Duke University Fund Raising Management Update

HERUG CONFERENCE

APRIL 20, 2010

Duke University Background

- Private University located in Durham, NC
- 13,000 students:50% undergrad; 50% graduate/professional
- 10 schools (faculties)
- Affiliated health system including 3 hospitals
- Total revenue - $4 billion (FY09)
- 32,000 employees
- Endowment - $4.4 billion (FY09)

NATIONAL FINAL FOUR CHAMPIONS

FINAL SCORE

61-59

APRIL 5, 2010 • LUCAS OIL STADIUM • INDIANAPOLIS, IN

04/05/2010

Duke University Fund Raising

- Duke raised $301 million from donors in FY09
- 100,000 donors made gifts to Duke in FY09 including more than 39,000 Alumni
- 133,000 active and addressable alumni tracked
- Over 700,000 total constituents tracked
- Duke employs over 300 people in development and alumni affairs

Total Contributions by Fiscal Year

Sources of Contributions – FY2009

University Fund Raising in the U.S.

- U.S. colleges & universities raised $27.9 billion in fiscal 2009; 11.9% decrease over fiscal 2008
- Top U.S. Universities

1. Stanford - $640 million (-18.5%)
2. Harvard - $601 million (-7.5%)
3. Cornell - $446 million (+9.1%)
4. Univ. of Pennsylvania - $439 million (-7.6%)
5. Johns Hopkins U. - $433 million (-3.5%)

13. MIT - $319 million (+2.3%)
14. Duke - $301 million (-21.8%)

Project History

- Duke has long needed to replace its legacy Fund Raising Management (FRM) application
  - Legacy application mainframe based
  - Due to customizations, Duke lacks vendor support for the application
- 2007:
  - Duke entered into an agreement with SAP to build customizations on CRM to support Fund Raising Mgt.
  - Functional specification developed by SAP and Duke

Project History

- 2008:
  - FRM design completed
  - SAP completed custom FRM software
- 2009:
  - Duke completed acceptance testing of FRM
  - Duke started implementation project
  - Blueprint completed in summer 2009
  - Upgrade to CRM 7.0 November 2009
- 2010 - Realization:
  - Adapting Web UI to meet Duke's specific needs
  - Conversions
  - Interfaces
  - Reporting
  - Prospect Management

Base CRM Functionality + FRM Add-On

Functional Area	Base CRM Functionality	FRM Add-on Functionality
Entity	60%	40%
Gift Processing	70%	30%
Pledge Processing	70%	30%
Planned Giving	70%	30%
Recognition & Membership	25%	75%
Volunteers	85%	15%
Events	85%	15%
Campaigns	95%	5%
Communications	100%	0%
Prospect Management	80%	20%

Entity Data

- Entity
  - Person (Alumni, Parent, Friend)
  - Corporation
  - Foundation
  - Other Organization
- Duke tracks over 700,000 entities
- Track up to 285 data elements per entity
  - Name(s)
  - Addresses
  - Capacity to Give
  - Relationships
  - Correspondence
  - Education

Entity General Data View

Working Context | Edit | Saved Searches | t | Go | Advanced

Individual Constituent: Thomas Daniels / NC 27708 / AL | Back

Save | Cancel | New | Gift | Pledge

- Home
- Entities
- Planned Giving
- Pledge / Gift
- Prospects
- Campaign
- Event / Volunteer
- Administration
- Reports
- NRT

Additional Links
- NRT

Entity Details Edit

First	Thomas	Middle	C.	Last*	Daniels
Prefix	Dr.	Academic Title			
Suffix		Prof Suffix			
Mailing Name	Thomas Daniels				
Search Term	TOM	Pref Gen Salutation			
Affiliation	Alumni	Status			
FERPA	☐	HIPPA	☐		
No Reminders	☐	No Receipts	☐		
Anonymous	☐	SSN			
Contact	Allowed	Entity Status	Active		

Biographical

Gender	Male	Marital status	Married
Race		Ethnicity	
Religion		Nationality	
Citizenship 1		Citizenship 2	
Date of Birth	10/12/1956	Birthplace	Greenville, NC
Source of info	Legacy Data	Spouse	
Region Head	HRXWCA	Region Code	Region 2

Information about Death

University In will	☐	Death Date	
Death Date Confirme		Death Date Notified	
Death Notice Source		Death Place	

Main Address and Communication Data

Business Name		
Street/House Number	457 E. Club Blvd.	
Address Line 2		
Address Line 3		
Address Line 4		
Postal Code	27708	
Country	US	USA
State	North Carolina	North Carolina
Phone/Extension	US	
Fax/Extension	US	
E-Mail Address	tom.daniels@tmail.com	
Website	www.tdaniels.com	
Comm. Method	E-Mail	
Reason for Addr Chg		
Research Code		
Research Date		
Do not Publish Phone	☐	
Address Status	Active	

Notes

Ratings List View

Individual Constituent: Thomas Daniels / NC 27708 / AL

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Save | Cancel | New | Gift | Pledge

Prospect Ratings New Edit List Show All Records

Insert

Actions	Rating Type	Rating	Rating Date	Review Date	Researcher	Comments
	Research Inclination Rating	High	03/22/2010	03/22/2011	ADSMFK	
	DUMC Inclination	Moderate	03/04/2010	03/04/2012	BOYDA	Follow-up evaluation required.
	Research Gift Capacity Rating	$10M<$25M	03/03/2010		HRXWCA	Donor evaluated for net worth of $15M.

Ratings Detail Entry Screen

Individual Constituent: Thomas Daniels / NC 27708 / AL

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Confirm

Rating Type	Research Gift Capacity Rating	Rating Date	03/03/2010
Rating	$10M<$25M	Review Date	
Basis	Net worth		
Source	Central Relation	Researcher	HRXWCA
Valid From	03/22/2010	Valid To	12/31/9999
Comments	Donor evaluated for net worth of $15M.		

Entity Home Page

General Data

Constituent ID	47622		
Description	Dennis W. K. Wagner		
Name	Dennis W. K. Wagner		
Title	The Reverend		
Birth Day	09/30/1941	Gender	Male

Spousal Data

Description	Marsha Lynn Wagner	Link	463932
Birth Day		Gender	Female
Joint Mailing Name	Reverend Dennis W. K. Wagner		
Joint Salutation	Marsha and Dennis		

Home and Business Addresses

No result found

Communication Control

Opt Code	Valid From	Valid To	Reason	Comments
Below the Line	08/04/2009	08/04/2009		Bulk loaded us
Track BCI phor	06/11/2008	06/11/2008		
LYBUNTE	11/18/2003	11/18/2003		BATCH LOADE
Chapel-Do Not	01/27/2010	01/27/2010		Do not send CI

Summary Data

Alumni

Preferred Class Year: 1963

Links

Link	Link	Link
Degrees(1)	Salutations(0)	Children(0)
Record Types(1)	Student Activities(0)	Memberships(0)
Pledges(0)	Gifts(0)	Gratuties(0)
Bequests(0)	Events(0)	Publications(0)

Expand Back 1 2 Forward

Prospect Links

Link	Link	Link
Moves(0)	Prospect Comments(0)	Prospects(0)

Prospect Details

Lifetime Giving History

Transaction Data Tracked

- Gifts
  - Over 100,000 donors gave at least one gift to Duke in FY09
- Pledges
  - Promises to give – tracked as Accounts Receivable on Duke's financial statements
- Planned Giving
  - Bequests & Trusts
- Volunteers
  - Track Alumni who volunteer to raise money for Duke
- Events
  - Date of Event & Who Attended

CRM Integration

Project Challenges

- Prospect Management functionality is a moving target
- New Major Fund Raising Campaign starts in July 2010
  - New Reporting challenges
  - Project team resources diverted
- Need to go live in fall or spring due to fiscal and calendar year processes