

## **CU I&E Submission: Gift Fund Tool Suite** <sup>[1]</sup>

### **Submission Highlights**

#### **Team Information**

Carl Sorenson, [Carl.Sorenson@colorado.edu](mailto:Carl.Sorenson@colorado.edu) <sup>[2]</sup>, Financial Reporting Developer  
Greg M. Brown, [greg.m.brown@colorado.edu](mailto:greg.m.brown@colorado.edu) <sup>[3]</sup>, Fiscal Compliance Analyst  
Saskia Sawyer, [saskia.sawyer@cufund.org](mailto:saskia.sawyer@cufund.org) <sup>[4]</sup>, Assistant Vice President, Gift Services  
Liz Adler, [Elizabeth.adler@cufund.org](mailto:Elizabeth.adler@cufund.org) <sup>[5]</sup>, Manager, Gift Services  
Shannon McBratney, [Shannon.mcbratney@cufund.org](mailto:Shannon.mcbratney@cufund.org) <sup>[6]</sup>, Assistant Director, Gift Administration & Compliance

#### **What**

Tableau and Cognos, Access, FE were used to create a number of gift fund tools (“gift fund tool suite”). The gift fund tool suite can be used to identify the following information:

- All of the gift funds assigned to a college, school, institute, or unit.
- Whether gift funds’ utilization rates seem appropriate.
- Accurate and complete donor restrictions placed on a gift fund.

The gift fund tools have resulted in both a time savings for users as well as an improvement to the gift fund business process. Users can easily navigate between the Tableau tools, Cognos reports, Fund Purpose Report, and m-Fin reports. The business process has been improved, because now users can easily tell if a gift fund has not been used recently and then identify the appropriate next steps.

The gift fund tool suite has been very well received on the Boulder campus. One user stated, “It’s amazing!” Additional comments can be found on page 10 of the PowerPoint file that was provided with this application.

#### **Why**

Prior to the implementation of the gift fund tool suite, those who wanted information on gift funds had to access different systems; specifically, m-Fin, Financial Edge, and Advance. Because these systems were not linked, it was a time consuming exercise for users to access information in these systems.

Users can now quickly and easily access gift fund information using the gift fund tool suite. In addition, users now have access to information that was not previously available to them. For

example, utilization rates as well as accurate and complete donor restrictions.

## When

Components of the gift fund tool suite were first implemented on the Boulder campus in May 1, 2019. Saskia and her team have made the Fund Purpose Report to all of the campuses July 1, 2019.

Carl is also working with the Anschutz and Denver campuses and plan to have the Tableau and Cognos tools available there in the near future.

We have had preliminary discussions with the Colorado Springs campus and are waiting to hear back from them to see if they are interested in having the gift fund tool suite implemented there.

---

**Source URL:**<https://www.cu.edu/controller/i-e-awards/current-submissions/cu-ie-submission-gift-fund-tool-suite>

### Links

- [1] <https://www.cu.edu/controller/i-e-awards/current-submissions/cu-ie-submission-gift-fund-tool-suite>
- [2] <mailto:Carl.Sorenson@colorado.edu> [3] <mailto:greg.m.brown@colorado.edu>
- [4] <mailto:saskia.sawyer@cufund.org> [5] <mailto:Elizabeth.adler@cufund.org>
- [6] <mailto:Shannon.mcbratney@cufund.org>