



Using CRM to Support Fund Raising and Our Migration to HANA

HERUG 2016

Deirdre Hurteau, Duke University

Kathleen Wilhide, SAP

Welcome

Introduction – I'm from Duke's Administrative Systems Management team, I'm the lead for Duke's CRM/FRM system support

Duke University and Duke Health

- ▶ Private Liberal Arts and Research University located here in Durham, North Carolina
- ▶ 10 Colleges & Schools
- ▶ 15,000 students – 43% undergraduate
- ▶ 38,000 employees – including Duke Health and Faculty
- ▶ \$5.4 billion in revenues in FY2015
- ▶ Live with SAP in 1999



Duke University and Duke Health

2010 & 2015 NCAA Basketball
Champions!



For those who haven't heard

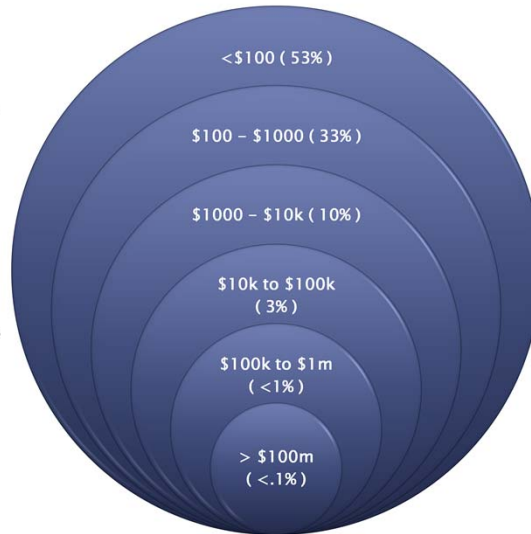
Fundraising at Duke

► Duke Forward Campaign

- Target of \$3.25b by June 30, 2017
- As of 30 June 2015 \$2.7b had been raised

► Giving in 2015

- 137,000 cash transactions from around 110,000 donors
- \$4.78m in gifts
- \$2.45m in pledges



Duke Forward is our active university wide campaign.

Officially kicked off in 2010 with the health system going a year earlier

Almost 20% of donations come from Alumni; around 10% from The Duke Endowment

790,000 donor records with 160,000 Alumni records

53% of our transactions come from gifts of \$100 or less (around 72,000)

CRM and Fund Raising Management

- ▶ One-Order Framework
 - Allows multiple business transactions to be generated from one trigger
 - Quotations, Contracts, Sales Orders, Activities, Opportunities etc
- ▶ Utilizes the standard CRM transactions
 - Gifts = Sales Orders
 - Pledges = Sales Contracts
 - Solicitations = Activities
 - Standard Business Partner processing
 - Standard Text, Date, Status Management etc
- ▶ Specific FRM configuration
 - Donor Bio master data
 - Transaction processing
 - Donor Giving Recognition
 - Specialty actions

Standard CRM configuration needed to underpin the fundraising management functionality

1. One Order Framework – flow through each related transaction. The fund code on a pledge line links to the gift line, links to a matching claim line, links to a matching gift line
2. Specialty actions – such as pledge schedule line create (which transactions to have payment schedules generated), tolerance postings – the % that generate balance write off

SAP FRM for Duke

- ▶ Alignment with Duke's Administrative IT Support Strategy
- ▶ Tighter integration with SAP Financials
 - Visibility of financials with a fully integrated solution compared with legacy
- ▶ Opportunity to modernize Duke's Fundraising
 - Platform for supporting future technology
 - Incorporate new technologies such as mobility
 - Enable improved processing and analytics

1. Duke was already an SAP shop – initial implementation back in 1999

1. The university wanted to bring all administrative systems under one group – employ best practices and have a consistent approach to support. Also introduce a uniform methodology for moving changes through the landscape

3. The legacy system was main frame based. Duke wanted to take advantage of the future improvements in technology SAP could provide. HANA is a good example of that

In general, moving to SAP FRM has provided Duke an opportunity to really use the system as an enabler; the system is supporting the future focus of the Development Office

Implementation – FRM 1.0

- ▶ Original implementation project started in 2007, with a re-boot in 2010
- ▶ Go-live in 2012
- ▶ Lots of Challenges
 - Exception based requirements
 - Data Conversion
 - Large volumes of data from legacy system took weeks to convert
 - Complex mapping from legacy to FRM
 - Multiple post go-live issues, mostly around converted data

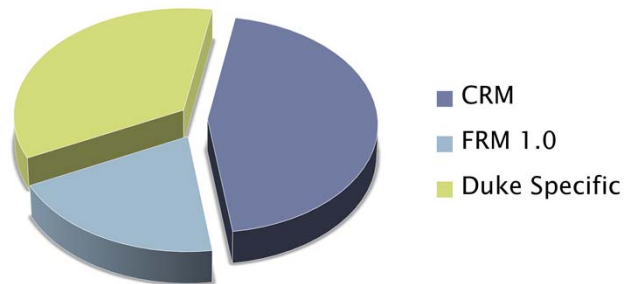
Data Conversion:

3.1 We converted everything from the legacy system to FRM 1.0 – all the way back to 1970. Around 725,000 entity records and almost 6 million transactions

3.1 Because of how long it was going to take, the focus became getting the data into the system as quickly as possible. As a result, we are still dealing with converted data issues almost 4 years on. Valuable lesson learned

Implementation – FRM 1.0

Significant Duke customization with FRM 1.0



About 1/3 of the what we went live with was customized by Duke

Exception based requirements meant we departed quite a lot from the delivered product, especially around donor record data.

Even simple things like how email was stored because a problem that required a custom solution to separate email addresses from standard addresses.

Prospect management was probably the area most heavily customized to meet the requirements of the Development Office.

Much of the prospect management was still being performed outside SAP with exports to a shadow reporting system each day to accomplish what was needed.

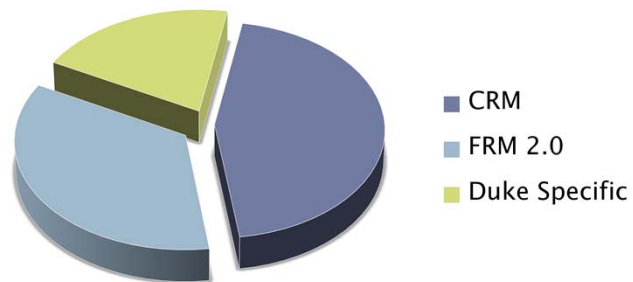
Upgrade - FRM 2.0

- ▶ Duke partnered with SAP to improve the delivered FRM solution
 - Kicked off in November 2013 with requirements gathering
 - Solution included a name space change
 - SAP delivered FRM 2.0 to Duke in January 2015
 - Duke implementation started February 2015 and went live in October 2015
- ▶ SAP delivered 19 enhancements based on Duke's experience
 - Transaction maintenance process improvements
 - Improvements in name, address and email/phone data storage;
 - Joint name build
 - Prospect Contact Report

1. REQUIREMENTS - Worked with a small project team in SAP's Custom Development group. Excellent experience.
2. REQUIREMENTS - SAP spent a lot of time to really understand our pain points and collaborate with Duke on solutions.
3. MAINTENANCE - Transaction maintenance is a large part of giving management. Change transactions back as far as the 1970's
4. JOINT NAME BUILD - Use BRF+ tool to manage the joint name build functionality
5. PROSPECT - Prospect Contact History Report – SAP incorporated the Contract Report in FRM 2.0. Used to notify the various interested parties in the Development Office when a prospect contact has been made.

Upgrade - FRM 2.0

Reduced the degree of Duke customization



The degree of Duke customization decreased to more like $\frac{1}{4}$ of the total solution
We are now under a maintenance agreement with SAP for support
Up to date with support packs

Upgrade - FRM 2.0

► Technical Specifications

- Release: 1.00.102
- Disk size: 365 gb
- Memory size: 103 gb
- Running on RHEL 6, VMware

► Challenges

- Name space change meant complications for migration
- Working out how the HANA database procedures are stored, changed and moved through the landscape
- Some custom programs ran slower on HANA

The upgrade project ran well, but that's not to say there weren't any challenges

1. NAME SAPCE - Engaged the SAP SLO (System Landscape Optimization) team for data migration.

'Lift and shift' from the oracle database to HANA

Migration completed in around 10 hours

2. CUSTOM CODE - These procedures live at a "lower level" than the ABAP stack (at the database layer) and therefore not all governed by version control and the transport management system the way data dictionary objects and ABAP code are.

Ended up using import/export functionality. This was somewhat prone to error and corrupted our system when we didn't get the dependencies right.

3. Some of our programs had unnecessarily long field lists which meant more columns being returned so was slower.

3. Also nested SELECT statements within LOOP statements seemed to perform more poorly

Once the coding was improved on these programs everything ran as good or better than pre-HANA.

Benefits of SAP CRM/FRM

- ▶ Tight integration to other SAP components used by Duke
 - Financials
 - HR/Payroll
- ▶ Enabled improvements in back office processing resulting in reduction of time and effort
 - At time of go-live, Alumni Records Management (ADR) had 33 staff; within 12 months this number had decreased by 1/3
 - Previous tasks performed manually now either partially or fully automated
e.g. Online giving, payroll gift deductions
 - End of year close is days sooner then before due to faster processing and integration to Duke's SAP Financials

1. INTEGRATION - CRM billing allows for real time updates to the ledger (previously done with journals)

2.1 EFFICIENCY GAINS - 33 Temp and permanent staff – reduction was mostly in temps
That's a direct decrease in the cost of processing and therefore increased gift value

2.2 EFFICIENCY GAINS - Online giving – at time of CRM go live, all online gifts printed out and processed manually. Now the donate to receipt cycle for online gifts has around 60% of transactions processing without anyone touching it. Last calendar year we had 26,500 online gifts so huge reduction in effort.

2.3 EFFICIENCY GAINS - Payroll Gift Deductions – Duke enhancement that allows employee to manage their gift deductions directly. Built with Webdynpro, fully automated from the entry made by the employee through to the payroll deduction

Benefits of SAP CRM/FRM

► Better, faster, more reliable data

- Higher quality of data available in shorter period of time
- Directly translates to improved reporting
- Development Officers have access to up to the minute information for decision making
- Less time spent in processing and reconciliation
- More time in analytics
- Automation reduces human element, therefore less opportunity for error
- Access to other SAP tools like FIORI

The end result – better, faster, more reliable data for decision making

1. PROCESSING TIME - ADR staff are starting to shift their focus to more to error and exception management rather than keying data.
2. HUMAN ERRORThe less a person needs to touch a transaction or donor record the less chance of error
3. With SAP, we have a standardized data model with inherent governance, reduction in production support required for bad data

Benefits of FRM on HANA

- ▶ Increased speed

'I used to spend so much time waiting for the wheel to stop spinning, But since going to FRM 2.0 on HANA, I get my results back in a matter of seconds' – ADR

- ▶ Optimized Donor Giving Summary Report

- Executed directly against HANA database
- Significantly Improved response time

- ▶ Opportunity for real time reporting directly against the database

- BW reporting
- MDADD

1. SPEED - Even though not optimized for HANA we've got significant increases in speed

2. GIVING SUMMARY - One of the big issues was the summary of donor giving.

Took considerable time to pull up a donor record with a lot of transactions because it needed to build the giving summary as part of the display.

Eg Various Donors – would time-out prior to HANA, now returns in 40 seconds

3. MDADD – duke developed mobile tool for Development Offices in the field

Donor Giving Summary Report

1043147 Ms. Adeline C Kelly Active FR Back

To Details Save Cancel

General Data

1043147 Adeline C Kelly, Wake Forest, USA Anon: ☐

Mail Name: Ms. Adeline C Kelly

Birth D... Gender: Female Ethnici...

HIPAA: ☐ FERPA: ☐ Duke in will: ☐

Preferred Mail: ADDIEKELLY@TEST.COM

Lifetime Giving

Cummulative | Annual Funds | Non - Annual Funds

Transaction Type	Legal Credit Amount	Soft Credit Amount
▼ Pledge		
Pledges	11,850.00	11,850.00
Payments due	8,200.00	8,200.00
▼ Gift		
Outright Gifts	800.00	800.00
Pledge Payment	3,650.00	3,650.00
Matching Gifts	0.00	300.00
▼ Cash		
Total Cash	4,450.00	4,750.00
▼ Deferred		
Revocable	0.00	2,000.00
Irrevocable	0.00	0.00

Related Links

Spousal Data

Soft Fl... ☐ Unknown

Joint Mail Name 1:

Joint Mail Name 2:

Joint Salutation:

Entity Summary

Children:

Snap shot of the donors giving for the donor by transaction type.

Shows pledge and gift information.

Legal verses soft credits – a legal credit is something you can deduct on your taxes; a soft credit is where a gift is 'counted' toward the donor e.g. a spouse

Also shows any planned giving of the donor

Further detailed by Annual fund and non-annual fund

Plans to give users ability to filter by school

Employee Payroll Gift Deductions

- Employee Self Service, accessed from our Work@Duke portal
- Fully automated
- Directly Integrates CRM with Payroll
- Significant efficiency gains
 - Reduction in errors
 - Faster processing
 - Better communications to the employee

Payroll Gift Deductions is a good example of what Duke has been able to accomplish with SAP FRM

1. ESS - Not true ESS, but as far as the employee is concerned there is no difference

Employee can control when their donations start and finish, and where they go. Only limitation it isn't retrospective

2. AUTOMATED - Only 1 manual step, to check the expected changes prior to updating payroll. Very cautious about making changes to a persons pay.

3. EFFICIENCY GAINS - Previous to this solution, ADR had an FTE processing payroll deductions and bank drafts

Records were kept in spreadsheets on a desktop.

Processing Payroll Gift Deductions and Bank Drafts are now completed in a matter of hours each month and all data is stored securely in SAP

Employee Payroll Gift Deductions

Payroll Gift Deduction Management

Welcome Deirdre M Schumann
You are currently paid Monthly

Giving to Duke

Designation	Amount	Start Date	End Date	One Time		
No deductions for Giving to Duke						

New Recurring New One Time Reset

Gifts to Doing Good in the Neighborhood

Designation	Amount	Start Date	End Date	One Time		
No Deductions for Doing Good in the Neighborhood						

New Recurring New One Time Reset

Instructions

Expand the Instructions tray for more details on adding or changing your payroll deductions.
If you have any questions or need assistance, please contact Alumni & Development Records at 919-684-2338.

Update Deductions Return to MyPay

Employee Payroll Gift Deductions

New Recurring Gift Deduction ✖

Please complete the following information:

How much do you wish to give each pay?:

Where do you want your deduction to go?: 📋

The first pay date you want deduction taken?: ▼

The last pay date you want deduction taken?: ▼

1. Table of eligible fund codes for selection – type ahead functionality
2. Defaults to the first available pay period for the deduction based on if the employee is monthly or bi-weekly. Can be future dated
3. Allows employee to select an end date, or have it go on perpetually.

Employee Payroll Gift Deductions

The screenshot displays a web application interface for managing payroll gift deductions. At the top, the title "Employee Payroll Gift Deductions" is centered. Below it, a section titled "Giving to Duke" contains a table with columns: Designation, Amount, Start Date, End Date, and One Time. A row is visible with the designation "Fuqua School of Business Annual Fund", an amount of "20.00", and dates "05/25/2016" to "12/22/2016". To the right of this row are buttons labeled "Edit", "Stop Later", and "Stop Now". Below the table are buttons for "New Recurring", "New One Time", and "Reset".

A "Confirmation" dialog box is overlaid on the interface. It contains the text: "Your updated Gift Deduction Details are as follows:" followed by "\$ 20.00 to Fuqua School of Business Annual Fund deducted each pay date beginning 05/25/2016 and ending 12/22/2016". At the bottom of the dialog are three buttons: "Accept", "Change", and "Cancel".

Below the confirmation dialog, there is a section titled "Gifts to Doing Good in the Ne" (partially visible) with a table containing a row with a checkbox and the text "No Deductions for Doing Good". Below this are buttons for "New Recurring", "New One Time", and "Reset".

At the bottom of the interface, there is an "Instructions" section with the text: "Expand the Instructions tray for more details on adding or changing your payroll deductions. If you have any questions or need assistance, please contact Alumni & Development Records at 919-684-2338." Below the instructions are buttons for "Update Deductions" and "Return to MyPay".

1. The employees selections are showing in the relevant wage type. When they are satisfied with how they have things set up, they get a confirmation message to accept or change
2. This updates a custom table in CRM.
3. Prior to each pay run, a custom program is executed in ECC to pull the changes into payroll.
4. A file of deductions taken is picked up by CRM after the pay run and processing as gifts.

Future Plans for Duke and FRM

► Upgrading our MDADD tool

- Custom developed by Duke to give Development Officers access to donor information on mobile devices
- Currently export from CRM to another database i.e. data is a day old
- Plan to build new solution using FIORI and report directly against HANA database

► Data Management

- Store supporting documentation in SAP
- Entity and Transaction level

► Challenge Campaign

1. Goal is to give development officers up to the minute access to a donors information before heading into a meeting:

What was the last gift given? Where to?
Do they have open pledges? Are they in arrears?
Names of the spouse and children
Do they like golf?
What are the details of the last ask for a donation?

2. Will be evaluating the SAP Data Management solution (along with others) against the requirements
3. Developing a custom solution for managing donor challenges.
4. Will utilize the delivered gift and pledge transactions
5. Create tools for the development office to allocate match amounts.