

Guide for:

NUFFO STUDENT FUND FINDER

Authoring Department: FINANCE
 Contact: AARON ROUSE OR HANNAH ALTHOUSE
 fundmanagement@nufoundation.org
 Anticipated Audience(s): FOUNDATION STAFF AND
 NUFFO USERS WHO
 MANAGE STUDENT SUPPORT FUNDS

Version 1.0 – last updated 3/8/22

Table of Contents

NUFFO Student Fund Finder	2
Software Overview	2
Benefits	2
Two Primary Uses for This Tool.....	2
Student Support Overview	3
Student Support Fund Searchable Criteria: What is it and How is it Used?.....	3
Help Me Understand Fund Criteria Restrictions.....	4
Using Student Fund Finder	4
Accessing Student Fund Finder	4
Navigation	4
Set Fund Criteria Fields	6
Boolean Operators	6
Fund Criteria Codes.....	8

Examples of Common Criteria Searches..... 11

 Students Who Live in a Certain State..... 11

 Students Who Graduated from a Nebraska High School 12

 Students Who Have a Specific Grade Point Average (GPA) 12

 Should I Exclude Blanks (or Include Them)? 12

Set Output Fields..... 13

 Fund Information 14

View Results..... 15

Export 16

Save, Load Configuration..... 16

Try It Now: Set Up Your First Searches..... 16

 Recommended Default: All Funds, All Criteria Configuration..... 17

Glossary of Key Terms 18

Help and Support..... 21

NUFFO Student Fund Finder

Software Overview

Benefits

Beginning in February 2022, a new enhancement will be launched, making it easier than ever before for NUFFO users to find information about the awarding criteria of student support funds.

NUFFO Student Fund Finder will improve the efficiency and ease of awarding student aid and will offer significant enhancements over previous availability of student support fund awarding criteria. Previously, fund criteria had to be referenced by downloading a Fund Summary Memorandum PDF on an individual NUFFO fund record. Now, these student support fund criteria are available (and searchable) directly within Ali+NUFFO.

Two Primary Uses for This Tool

Utilizing Student Fund Finder may be useful in many instances. There are two likely scenarios in which it will be most beneficial:

1. **Making Annual Student Awards:** Each spring, academic units across the NU system begin building financial aid packages for NU students. This includes the awarding of UNF donor student support funds. Traditionally, large numbers of scholarships are awarded during this time, and having a quick way to view fund criteria may be beneficial. By using Student Fund Finder, users can generate a report of all funds under their authority and have a quick and easy way to identify what criteria apply to a certain fund.

2. **Identifying Funds for Individual Students:** At times, it may be necessary to try and identify funds to assist an individual student. By using the filtering capabilities of Student Fund Finder, key demographic information about a student can be used to identify student support funds for which the student is eligible. For example, it is possible to filter student support funds based on a student's hometown, class year, major, GPA or any combination of other criteria.

Student Fund Finder offers enhanced fund management functionality **specifically for student support funds**, which include:

- Scholarships
- Fellowships
- Student awards, etc.

Fund types *excluded* from Student Fund Finder include:

- Capital improvement
- Discretionary
- Faculty and staff support
- Research
- Programmatic and project support

Student Support Overview

Student Support Fund Searchable Criteria: What is it and How is it Used?

When donors establish funds to support the University of Nebraska (NU), certain criteria may be put in place by the donor. These fund criteria specify how the fund should be managed, how it should be used and who has the authority to request expenditures from the fund. While almost every fund managed by the University of Nebraska Foundation (UNF) has some type of use criteria outlined by the donor, student support funds typically provide the most extensive collection of fund criteria. Student support funds include scholarships (undergraduate and graduate), graduate student fellowships, emergency funds, travel funds, loans and student awards/grants. Donor criteria may define certain activities, backgrounds or qualities a student must possess to receive financial support from the fund.

Ensuring that donor funds are used and awarded as intended is a top priority for NU and UNF. Providing student support per the documented donor intention demonstrates top-tier donor stewardship and could result in additional philanthropic support. Failure to follow and meet the specific criteria defined by the donor can create long-term damage to the donor relationship, and NU may be held responsible for replenishing any monies awarded from a donor fund to a student who does not meet the defined criteria.

Help Me Understand Fund Criteria Restrictions

While UNF does its best to work with donors in keeping awarding criteria as simplified as possible, criteria from fund to fund can vary significantly. Some donor funds have very specific awarding criteria, while others are broad. When creating Student Fund Finder, UNF identified key data points and coded them to each fund record.

When reviewing fund criteria to make student awards, there are a couple things to keep in mind:

- **Award criteria defined by the donor cannot be ignored.** If the donor has stated that a student must meet certain requirements, the student must meet everything defined in the Fund Summary Memo.
- **There is a difference between *required* and *preferred* criteria.** From time to time, a donor may note a “preference” that the student meet certain criteria. While every effort should be made to meet the donor’s preference, if it cannot be met, that criteria can be removed from consideration. When reviewing fund criteria, you will see language that indicates if an award criterion is preferred. Additionally, as outlined later in this document, when looking at fund criteria on NUFFO, required versus preferred criteria will be noted. If the criteria are *not* listed as preferred, the award must be made to a student who meets that *exact* criteria.

If you are unsure about what a fund criterion means or whether a student is eligible to receive the award, please contact your campus financial aid office or the UNF Funds Management Team at fundmanagement@nufoundation.org. Any funds that are awarded incorrectly may require reimbursement back to the donor fund from NU.

Using Student Fund Finder

With all searchable criteria available on student support funds in NUFFO, it is now possible to search for funds using Student Fund Finder. While there are some complexities to understanding this tool, once familiar with it, NUFFO users will be able to easily generate lists of student support funds and their associated criteria.

Accessing Student Fund Finder

Student Fund Finder is available to users in NUFFO. Users will find the link to the tool located in the Site Navigation section when logged in.

Navigation

Student Fund Finder is divided into three main areas:

1. **Fund Criteria:** The Fund Criteria tab is where the user will set the parameters for their search.
2. **Output Fields:** The Output Fields tab is where the user will define what information they want to display.

3. **Results:** The Results tab will display a list of funds that meet the criteria set on the Fund Criteria tab and will include the output values identified on the Output Fields tab.

1 Step One
Choose one or more student support criteria on which you wish to search. If you select no criteria, you can return a list on all funds you have access to.

2 Step Two
Choose which data you would like included in your output (results). *Best practices is to include all options.* You will have the option to save the view and parameters used to create the list so you can reuse you're your criteria for future searches.

3 Step Three
Preview results. You will have the option to export the results list as a CSV (spreadsheet) file.

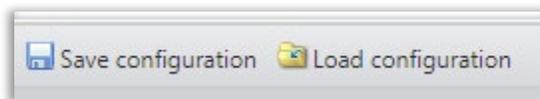
The screenshot shows the 'Student fund finder' application with three tabs: 'Fund Criteria', 'Output Fields', and 'Results'. The 'Fund Criteria' tab is active, showing a list of filter fields such as 'Diversity Criteria', 'Ethnicity', 'Financial Need', etc. A 'Save configuration' button and a 'Load configuration' button are visible at the bottom of the interface.

Student Fund Finder is designed much like other software “wizards” that walk you through a task, step by step. In a nutshell, the process involves three main tabs that are completed in order from left to right:



Tip: You may also run the tool without choosing *any* fund criteria. This will generate a full list of all funds and criteria under your authority.

Additionally, users have the option to save and load searchable criteria configurations. Configurations are helpful if a user has certain searches (each using unique parameters) they want to save and run in the future. By saving a configuration, the user can save the Fund Criteria and Output Fields they want to see and view again later, load that configuration and get an updated list of results. Users can save multiple configurations to their profile and set a default configuration to load automatically when accessing the system.



Set Fund Criteria Fields

To add a criteria field to a search, a user can either double click on the criterion to be added or click on it once and select the arrow to move it to the selected filter fields pane. Leave this section blank if you wish the results to include *all* criteria.

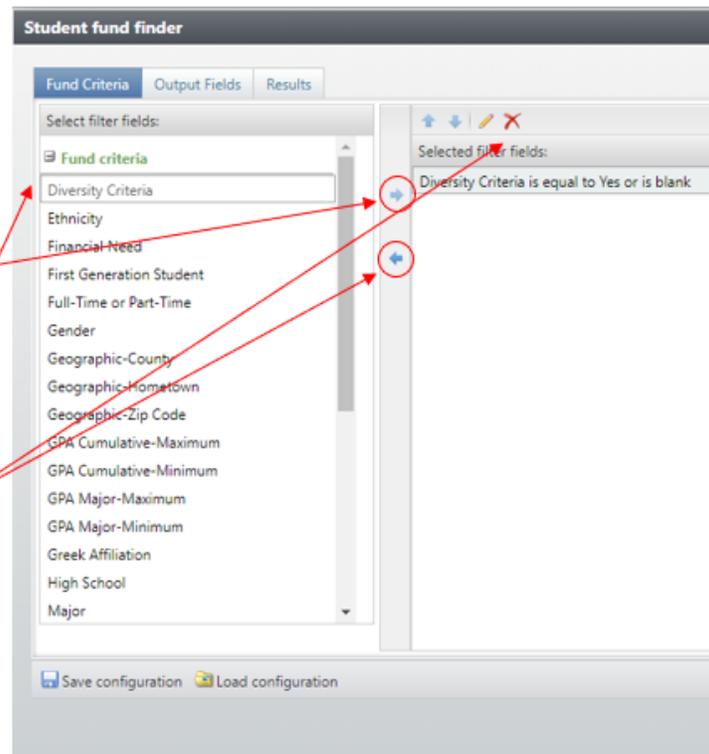
Similarly, if a user wants to remove a field from the search criteria, selecting the field to be removed in the selected filter fields pane and clicking the remove arrow will take the filter out of the search.

Adding Criteria

A field can be added by either double clicking the criterion in the list or click on it once and select the arrow to move it to the selected filter fields pane.

Remove Criteria

A field can be removed by either clicking on the criterion once in the selected filter fields pane and either clicking the arrow to move it or the delete button



Boolean Operators

When setting Fund Criteria fields, it is important to have a basic understanding of Boolean operators. Selection of the correct operator will help a user identify funds that meet certain criteria. *It is very important to note that when you type in key values or text to conduct a search, you must type them in precisely* (as the search criteria are based on exact values and any misspelling will affect your results). The list below highlights the operators available and examples of when they may be used.

Term	Definition	Example
Equal to	Number or text value; Results equal <i>exact</i> value chosen or entered; Will primarily be used for fields that contain a drop-down list of values; Consider using a “Contains” operator for free text fields	If you type in <i>Benson</i> , results will display only an <i>exact match</i> to this <i>one</i> keyword
Not equal to	Results exclude <i>exact</i> value chosen or entered; Will primarily be used for fields that contain a drop-down list of values; Consider using a “Does not contain” operator for free text fields	If you type in <i>Benson</i> , results will include everything <i>except</i> exact match for Benson
One of	Results includes all values chosen or entered; same as Equal to, but with a list of options; Will primarily be used for selecting multiple values for fields that contain a drop-down list of values	If, when searching for high schools, you type on separate lines ‘Benson Millard Papillion’ the results will include all high schools for all three cities
Not one of	Results exclude all values chosen or entered; <i>Most likely won't be used</i>	
Less than	Numeric result is less than value entered; Will primarily be used for number-based criteria (GPA, award amount, etc.)	If you enter <i>100</i> , results will include all numbers 99 and below
Less than or equal to	Numeric result is less than or equal to the value entered; Will primarily be used for number-based criteria (GPA, award amount, etc.)	If you enter <i>100</i> , results will include all numbers 100 and below
Greater than	Numeric value is greater than the value entered; Will primarily be used for number-based criteria (GPA, award amount, etc.)	If you enter <i>100</i> , results will include all numbers 101 and above
Greater than or equal to	Numeric value is greater than or equal to the value entered; Will primarily be used for number-based criteria (GPA, award amount, etc.)	If you enter <i>100</i> , results will include all numbers 100 and above
Between	Numeric value is between the minimum and maximum value entered; Will primarily be used for number-based criteria (GPA, award amount, etc.)	If you type in <i>1</i> and <i>10</i> , results will include 2-9
Not between	Will primarily be used for number-based criteria (GPA, award amount, etc.)	If you type in <i>1</i> and <i>10</i> , results will include all number values lower than 1 and all values higher than 10

Term	Definition	Example
Blank	Results equal blank values; <i>Most likely won't be used</i>	Note: If a field does not contain information, it is considered a 'blank' field
Not blank	Results exclude blank values; <i>Most likely won't be used</i>	Note: If a field contains <i>any</i> value, it is considered a "not blank" field
Begins with	Results begin with value chosen or entered; <i>Most likely won't be used</i>	
Does not begin with	Results do not begin with value chosen or entered; <i>Most likely won't be used</i>	
Contains	Results contain the value chosen or entered; <i>Will primarily be used for free text fields.</i>	In a high school search, if you type in <i>Millard</i> , results will include <i>all</i> the Millard schools
Does not contain	Results do not contain the value chosen or entered; <i>Most likely won't be used</i>	

As you add each fund criterion to search upon, the wizard will ask you which operator you want to use and the value you want to search on (if applicable). Depending on the criteria added by the user, the operator values available will change based on the data type. For example, if the data type is number based, the *greater than*, *less than* and *between* operators will be available. For non-numerical-based data types, these operators won't be available.

Fund Criteria Codes

As mentioned previously, UNF has coded student support funds with some of the most common fund criteria. The following list identifies and defines the current codes that may be assigned to a student support fund.

Searchable Criteria Code	Definition	Recommended Boolean Operator(s)
Academic Ability	Recipient must display academic ability to receive the award	This is a Yes/No field, no Boolean operators required
Academic College	Identifies the college a student must be enrolled in to receive the award	Equal to; one of
Academic Involvement	Identifies the academic program(s) the student must be part of to receive the award	Equal to; one of
ACT Score-Minimum	Minimum ACT score a student can have to receive the award	Greater than or equal to
Age-Maximum	Maximum age of a student to be eligible to receive the award	Less than or equal to

Searchable Criteria Code	Definition	Recommended Boolean Operator(s)
Age-Minimum	Minimum age of a student to be eligible to receive the award	Greater than or equal to
Athletics Involvement	Identifies the athletics team a recipient must be involved in to receive the award	Equal to; one of
Award Amount-Exact	Exact amount the award must be as defined in the fund governing document	Any numeric operator, depending on what the user is looking for
Award Amount-Maximum	Maximum amount the award must be, as defined in the fund governing document	Less than or equal to
Award Amount-Minimum	Minimum amount the award must be, as defined in the fund governing document	Greater than or equal to
Class Rank	Identifies any class rank a student must have to be eligible for the award	Contains
Club Involvement	Identifies club(s) the student needs to be involved in to receive the award	Equal to; one of
College Course-Current Enrollment	Identifies the college course(s) the student must be currently enrolled in to receive the award	Contains
College Course-Previous Enrollment	Identifies the college course(s) the student must be currently enrolled in to receive the award	Contains
Community Involvement and Volunteerism	Student must demonstrate community involvement and/or volunteerism to be eligible	This is a Yes/No field, no Boolean operators required
Credit Hours-Cumulative-Maximum	Maximum cumulative credit hours a student can have to receive the award	Less than or equal to
Credit Hours-Cumulative-Minimum	Minimum cumulative credit hours a student can have to receive the award	Greater than or equal to
Demonstrated Leadership	Student must demonstrate leadership to receive the award	This is a Yes/No field, no Boolean operators required
Diversity Encouraged	Awards encouraged for students of diverse backgrounds	This is a Yes/No field, no Boolean operators required
Ethnic Origin	Ethnic origin or nationality a student must have to be eligible to receive the award	Equal to; one of
Financial Need	Student must demonstrate financial need to receive award	This is a Yes/No field, no Boolean operators required
First Generation Student	Student must be first-generation of his/her family to receive the award	This is a Yes/No field, no Boolean operators required
Full-Time or Part-Time	Identifies if a student must be a full-time or part-time student to receive the award	Equal to; one of

Searchable Criteria Code	Definition	Recommended Boolean Operator(s)
Gender	Identifies what gender a student must be to receive the award	Equal to; one of
Geographic-County	Identifies the county(-ies) the recipient must be from to receive the award	Equal to; one of
Geographic-Hometown	Identifies the hometown(s) the recipient must be from to receive the award	Contains
Geographic-State	Identifies the state(s) the recipient must be from to receive the award	Equal to; one of
Geographic-Zip Code(s)	Identifies the zip code(s) the recipient must be from to receive the award	Contains
GPA-Cumulative-Minimum	Minimum cumulative GPA a student can have to receive the award	Greater than or equal to
GPA-Major-Minimum	Minimum major GPA a student can have to receive the award	Greater than or equal to
Grade Level	Grade level a student must have to be eligible to receive the award	Equal to; one of
Greek Affiliation	Identifies Greek chapter recipient must be associated with to receive the award	Equal to; one of
High School	Identifies the high school(s) the recipient must be from to receive the award	Contains
Honorary Involvement	Identifies honorary organization(s) the student needs to be involved in to receive the award	Equal to; one of
Interest Area	Area of interest a student must have to be eligible to receive the award	Contains
Major	Identifies the major(s) the recipient must have to receive the award	Equal to; one of
Military Service	Student must have active or former military service to receive the award	This is a Yes/No field, no Boolean operators required
Minor	Identifies the minor(s) the recipient must have to receive the award	Equal to; one of
Music Involvement	Identifies the music group(s) the student must be involved in to receive the award	Equal to; one of
Number of Awards-Exact	Exact number of awards that must be made from the fund annually	Equal to
Number of Awards-Maximum	Maximum number of awards that can be made from the fund annually	Less than or equal to
Number of Awards-Minimum	Minimum number of awards that can be made from the fund annually	Greater than or equal to
Organizational Involvement	Identifies educational organization(s) the student needs to be involved in to receive the award	Equal to; one of

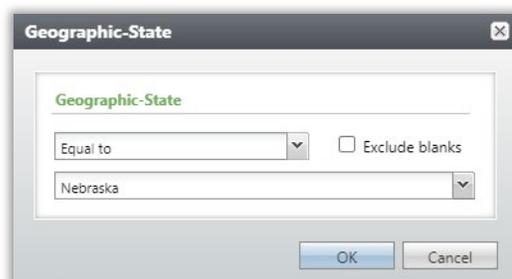
Searchable Criteria Code	Definition	Recommended Boolean Operator(s)
Other Aid Received	Identifies if the fund can be awarded to students who have received other financial aid	This is a Yes/No field, no Boolean operators required
Other Criteria	Specific criteria that must be met for awarding, not defined in existing coding structure	Contains
Religion	Identifies the religion(s) a student must associate with to receive the award.	Equal to; one of
Renewable	Fund can be renewed and re-awarded to a previous recipient	This is a Yes/No field, no Boolean operators required
ROTC Involvement	Identifies the ROTC involvement the recipient must have to receive the award	This is a Yes/No field, no Boolean operators required
SAT Score-Minimum	Minimum SAT score a student can have to receive the award	Greater than or equal to
STEM	Indicates the award should be given to a student pursuing a degree in a STEM field	This is a Yes/No field, no Boolean operators required
Student Government Involvement	Identifies the student government involvement the student must have to receive the award	Equal to; one of
Undergraduate or Graduate	Identifies if a student must be an undergraduate or graduate student to receive the award	Equal to; one of

Examples of Common Criteria Searches

To help explain this better, consider the following examples:

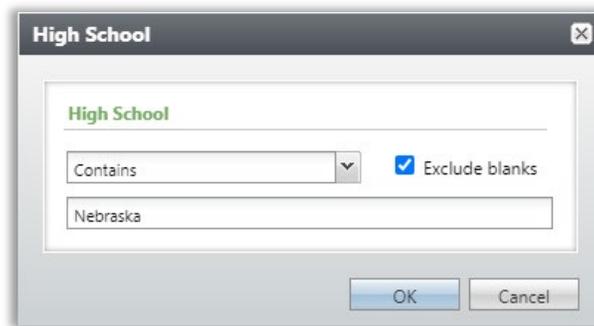
Students Who Live in a Certain State

- The user wants to filter funds that are available for **students who live in Nebraska**. In this case, the user would select the Geographic-State criterion, use the operator Equal To and select Nebraska from the dropdown menu. Note that by not checking *Exclude Blanks* in this example, the results will also return funds that are silent on the Geographic-State criteria. If the donor has not specified any state criteria, that fund is eligible to be awarded to Nebraska students.



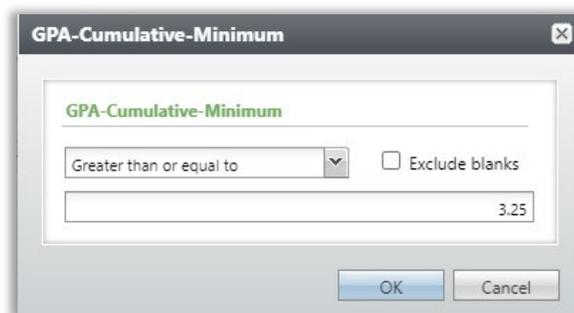
Students Who Graduated from a Nebraska High School

- The user wants to filter funds that are available for **students who graduated from a Nebraska high school**. In this case, the user would select the High School criterion, use the operator Contains, and type in Nebraska. Note that by checking the *Exclude Blanks* in this example, the results will only return funds that contain Nebraska in the Geographic-State criteria. If the donor has not specified any high school criteria, the blank criteria field will remove it from this search result.



Students Who Have a Specific Grade Point Average (GPA)

- The user wants to filter funds that are available for **students who have a 3.25 cumulative GPA**. In this case, the user would select the GPA-Cumulative-Minimum criterion, use the operator Greater than or equal to, and type in 3.25. Note that by not checking *Exclude Blanks* in this example, the results will also return funds that are silent on the GPA-Cumulative-Minimum criteria. If the donor has not specified any minimum cumulative GPA criterion, that fund is eligible to be awarded to students with any GPA, including those over 3.25 as defined by the search.



Should I Exclude Blanks (or Include Them)?

One additional consideration when setting Fund Criteria is whether to exclude blanks or include blanks. **By default, the system will always be marked to include blanks.** Consider the following examples:

- When the **Exclude blanks** box *is checked*, the only funds that will be returned are those that have the selected criteria coded on them. For example, if the user sets the Geographic-State criterion equal to Nebraska and checks the Exclude blanks box, the only funds that would be returned are those that have that exact criterion coded on them.
- When the **Exclude blanks** box is *not checked* (thus indicating that blank values *should* be included) any funds that have the selected value coded on them or have nothing coded to that criterion will be returned. Using the same example from above, if the user sets the Geographic-State criterion equal to Nebraska and unchecks the Exclude blanks box, any fund that has Nebraska coded to it or has no Geographic-State value coded to the fund will be returned.

Understanding whether to include or exclude blanks will help broaden or limit the results from a search.



A recommended best practice is to leave the Exclude blanks box unchecked. By doing so, the user is saying they want to see all funds that meet the selected criteria or are silent on the criteria. Using the Geographic-State equal to Nebraska example above, many funds may not list a state criterion, therefore that criterion is not coded to the fund. When the Exclude blanks checkbox is left unchecked, your results will return funds that name Nebraska as the state in the governing document or name no state in the governing document. By checking the exclude blanks checkbox, the only funds that will be returned are those that have the Geographic-State equal to Nebraska coded on them.

Set Output Fields

Output Fields is where the user will determine what information is displayed on the Results tab. As a rule of thumb, best practice is to *select every output field* to display on the Results tab. This ensures that the results list displays all criteria related to awarding a fund. The output fields are divided into two groups:

1. **Fund Criteria:** These output fields reflect all the searchable criteria points that can be coded to a fund, as defined earlier in this document. These fields will display what criteria must be met for a recipient to receive the award. For a listing of all possible fund criteria output fields, reference the fund criteria codes table above.
2. **Fund Information:** These output fields include basic fund information that may be helpful to have when making awards. This includes information such as Fund ID, Fund Name, Fund balances, etc. For a listing of all possible fund information output fields, reference the fund information table below.

Like setting, adding and removing criteria on the Fund Criteria tab, adding and removing output fields can be done by selecting the criteria and clicking on the add or remove arrow. Additionally, users can select to add or remove all criteria using the add and remove all buttons. This will eliminate the need to add each criterion individually.



Tip: The system defaults to adding **Fund ID** and **Fund Name** to your results list and displaying those columns first. We recommend leaving those columns and then adding all remaining options. The arrow appears grayed out (not blue) when you try to add a field that has previously been added.

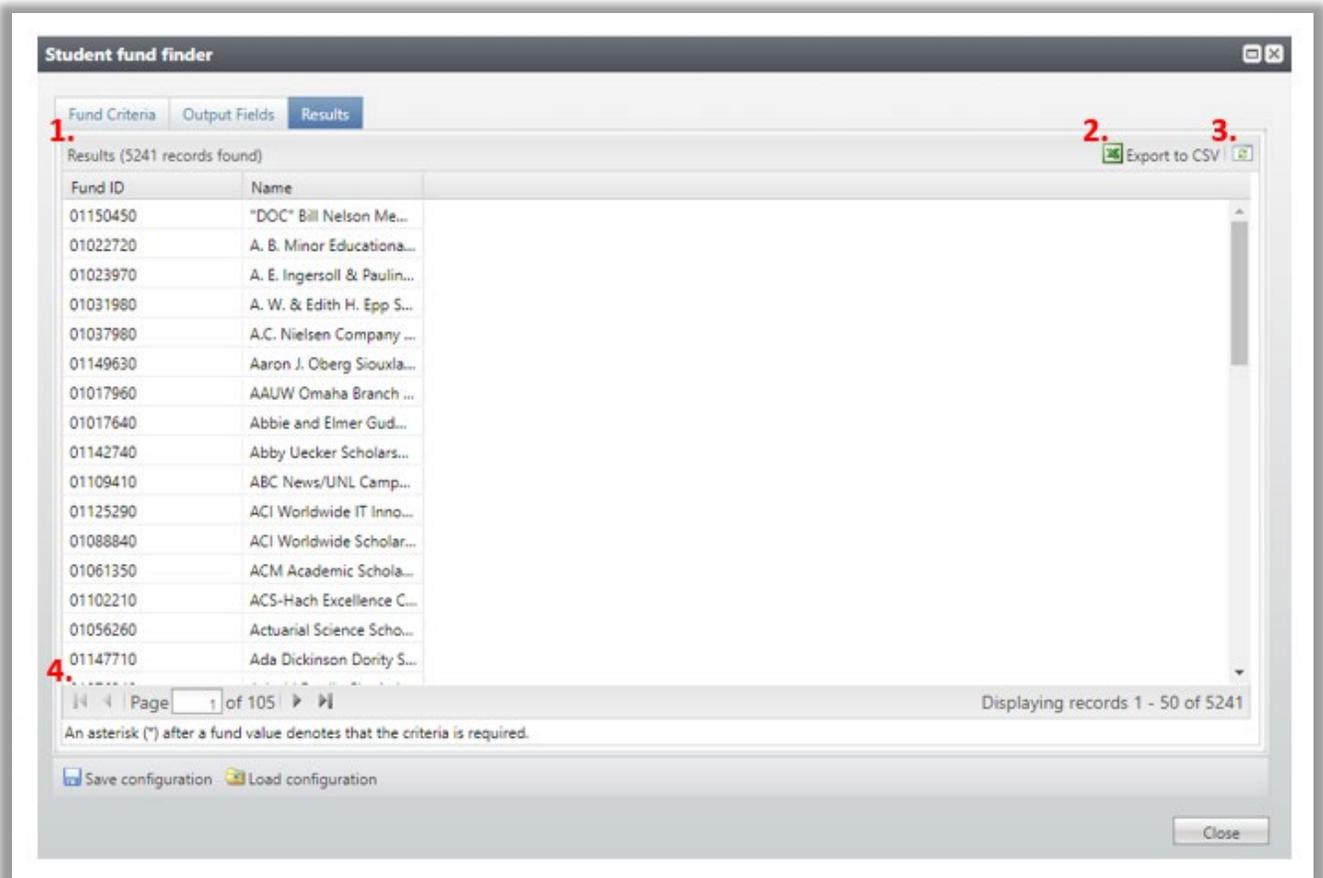
Fund Information

Add this fund information column as an output field...	...if you wish to view this related information as a column on the exportable results list.
Book Value	Original value of the gift(s) and additional gifts or deposits invested
Campus-College-Department	The area of campus the fund supports
Estimated Annual Income	If the fund is permanently endowed or quasi-endowed, the amount of income estimated to be earned in a year's time
Fund ID	Unique eight-digit fund identification number maintained by UNF Note that this is different from a campus WBS account number
Fund Type	The three fund types include: <ol style="list-style-type: none"> 1. Permanently endowed funds 2. Quasi-endowed funds 3. Expendable funds To learn more, watch this three-minute video or visit the SHOW ME THE MONEY lesson in the NUFFO e-learning module
Market Value	The current value of the fund's investment (computed monthly)
Name	The name of the fund
Spendable Balance	Spendable cash, updated with every transaction Exception: For scholarships and fellowships this is the amount able to be awarded next academic year; the value is updated once annually and is static from March 1 forward
Underutilized	A result of True means the fund is underutilized A result of False means the fund is <i>not</i> underutilized For a fund to be considered underutilized it must be one of the following: <ul style="list-style-type: none"> • A permanent endowed or quasi-endowed fund in which the spendable balance is at least two times 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

View Results

Once a user sets the Fund Criteria and Output Fields, the funds that meet the criteria will be displayed on the Results tab. The following graphic displays key functions to be aware of on the Results tab:

1. **Count of funds** – The number of funds that meet the criteria defined by the user
2. **Export to CSV** – Allows the user to download the list of results as a CSV file (spreadsheet)
3. **Refresh** – When using the tool, if a user adds or removes criteria or output fields, this button will refresh the data
4. **Navigating to additional funds** – The results page only shows 50 records at a time, to navigate between pages, the user can move backwards and forwards using the navigation arrows



When reviewing funds displayed on the Results tab, be aware of two things:

- Users will likely encounter several blank fields (or columns). This is to be expected. Typically, most funds will only have a handful of criteria that are coded on them. Blank fields indicate that the donor agreement is silent to the selected criterion.

- As mentioned previously, some criteria may be *required* while others are *preferred*. Values in the results marked with an asterisk (*) indicate that the criterion is required, and the recipient must meet this criterion to receive the award.

Export

Though it is possible to download (export) the results, users should use caution when doing so. Fund criteria is subject to change as donors amend their funds and new funds are created. Using an outdated list that was previously downloaded could result in a fund being misawarded. If a user does download information, those lists should be frequently refreshed to ensure the most timely and accurate information is being used. Funds awarded incorrectly may require repayment to correct the awarding error.

Save, Load Configuration

It is possible for users to save and load specific criteria configurations when searching for and viewing fund results. For example, a user may frequently search for funds that can be awarded to a student of a specific major. Instead of rebuilding a fund search every time the user logs in to the system, he/she can instead save that configuration and reload it, eliminating the need to rebuild the same search previously used. Configurations are specific to each user and there is no limit to the number of configurations a user can save.

Once you have built your search, setting the fund criteria and output fields, to save it as a configuration, click on the Save Configuration button. This will allow you to name the configuration, provide an optional description and select if you want to load that configuration by default. By saving a configuration as a default, it will automatically load this configuration every time you log in. Only one configuration can be set as the default.

Once a configuration is saved, you can load it by clicking on the Load Configuration button. This button will open a window of all configurations you have created that are available. Within this window, you will see the name, description and default settings for your configurations. Note that if you want to change your default configuration, select the new default configuration from the list and click on the edit button. Users also have the option to delete configurations that are no longer needed.

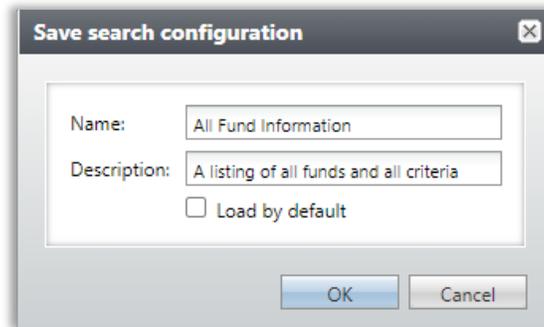
Try It Now: Set Up Your First Searches

Now that you are familiar with the concepts and components of Student Fund Finder, practice and hone your skills by conducting these practice searches to help you get started.

Recommended Default: All Funds, All Criteria Configuration

While there are countless configurations a user could build and save, one configuration every user is encouraged to save is one to display all funds with all criteria. When making awards in the spring for the upcoming academic year, it may be helpful for a user to have a list of all their funds with all of the criteria output. Use the following steps to build and save this configuration.

1. On the Fund Criteria tab, do not select any filters. When no filters are set, it will return all funds that a user has the authority to view.
2. On the Output Fields tab, add all output fields to the selected output pane. Each user can determine what order they want fields to appear in, but it may be helpful to include select Fund Information fields, such as Fund ID and Fund Name at the top of the list so those columns appear first.
3. Click on the Save Configuration button and provide a name and description.



Glossary of Key Terms

Please review the key terms below before attempting to use the new tool.

Term	Definition
Blanks	Any field that is empty, containing no value.
Boolean operators	<i>Boolean operators</i> refer to a system of logical thought that is used to create true/false statements and help you refine your search results. Refer to the Boolean Operators section of this document for additional information.
Configuration	The settings and parameters you choose to create your output results may be saved as a configuration so you can reuse them later. Each NUFFO user can save an unlimited number of configurations, which can later be used (“loaded”) during subsequent uses.
Filter fields	Criteria points that have been coded on student support funds and can be queried against to identify funds that meet specific criteria.
Fund authority	The university positions that may access a foundation-held fund. Two primary types of fund authority exist, and fund authority also grants a user access to NUFFO. View this video (6m40s) to learn all about fund authorities or visit the WHO USES NUFFO? SPENDING AUTHORITIES AND VIEWING AUTHORITIES lesson in the NUFFO e-learning module .
Fund criteria	Step one of using the tool is to choose which criteria you wish to search on. If you leave this tab blank it will generate a list including <i>all</i> criteria. Alternately, to narrow your search, choose one or more student support criteria on which you wish to focus.
Fund governing document; Fund criteria	<p>A fund agreement is a type of fund governing document, which governs the use of gifts donated to the foundation that 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.). These fund criteria previously had to be referenced by downloading a Fund Summary Memorandum on an individual NUFFO fund record. For student support funds, these criteria are now available (and searchable) directly within Ali+NUFFO.</p> <p>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. Fund agreements are saved on a Purpose record in PaperSave, and thus are available only to foundation staff. See also Fund Summary Memorandum (the “lite” version available to NUFFO university partners).</p>

Term	Definition
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 .
Output fields	Step two of the wizard. Choose which fields you would like to have displayed as part of your results list. A best practice is to choose <i>all</i> options, then remove or hide them from results if not needed.
Preferred criteria	Preferred criteria are those the donor has identified as being important to consider when making an award but can be omitted when issuing awards if there are no recipients that meet the stated criteria.
Required criteria	Required criteria are those the donor has identified and must be met when making an award. If the recipient does not meet the stated required criteria, he/she is not eligible to receive the award.
Results	Step three of the wizard. Preview results. You will have the option to export the results list as a CSV (spreadsheet). If you do export lists, you are encouraged to update them frequently. Fund criteria are subject to change as donors amend their funds and new funds are created.
Searchable criteria	Refer to the Fund Criteria Overview section below to understand more about criteria, how they are chosen and how they appear in NUFFO.
Site	<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>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).

Term	Definition
Underutilized funds	<p>Funds that are not currently being fully utilized by university partners display in NUFFO <i>in red italics</i>. Utilization of donor-established funds is an important step in the donor stewardship process. Donor gifts are made under the assumption that the university will utilize those dollars in a timely manner and for the purposes outlined in the fund governing document. No donor makes a gift intending for it to sit in a fund unspent. To facilitate proper fund stewardship and utilization, underutilized funds are displayed in red italics.</p> <p>Helpfully, NUFFO allows you to:</p> <ul style="list-style-type: none"> • filter for underutilized funds for which a donor has requested to receive an annual fund report (in October, for the prior fiscal year ending July 31); fund reports provide details about income and spending/award activity; • prioritize spending of that fund due to donor stewardship preferences and accountability; and • view the name and address of donor(s) receiving the fund report (if applicable). <p>For a fund to be considered underutilized it must be one of the following:</p> <ul style="list-style-type: none"> • A permanent endowed or quasi-endowed fund in which the spendable balance is at least two times 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. <p>If a fund reaches underutilized status, this can be addressed by submitting a payment or transfer request or by reinvesting a portion of an endowed or quasi-endowed fund's spendable income back into the principal. If plans are in place to utilize the fund over a period of time or if there is an explanation for why the fund is underutilized, please post a note on the Notes tab of an individual NUFFO fund record.</p>

Help and Support

	Your Campus Financial Aid Office	Foundation Fund Management Team FundManagement@nufoundation.org	Foundation Service Desk ServiceDesk@nufoundation.org	Ali CRM Team AliCRM@nufoundation.org	Ali Community Website https://alicommunity.nufoundation.org/
Fund Management Questions					
How to use Student Fund Finder		<input checked="" type="checkbox"/>			
Unsure what a fund criterion means	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Unsure whether a student is eligible to receive the award	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<i>Any funds that are awarded incorrectly may require reimbursement back to the donor fund from NU.</i>					
Questions or issues about using Ali+NUFFO			<input checked="" type="checkbox"/>		
Submit ideas for Ali+NUFFO improvements				<input checked="" type="checkbox"/>	
Request new NUFFO access for a member of your team					<input checked="" type="checkbox"/> Request Access (top) <input checked="" type="checkbox"/> Submit Fund Authority Form