

Q10

Is there any constituent information not currently provided in GAIL that you would like to see?

Response: It would be nice to see, at a glance on the main screen, what boards or groups a constituent is affiliated with.

Answer: If a constituent is a member of a board or group in GAIL, a member constituency will appear at the top of their profile. By clicking on it, you will automatically be redirected to their list of affiliated groups. A new tile can also be created to reflect these groups if desired.

The screenshot displays the profile for 'Mouse, Mr. Mickey' with a Lookup ID of 10954749. A red arrow points to the 'Committee member' link under the 'Constituencies' section. Below the profile, a navigation bar includes 'Relationships', 'Relationship Tree', 'Relationship Maps', 'Group Member', and 'Committees', with the last two highlighted by a red box. The 'Committees and roles' section shows a table with one entry: 'LAW - Board of Visitors' starting on 4/5/2019.

Name	Start date	End date
LAW - Board of Visitors	4/5/2019	

Q10

Response: I would like to see which selections a constituent is included in from their profile.

Answer: There are over 25,000 selections in GAIL. The average constituent probably falls into tens or hundreds of those selections. Putting this information on a constituent's profile would not only be cluttered but the data would also be inaccurate. Selections only update their list of constituents when they are used in a marketing effort or event. Selections also don't consider a constituent's communication preferences or whether or not the constituent has active contact information until they are used in a communication. That's why it is so important to process a selection through a marketing effort or event.

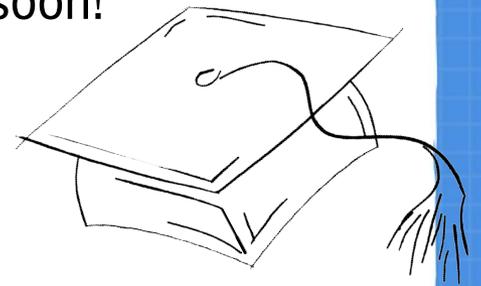


Q10

Response: I would love to see whether a person is not just a current faculty or staff member at the top of the page but if they are former, retired, or emeritus.

Answer: This is a great idea that can easily be implemented. We have discussed with our Application Support team about creating a new constituent tile that will provide this data. More details soon!

Response: I would like to see educational information for constituents who did not attend UGA.



Answer: Although most GAIL users don't have access to update constituent education themselves, you can ask our Records team to add educational information about non-alums. For example, if you know that your non-alum donor, Harry Potter, graduated with an undergrad degree from Ohio State, you can email records@uga.edu and have that information added to GAIL.

Q10

Response: I would like to see events constituents have spoken at.

Answer: If a constituent has registered to attend an event in GAIL, an Events tab will populate on their profile. A new section will be added to the Events tab that displays a list of events where the individual was tagged as a speaker. To see how to connect speakers to events in GAIL, [click here](#).

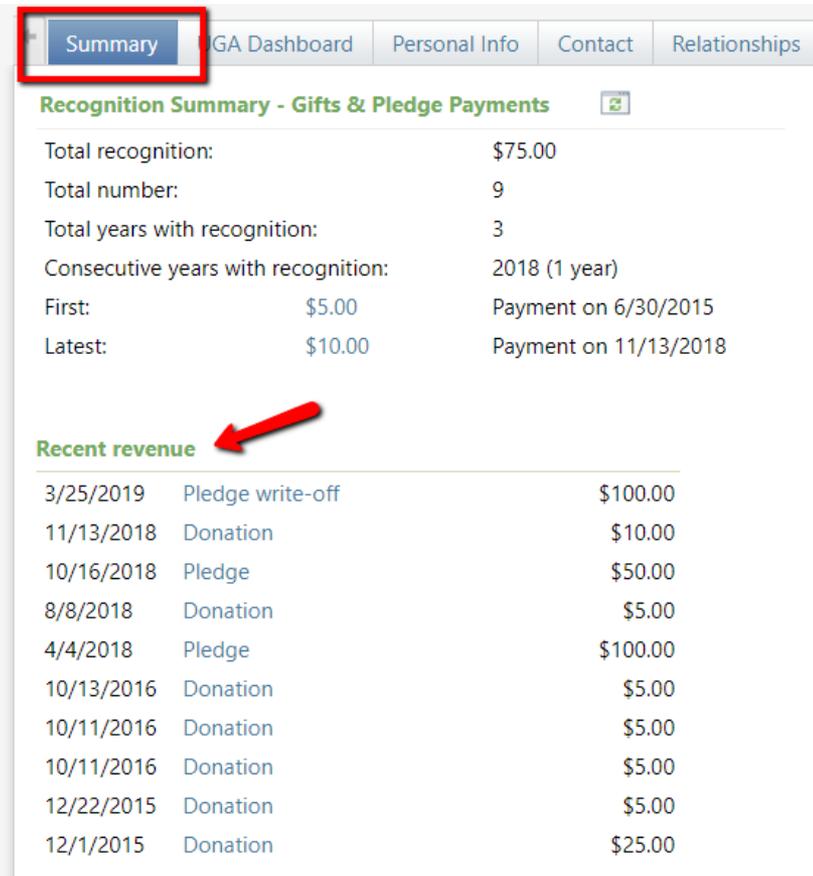


Communications	Education	Attributes	Events	Documentation and Interactions	Vanguard Images	Memberships	Revenue	Region Codes	Smart F
Registrations (8) <input type="checkbox"/> Filters <input type="checkbox"/> More 									
Main event	Event name	Start date	End date	Registration opti...					
☰ <None>									
⊖	DARVP - 2017 AdvanceUGA Conference	2/13/2017	2/13/2017	Complimentary					
⊖	ASRV - True Colors Training	3/17/2017	3/17/2017	Individual					
⊖	CDDR - 2018 Presidents Club Reception	9/28/2018	9/28/2018						
⊖	GMOA - 19.01.26 Elegant Salute XVI	1/26/2019	1/27/2019	Individual					
⊖	AA - UGA Young Alumni Rooftop Takeover (PCM)	3/31/2019	3/31/2019						

Q10

Response: I would like to see the breakdown of a constituent's most recent donations.

Answer: On the Summary tab of each constituent's record there is a recent revenue section with information on the last 10 gifts a donor has made. You can click on these hyperlinks to receive more info or you can go to the Revenue tab of the constituent's profile and sort your revenue history list by date. You can also run the Constituent Credit Total report.



The screenshot shows a web interface for a constituent profile. At the top, there are several tabs: 'Summary' (highlighted with a red box), 'GA Dashboard', 'Personal Info', 'Contact', and 'Relationships'. Below the tabs is a section titled 'Recognition Summary - Gifts & Pledge Payments' with a small icon. This section contains a table of summary statistics. Below that is a section titled 'Recent revenue' with a red arrow pointing to it. This section contains a table of the constituent's most recent donations and pledges.

Recognition Summary - Gifts & Pledge Payments		
Total recognition:		\$75.00
Total number:		9
Total years with recognition:		3
Consecutive years with recognition:		2018 (1 year)
First:	\$5.00	Payment on 6/30/2015
Latest:	\$10.00	Payment on 11/13/2018

Recent revenue		
3/25/2019	Pledge write-off	\$100.00
11/13/2018	Donation	\$10.00
10/16/2018	Pledge	\$50.00
8/8/2018	Donation	\$5.00
4/4/2018	Pledge	\$100.00
10/13/2016	Donation	\$5.00
10/11/2016	Donation	\$5.00
10/11/2016	Donation	\$5.00
12/22/2015	Donation	\$5.00
12/1/2015	Donation	\$25.00

Q10

Response: I know that some matriculates are not included in the records and I do wish we could include all those. I'm not sure if that's possible though.

Answer: Prior to 2009, only UGA students who graduated from UGA were guaranteed to be added into our database. Matriculate information was only added if the constituent had another connection to UGA, like being a donor. Now all matriculates are tagged in GAIL. If your school currently has a list of matriculate alumni they would like tagged in GAIL, please email records@uga.edu

Response: I would like to be able to sort constituents by high school.

Answer: In 2015, our Records team began adding high school information for our incoming freshmen UGA students. You can view this data within the Education tab of a constituent's profile. This information can also be queried to create selections or have the data added to your export definitions.

Q10

Response: If they are current or former UGA employees, it would be helpful to see the positions they've held during their time at UGA.

Answer: We are changing our current HR upload process to reflect employee position changes within UGA. Going forward if an employee changes jobs at UGA you will be able to see their new employment information along with their old data.

Response: All scholarships received.

Answer: Scholarship information is added in GAIL following the end of the fiscal year. While we are informed throughout the year the intended scholarship recipients, we often aren't alerted of when they are cancelled or not awarded. In order to prevent incorrect data from being added to GAIL, we wait until Financial Accounting closes their books to verify which students were actually provided scholarships.

Q10

Response: I'd love to see their recent social media posts to Facebook, Instagram, LinkedIn ... although I know that may just be physically impossible, but worth mentioning!

Answer: While we can't add this information directly into GAIL, we can create shortcuts to that data. When you link a constituent's social media account via their Contact tab you will see corresponding icons appear on their Contact Information tile. This gives you a one-click redirect to view their most recent posts. *(If they are not marked as private.)*



Mouse , Mr. Mickey

Individual Lookup ID: 10954749

Constituencies: Committee member

Personal Information

Mr. Mickey Mouse
Nickname:
Maiden:

Contact Information

Primary phone
+ Primary phone

Primary email
mickey.mouse@disney.com (Residential)

[in](#) [ig](#) [f](#)

Employment

No employment history

Summary Personal Info **Contact** Education Relationships Communications Attributes

Expand all Collapse all

Addresses (0) Add

Phone numbers (0) Add

Email addresses (1) Add Filters More

Contact information	Type	Primary
mickey.mouse@disney.com	Residential (Current)	Yes

Social media accounts (3) Add More

Contact information	Service	Type
	Instagram	
	LinkedIn	
	Facebook	

Q10

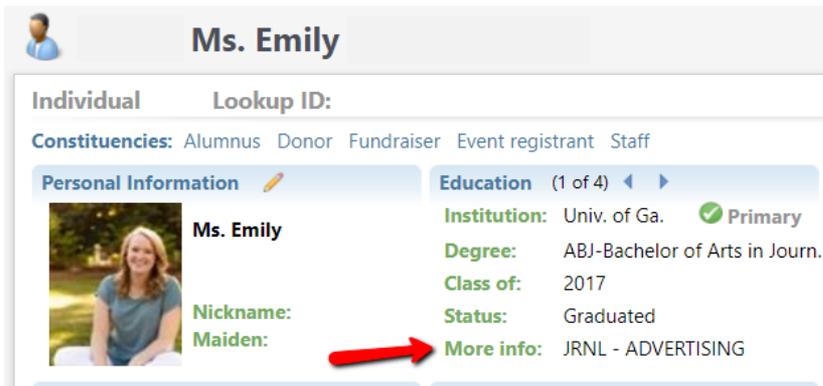
Response: I would like to see business titles.

Answer: If you display the *Employment* tile on a constituent's profile, you will see the job title listed.



The screenshot shows a profile for Ms. Leslie. The 'Employment' tile is active and displays the following information: University of Georgia, Title: INSTRUC TECH DEV PROF SPEC, Location, Career level, Category, and Date range: 12/6/2010 - . A red arrow points to the job title.

Response: I would like to see the department/major information on the education tile and not just the degree name.



The screenshot shows a profile for Ms. Emily. The 'Education' tile is active and displays the following information: Institution: Univ. of Ga. (Primary), Degree: ABJ-Bachelor of Arts in Journ., Class of: 2017, Status: Graduated, and More info: JRNL - ADVERTISING. A red arrow points to the 'More info' field.

Answer: If you display the *Education (Custom)* tile on a constituent's profile, you will see the major listed beside *More info*.

Q10

Response: We often have good home contact information but I'd like more work contact information.

Answer: Keeping track of an individual's work contact information in GAIL is tricky. We currently don't have a database that can auto-maintain this information. This means it's each team's responsibility to track this data. If you need contact info for prospecting purposes, you can request this from [Prospect Research](#). If you'd like more information about how we currently upload business contact information in GAIL, [click here](#).

Response: Could current student emails update to their UGA emails?

Answer: When a current student receives their UGA email address, it is added to their constituent profile in GAIL. If a student already has an email address, the UGA email address will be added as a secondary contact method. If the student doesn't already have an email in GAIL, their UGA email will become their primary. If at any time a student requests to have a [new primary email](#), this can easily be changed.

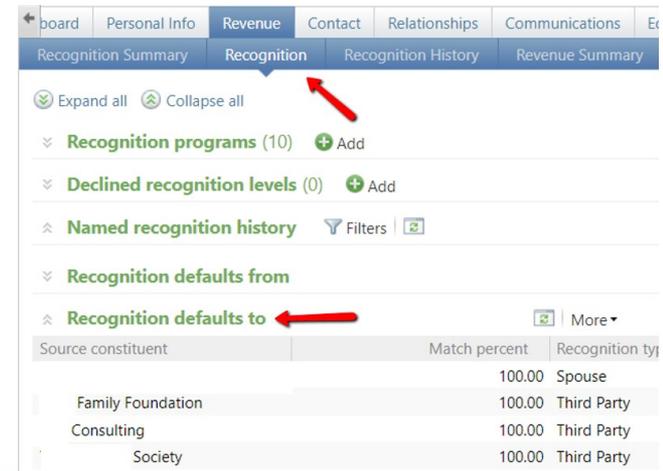
Q10

Response: Full employment history as reported on LinkedIn. I would love a tab on the Constituent page that pulls in their entire history, including organizations, board service, the groups they belong to, etc.

Answer: The primary focus of our Records team is to collect the most up-to-date and recent information on our constituents. We currently can't dedicate the resources to gather extensive employment history when we are still trying to locate current data. However any team is able to collect and enter this information into GAIL if needed.

Response: I would like to see if a constituent has a Family Foundation.

Answer: If a donor receives recognition credit through a Family Foundation, you will see this listed in the Recognition subtab of the Revenue tab. This section will also show any other constituents that contribute to the recognition of the donor.



The screenshot shows the GAIL system interface with the following structure:

- Navigation tabs: board, Personal Info, Revenue, Contact, Relationships, Communications, etc.
- Subtabs under Revenue: Recognition Summary, Recognition, Recognition History, Revenue Summary.
- Buttons: Expand all, Collapse all.
- Sections:
 - Recognition programs (10) + Add
 - Declined recognition levels (0) + Add
 - Named recognition history Filters | [icon]
 - Recognition defaults from
 - Recognition defaults to [icon] More ▾
- Table:

Source constituent	Match percent	Recognition by
Family Foundation	100.00	Spouse
Consulting	100.00	Third Party
Society	100.00	Third Party

Q10

Program	Degree	Campus	College/School	Department/Major
Undergraduate	ABJ-Bachelor of Arts in Journalism	Athens	Journalism & Mass Comm	ADVERTISING
Graduate	MA-Master of Arts	Athens	Journalism & Mass Comm	JRL & MASS COMMU
High School				
Undergraduate	BS-Bachelor of Science	Athens	Arts & Sciences	PSYCHOLOGY

Response: It's confusing that some SPIA graduates are listed as A&S. I know SPIA majors used to fall under A&S before 2001, but could we please add another line to the Education tab to clarify that certain alums are now considered SPIA graduates?

Answer: For majors that resided with one college in the past but are now associated with another college, we have the degree area column of the education tab. The school/college column will display the college of when the degree was awarded and the degree area column will show the college the major now resides with. We will plan to move the degree area column closer to the school/college column for easier viewing.

Education	Attributes	Events	Documentation and Interactions	Vanguard Im
	Minor 3	Minor 4	Degree Areas	
			Journalism & Mass Communication	
			Journalism & Mass Communication	
			Arts & Sciences	

Q10

Response: It would be helpful when searching for a prospect to have the manager's name show up in the search so I can more easily find them.

Answer: When searching for a prospect you can add the prospect constituency and prospect manager's name as search criteria. This will significantly lower the amount of results returned.

The screenshot shows a search interface with several input fields and dropdown menus. The 'Sites' dropdown is set to 'All sites'. The 'Email address' field is empty. The 'Constituency' dropdown is set to 'Prospect'. The 'Phone number' field is empty. The 'Prospect manager' field is highlighted in yellow and contains a search icon.

Response: Employer, if known.

Answer: Constituent employment information can be found on the relationships tab within the constituent's profile. You can also see this information by adding the Employment constituent tile.

The screenshot shows a constituent profile page with the 'Relationships' tab selected. A red arrow points to the 'Relationships' tab. Below the tabs, there is a section for 'Relationships (1)' with options to 'Add individual', 'Add organization', and 'Add group/household'. Below this, there is a section for 'Organization' with a dropdown menu set to 'Disney Media Networks'. Below the organization section, there is a table with columns for 'Relationship' and 'Employment information'.

Relationship	Employment information
Mouse, Mr. Mickey is the:	Employee
Start date:	Job title: CEO
Industry: Entertainment	
Disney Media Networks is the:	Employer
End date:	Category: Executive Office
	Start date: 11/18/1928
	Career level: Senior
	End date:

Q12

Would you like to provide any additional feedback, or ideas for improvement, regarding constituent data in GAIL?

Response: The GAIL lookup ID should be on all pages.

Answer: When navigating a constituent's profile through the information tabs, the lookup ID of the constituent will always remain at the top of the page. If you come across another page in GAIL, or run a report in GAIL, that does not have the constituents' lookup IDs displayed, please submit a request to askit@uga.edu to have that information added.

The screenshot shows a constituent profile for 'Mouse, Mr. Mickey'. At the top, there is a header with a person icon and the name 'Mouse, Mr. Mickey'. Below this, the text 'Individual' is followed by 'Lookup ID: 10954749', which is highlighted by a red arrow. Underneath, it says 'Constituencies: Committee member'. The profile is divided into three tabs: 'Personal Information', 'Contact Information', and 'Addresses'. The 'Personal Information' tab is active, showing a Mickey Mouse avatar, the name 'Mr. Mickey Mouse', and fields for 'Nickname:' and 'Maiden:'. The 'Contact Information' tab shows 'Primary phone' and 'Primary email' (mickey.mouse@disney.com). The 'Addresses' tab shows '165 Magic Avenue, Orlando, FL 32830' and 'Residence (Current)'.

Q12

Response: I would like more up-to-date constituent contact information.

Answer: Constituents change their contact information frequently and with over 600,000+ individual constituent records in GAIL that equals one really big project. The Records team processes countless database uploads throughout the year in conjunction with the Prospect Research team who spends all day gathering constituent data. It's extremely important that our 500+ GAIL users provide assistance between these major uploads. How can you do this? One simple way is to include an [update your information](#) link in your emails. We also encourage our users to make updates in GAIL themselves or send the information to [Records](#). It takes a community to build the accuracy of GAIL.



Q12

Response: There are still duplicates of constituents in GAIL. Does someone look for these or do we need to submit the error?

Answer: Records runs an internal report every month that identifies potential duplicates in GAIL. However, these sweeps can't catch everything. If you identify two separate constituent profiles with different lookup ids that you think may be the same person, please contact [Records](#).

Response: Sometimes for a constituent search in a particular location, the 100 results display limit can slow work down.

Answer: The constituent search function is designed to locate a single constituent. It is not a list pulling tool. This is why the constituent results are capped at 100. If you need to pull a list of constituents in a specific location, you can request this information from the query team. If you are struggling to locate a specific constituent, you can contact the [Client Services](#) team for help.

Q12

Response: We've received notice that outdated residential addresses need to be tagged as "do not mail" rather than end-dated. This makes it challenging to know whether the constituent doesn't wish to be contacted or if the address is simply outdated.

Answer: When you tag an address as "do not mail" there is a drop-down menu underneath where you can select a reason. If the constituent does not want to be contacted at this address, select *constituent request*. If the address is old or incorrect, select *historical* or *invalid*.

The screenshot shows the 'Edit address' interface. The 'Address information' section includes fields for Type (Residence), Country (United States), Address (165 Magic Avenue), City (Orlando), State (FL), and ZIP (32830). The 'Start date' field is set to mm/dd/yyyy with a calendar icon, and a note indicates the address was created on 1/8/2010. On the right, the 'Set as primary address' checkbox is checked. Below it, the 'Do not send mail to this address' checkbox is also checked. A red box highlights this section, and a dropdown menu is open, showing the following options: Constituent Request, Deceased, FM, secondary and can't be verified, Forwardable Move, Historical, Incomplete, and Invalid Address. Two red arrows point to the 'Constituent Request' and 'Invalid Address' options.

Q12

Response: Encourage everyone to add any information they may have to the system. I see many missing spouses, for example.

Answer: The best way to identify potential unconnected spouses is through your postal mail marketing efforts. Often times duplicate addresses appear in your Excel document because two individuals are not connected via a household. After you've [located your duplicate addresses](#), you can send the list of constituents to [Records](#) to confirm those marriages.



Response: Could we flag for review constituent records that have not had any activity after a certain period of time?

Answer: Records in GAIL have more activity than you might think. For example, every year each constituent record gets processed through the National Change of Address. Just because data on a record hasn't changed doesn't mean that it's not still accurate.

Q12

Response: Many students after graduating will continue to have their UGA email. I wish that the system would automatically remove any UGA emails.

Answer: The UGA emails of our graduating students are made historical if we receive a forwarding email from EITS or an email communication bounces back. UGA emails are not automatically removed when a student graduates because that student may go on to pursue another degree at UGA or they may be employed by UGA.

Response: I suggest that if a spouse is deceased then on the living spouse's record, that there be a way to notice that easily.

Answer: Currently on the primary relationships custom tile you can find the deceased tag at the end of the spouse's name. However we have agreed to have this moved to the beginning of the spouse's name for easier viewing.



The screenshot displays a user profile with two main sections: 'Personal Information' and 'Primary Relationships'. In the 'Personal Information' section, there is a profile picture of Mickey Mouse and the following text: 'Mr. Mickey Mouse', 'Nickname:', and 'Maiden:'. The 'Primary Relationships' section shows a 'Spouse (10954750)' with the name 'Mouse, Ms. Minnie (Deceased)'. A red arrow points to the '(Deceased)' tag at the end of the spouse's name. Below the spouse information, the 'Primary business' section is visible, showing 'Disney Media Networks' and 'Job title CEO'.

Q12

Response: List of memberships, relationships, giving, etc. it's like a puzzle to track down all the ways in which a person is involved. Not sure the best system, but there's so many tabs.

The screenshot displays a constituent profile for "Mouse, Mr. Mickey". The profile includes the following sections:

- Individual** Lookup ID: 10954749
- Constituencies:** Committee member
- Personal Information:** Mr. Mickey Mouse, Nickname: Mickey, Maiden: (blank)
- Contact Information:** Primary phone: + Primary phone, Primary email: mickey.mouse@disney.com (Residential)
- Addresses:** 165 Magic Avenue, Orlando, FL 32830, Residence (Current)
- Employment:** Disney Media Networks, Title: CEO, Location: Orlando, FL, Career level: Senior, Category: Executive Office, Date range: 11/18/1928 -

A red arrow points to the "UGA Dashboard" tab in the navigation bar at the bottom of the profile. Other tabs include Summary, Personal Info, Contact, Education, Relationships, Communications, and At.

Answer: In 2017, a new tab was added to the individual constituents' profile called the [UGA Dashboard](#). This tab houses most constituent information on one page (including memberships, relationships, and giving). This eliminates the need to navigate multiple tabs.

Q12

Response: I dislike where the deceased date resides in the constituent profile.

Answer: This customization has been discussed with the Application Support team and unfortunately right now it would be too tricky to move this data without a lot of work involved. However, we have added this request to the official GAIL wish list to revisit at a later date.

Response: A LOT of education information is missing from GAIL. A lot of this information is likely obtainable from the Registrar by requesting this data. It would be helpful for this major/education information to be updated by DAR records staff in a systematic way.

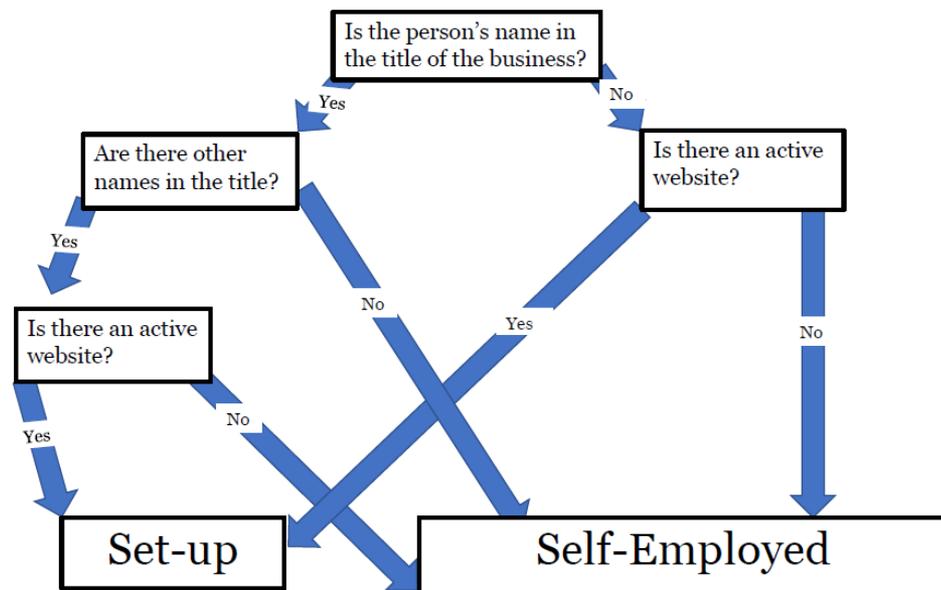
Answer: Updated information about our 37,000+ current students is obtained by our Records staff from the Registrar's office every semester. If there is specific educational information that you see is missing in GAIL, please contact us at askit@uga.edu so that we can look into it.

Q12

Response: Most places people work at do not have GAIL profiles, which means a new organization has to be set up in order for employment data to be updated. Constantly emailing Records to have them set up a GAIL record for small companies is highly inefficient and a pain.

Answer: Not all small companies need to be added as new organizations in GAIL. You can use this flowchart to determine if the constituent should be self-employed instead.

Set-up vs Self-Employed



Q12

Response: Employment data is often not updated in GAIL.

Answer: UGA employment information is updated by HR 3 times a year. LiveAlumni runs 4 times a year and updates our alumni employment. The UGA Career Center provides a list of recent graduates' employment once a year. Each of these batch processes add and update thousands of constituent records. Along with these mass uploads, our Records team also updates employment through the information provided via records@uga.edu. The Prospect Research team makes employment connections as they research potential prospects. However, there are still 650,000+ individuals in GAIL. That's why we highly encourage every GAIL user to update constituent employment information when it is discovered. The more GAIL users that contribute to the system, the more accurate GAIL becomes.

Q12

Response: I would like to see the many profiles combined. When you search for a person, the same person comes up 7 times.

Answer: There are several reasons why a constituent may appear more than once in your search results. The majority of the time, the number of results that appear depends on your advanced search options and where you're searching for constituents. For example, the custom constituent search will always bring in more results because it considers an individual's multiple degrees. By unchecking the "only search primary addresses" option, the results will show every address an individual has had listed on their profile.

Advanced search options

Search in: Individuals Organizations Groups/Households

Check nickname Only search primary addresses

Check aliases Include deceased

Check alternate lookup IDs Include inactive

Check merged constituents Include fuzzy search on name

Hide advanced search options

Results (66 records found)

Advanced search options

Search in: Individuals Organizations Groups/Households

Check nickname Only search primary addresses

Check aliases Include deceased

Check alternate lookup IDs Include inactive

Check merged constituents Include fuzzy search on name

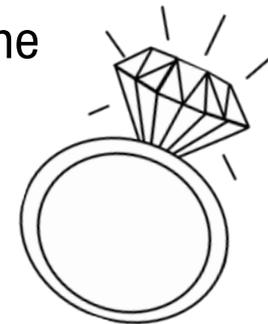
Hide advanced search options

Results (1 record found)

Q12

Response: Company names are the thing that is most out of date.

Answer: At the end of 2017, a huge clean-up project was completed to better organize major corporations in GAIL. The project focused on tying subsidiaries to their parent companies and also updating business names. If you see a company name that needs to be updated, please email records@uga.edu



Response: Married people who have changed their names are often very hard to find.

Answer: If you don't know a constituent by their new married name, you can search a constituent's maiden name by using the custom constituent search.

Constituent Search (Custom)

Name/Lookup ID:	<input type="text"/>	Country:	<input type="text"/>
Last/Org name:	<input type="text"/>	Address:	<input type="text"/>
First name:	<input type="text"/>	City:	<input type="text"/>
Middle name:	<input type="text"/>	State:	<input type="text"/>
Maiden name:	<input type="text"/>	ZIP/Postal code:	<input type="text"/>

Q12

Response: I would like to be able to identify LGBTQ alumni.

Answer: There is currently an educational involvement special interest tag for students and alums involved in the LGBTQ community.



The screenshot shows a web form titled "Add educational involvement". It contains two dropdown menus. The first dropdown menu is labeled "Type:" and is set to "Special Interest". The second dropdown menu is labeled "Name:" and is set to "Lesbian, Gay, Bisexual, Transgender". There is a small edit icon (pencil) next to the "Name:" dropdown menu.

Response: It seems that when we do large data crawls from outside vendors, the data is not as clean and up-to-date.

Answer: Any time we do a major data upload from an outside vendor, it is carefully reviewed and cleaned-up by our Records team. However, there is always a chance of misinformation. That's why it's so important to have the eyes of our GAIL users. If you locate incorrect information on a constituent's profile, please email records@uga.edu so that the error can be resolved.

Q12

Response: I wish there was a short screen to set up employer and title, all on one screen, without so many extra fields.

Answer: We are currently discussing the design of a new short screen for entering employment information on a constituent's profile. Ideally the new window will give users the ability to quickly enter the employer, job title, and location all on one screen.

The screenshot shows a web form titled "Add a relationship" with three tabs: "Relationship information", "Employment and contact information", and "Employment location / info source". The "Relationship information" tab is active and contains the following fields:

- Related organization: [Searchable text input]
- Relationship: [Text input]
- Mouse, Mr. Mickey is the: [Employee] (dropdown)
- Organization is the: [Employer] (dropdown)
- Start date: 4/8/2019 (calendar icon)
- End date: mm/dd/yyyy (calendar icon)
- General: This is the primary business for Mouse, Mr. Mickey

The "Employment and contact information" tab is also visible and contains the following fields:

- Employment information:
 - Job title: [Text input]
 - Category: [Dropdown]
 - Career level: [Dropdown]
 - Schedule: [Dropdown]
 - Department: [Text input]
 - Division: [Text input]
 - Responsibilities: [Text area]
- Employment information extension:
 - Location: [Text input]
 - Info source: [Dropdown]

At the bottom of the form, there is a "Help" icon and "Save" and "Cancel" buttons.