsibilities have been assigned to other departments. On July 1, 2003, Dave was promoted to senior director for University Relations. He is currently leading a review of the advisory councils program in addition to serving as the subcommittee chair for the Renovare project and chair of the BSR Advance Steering Committee. He also continues to work with a number of University benefactors, both domestic and foreign.

Before coming to Notre Dame, Dave held several development-related positions at Loyola Marymount University (formerly Loyola University of Los Angeles), where he earned his bachelor of business administration degree. Dave also earned an MBA from the University of Southern California. He then served for four years on active duty in the United States Air Force before receiving an honorable discharge with the rank of captain.

For Dave's superb service to Notre Dame, he was presented with a presidential award in 1991. In addition, he was conferred the status of *honorary alumnus* by the Notre Dame Alumni Association in 1996; at the time, Dave was one of only 17 individuals in the University's history to have received this distinction. As you can see, we are extremely fortunate to have Dave leading this critical project for University Relations. His breadth of administrative experience and understanding of fundraising will certainly benefit all.

Favorite Music: "Classical, country, and late 50s/early 60s"

Favorite Food: "Mexican"

Three Adjectives Used to Describe Me:

"Committed, organized and good listener"

Two Adjectives Never Used to Describe Me:

"Indecisive and ruthless"

Hobbies: "Visiting and collecting model lighthouses, and attending Notre Dame athletic events"

Favorite Quote: "What goes around, comes around."

ENTITY IDENTITY

Phase 1 Update

You are all making great progress with the conversion of the ACT databases, and this has truly been a team effort. So far, we have completed conversions of the following databases into the production version of Advance:

June 27: **John Hannan**

August 27: **Bill Doyle** and **Chris Bonwit**

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**

We are in the testing stage for the ACT databases of **Chuck Schnur** and **Mark Irving** and will have these conversions completed in the near future.

We are proceeding with a manual conversion of the Corporate ACT database beginning with companies that **Roger** and **Connie** are currently working with. **Augie** is assisting Corporate Relations with decisions related to how the data will convert into Advance. Our student worker will help us by entering data and loading attachments into Advance.

We understand that data conversion is only one of the segments that must be completed in Phase I, and we have begun addressing other segments. The primary one of these is to provide the necessary reports that have been requested. **William** has begun consolidating the lists so that we can prioritize and conquer this task.

Richard's Training Corner

I write this from the road, and as I said to Katherine yesterday, "If it's Wednesday, I must be in New York City." I have been asked to write a short training article for *Advance Notice*, so fasten your seat belt and hang on. Here we go! After NYC, I travel to San Diego, then onto New Hampshire, Chicago, and Pennsylvania to assist our off-campus regional offices. Although traveling, I can still be reached and will do everything in my power to assist you!

I have been hearing a lot of comments lately, such as "This seems so redundant" or "Isn't this found in another place in Advance?" My answer is that it probably *does* seem redundant. In reality, this system gives us a flexibility to retrieve data that we have never had in the past. We have a mountain of information to work through up front. I feel your pain – sometimes literally! It's ugly and nasty; but once this work is done, it's done. The rewards will far exceed any effort we put into it. I can only ask you to trust us on this for now.

In the future, my "Training Corner" will focus on topics or concerns brought to my attention by you, the users. I am here for you! I hope this comes through in the training and in my day-to-day interactions with all of you. If you have any issues or article suggestions for me, please email them to rkohler1@nd.edu or give me a call at 1-0993.

Thanks!

Richard Kohler

Happy Halloween from the
Advance Notice
Gang!



Thanks for the Memories!

Many of us may not realize that conversion is not a new idea. We work among folks who have been here long enough to say, “we are doing *another* conversion of our data?” Yes, just a few short years ago – 19 to be exact – the Development Department embarked on a conversion from an IBM-based system to the current, soon-to-be-replaced HP(DIS) system. Over the next few issues of *Advance Notice*, we’ll be sharing the memories of some of these people.

Carol Hennion mentioned that back in the day they worked in phases for the HP system, too. Phase I was live long before Phase II. They were actually using Phase I while uploading all the information into the old system every day! They had weekly meetings with what was then called Administrative Computing, and often one or two consultants from the DIS system would be at these meetings. Carol was the Development representative and met daily with Barb Roberts from Administrative Computing to work on conversion specs and to find and correct data, as well as to meet with DIS consultants to discuss processes and needs.

Beth Schneider remembers working to input data and then double-checking benefactor data from the printouts to make sure the codes were correct. She feels that the transition went smoothly,

though the process was very time-consuming. Beth actually began working in Development right out of high school as a report checker in Alumni Files. She left the University briefly but returned as temporary help for the start-up of the HP database, which led to a full-time position. Even in the face of another conversion, Beth says that returning to Notre Dame was a good decision!

From a programmer’s standpoint, **Donna Adams** –who has been with the University for 25 years – remembers the conversion quite well. She was even able to provide the actual start-up dates for the various phases of the project. At the time of the IBM-to-HP conversion, Donna worked for OIT as a programmer. Part of her regular responsibilities was to work on the integration between HR and changes in the DIS system. Donna wrote one of the first full screens on the IBM. The information input was not real time, so batch updates were done at night. Donna remembers that there was minimal training from AMS, the company from which DIS was purchased. Brian Robinson and others from AMS worked onsite during the project. Donna has spent many, many hours working on our latest conversion, to BSR Advance. She commented that “I love a challenge, and this current conversion has definitely presented many of those!”

Terms of Endearment

Table: The structure used by Advance to store information. Similar to spreadsheets, each column represents a field and each row represents a record in the table. (Formerly called *data set* in DIS.)

Proposal: Documents the details about a request for a gift. The “ask” may have already occurred or may be forthcoming in the near future. The proposal need not be written – it can be verbal.

Row: Records or entries into Advance tables. For example, each specific address for a given entity has its own row in the address table. (Formerly called *record* in DIS.)

Lookup: A collection of IDs resulting from the use of a lookup window. The collection may be entities, prospects, tasks, contact reports or other attributes maintained by Advance.

Articles for *Advance Notice* are written by BSR Project Core Team members. Jen Hengehold (Stewardship Programs) serves as the *Advance Notice* editor.