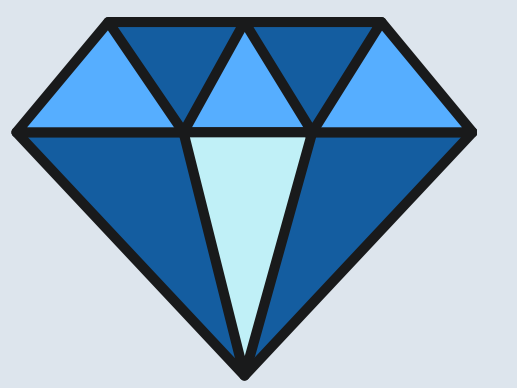




Funds Management System and Process Enhancements Project



Award Winner: University of Nebraska Foundation

Year: 2024

Award Level: Sapphire

Category: Technology & Innovation

Project Summary

The UNF Funds Management Systems and Process Enhancements project is a multi-year review, analysis, and redesign of critical funds management functions.

The project focuses on the lifetime of a fund, from inception to closure or perpetual endowment. While primarily concentrating on tool and system upgrades to execute key funds management tasks, it also emphasizes redesigning fund management processes and standards.

As the project approaches completion, the UNF funds management team has witnessed significant transformation, enhancing its capacity to serve internal partners, university affiliates, and donors through new technologies and systems, enabling increased efficiency and effectiveness.

The following visuals show the functionality of the technical solution that was developed.

Position	Position ID	Constituent	Lookup ID
NU-President	NU-001		
NU-Provost	NU-001-001		
NU-Vice Provost	NU-001-001-001		
NU-Systems Scholarship Committee-Chair	NU-001-001-002		
NU-Digital Education-Associate Vice President	NU-001-001-003		
NU-Digital Education-University of Nebraska High School-Director	NU-001-001-003-001		
NU-University of Nebraska High School-Principal	NU-001-001-003-001-001		

The technical solution created a configurable hierarchy of fund authority positions in the donor CRM. To each position, a constituent record could be attached, reflecting the individual who holds that fund and is the assigned fund authority.

With the addition of award criteria on fund records, a fund finder tool was developed. This tool allows campus partners to set award criteria they want to search for, determine what output fields to include in the results, and download a list of all funds that meet the selected criteria. Additionally, the tool allows users to query on an empty criterion set and download a list of all funds and their associated criteria in one file, to assist in the annual scholarship awarding process.

Users enter a new request using an electronic form. The form captures all of the required information needed for processing. The form leverages existing system data. For example, a user can select an existing vendor record and the address information will automatically populate. Also, users can search for the fund record the expense should be charged to. When the donor fund record is selected, the form will display the funds current spendable balance and the pending spendable balance. The pending spendable balance deducts any pending requests that are being processed and deducts those from the spendable balance. This aids the requestor by providing a real-time update on whether there are funds available to process this current request. Finally, users can attach electronic documentation to each request record to assist with the final processing of the request.

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Aspire Awards

