

2020 SURVEY RESULTS & RESPONSES

Question 1

If **GAIL** was a person, what 5 words would you use to describe them?



Question 1



**GEORGIA STRONG.
DAWG STRONG.**

Question 2

How long have you been using **GAIL**?

Answer	%	Count
Less than a year	15.61%	27
1-2 years	21.97%	38
3-4 years	27.75%	48
Since 2013	34.68%	60

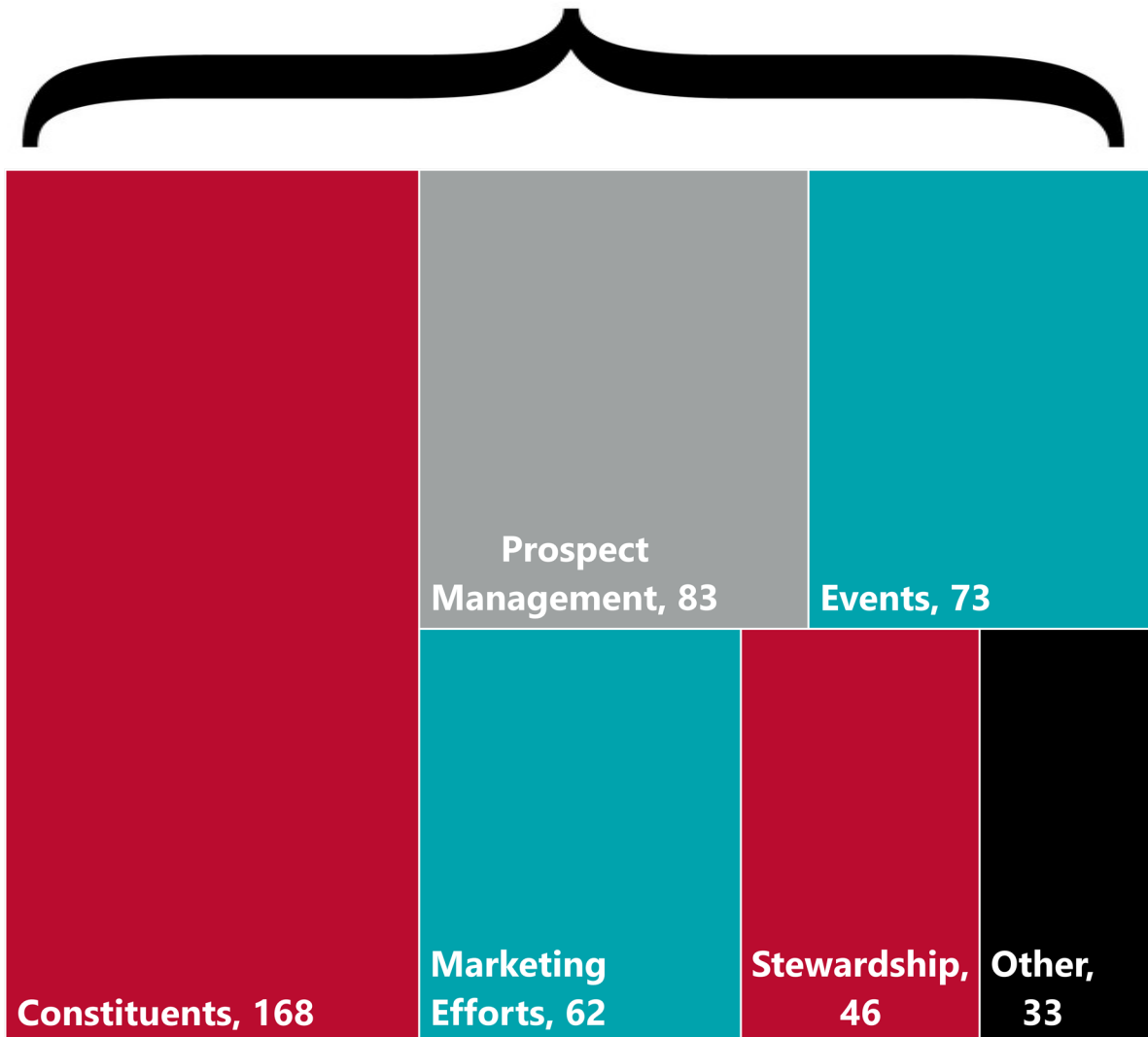
Question 3

How often do you use **GAIL**?

Answer	%	Count
Every day	75.86%	132
A few times a week	17.82%	31
Rarely	2.30%	4
A few times a month	4.02%	7

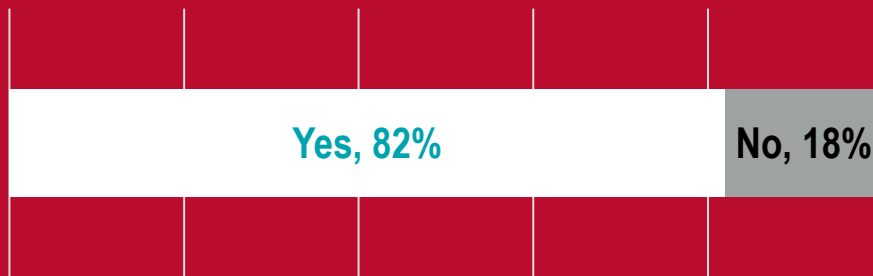
Question 4

What areas of **GAIL** do you use?

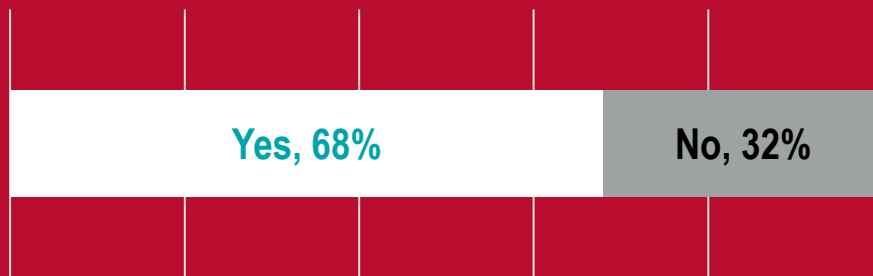


Questions 4a, 4b, and 4c

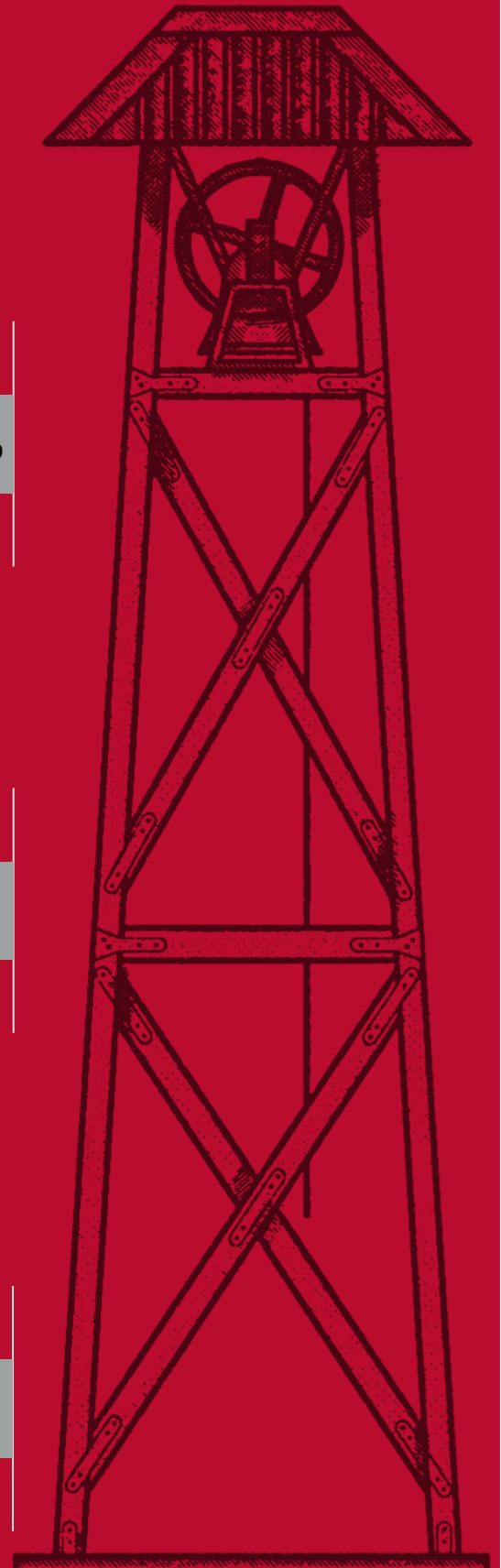
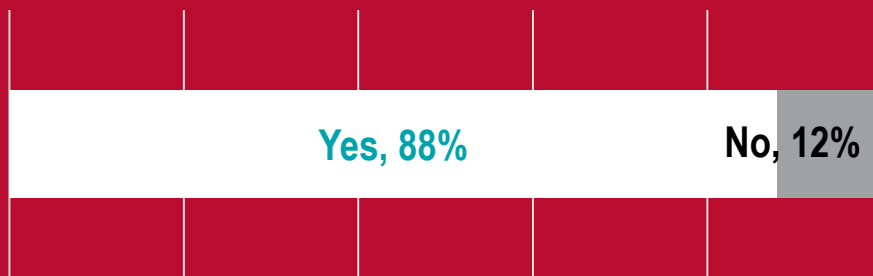
Is it easy to find constituents and locate the information you need?



Have the improvements made to Events helped organize your events?



Have the improvements made to Direct Marketing Efforts helped you send out communications?



RESPONSE

Usually, but sometimes it is hard to find someone if they go by their middle name or a nickname and it's not already part of their GAIL profile. Also, GAIL is notorious for getting the middle name/initial of women wrong. I always have to find other ways to confirm the correct name/initial to use (e.g., LinkedIn, Facebook profiles) for women.

Searching GAIL can sometimes be very tedious. Here are tips Records recommends...

- ✓ Always have nickname and aliases checked under your additional search options.
- ✓ Do not select clear in search because it will remove those options and you may not realize it when conducting a search.
- ✓ If you do not find the person you are searching for under first name, try the name in the middle name field.
- ✓ Records may not always know someone's nickname so if you locate the person and the nickname is missing please add it so searching is easier next time.
- ✓ When searching for organizations or foundations use the * before the unique part of the name. For example, *Home Depot rather than trying to remember if you need to search for The Home Depot. This special character will find all organizations that include the words "home depot" in the name and you do not need to know exactly how it is entered.

RESPONSE

Sometimes there are names that don't come up when I search even though it's a nickname. I also struggle with finding things (it feels like a rabbit hole) when it comes to how someone got recognition or what fund they gave to.

Name preferences can be as unique as each person. In order to establish processing guidelines, the Records department uses first, maiden, last as the combination of name elements for a female who is married. This may not always be the preference of the individual and it can always be changed when it is known otherwise.

Mostly yes, but GAIL would be more user friendly if a name search was not required to be 100% accurate on the spelling. Would rather see GAIL be more like Google and give you a range of responses.

Constituent search does not require 100% accuracy. You can uncheck "Match all criteria exactly" to do partial matches, you can use a percent "%" symbol to define where you want to allow other characters, and you can check "Include fuzzy search on name" to deal with spelling differences.

RESPONSE

I know you know this but it would be incredibly helpful to retain the selections/individuals added to an invitation. It would be nice if when you added segments they were listed like in the direct marketing effort.

We acknowledge that this requested enhancement exists and hope that we can address the need, at least partially, in future.

I wish there was an easier way to pull a selection into an excel file instead of having to create "fake" efforts just to get the list of constituent information.

It is possible to do exports with selections without doing a "fake" marketing effort. Please note that you should always use DME's or Invitations if your intention is to send out communications based on the related data. Contact AskIT if you have any questions!

**GEORGIA. STRONG.
DAWG. STRONG.**

RESPONSE

Name search tool is not friendly. Information is often buried or confusing to find because there is so much in there. I wish I could customize my viewing to only show what I find important when searching for prospects.

You can click "Only search primary addresses" to limit the number of duplicate records being shown. You can also use the out-of-box Constituent Search, if the custom version of the Constituent search shows more info than you need. You can uncheck the inclusion of Organizations and Groups/Households to reduce the list further. You'll just need to remember to reset some of these choices when you need to expand your search.

Sometimes foundations can be difficult to find. Some of the foundations include "The" at the beginning and others do not. Sometimes "and" is "&." It would be nice to not have to remember which is which.

You don't need to remember, just uncheck "Match all criteria exactly" and put this "%" at the start of the Last/Org name - searching on "Academy" will get the ones without another word in front Academy and "% Academy" will get constituents with other words including "The" in front.

RESPONSE

When I have limited information from a referral, it can be nearly impossible to perform a search without researching more information from Google, social media, etc.

Most referrals assigned by the research team also have a Proactive Prospect Entry saved in Interactions and a prequalification note (in notes in Documentation). There you can find more details about biographical and financial information on the prospect. If no information is available in GAIL, contact the researcher who made the referral entry to get more detail.

Knowing who top prospects are but that isn't necessarily GAIL or RPM "fault" - it's just that we don't always have the best data.

You can sort based on The L and the A from the LAIT score. It will provide you with prospects with highest affinity and highest capacity (top score for each is 25). An algorithm of L+A is in progress.

**GEORGIA. STRONG.
DAWG. STRONG.**

RESPONSE

Wish we could pull more queries on our own without having to do a request. Otherwise information is relatively easy to find.

ASRV is currently working on a List Builder/Query-like tool for users.

Sometimes I still struggle with tiered events.

Events II class is a great opportunity to learn about multi-level events:

<https://support.dar.uga.edu/GAIL/gail-training-outline/>

Emailing separate segments of my audience - I had a networking night and I wanted to email the students in advance separately but it was more difficult/work than I would've expected.

If you're having trouble with segmenting your audience, please don't hesitate to reach out to Client Services or AskIT! We're here to help in any way we can.

RESPONSE

Attendee addresses are not always available when I need to download them as a list.

You'll have to create a new event invitation to pull a list that includes contact information! You can do so using a smart query.

<https://support.dar.uga.edu/GAIL/event-smart-query-for-registered-attended-constituents/>

Yes, but having to do a marketing effort to get the emails of those who attended does not help us so outreach as well.

Contact information of event attendees should be gathered by creating a new event invitation, never a marketing effort. You can use a smart query (instructions in blog post) to pull together a selection of your attendees without requesting one from AskIT.

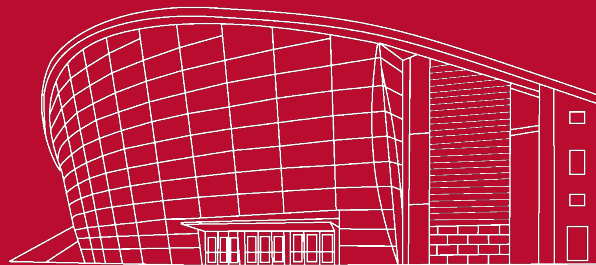
**GEORGIA. STRONG.
DAWG. STRONG.**

Questions 4d & 4e

Have the improvements made to Prospect Management helped you solicit donations?



Have the improvements made to Stewardship, Acknowledgements and Recognition Programs helped you communicate with donors?



Stegeman Coliseum

RESPONSE

The changes are very helpful, but it is still a multi-layered process to add a plan and opportunity to said plan. Is there a way to simplify? I haven't even created my own plan yet, but the training was a tad overwhelming!

There are two ways to add a plan. I would encourage you to use the "Add Proposal (plan and opportunity) option when viewing the constituent as a prospect (on the "plans" tab). This will allow you to add a plan and opportunity from the same screen. Please remember that your Prospect Management liaison is available to do an extra deep dive on adding plans and all things related to RPM.

Yes mostly, but I do struggle with trying to determine what gifts and pledge payments a donor has made. For example: the Terry Dean's Advisory council is required to make a leadership annual gift. When looking to see if one of my folks had made their gift, it was very difficult to determine as the gift was 'linked' to a pledge made in 2016. I have learned there is a way to change your settings to see this but it is very confusing for a person who does not do this often.

First, adjust settings to group by transaction instead of commitment when searching in this situation. (Then switch back to commitment because that is a good default!) If you want to see quickly if someone has given in a fiscal year, running the Constituent Credit Total report is a good tool.

**GEORGIA. STRONG.
DAWG. STRONG.**

RESPONSE

As someone who works in annual giving, the plans are not always set up for an annual giver. It'd be awesome if there was a plan module that specified annual gifts that could be kept open and asks tracked year over year.

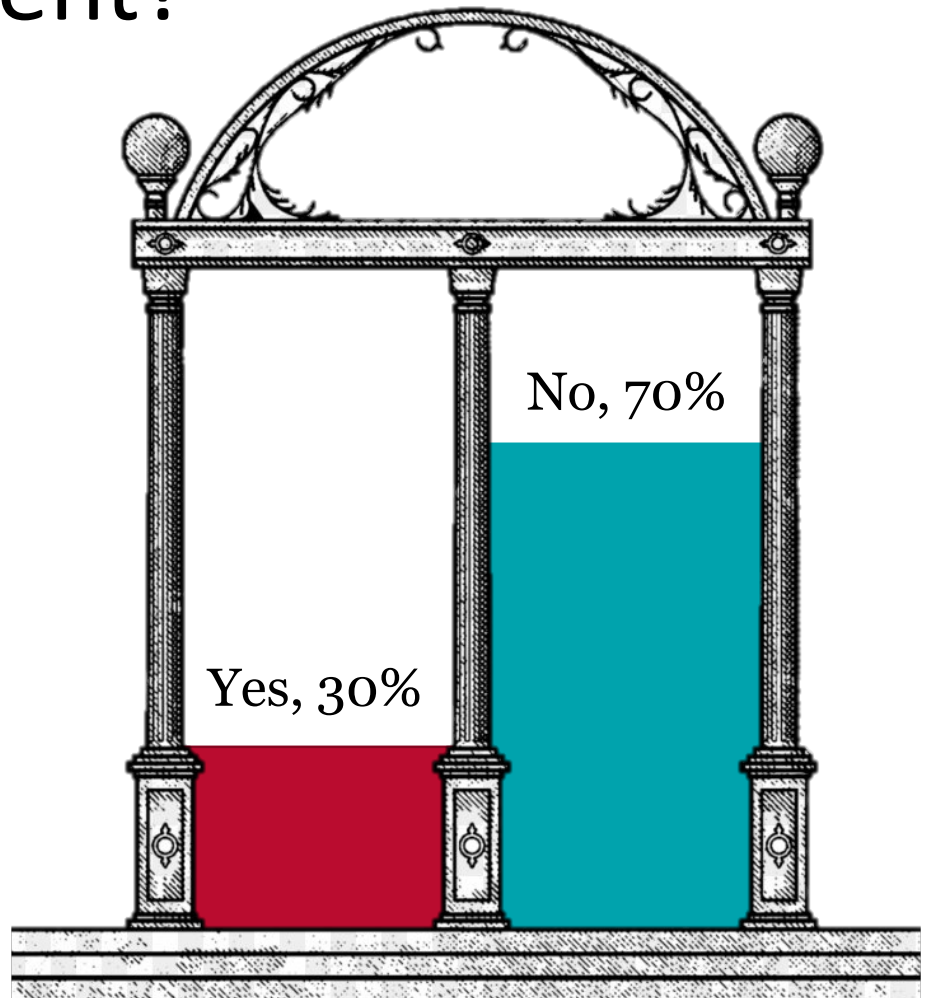
There is a Annual Leadership Plan template you can use but it sounds like you don't want to close the plan once that year's gift has been made, but that's how plans function. We will see if there's another tool that might work!

I still struggle with how complicated the Acknowledgement Process is and I get frustrated that it loads an interaction in GAIL when you pull the info down instead of afterward when you've actually sent the acknowledgement. That seems like a flaw - what if you pull the info down and never send anyone anything?

The Acknowledgement Process is functioning intentionally this way - we can't guarantee an agent is actually sending the letter, but this indicates that they've been made aware of the donor's gift then it's up to their s/c/u business process as to who they send a letter to. It's a communication, not an interaction that gets tagged.

Question 5

Do you currently track any data or send communications outside of the GAIL environment?



RESPONSE

I track my portfolio in spreadsheets that I have developed to track my top prospects, my outreach and former trips, my anticipated FY asks and next steps for my most crucial prospects.

Why not put this into GAIL? You can pull it back out into the desired format.

I don't know the best way to track when someone adds a planned giving plan to GAIL. I wonder if a report could be generated that would give me a weekly list of new planned gift plans. Maybe that exists already and I just don't know how to do it!

There is not a report, but we would be happy to set up something for you. Our Query Team would just need to work out the details!

DO Portfolio Analysis (Not who is in the portfolio, but more about the quality of the composition and pipeline management stuff).

Would any of the charts ASRV's include in the quarterly snapshot give you this same information? Depending on what you're tracking in your spreadsheet, we could add to ours and you would have it all in one space. Prospect Management would love to see what you're tracking and get a better idea.

RESPONSE

A copy of the actual receipt on the donors profile will make it easier to resend receipts by email. I resend or email returned donor receipts and also on finding Estate donors and institutions are not easily done. Maybe I just haven't had enough practice.

Adding a receipt tab to a transaction is a good idea. Remember that, generally, planned gifts are entered on the original constituent record. We rarely set up "Estate of..." constituent records. If you are having trouble finding estate gifts, double check your search settings to make sure you are including deceased constituents.

I typically use a current donor spreadsheet which tracks the most recent donor gifts from my territory. I also use the snapshot PM sends to me.

I think there's a way we could automatically push out a report to you of most recent donor gifts based on your territory. I would love to know more about your process.

**GEORGIA. STRONG.
DAWG. STRONG.**

RESPONSE

We send out ThankViews pretty regularly, and I often forget to put the communications entry on there as we've been instructed. Reminders that we could export the info from ThankView for batch interactions (or maybe, adding the communications code to several emails at a time) could be helpful.

You can catch up on the Correspondence tagging process, you just need to supply askit@uga.edu a list of GAIL Lookup ID numbers.

We like to send event reminder emails on the day of events to our registrants from a personal email in case there are any questions about parking, location, dress, etc. It is very cumbersome to find the emails for the event registrants.

The smart query tool is the best solution for getting the registered attendees' email addresses. Simply create a 'final' invitation and that will pull them for you, even if you prefer to download the addresses to use your own email account.

We send some communications to our board via a listserv. It would be helpful if we could disable No emails drop code on Board emails.

If you are sending these out to a listserv address, you could alternately record the communication as an interaction.

**GEORGIA. STRONG.
DAWG. STRONG.**

RESPONSE

We use Qualtrics to gather data from surveys. If I was able to use GAIL to gather information from a survey, it would eliminate constituent information errors and create a more seamless report.

GAIL does not have a survey tool that collects user feedback, however, there is a place under Documentation where such survey responses can be stored. You still would need to consider sensitive nature of feedback for open records requests.

Just let us use Mailchimp. It is so much easier and more intuitive. It's harder to edit emails in Gail. Links breaks. There are all sorts of little quirks.

We are making changes to the Bee integration in the very near term that will do a much better job of notifying the users of when they are trying to use a link that causes an error when being redirected from GAIL. Mailchimp, while very user friendly, isn't integrated with GAIL and it would require complicated new processes, and likely hourly manual updates between the two systems to ensure constituent and solicit code information is being updated. Having a consolidated email platform is easier to manage across the dozens of staff who send out emails regularly to our constituents. Lastly, there is a substantial cost savings. MailChimp, licensed appropriately for our organization, would cost tens of thousands of dollars monthly.

**GEORGIA. STRONG.
DAWG. STRONG.**

Question 6

How many other people in your department use GAIL actively?

Answer	%	Count
I am the only one	2.94%	5
1-5	28.24%	48
5+	68.82%	117

Question 6a

Do people in your department rely on you to do their tasks in GAIL?

Answer	%	Count
Yes	28.48%	47
No	71.52%	118

Question 6b

Has your department had a Consultation in the past year?

Answer	%	Count
Yes	43.48%	70
No	56.52%	91

Question 6c

Would you like to schedule a Consultation with Client Services?

Answer	%	Count
Yes	20.45%	18
No	79.55%	70

Question 7 & 7a

When was the last time you attended a GAIL training class?

Answer	%	Count
Within the past few months	18.93%	32
Within the last year	37.87%	64
It's been more than two years	43.20%	73

Please rate the experience of your last GAIL training class.

Answer	%	Count
Excellent	61.05%	58
Good	29.47%	28
Average	9.42%	8
Poor	0.00%	0
Terrible	0.00%	0



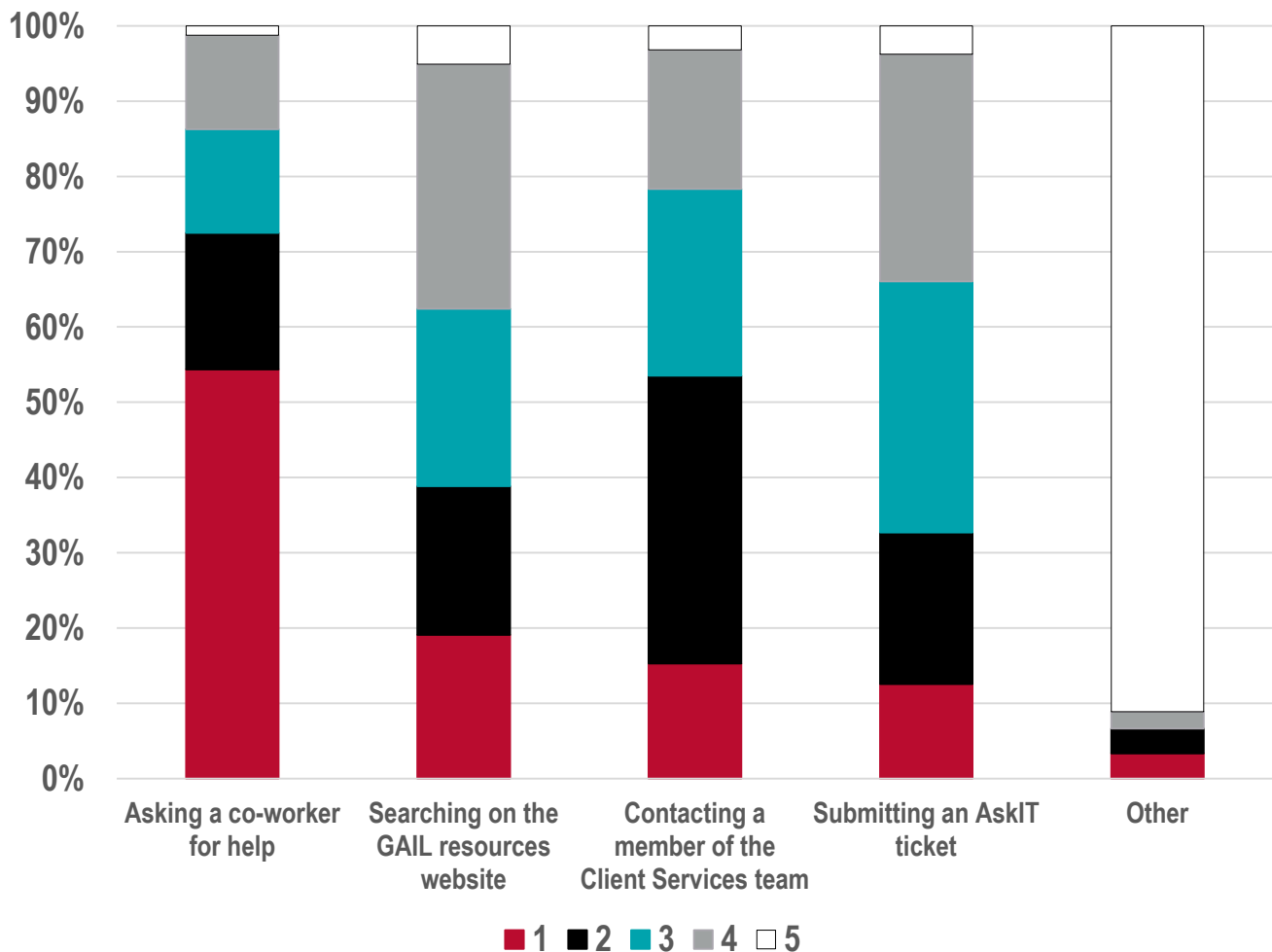
Miller Learning Center

Question 8

From the list provided, rank number 1-5 your preferred method of **getting help** with GAIL.



Question 8



54% of GAIL users ranked “Asking a co-worker for help as their top answer. The second most popular choice was “Contacting a member of the Client Services team.” Please note on Question 7 that 43.20% of users have not had GAIL training in the past two years. GAIL is always improving so we recommend reaching out to askit@uga.edu if you need assistance!

**GEORGIA. STRONG.
DAWG. STRONG.**

Question 9

Do you think the monthly Tips & Tricks email newsletter is helpful/engaging?

Answer	%	Count
Yes! I love Tips & Tricks!	87.50%	140
No. I would like to see information about...	12.50%	20



Question 10

If there are certain parts of your job that requires you to do manual calculations, reconciliations, or other analysis that you feel could be converted to a report, email alert or some other systematic process, please describe below with as many details as possible.



Tate Student Center

RESPONSE

It would be helpful if GAIL and OS had two-way communication for comparing fund information and gathering scholarship recipient data.

FAME is the official source for all scholarship transactions. However, recipients, fund number and fiscal year awarded are loaded into GAIL after the end of each fiscal year. FAME transactions are netted so that anyone whose payment was cancelled is not loaded into GAIL. Recipient information is found in GAIL under the designation/recipient tab and under the constituent's record under Education tab, Scholarship section. Regarding fund information, some FAME fund information is stored as fund attributes in GAIL. Ex. Fund Purpose, department, and gift agreement signed.

Automatically make members of groups "former members" when they are marked deceased.

Part of the deceasing process for the Records department includes ending committee or group memberships. We are currently looking into ways to streamline the steps for deceasing a record and we will look at the feasibility of automating this step.

RESPONSE

It would make my job a lot easier if fund IDs and recognition credits were hyperlinked within each gift in GAIL. I spend a lot of time looking at revenue, and it would be more efficient if I was able to click the designation or recognition credits when I'm looking at a specific gift or pledge rather than copying and pasting in a fund purpose search or a constituent search. Additionally, it would be nice when you change name formats on one spouse, it could be copied over to the other spouse without having to manually repeat the steps to update the same name format on both records.

This update would be helpful for many users. It would be nice if the fund IDs on a transaction were hyperlinked to the purpose. Same with recognition credits linking to the constituent record. This is an item for ASRV to review!

Fundraiser pipeline report, Prospect listing with last interaction by the fundraiser, Portfolio distribution by plan stage, Pledges due to be paid off in the next 18 months, Official revenue total by unit, Monthly alum participation for a unit, Donor retention for a unit. I do all of these manually and would be HAPPY to show them to you! I'm learning Tableau so I can build them there.

Yes, please show these to our Query Team. We already know that several of these could be a query that you can run so that you don't have to do this manually. There may even be a possibility that one or two of these could be a report you subscribe to.

**GEORGIA. STRONG.
DAWG. STRONG.**

RESPONSE

After each commencement, Olivia I believe provides Evan Tighe with updated "alumni count" information. While we want to stick with the same # of living alumni and only update that twice per year, that alumni data could prove useful for more than just Evan and team. Could be interesting to provide an alumni demographic overview once or twice a year Ex. does 1/3 of our alumni still live in the ATL area? what are the top 10 cities for alumni?

We are exploring the data visualization tool Tableau and hope to integrate some of this information into that for everyone to see/use. Stay tuned.

*Is there a one-click pipeline report? If there is, I haven't found it yet (I'm new). If there isn't, I would *love* to see one!*

By pipeline, we assume you mean opportunities you've entered into the system. There are a few options - a couple of things in the system that could give you what you need and our RPM snapshot report that we can refresh at anytime

**GEORGIA. STRONG.
DAWG. STRONG.**

RESPONSE

On some donors, we have multiple plans. When I have an interaction with said donor, sometimes I don't know "which plan" to input the contact. I typically choose one but then I need to go back on the others and do editing. Sometimes the pending step is the same for all of the plans, but I have to input separately. I wish all plans could work together a little better.

Prospect Management would love to discuss this with you. There will always be circumstances when multiple plans are needed, but we would love to see collaborative approaches with our donors. We would encourage you to add steps to your own plan, but if you do not own a plan, perhaps a general interaction is the way to go!

I wish GAIL would display gift totals, etc. on the Fund purpose page with some type of smart field. I would prefer not to have to run a report to get those totals. I would like to go to that page and see the answer.

ASRV would have to create a new smart field type to do gift totals on a fund purpose. There are 10,020 active on Production. If we did one for every fund and IF it only took 2 seconds to run, which isn't reasonable to expect, it would take 5.56 hours to run. Smart fields are refreshed overnight and the current 60+ that we have already take over 2 hours to refresh.

**GEORGIA. STRONG.
DAWG. STRONG.**

RESPONSE

Is there a way to add a button to create the spendable side of a fund vs. setting up a whole separate fund?

That's a great question! Endowments need to be evaluated by the Gift Agreements team to determine if it's appropriate to set up a spendable fund. It's usually ok, but every situation is different.

Our team would love to be able to easily pull programmatic records, like, everyone who has signed up to be a mentor, or all alumni who serve on alumni boards across campus, as easily as possible. Essentially, we are working with you all already to create an alumni engagement report.

We are currently working with the Alumni Association on an Alumni Engagement project that should cover this. Stay tuned!

I would like to click a button and know exactly what someone's lifetime recognition is for Cumulative Giving Societies.

Currently there are 25 recognition programs that focus on Cumulative Giving. Click on revenue/recognition tab on constituent's record to see the Cumulative Giving Societies of which they are a member. Click on a program to see lifetime recognition for that program.

**GEORGIA. STRONG.
DAWG. STRONG.**

RESPONSE

It would be great if there were an easier way to keep up with our visit totals for the month, instead of toggling back and forth and keeping a tally to the side... In addition, it'd be great if there was a way to automatically put an email into GAIL simply from the email itself instead of having to manually put it into GAIL. If we were shown how to just hit a button to get an email to get it into someone's record without having to do yet another task, I feel like it would be wanted by all.

You can use the Impact Report to see your visit total for the month. It's available to all GAIL users. There is also the CDMG - Interactions report that you can use if you want to see every interaction all in one place. We need more information on automatically putting an email into GAIL. Please contact Client Services so we can work on this with you!

**GEORGIA. STRONG.
DAWG. STRONG.**

RESPONSE

I would love to streamline how interactions are put in--I thought we experimented with them being put in automatically? Why does it take so many steps to cancel a plan or make it historical? Delete all steps and opportunities, etc. and do that automatically.

There is a process that allows you to enter interactions into a spreadsheet that can then be imported into GAIL, this works for stand-alone interactions, it will not work for contact reports on plans. This was launched in December and announced through Tips & Tricks.

<https://support.dar.uga.edu/GAIL/did-someone-say-batch-interactions/>

Making it easier to mark a plan historical is something that has been discussed, and should be relatively easy, but it needs to be prioritized with the myriad of other requests. The opportunities and steps should not need to be deleted, but instead it would be better to change their status to Canceled.

THANK YOU TO ALL OF OUR SURVEY RESPONDERS AND OUR CONTRIBUTORS!

If your question was not answered in this document, please know that it is being taken into consideration and we are prioritizing all of the requests for a response in the near future.

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