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A	Term	Definition	Manual, Guide, or other Source
	Acknowledgement	An acknowledgement is a "thank you" for revenue that was given by a donor. There may be multiple acknowledgements for an individual transaction. See also Campus Based Acknowledgement Letters .	CRM Online Glossary
	Acquisition Lists	Acquisition lists are files with names and addresses of potential donors that you rent or purchase from vendors. These files may also contain other information that is not essential for sending a marketing effort but may be useful when reporting on the success or failure of a particular list. For this reason, nonessential fields (fields other than name and address) are considered part of each list and are not discarded.	
	Additional Fundraiser	Person(s) acting on behalf of the University or Foundation with the interaction's Owner who are involved in the interaction. Additional fundraiser(s) are recorded on the Attributes tab of a general interaction .	
	Advancement	<p>Advancement is a strategic, integrated method of managing relationships to increase understanding and support among an educational institution's key constituents, including alumni and friends, government policy makers, the media, members of the community and philanthropic entities of all types.</p> <p>The primary core disciplines of educational advancement are alumni relations, communications, marketing and fundraising. Advancement professionals work on behalf of educational institutions to:</p> <ul style="list-style-type: none"> • Secure private financial support from potential donors committed to the mission of the institution • Engage alumni in the life of the institution as volunteers, advocates and supporters • Promote or market the institution to prospective students, their parents and others • Communicate about the institution with those who have a stake in its success, including community members, business leaders, government officials, the press and others 	
	Ad-hoc Query	An ad-hoc query is a tool that enables you to select, group, and list records that meet a set of conditions you define. It provides access to all of your data and helps you answer specific organizational questions. Compared to/see also Query; Smart Query .	CRM Online Glossary

Term	Definition	Manual, Guide, or other Source
Ali CRM	<p>Constituent Relationship Management (CRM) database system developed by Blackbaud. Aletheia is a constituent records management system that will be used to store and track information related to advancement of the University of Nebraska through engagement with alumni, donors and friends of the University. The system (and all data stored therein) is owned by the University of Nebraska Foundation.</p> <p>The Advancement CRM has been nicknamed “Ali,” short for Aletheia (pronounced "al-uh-thee-uh".) In the Greek language, Aletheia is variously translated as unclosedness or unconcealedness. In Greek mythology, Aletheia is considered the Goddess of Truth. Ali CRM is to become the once source of truth for University of Nebraska advancement information.</p>	Core Principles Guide - revision by JR 10.5
Ali Access Web Site	<p>The one-stop shop for all information related to Ali. This site contains information for current and prospective Ali CRM and NUFFO users; a link to log into Ali CRM; forms; training & resources; help; and much more. www.nufoundation.org/ali</p>	
Anonymous Donors	<p>This information is located both on the Personal Information tile <i>and</i> on the Personal Info tab, Personal sub-tab, in the Personal Information section near the top (which may need to be expanded to be visible) of an individual constituent record. When Ali CRM users write a thank-you for a gift, determination must be made to ensure the donor does NOT give anonymously. Reports about donor gifts, generated from NUFFO, omit anonymous donors.</p>	
Appeals	<p>Appeals are planned efforts performed to contact constituents and generate gifts, such as direct mailings, phonathons, dinners, and auctions. Typically, an appeal occurs within a specific time period and has a monetary goal. The foundation uses appeal codes to track the annual giving solicitation from which a gift originated.</p>	CRM Online Glossary; NUFFO Glossary
Appeal Mailing	<p>Solicitations sent to multiple recipients, targeting one main audience. All recipients receive the same treatment, therefore there is no segmentation.</p>	
Attributes	<p>Attributes are like "utility drawers" for data placement in Ali CRM, and provide flexibility for record keeping. Attributes facilitate entry and retention of additional pertinent information for our operations. <i>Attributes are available in the following locations of Ali CRM: Constituent, revenue, interaction, event, registrant, education history, designation, plan, address, benefit, opportunity, stewardship plan, modeling and propensity, grant purpose, purpose, funding request.</i></p>	CRM Online Glossary
Audit Trail	<p>Audit trail on data allows users to see a history of what, who and when data was added, changed or deleted on a record.</p>	

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Batch Entry	A method to add or update records in the database. Batch entry is designed for efficiency. It results in rapid entry and update of large numbers of transactions. Batches are for the following update processes in Ali: Constituent, Revenue, Event, and BBIS.	CRM Online Glossary
BBIS	Blackbaud Internet Solutions. The web content management and email marketing system that integrates with Blackbaud CRM.	Core Principles Guide - revision by JR 10.5; better definition from CRM Glossary
Blackbaud	Software creator of the product known as Blackbaud CRM. Ali CRM is the University of Nebraska's configuration of Blackbaud CRM.	
Book value	The original value of the gift(s) and additional gifts or deposits invested.	NUFFO Glossary

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Campaign	Campaigns are designed as a fundraising structure that is configured to meet annual or comprehensive campaign needs. Campaigns can contain goals, time frames, priorities and sub-priorities. A campaign structure allows for roll-up reporting as well as drill-down detail analysis.	CRM Online Glossary
Campus-Based Acknowledgement Letters	To ensure quality acknowledgments from campus leadership (Dean level and above) for gifts at all levels across the University of Nebraska in a timely manner, the foundation created an acknowledgment program to make it easy for campus leadership to express appreciation to donors. The foundation – through development officers and administrative support professionals - provide campus partners with draft letters from which to work. Campus leadership signs and sends letters, and copies are uploaded into the Ali CRM donor database.	Campus Based Acknowledgement guide
Campus Rep	A secondary solicitor role type for the University President and/or University employee(s) collaborating with the Primary Manager to manage plan activity on prospect plans.	Prospect Management Design Document; Solicitor Role

Term	Definition	Manual, Guide, or other Source
Case Statement	<p>A general overview of a fundraising initiative; <i>non-constituent specific</i> . Development officers share case statements with both individual and corporate/organization donors. Case statements provide basic information about a campus project or fundraising initiative and typically include a range of giving options or a generic call to action. See the Communications Appendix at the back of the Fundamentals Manual for a list of campus record Lookup IDs or to see current and past materials created for the college or unit. Detailed instructions for viewing these materials is available in the Communications Appendix.</p> <p>UNF Development Communications staff place PDFs of case statements on the respective campus record in Ali CRM.</p>	Prospect Management Design Document; Interaction Attachment Type
Cash to be Invested	<p>In expendable funds, this is the cash balance available to spend. In endowed funds, this is the cash invested at the beginning of the month following receipt.</p>	NUFFO Glossary
Channel	<p>A channel is a method of soliciting a constituent or a prospect in direct marketing. Examples of channels include mail, phone, and email.</p>	CRM Online Glossary
Commit	<p>The act of creating or updating records in the database that have been entered through Batch Entry. The transactions in a batch are not visible in other parts of the system until the Commit process is run.</p>	CRM Online Glossary
Committee	<p>Committees are a group of constituents with membership or participation in an activity. A committee record is created and then constituents are given a membership role. Committee examples include: Foundation and Alumni Association boards and committees, campus advisory boards, "friends" groups, etc. Please refer to the Constituent Groups: When and How to Track Constituent Groups guide for further explanation about Selections, Committees, Organization records, and Volunteer Types.</p>	CRM Online Glossary
Communication Name Patterns	<p>Communication name patterns allow you to generate unique but consistent names for all direct marketing efforts created from a communication template. When you configure name patterns, you select parts that build the effort's name. Some parts are dynamic and populate automatically when a user creates an effort. For example, if you include the Appeal code or Channel part, those values pull from the appeal or channel assigned to the communication template. Values for Static identifier and Counter parts populate automatically when a user creates a new effort. If you include a Free-form part, the user who creates the marketing effort must enter a text value for that part of the name.</p>	

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Communication Template	Communication templates define default settings for direct marketing efforts and simplify the setup process by including only the options you need to create the effort. With communication templates, you can create direct marketing efforts that are simple or very complex. You can choose which features to make available for a direct marketing effort. For example, if you don't want to track KPIs, you can leave the KPIs grid blank and lock it so the KPIs tab is completely hidden for users who create marketing efforts based on that template.		
Constituency	Constituencies distinguish the nature of constituents' relationship or affiliation with the Foundation, Alumni Association and/or University of Nebraska. Constituents may have multiple assigned constituencies. Please refer to the Constituency Definitions guide for definitions.	CRM Online Glossary	
Constituent	An individual, organization, household, or committee that has a record in CRM.	Core Principles Guide - revision by JR 10.5	
Correspondence	A communication with a constituent, usually via mail. This type of communication usually does not contain a gift ask. Examples would be a Development Officer introduction letter, a newsletter or publication, etc.	CRM Online Glossary	
Creative	The art or copy that can be stored in CRM to access in the future. Creatives are any collateral sent to potential donors, such as individual graphics, pamphlets or letters, gifts or premiums such as pens, and labels or magnets inserted into marketing efforts.	CRM Online Glossary	
CRM	Constituent Relationship Management (CRM) database system. There are several different CRM software systems on the market; the University of Nebraska Foundation's is made by Blackbaud.		
D	Data Warehouse	A system used for reporting and data analysis. It is populated on a regular basis with data from the Transactional system. Using the data warehouse for reporting avoids performance issues with the transactional system.	
Development Officer (DO)	A development officer is a fundraiser for a college, campus, or unit. The job relies heavily on making and communicating with contacts to convey the vision of the campus, college or unit in order to solicit donations. As compared to RAO .		

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Donor	An individual who has made at least one gift to the University of Nebraska or one of its affiliated entities. The Donor 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. See the Constituency Definitions guide for more information.	Prospect Management Design Document; Planned Gift Beneficiary Type	
Donor Advised Funds	A donor-advised fund is a charitable giving vehicle used when a donor wants to make charitable donations to multiple organizations. Donor-advised funds are often chosen as an alternative to creating a family foundation or direct giving to multiple charities. The University of Nebraska Foundation is happy to provide donor-advised funds as an option for our many donors who consider the University of Nebraska their primary charity but who would also like to support other worthwhile charitable causes in their community or across the country. See UNFCGF .	MarComm materials	
Donor Engagement Process™ (DEP)	A disciplined sequence of interactions between fundraisers and donors artfully managed using effective communication skills and donor insight. See also Prospect Plan Outline; Steps .		
Dynamic Selection	A dynamic selection is an ever-changing list which analyzes the members of the selection each time it is used. This may result in slower response time, depending on the complexity and number of records returned. For example, if a Dynamic Selection is used, a recently-deceased person would be excluded from the selection, while an individual newly meeting the criteria for the first time would automatically be added into the selection. As compared to/see also Selection; Static Selection .	CRM Online Glossary	
E	Estimated Annual Income	The amount of estimated income earned in a year.	NUFFO Glossary
	Event Participant	A constituent who is participating in the event as a registrant or guest.	CRM Online Glossary
	Exclusions	When running a business process in Ali such as the event invitation process or communications process, exclusions may be specified for the output. Solicit codes are an example of exclusions that could be used.	

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Expendable Fund	The balance of an expendable fund is not permanently invested. Therefore, all gifts made to an expendable fund are immediately available for the purpose of the fund. As compared to Permanent Endowment; Quasi Endowment .	NUFFO guide	
Expense Activity	Expenses charged to the fund during a specific time.	NUFFO Glossary	
Export Definition	An export definition is a pre-defined list of fields that will be made available in the output when it is used. Once an export definition is established and saved, it can be utilized in the future without having to re-define the parameters. An Export Definition also allows you to select the desired Address Processing Option and Name Format Options, but this type of selection requires a manual de-duping of any duplicate households within the list. Examples include LastName, FirstName, LookupID, Salutation, Addressblock, etc. This is used when creating a mail package for an event invitation, general correspondence, appeal, or marketing effort. As compared to/see also Selection; Output Format; Householding .	CRM Online Glossary	
F	Finder Number	Finder numbers may be generated within an Appeal Mailing or Marketing Effort. The Finder Number is a unique identifier that encapsulates the Constituent and the source code information to speed up data entry when gifts are returned for the solicitation.	CRM Online Glossary
Financial Details (in NUFFO)	<i>Financial</i> information is only available for the prior 18 months, and <i>gift</i> information is only available for the prior 12 months in NUFFO.	NUFFO guide	
Foundation Contact	A member of the foundation's staff to contact with questions about this fund.	NUFFO Glossary	
Functional Area	Functional areas are located in the blue navigation bar across the top of the Ali CRM screen. Areas available to each user are dependent upon the security rights and system roles applied to individuals based on job roles and responsibilities. Permissions are very granular, and may include the ability(-ies) to view; edit; add; and/or delete content in Ali CRM.	Fundamentals Manual	
Fund	A fund refers to the pairing of a Fundraising Purpose and Designation. The foundation has approximately 10,000 active funds.		
Fund A	The foundation's main endowment fund is split among dozens of professional managers and governed by the investment policy set by the foundation's Investment Committee. Fund A works like a mutual fund, with each endowed fund owning units of Fund A.	NUFFO Glossary	

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Term	Definition	Manual, Guide, or other Source
Fund Agreement	A fund agreement governs the use of gifts donated to the foundation which are deposited into a fund maintained by the foundation. It usually restricts the use of the gift to a particular department, program or specific purpose (e.g. scholarships, research, etc.). A fund agreement is generally a bilateral contract between the foundation and the donor but may also be a will, trust, letter or other written instrument documenting the donor’s intent for the use of the gift. See also Fund Summary Memorandum .	NUFFO Glossary
Fund Category	Refers to the type of fund. Options include: Agency fund expendable; Deferred gifts; Expendable funds; Loan funds; Permanent endowment; Quasi-endowment; Unrestricted.	NUFFO Glossary
Fund Established	The fund established date.	NUFFO Glossary
Fund Purpose No Longer Exists	<p>Some fund agreements provide an alternate use for a fund when the original purpose no longer exists; this provision is generally applicable only if the university eliminates the college, department or program named as the beneficiary of a fund. If the college, department or program is moved to or merged with another unit of the university, the fund will continue to maintain its original purpose within the new university unit.</p> <p>If a fund agreement also allows another purpose if the original purpose cannot be reasonably carried out, this is a factual determination that will be made jointly by the foundation and the university depending on the existing circumstances. It should generally be initiated by written request to the foundation from the university. For example, if a professorship is meant to support a recipient engaged in a specific area of research within a department and then the university modifies its academic priorities so that it no longer has this research focus area, it may be appropriate to seek a modification of the purpose to a similar research area within the university’s academic priorities. Unless the terms of the fund agreement provide otherwise, the process for determining another purpose will generally require the approval of the foundation’s board of directors.</p>	NUFFO Glossary
Fund Report	<p>The University of Nebraska Foundation's fund reports are financial documents prepared for donors annually to keep them informed on the activity of their funds, as well as to update them on and encourage confidence in the foundation fund management policy.</p> <p>Once mailed, reports and accompanying letters are uploaded to Ali CRM on an individual constituent record’s Documentation and Interactions tab. If locating a fund report interaction on a specific constituent record proves difficult, check the spouse’s record, as uploads are added to one person’s record and not a couple’s household record.</p>	
Fund Usage	Details about how a fund is able to be used. Fund usage categories include Capital Construction; Faculty Support; Research; Student Support. Please refer to the NUFFO guide for details.	NUFFO guide

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Term	Definition	Manual, Guide, or other Source
Fund Summary Memorandum	The Fund Summary Memorandum is a distilled snapshot of information contained within the governing document of the Fund Agreement. Fund Summary Memorandums provide university users with details they need to know about how funds may or may not be spent, and are available in NUFFO. See also Fund Agreement .	NUFFO Glossary
Fundraiser	Fundraisers are individuals who directly or indirectly support Advancement efforts. Examples include Foundation, President's Office and University employees, as well as, Regents or volunteers acting in a capacity representing the interests of the university. <i>Note: In order for a constituent to be added as an Additional Solicitor to a step interaction, it is necessary for that constituent to have the Fundraiser constituency applied to their individual constituent record.</i>	
General Correspondence	The process used for writing bulk/mass communications to individual constituent records; correspondence processed in this manner is found on an individual constituent record's Communications tab. Please refer to the General Correspondence - bulk communications guide for additional information, including details about general user versus super user responsibilities for this process. As compared to Write a Letter .	
Group (of constituents)	Logically-related constituents viewed using a single record in CRM. Group records facilitate the viewing and reporting of aggregate information about members of the group. NU has chosen to track all groups as Committees. For information about maintaining groups in Ali CRM, please refer to the Constituent Groups: When and How to Track Constituent Groups guide which also includes explanation about Selections, Committees, Organization records, and Volunteer Types. See also Committees .	Core Principles Guide - revision by JR 10.5
Guide	These brief guides interpret the foundation's policies, and provide enriched content beyond that which is provided in a Manual , the other main source of reference material provided to Ali CRM users. Guides are posted in the References and Training Materials portion of the Ali Access web site. Formerly known as SRG (Supplemental Reference Guide.) Compared to/see also Manual .	
Hard (Revenue) Credit <i>and</i> Soft (Recognition) Credit	See also: Recognition Credit and Revenue .	NUFFO Glossary

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Help	<ol style="list-style-type: none"> 1. The blue question mark icon in the upper right corner of Ali CRM provides contextually-responsive online help, provided by <i>Blackbaud</i> . 2. Online References and Training Materials (at Ali's Access web site) provide content <i>specific to the University of Nebraska</i>. 3. Issues and inquiries about Ali CRM may be submitted via email to: servicedesk@nufoundation.org 	
Household record	<p>A household record is a data aggregate that is automatically created when relating two individuals as spouses. It is intended to organize information from both records into one place. Information is <i>never</i> written to a household record.</p> <p>If a household dissolves due to death or divorce, the household record becomes inactive. In the event of a future remarriage, a new household record would be created, leaving the former inactive household record intact.</p>	Core Principles Guide - revision by JR 10.5
Householding	<p>"Householding" records within a selection refers to Ali CRM's ability to identify households within a selection and combine the output so that <i>only the primary</i> individual in the household receives the communication. This feature is only available if using Output Format/Formatted mail correspondence output (and it will not work if using an Export Definition.) See also Output Format; Export Definition.</p>	General Correspondence Manual
Inactive	<p>Records and information generally are not deleted from Ali CRM, but rather are made inactive.</p>	Prospect Management Design Document; Planned Gift Beneficiary Type
Interaction	<p>Interactions are a permanent record of personal contact with a constituent. They are on the Interactions sub-tab of the Documentation and Interactions tab of a constituent record.</p>	

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	Investment: Spending Policy	The endowment is prudently invested and broadly diversified. The foundation’s spending policy stipulates that income distribution for Fund A will be 4.25 percent of a 20-quarter moving average.	NUFFO Glossary
K	KPI	Key Performance Indicators (KPIs) enable fundraisers to quickly check their performance. For example, the major giving manager wants his fundraisers to keep an eye on their performances based on the dollar amount of each fundraiser’s “Qualified” gift opportunities. The manager makes this request to the KPI administrator, who creates a KPI instance for each fundraiser. Because “Opportunities Amount” is a context-sensitive definition, KPI links are added to each fundraiser’s record, allowing him easy access to the KPI data. This is an upcoming feature of Ali CRM.	CRM Online Glossary
L	Letter	Correspondence drafted to assist with fundraising, stewardship, etc. Could include cover letters, appeal letters, thank you letters, general correspondence, etc.	Prospect Management Design Document; Interaction Attachment Type
	Lookup ID	The primary identifier for the constituent used by the organization.	CRM Online Glossary
M	Mail Preference	To respect a constituent’s communication preferences, you can use constituents’ mail preferences. For example, a constituent may request to receive appeal mailings at the primary home address and revenue acknowledgements at the primary email address. This information is located on an individual constituent record's Communications tab, Preferences sub-tab. As compared to Solicit Code .	CRM Online Glossary
	Manual	Manuals are topical comprehensive guides which focus on procedure. Manuals were originally purchased from Blackbaud and customized by foundation design leads and subject matter experts for use by Ali CRM users. The most widely-used manuals include Fundamentals; Events Management; General Correspondence. The Fundamentals Manual contains an Appendix of selected essential "deep-dive" content provided by various departments within the foundation. Formerly known as JumpStart Manual (JSM) . Compare this/see also Guide .	
	Market Value	The current value of the fund’s investment computed monthly based on valuation statements received from each of the foundation’s investment managers.	NUFFO Glossary

	Term	Definition	Manual, Guide, or other Source
	Multi-level Event	A larger event that has multiple components to it, such as a multi-day or multi-function event. See also Supporting Event .	CRM Online Glossary
N	Naming Conventions	<p>A collection of rules followed to create names which allow users to deduce useful information, provide standardization, and enhance searchability and organization of items in a list. Please see Naming Conventions and Standards in Ali guide for organization, campus, and institute acronyms and standards. Please see Naming Queries and Selections guide for those conventions.</p> <p>Events planners use this event naming convention: YEAR Organization/Campus/College Name of event (i.e., 17 UNF UNO CBA Scholarship Dinner)</p> <p>General correspondence super users use this: Organization/Campus College/Unit Description of mailing Year (i.e., UNF Pride of Place July 2017)</p>	Events Management Manual; General Correspondence Manual
	Non-solicitation Mailings	Non-solicitation mailings will be used when there is no “ask” included in the letter. Examples include the communications related to recognition programs, informational newsletters, and some event correspondence.	
	Note (in NUFFO)	Use the notes section in NUFFO for logging or communicating information back to the foundation contact regarding this fund. Example note: <i>This fund is underutilized because we are waiting until the spendable amount goes above \$___ dollars to buy a piece of equipment.</i>	NUFFO Glossary
	NUF	University of Nebraska Foundation. More commonly abbreviated as UNF .	

Term	Definition	Manual, Guide, or other Source
NUFFO	<p>NU Foundation Funds Online. A feature housed within Ali CRM available to foundation staff and authorized campus units to provide them with fund information resulting from private gifts. The purpose of NUFFO is to expedite the university's use of donor funds and to encourage academic units to acknowledge and thank donors for their gifts. Foundation users are able to see all fund information. Authorized university users are able to view fund information for funds where they have Spending Authority and/or Viewing Authority only, including campus business managers.</p> <p>NUFFO users typically have access only to NUFFO within Ali CRM, and will be unable to see constituent biographical or other information unless they are approved by campus leadership for that access. Please refer to the NUFFO guide for additional details and definitions.</p>	Fundamentals Manual; NUFFO Glossary
O	Operational System	The system used day-to-day to process transactions - Ali CRM.
Organization	<p>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. If the group of constituents donates as a collective group, then an organization record must be used.</p> <p>Please refer to the Constituent Groups: When and How to Track Constituent Groups guide for further explanation about Selections, Committees, Organization records, and Volunteer Types.</p>	
Organizational Hierarchy	The Foundation's fundraising structure is defined in CRM. Each level within the hierarchy allows for roll-up reporting on performance of the fundraiser(s) or department. The organizational hierarchy also allows fundraiser managers to view roll up information on their direct and indirect reports. See also Sites .	Prospect Management Design Document
Other Cash	Generally, this is cash available to spend, except for scholarship and fellowship funds.	NUFFO Glossary
Output Format	Output Format Formatted mail correspondence output is the only way to "household" records, or omit duplicate correspondence to the same household within a selection. As compared to Export Definition .	
Outstanding Pledges	The amount donor(s) committed to giving to a specific fund in a specified time frame.	NUFFO Glossary

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Term	Definition	Manual, Guide, or other Source
Owner	The person primarily responsible for an interaction. Additional person(s) involved in an interaction may be added as an Additional solicitor on the interaction's Attributes tab.	Fundamentals Manual
Package	Packages enable you to group items delivered to a marketing effort recipient, such as an appeal letter or event tickets.	
Participants (Interactions)	<p>Participants are household members, organization contacts, and other related constituents being engaged in an interaction. Examples include a spouse, children or other family members, financial or legal advisors, or an organization contact(s). Typically foundation and university staff are NOT Participants.</p> <p><i>Note: Entry of a constituent in the Participants field causes the Interaction, Plan or Step record to appear on that constituent's record as well. The Fundamentals Manual provides step by step directions about this process.</i></p>	
Permanent Endowment	The permanently endowed principal of a fund invested with only the spendable net income generated by the investment made available for the purpose of the fund. As compared to Expendable Fund; Quasi Endowment .	NUFFO guide
Personally Scheduled Meeting (PSM)	Face-to-face meeting planned with the prospect for the purpose of qualifying and/or advancing the prospect's relationship with the university. For major events that a DO plans, one PSM action may be used for the purpose of documenting a face-to-face substantive interaction that enhanced the prospect's relationship with the university and/or foundation at the event.	
Pledge	A promise to make a gift. When the gift is received by the foundation, a payment is applied to the pledge and the pledge balance is updated.	
PRA	Prospect Research Analyst. Member of the Research Reporting and Analytics team at the University of Nebraska Foundation. See also RRA .	

	Term	Definition	Manual, Guide, or other Source
	Prospect	A prospect is anyone identified as potentially having capacity and inclination to give a major gift to the university. A prospect may be identified by fundraisers, researchers, prospect managers and others involved in advancement activities. Constituents who have or have had the Prospect constituency have the Prospect tab (and related functionality) visible on their records.	
	Prospect Management	Prospect Management empowers us to define and describe the university’s prospect pool and helps us to plan and administer strategic objectives, initiatives, outcomes and next steps. It equips us to generate and act upon valuable, accurate information about these members of the University of Nebraska community, which helps us keep them engaged in the life of the university and committed to its ongoing achievements and vision toward the future. It provides for demonstrable accountability of our progress to foundation and university leadership. It facilitates collaborative efforts across development teams, enhancing communication between the many people responsible for making relationships stronger and mutually satisfying.	
	Prospect Manager	The development officer responsible for developing, coordinating and executing a strategy to maximize the prospect’s involvement with, as well as current and life-time giving through the UNF . - Prospect Managers manage the relationship, involving the necessary people at the appropriate times to assist in the Donor Engagement Process™ . - Prospect Manager assignments may be based on the level and type of giving, college interests, regional assignments and other variables, and may change as the prospect’s potential and interest(s) develop or change over time. Individual responsible for the overall relationship with the prospect. There is only one Prospect Manager per constituent or household. Formerly known as Primary Solicitor .	
Q	Quasi Endowment	The principal of a quasi-endowed fund is invested like an endowed fund with only the spendable net income generated by the investment made available for the fund's purpose. However, the principal of a quasi-endowed fund may be un-invested and spent if permitted by the fund agreement, subject to the approval of the foundation. As compared to Expendable Fund; Permanent Endowment .	NUFFO guide
	Query	A tool used to group and display records that meet a set of defined criteria. Compared to/see also Smart Query .	CRM Online Glossary

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Term	Definition	Manual, Guide, or other Source
RAO	<p>Regional Advancement Officer. A specialized type of development officer who does not have a portfolio assignment, but rather is engaged with a broad base of constituents within defined geographic area(s) having a high concentration of University of Nebraska supporters. Once constituent interest and/or inclination are identified, the RAO then transitions the prospect to the development officer(s) responsible for the unit(s).</p>	Prospect Management Design Document; Plan Type; Intranet RAO PPT
Recognition Credit	<p>Recognition credit – sometimes known as soft credit – is the sharing of the gift value with someone other than the legal donor for recognition purposes (i.e., Recognition credits are often used to give a donor credit for a gift he/she did <u>not</u> directly make.) This recognition is to identify someone who was involved in the decision to give. Recognition credits are most commonly used in spousal relationships. When a gift is received by the foundation, it is applied to one constituent record (hard "revenue" credit) and the spouse receives credit for that gift as well on his/her constituent record (as recognition credit). For example, the foundation may receive a \$100 gift from married constituents. One of the constituents will receive a \$100 <i>revenue</i> credit and the spouse will receive a \$100 <i>recognition</i> credit.</p> <p>Other common areas that recognition credits may appear are on matching gift contributions (the organization making the gift receives the hard credit and the employee who applied for the gift receives the recognition credit) and charitable foundations (the foundation receives the revenue credit as the contributing constituent and any family or board members related to that charitable foundation may receive recognition credit). As compared to Revenue. See also Hard Credit (Revenue) and Soft Credit (Recognition).</p>	CRM Online Glossary; NUFFO Glossary
Relationships	<p>An association between two individual constituents or between an individual constituent and an organization constituent. Relationships between individual constituents often describe familial associations (husband/wife), whereas relationships between individual constituents and organization constituents often describe employment associations (employer/employee). See also Fund Relationships.</p>	CRM Online Glossary
Report	<p>Detailed output of aggregate information. In contrast to a query, a report is usually designed to track specific data or metrics in a consistent format for use over time, and can be used repeatedly for efficiencies.</p>	CRM Online Glossary

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Term	Definition	Manual, Guide, or other Source
Response Device	The coupon, order form or reply card that a constituent completes and returns to the sender to complete a transaction. Formerly known as Contribution Cards .	CRM Online Glossary
Revenue	Any "hard credit" financial transaction in CRM, including commitments (examples: recurring gifts and pledges) and payments (example: outright payment; recurring gift payment, pledge payments, event registration payment, membership payments, etc.). Formerly known as Gifts . See also Recognition Credit .	CRM Online Glossary
Revenue Activity	Income earned and new gifts received by a fund during a specific timeframe.	NUFFO Glossary
RRA	Research Reporting and Analytics . Team within foundation Advancement Services responsible for, among other tasks, creating selections and reports within Ali CRM.	
RSS feed	Really Simple Syndication . A simple XML based system that lets users subscribe to content such as news or website updates and then aggregate it into a single location using RSS aware software. With this feature you can target important information to members of your organization. Users who subscribe to the RSS feed can view the information as it is updated in the program. For example, an RSS feed can supply the person responsible for a special event with up-to-date registration information. RSS feed functionality is an upcoming feature in Ali CRM.	Navigation
Scholarship Recipient		
Thank-you Letters to Donors	Please refer to the NUFFO guide for information about this process and best practices.	NUFFO guide
Seeds	Seeds are individuals who will receive marketing materials from <i>within your organization</i> . An organization might place staff and others from across the country on its seeds list to monitor mail delivery dates, along with the quality in which the mailing was received. Additionally, seeds will monitor that vendors followed instructions from the point of sign off to generate the mailing, including fields inside the letter, premiums, etc.	CRM Online Glossary
Segment	Segments define who is being targeted for a marketing effort, based on data attributes and/or giving history. Segments are created by selections.	

S

Term	Definition	Manual, Guide, or other Source
Selection	<p>A selection is a pre-defined set (or list) of records of the same type either built from a query or imported. A selection is often used as input into a process or report as a means to specify which set of records should be acted on by that process. A selection can also be made available to other queries. Selections are similar to ad-hoc queries. As compared to/see also Dynamic Selection; Static Selection. Please refer to the Constituent Groups: When and How to Track Constituent Groups guide for further explanation about Selections, Committees, Organization records, and Volunteer Types.</p> <p>Sites provide the ability to classify and segment certain records to a specific area within the foundation/campus hierarchy. Additionally, by using sites, the foundation can easily generate reports at a very detailed level or roll up reporting to group many associated sites into one reporting unit.</p> <p>Sites are used on revenue (based on the lowest level purpose of the designation), interactions, mailing preferences, events, designations, marketing efforts etc. Please refer to the Site Records and Site Hierarchy guide for additional information. See also Organizational Hierarchy.</p>	
Site(s)	<p>In NUFFO, Sites identify the campus and area a fund supports. For example, if you want to view all funds for UNL A&S Department of English, in the name field search for *English* and it will pull up all sites with “English” in the Site name.</p> <p>Note: it is recommended to search Sites using broad terms with wildcard characters (*) and select from the narrowed down results list.</p> <p>Important: It is important to select the correct Site! A Site selection of:</p> <ul style="list-style-type: none"> • UNO Arts and Sciences is “upper tier” (higher in the hierarchy) and truly includes ALL departments whereas • UNO AS All Departments limits the search to funds intended to benefit all departments in the college of arts and sciences at UNO (and thus is quite limited in results). 	CRM Online Glossary; NUFFO Glossary
Smart Field	<p>Provide the ability to combine different pieces of constituent data, such as revenue and marketing, to create a calculation that can be used as filters and output in queries/selections. Examples of Smart fields include: Revenue application counts to a particular designation or Gift amounts within a certain time period.</p>	CRM Online Glossary
Smart Query	<p>A smart query is a tool that enables you to use a previously defined query, known as a definition, to generate an instance of the results based on parameters you specify. The Definition typically performs complex calculations that use business logic, so you save time when you create smart query instances because you only need to enter the parameters for the results you need. See also Ad-Hoc Query; Query.</p>	CRM Online Glossary

Term	Definition	Manual, Guide, or other Source
Solicit Code	Solicit codes allow constituents to globally opt out of solicitations and communications. For example, for constituents who do not want to receive email of any type, a “Do not email” solicit code can be assigned. This information is located on an individual constituent record's Communications tab, Preferences sub-tab. As compared to Mail Preference .	CRM Online Glossary
Solicitor	An individual or organization having a role in Development Activity or operations.	CRM Online Glossary
Source Code	A series of letters or numbers affixed to an outgoing marketing effort comprised of different source code parts which represent various elements of the marketing effort.	
Spendable Amount	The spendable amount is the current balance available to be spent from a fund consistent with its fund agreement. Please refer to the NUFFO guide for Availability of information, Estimating Spendable Amounts, Fund Usage requirements, and more.	NUFFO Glossary

**Spendable Net
 Income**

If a fund is endowed, its principal is considered a permanent endowment and is kept intact and invested using the foundation’s policies, with the spendable net income generated then available for the purpose (reason) of the fund. Spendable net income refers to the permitted annual spending amount for the endowed fund as determined by the foundation’s investment and spending policy. A copy of the foundation’s current investment and spending policy is available upon request.

For professorships and chairs only: If the fund agreement **requires** reinvestment of excess spendable net income (applicable to endowed funds only), the foundation will automatically reinvest all remaining spendable net income with the principal of the fund as of July 1 each year. If the university commits all or a portion of the spendable net income remaining in the fund but has not yet submitted a payment request, the university must notify the foundation in writing no later than June 1. The notice must specify the committed amount and provide an estimated timeline for expenditure of the committed amount so it’s not reinvested. If the fund agreement **permits** but does not require reinvestment of excess spendable net income, the dean of the college must notify the foundation in writing no later than June 1 each year, specifying the amount of excess spendable net income to be reinvested as of July 1. If the foundation receives no written notification of reinvestment, excess spendable net income shall remain available for expenditure.

NUFFO Glossary

For scholarships and fellowships only: If the fund agreement **requires** reinvestment of excess spendable net income (applicable to endowed and quasi-endowed funds only), the foundation shall automatically reinvest all remaining spendable net income with the principal of the fund as of February 28 each year. If the fund agreement **permits** but does not require reinvestment of excess spendable net income, the fund’s spending authority must notify the foundation in writing specifying the amount of excess spendable net income for reinvestment. If the foundation receives no written notification of reinvestment, excess spendable net income shall remain available for expenditure.

Spending Authority

A spending authority is the position, committee, or entity at the university that is responsible for administering and authorizing expenditures from a fund. See also **Viewing Authority**.

NUFFO Glossary

Term	Definition	Manual, Guide, or other Source
Spending Policy	The endowment is prudently invested and broadly diversified. The foundation’s spending policy stipulates that the income distribution for Fund A will be 4.25 percent of a 20-quarter moving average of the fund's market value.	NUFFO Glossary
Static Selection	A static selection is an unchanging list; this selection type creates a fixed set of members when it is created. Those members do not change until the static selection is manually refreshed. A static selection provide faster processing when it is used because the system does not need to refresh the members of the selection. As compared to/see also Dynamic Selection; Selection .	
Stewardship	Stewardship (defined by Merriam-Webster as “the careful and responsible management of something entrusted to one’s care”) is an integral component of the donor cultivation cycle, playing a role from the beginning to the end of the gift giving continuum. Our best prospects are our past donors, and it is essential that the foundation and university demonstrate appreciation of donors through a variety of means and that it accurately communicates to donors how their gifts are being used, whether the donor is an individual or an organization. Through proper acknowledgment, fund stewardship, donor recognition, event management and engagement, outstanding stewardship helps ensure a positive donor experience and strengthens the relationship between the donor and the University of Nebraska.	
Supporting Event	A sub-event that is part of a larger multi-level event. See also Multi-level Event .	CRM Online Glossary
System Roles	Security in the program is determined by system roles and record-level access. System roles determine the features, tasks, queries, and more to which your users have access, while record level security determines the specific records users can access.	CRM Online Glossary
Transaction System	The system used day-to-day to process transactions - Ali CRM.	
Transfer Activity	Details of the transfers into or out of this fund.	NUFFO Glossary

T

Funds are categorized by the investment code. The three most common are:

Expendable Fund: The balance of an expendable fund is not permanently invested. Therefore, all gifts made to an expendable fund are immediately available for the purpose of the fund.

Type (of Fund)

Permanent Endowment: The permanently endowed principal of a fund invested with only the spendable net income generated by the investment made available for the purpose of the fund.

NUFFO Glossary

Quasi Endowment: The principal of a quasi-endowed fund is invested like an endowed fund with only the spendable net income generated by the investment made available for the fund's purpose. However, the principal of a quasi-endowed fund may be un-invested and spent if permitted by the fund agreement, subject to the approval of the foundation.

A fund displayed in red italics in NUFFO is considered underutilized. A fund is considered underutilized if it meets the following criteria:

- An endowed or quasi-endowed fund in which the spendable balance is two times or greater than the estimated annual income.
- An expendable fund in which the fund has had no expense or transfer activity in the past 24 months.

U

Underutilized Fund

If a fund is underutilized, please post a note on the **Notes** tab explaining why the fund is underutilized or to inquire how to resolve the non-utilization of the fund.

NUFFO Glossary

UNF

University of Nebraska Foundation. Sometimes also abbreviated as **NUF**.

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Term	Definition	Manual, Guide, or other Source
UNFCGF	UNF Charitable Gift Fund, a separate organization affiliated with the University of Nebraska Foundation. Fund numbers begin with 02; because these funds are not spendable by campus, they are not visible via NUFFO. See Donor Advised Funds .	UNF Office of General Counsel
V	Viewing Authority	NUFFO guide
	The position, committee, or entity authorized by the spending authority to view fund information for management purposes. See also Spending Authority .	
Volunteer	<p>This term has multiple uses in Ali and each are defined below.</p> <ul style="list-style-type: none"> ● Volunteer Constituency - Constituents that volunteer will receive a constituency code of Volunteer which will unlock the Volunteer tab and its affiliated functionality. ● Volunteer types - Volunteer types are added when tracking an individual's service for or on behalf of the University of Nebraska and its affiliates is necessary. Examples include: Postcards for Pride and Huskers for Higher Education. ● Plan type (Prospects Functional Area) - Used by the Office of Trustee and Volunteer Relations to track engagement and administrative efforts of the office with volunteers Note: Opportunities are not added to this plan type. ● Secondary Solicitor Role (Prospect Plans) - A role type for a Foundation volunteer who is collaborating with the Primary Manager to manage Plan Activity. <p>Please refer to the Constituent Groups: When and How to Track Constituent Groups guide for further explanation about Selections, Committees, Organization records, and Volunteer Types.</p>	Prospect Management Design Document; Plan Type; Solicitor Role
VSE	Voluntary Support for Education. An annual survey of colleges and universities conducted by the Council for Aid to Education (CAE.) The purpose is to collect data on fundraising at higher-education institutions.	

**Write a Letter**

This Ali CRM functionality allows the user to write an personalized letter from within any constituent record. Merge data from Ali CRM into a pre-loaded letter template; the user selects addressee, address and salutation information, then saves the interaction in Ali CRM all in one seamless process. This correspondence type appears on an individual constituent record's **Documentation & Interactions** tab. As compared to **General Correspondence**.