Supplemental Reference Guide for:

CONSTITUENT GROUPS:
WHEN AND HOW TO TRACK CONSTITUENT GROUPS

Authoring Department: ADVANCEMENT SERVICES

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Anticipated Audience(s): ALL

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Summary

As you continue to expand your work in Ali CRM, you may determine the need to collectively view or contact groups of individual constituents. If these constituent groups are not in Ali CRM and you would like them to be added, please contact Jessie Rader, Director of Advancement Records and Research. Jessie will help guide you through the information needed to process your request. This document will give you a general overview of items to consider when requesting a constituent group and the best methods for tracking and maintaining them.

When to track constituent groups

As you consider constituent groups, please keep in mind that Ali CRM is an Advancement CRM. It is not a student or staff (human resources) CRM database. Ali is designed to warehouse information about alumni, donors and friends of the university. Students who are scholarship recipients are included in Ali CRM, and some staff and faculty are included based upon their advancement roles. However, Ali CRM is not intended to be used for student or staff affairs and management. When students graduate, they are added to Ali CRM as part of a routine process with all four campuses.

Please consider the following questions when thinking through your constituent groups. When answering these questions, please elaborate further than Yes/No when able.

1. How do you plan to use this group?
2. Do you currently track this group? What data do you have?
3. Is this an organized group (i.e. advisory board, chapter)?
    a. If yes, is this a subset of another organization or group?
        i. Does this group make donations?
        ii. Do the members of the group serve terms? If yes, how long?
        iii. What roles can the members serve? (i.e. member, chair, president)
        iv. Do they host events?
    b. If no, is it a special list or grouping used for communication purposes?
    c. If no, is this a list of volunteers (i.e. calls senator, writes postcards)?
4. Is this an internal (University of Nebraska, Foundation, Alumni Association) or external group?
5. How will this group be maintained? How often will updates be provided?

How to track constituent groups

When working with constituent groups in Ali CRM there are many different ways to track them. Based on the use and function of the group, it can be tracked as a Selection; Organization constituent record; Committee constituent record; or Volunteer Type and Job.

Selections

- Throughout Ali CRM, a business process may prompt you to create a selection. A selection is a named list of IDs of the same record type that allows you to indicate the records for a process to include when it generates results, such as event invites or other communications. Selections can be created from queries, smart queries or imported from a spreadsheet. Selections allow you to pull a variety of data points to create a collective group sharing a set of criteria.
- Selections can be created for you by contacting Jessie Rader or the Foundation's Prospect Research Analysts. There are thousands of selections in Ali CRM so careful attention must be paid to copy and paste the *exact* name of the selection to use.
- There are other supplemental reference guides on **Importing Selections** and **Naming Conventions and Standards** if you need further information on working with selections.

Organization Records

- Organization records are companies, businesses, and organizations that support our mission or interact with our organization in other ways. Examples include corporations, foundations, alumni chapters, sororities, and fraternities.
- An organization allows you to track relationship types (see below), start/end dates, and job titles for the related individual constituents. Organizations can also have relationships with other organization records and committee records.
- If the group of constituents you wish to track **donates as a collective group**, then an organization record must be used.

Relationship Types for Organizations:

Accountant	Co-Owner	Former Branch
Administrative	Co-Executor	Former Consultant
Advisor	Corp Contact	Former Client
Affiliation	Co-Trustee	Former Contact
Agent	Designated Rep.	Former Employee
Board Member	Director	Former Employer
Board of Dir.	Emeriti	Former Main Co.
Bus. Assistant	Employee	Former Member
Bus. Assoc.	Employer	Former Other
Bus. Consultant	Executive Assistant	Former Owner
Bus. Relationship	Executive Contact	Former Parent Co.
Chair of the Board	Executive Director	Former Partnership
CEO	Faculty	Former Subsidiary
CFO	Financial Advisor	Former Unknown
CIO	Former	Former Volunteer
COO	Former Attorney	Organiz Main
Client	Former Board Mem.	Organization

Other	Retired Consultant	Student
Other-Business	Retired Employee	Student Board
Owner	Retired Employer	Subsidiary
Parent Corporation	Retired Exec Cntct	Trust
Partnership	Retired Member	Trust Officer
Pledge	Retired Other	Trustee
Power of Attorney	Retired Owner	Unknown
President	Retired Partner	Vice President
Retired Board	Staff/Managerial	Volunteer

Committee Records

- Committee records associate individuals or organizations as members of a committee for managing and reporting purposes. Committees have the ability to plan events, set financial fundraising goals, and set non-financial committee goals.
- Committee members have **roles** assigned and start and end dates to manage terms.
- Committee records show unique information to the committee and also summarized information for the members.
- One of the benefits of the committee is that interactions can be uploaded to each member's constituent record with one interaction by marking them as **Participants** on the committee record's interaction.

Volunteer Types and Jobs

- Volunteer types are used when the group does a service for the University of Nebraska and its affiliates and tracking this particular type of service is necessary. Examples include: Postcards for Pride and Huskers for Higher Education.
- Constituents that volunteer will receive a constituency code of Volunteer which will unlock the **Volunteer** tab. On the **Volunteer** tab, the volunteer type will be populated with the type of volunteer work for which they are available and willing to participate. If they volunteer for particular events or assignments, a timesheet for the job will also be added to their record.
- Volunteers cannot be viewed collectively unless a selection is created.
- To see all of the current volunteer types in Ali CRM, go the **Volunteer** functional area in the blue navigation bar at top, and click **Volunteer Types**.

Maintaining constituent groups

A benefit to tracking constituent groups in Ali CRM is the access to up-to-date contact information. The Foundation routinely runs National Change of Address (NCOA) updates, data cleansing and data appends.

It is also important that Ali CRM users report updates to records to the Foundation's biographical records team (biographicalrecords@nufoundation.org). These updates can include contact information, biographical changes, relationship changes, committee member changes and communication preferences. This will ensure that we will all be working from the same rolodex with the most current information and least negative impact to alumni, donors and friends.

If you request to have a constituent group made, it is your responsibility to report any updates to the group relationships or memberships to the biographical records team (biographicalrecords@nufoundation.org). With the growing number of groups and wide variety of start and end dates, it is very difficult to research and maintain the member lists without assistance from those closest to the groups.

A good rule of thumb is to make sure the members of your group are current prior to sending correspondence or contacting the members.