

Guide for:

CONSTITUENCIES IN ALI CRM

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Anticipated Audience(s): ALL ALI USERS

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Constituencies in Ali CRM

Constituencies define the affiliation a constituent has with our organization. Some of the constituencies are system-generated and are dependent on data points that exist on the record while others are user-defined. Constituencies displayed in [blue](#) are hyperlinks to the sections of the record containing additional details related to the constituency. Constituencies displayed in black are user-defined codes and are not hyperlinks. Constituencies can be found along the top of the record near the **Lookup ID** or on the **Personal Info** tab, **Constituencies** sub-tab.

Primary Constituencies and Definitions

There should only be one primary constituent code assigned to each constituent record.

Display	Definition
Alumnus	A constituent who has completed at least one degree (associate, undergraduate or graduate) from a campus in the University of Nebraska system – Lincoln, Medical Center, Omaha, Kearney or Curtis. This code is applied automatically based on a “Completed” education status with a Nebraska system school.
Committee	Committee records are a specialized group in Ali. Committee groups have all of the group functionality, but can optionally also be event coordinators and solicitors.
Corporation	A business, partnership or cooperative that has been organized for profit-making purposes, including those owned by individuals and families and other closely held companies.
Foundation-Corporate	A foundation that is directly associated with a corporation. This foundation may make gifts and grants independently or match philanthropic giving by their employees.
Foundation-Family	A family foundation is one in which the donor or the donor's relatives play a significant role in governing and/or managing the foundation. It is feasible that a foundation would begin as a family foundation but evolve into a private foundation after the death of the donor and/or donor's relatives.
Foundation-Private	A nonprofit organization which is usually created via a single primary donation from an individual or a business and whose funds and programs are managed by its own trustees or directors.
Fundraising Consortia	Entities that have been formed by a group of cooperating institutions or organizations to facilitate their fundraising activities.
Government	Government entities such as police departments, city or state agencies, etc.
IRA	This code is assigned to a constituent record when a donation is made via an IRA and not directly from an individual.
Other Organization	Organizations that don't fit into the other primary organization constituencies.
Public Educational Institution	Public schools and school districts, including public higher education institutions.

Relation only	Record that exists in Ali CRM because of a relationship to another constituent record. Once another constituency is added, the Relation only constituency is automatically removed.
Religious Organization	Churches, synagogues, mosques, temples and other houses of worship, as well as their denominational entities, hierarchies and service groups.
Student	Individual who is currently enrolled at one of the University of Nebraska campuses – generally used for student alumni members – and does not already have an associate, undergraduate or graduate degree from any of the University of Nebraska campuses.
Trust	A trust is the holder of assets designated for specific uses, charitable or non-charitable based on the type of trust. Similar to a foundation, it could operate as a donor-advised entity or as a wholly charitable trust administered by others, or it could provide an individual income over time.

Secondary Constituencies and Definitions

These can be used to further categorize records. A constituent can have multiple Secondary Constituencies.

Display	Definition
Bank	The banking organization used by the University of Nebraska Foundation for direct debit and credit card transactions.
Committee member	Constituent is a current member of a committee record.
Donor	Individual has made at least one gift to the University of Nebraska Foundation or one of its affiliated entities; this constituency is automatically added whenever a constituent record is linked to a revenue record. Variations of this constituency include Major Donor and Recognized Donor , depending on giving levels.
Donor-Advised Intermediary	The donor sends an asset to a tax-exempt organization as a gift to that entity. The asset is then in the name of – and under the control of – that <i>entity</i> . The donor then contacts the entity and advises it to make a gift to a qualified organization. The tax-exempt organization gets Revenue credit and the donor receives Third Party Recognition credit. (This could include a non-profit arm of a for-profit company, i.e., Fidelity’s gift fund.)
Donor-Directed Fund	The donor has a donor-directed fund with the foundation.
Donor-Directed Intermediary	The donor sends an asset to a financial institution or foundation for investment and safekeeping. The assets remain in the name – and under the control of – the <i>donor</i> . The donor contacts the institution and directs it to issue a check in the name of the qualified nonprofit. The financial institution or foundation gets Revenue credit and the donor receives Third Party Recognition credit.
Event registrant	Individual that has registered for at least one university, foundation, or alumni association advancement event.

Fundraiser	A constituent who serves as a fundraiser or contact point for prospects on behalf of the University of Nebraska or the University of Nebraska Foundation.
Life Income Beneficiary	An individual entitled to income from a gift arrangement with the University of Nebraska Foundation.
Major donor	A major donor constituent with lifetime giving greater than or equal to \$50,000.
Member	Individual that is currently a member of a membership program.
Non-degreed Alum	Individual that has attended at least one class on one of the University of Nebraska campuses but does not already have an associate, undergraduate or graduate degree from any of the University of Nebraska campuses.
Planned giver	This constituent has an accepted planned gift on record. Planned gifts, also known as deferred gifts, include a variety of methods a donor can use to leave money or assets to the foundation at his or her death, or a way to invest money so the donor can receive benefits during his or her life and <i>bequeath</i> – or leave the remainder – to the foundation.
Prospect	A constituent that was previously or is currently assigned to a foundation or university Fundraiser, that has an active or inactive prospect plan, or that has a planned gift on record. The prospect constituency will be added to constituents when an assignment and/or a plan will be added to that constituent's record, or when a prospect passes away and we discover that they left a planned gift in their estate.
Recognized donor	Constituent that is included in a Recognition Program.
Staff	This code is assigned to all current employees of the University of Nebraska or University of Nebraska Foundation.
UNF Gift Planning Advisor	Gift planning advisors as identified by the University of Nebraska Foundation Gift Planning department.
Vendor	A categorization given to entities found in Events Expense Reports.
Volunteer	Individual that is currently or has previously served in a designated volunteer role.