

Student support fund criteria are available (and searchable) directly within Ali+NUFFO. Two scenarios in which the tool is most beneficial:

1. **Making annual student awards** – generate a report of all funds under your authority and identify criteria that apply to each fund
2. **Identifying funds for individual students** – filter student support funds based on criteria

Student Support Funds Include:

Scholarships (undergraduate and graduate) Emergency Funds

Graduate Student Fellowships Travel Funds

Student Awards/Grants Loans

Funds Excluded from Student Fund Finder:

Capital Improvement Research

Discretionary Programmatic and Project Support

Faculty and Staff Support

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



Unsure what a fund criterion means



Unsure whether a student is eligible to receive the award



Any funds that are awarded incorrectly may require reimbursement back to the donor fund from NU.

Questions or issues about using Ali+NUFFO



Submit ideas for Ali+NUFFO improvements



Request new NUFFO access for a member of your team



Request Access (top)
Submit Fund Authority Form

Understand Fund Criteria

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.

Some donor funds have very specific awarding criteria, while others are broad. UNF identified key data points and coded them to each fund. 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.

Access and View Searchable Criteria in NUFFO

Fund criteria appear multiple places in NUFFO. Student award criteria (available only on student support funds) appear as illustrated below.

In NUFFO:

A. Student Fund Finder tool

01024670 - N Fund - Business Scholarships

1.
2.

Fund Information

Fund Type: Expendable
 Use Code: Student Support
 Purpose Codes: Scholarships-Undergraduate Students
 Site: UNL BUS All Departments
 Established: 06/12/80
 Fund Summary Memorandum
 Fund Balances

2. **Fund Purpose.** This Fund shall be used to provide scholarships to undergraduate students in the College of Business, University of Nebraska-Lincoln (the "Purpose").

NU Foundation Funds Online (NUFFO)

Site Navigation

My Fund Portfolio

View a listing of all funds you have authority view. Funds that can be accessed here.

Student Fund Finder

A.

Search and review student support fund criteria for funds

Summary Reports

View financial and donor information reports for all funds

On an individual NUFFO fund record
(in My Fund Portfolio area)

1. Purpose Codes

2. Fund Summary Memorandum

- Fund Purpose section

3. Student Award Criteria tab

- Name of Criteria
- Description
- Value
- Required (or Preferred)

Financial Details | Notes | Fund Report Card | **3. Student Award Criteria** | Fund Authority | Donor Information

Student Award Criteria (5)

Search Columns Save list Open list Clear all filters

Name	Description	Value	Required
Academic College	Identifies the college a student m...	UNL College of Business	Yes
GPA-Cumulative-Minimum	Minimum cumulative GPA a stude...	3.00	
Major	Identifies the major(s) the recipien...	Business, Marketing	Yes
Renewable	Fund can be renewed and re-awar...	Yes	
Undergraduate or Graduate	Identifies if a student must be an ...	Undergraduate	Yes

Keyword Search

My Fund Portfolio

Results (1) Filters More

Fund ID: Fund Name: Purpose Code: **Keyword:** Order: Apply Reset

Show funds at my spending authority Show underutilized funds only Show funds with donor reporting

Fund ID Fund Name Spendable A... Est Annual In... Book Value Market Value Donor Receives ... Last Expenditure Spending Auth... Fund Type Use Code Notes

The **My Fund Portfolio** filter offers a keyword search. This new filter searches across multiple system fields and return values that match keywords input by a system user. Fields that will be searched include:

- Fund Name
- Naming Opportunities
- Purpose Code
- Purpose Code Comment
- Searchable Criteria Values
- Tags



Rules of the Road

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.

Navigation

Three main areas to Student Fund Finder (SFF) wizard:

1. **Fund Criteria** tab. Set parameters for the search. Alternately, leave this tab *blank* (select none) to generate a full list of *all* funds and criteria under your authority.
2. **Output Fields** tab. Define what information will be output. Best practice: select all.
3. **Results** tab. Preview a results list of funds; you may opt to export the results.

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



Tip: The center arrow appears grayed out (not blue) when you try to add a field that has previously been added.

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.

Boolean Operators

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.



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)

Term	Definition	Example
Equal to	Number or text value; Results equal exact 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 exact 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 <i>Benson</i>
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
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 <i>99</i> and below

Term	Definition	Example
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 <i>100</i> 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 <i>101</i> 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 <i>100</i> 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 <i>2-9</i>
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 <i>1</i> and all values higher than <i>10</i>
Contains	Results contain the value chosen or entered; Will primarily be used for free text fields.	In a high school search, if you type in <i>Millard</i> , results will include <i>all</i> the <i>Millard</i> schools

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
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

Searchable Criteria Code	Definition	Recommended Boolean Operator(s)
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 previously 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

Fund Criteria – *continued*

Searchable Criteria Code	Definition	Recommended Boolean Operator(s)
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

Fund Criteria – *continued*

Searchable Criteria Code	Definition	Recommended Boolean Operator(s)
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

Searchable Criteria Code	Definition	Recommended Boolean Operator(s)
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
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

Fund Criteria – *continued*

Searchable Criteria Code	Definition	Recommended Boolean Operator(s)
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

Should you include or exclude blanks?

- By default, the system will always be marked to include blanks.
- 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.

Common Criteria Searches

Students who live in a certain state (i.e., NE)

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 NE high school

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 specific GPA

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.



Values (criteria) in the results list marked with an **asterisk (*)** indicate that the criterion is **required**, and the recipient must meet this criterion to receive the award.



Exporting results is discouraged because donors can amend fund criteria (which are therefore subject to change.) Funds awarded incorrectly may require repayment to correct the awarding error. If results are exported, users are encouraged to refresh their lists often.



Save (and later reload) configurations to easily perform common searches.

View the [NUFFO e-learning module's Student Fund Finder](#) lesson for videos, guides and additional support resources.



The e-learning module is available in the **NUFFO Training and Reference** section on the Ali Community website: <https://alcommunity.nufoundation.org/>

Output Fields tab: Fund Information

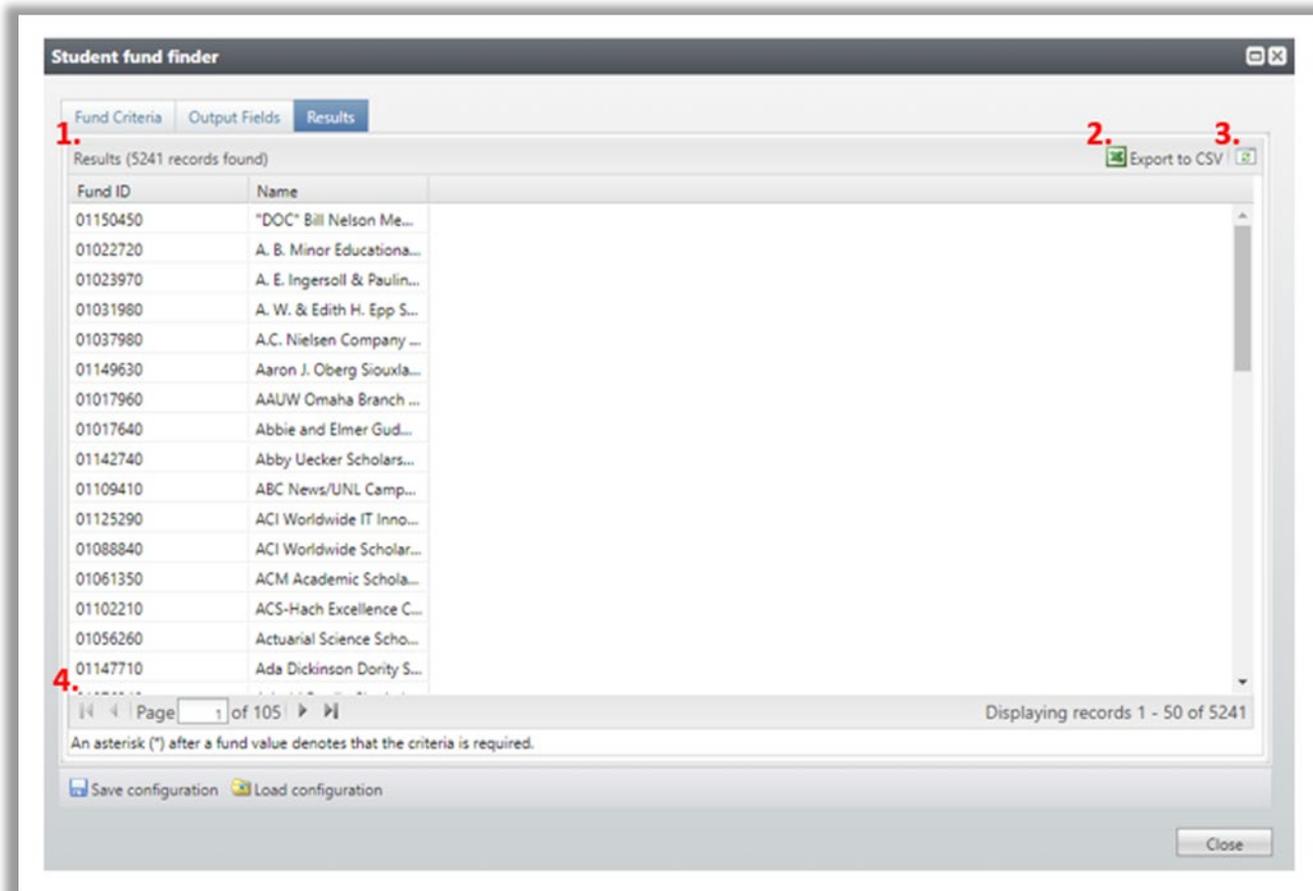
Add this fund information column as an output field...	...if you wish to view this related information as a column on the exportable results list.
Book Value	Original value of the gift(s) and additional gifts or deposits invested
Campus-College-Department	The area of campus the fund supports
Estimated 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 <p>To learn more, watch this three-minute video or visit the SHOW ME THE MONEY lesson in the NUFFO e-learning module.</p>
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 not 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



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**.

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.