DONOR AND ALUMNI RELATIONSHIP TOOL

- New fundraising system replacing the Donor, Alumni, and Constituent Database (DAC).
  - Based on Blackbaud Enterprise CRM (BBEC)
  - Customized to meet U-M’s needs

- University-wide investment to:
  - Track all information about entities (constituents) seamlessly in one book of record (enterprise wide system)
  - Enable better information integration with the university’s financial system
  - Enhance online giving to improve the alumni and donor experience
  - Reduce supplemental and shadow systems
  - Meet U-M compliance needs effectively (e.g., financial reporting)
**PROJECT ORGANIZATION OVERVIEW**

- **Governance Executive-Level Sponsors**
- **Consultative Council**
- **Project Directors**
- **Core Design Team / Functional Design Teams**
- **Technical Teams**
- **Test & Training Teams**

**GETTING READY FOR TRANSITION**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System Design &amp; Awareness</strong></td>
<td><strong>Preparation</strong></td>
<td><strong>Training</strong></td>
<td><strong>Go Live</strong></td>
<td><strong>Stabilization</strong></td>
</tr>
</tbody>
</table>

- **Cross-campus input on system design:**
  - 14 design teams, over 100 representatives from schools, colleges, and units

- **Preparing for change**
  - Unit representatives will prepare units to use DART (Unit Liaison Program):
    - Identify unit impacts, individuals who will need training, and more
  - DART system testing starting in 2011
  - Classroom training and online training materials available for support
  - Continued demonstrations and software previews coming
**LIFE CYCLE OF THE GIFT**

**Gift Made**
- Development - Gift Officer Solicits Gift
- Donor Makes Gift

**Gift Spent**
- Fund Intake by S/C/U
- Department Spends Funds

Mpathways/General Ledger Tracks
Fund Availability and Utilization

**Donor Stewardship**
- Some gift utilization can be captured (e.g. scholarship recipients, named professors, etc.)

Driving closer collaboration through DART
REVENUE DESIGN TEAM MEMBERS

Jarrod Van Kirk – FinOps (Co-Lead)
Cathy Spickard – OUD (Co-Lead)
  • Patrick Franklin – OUD
  • Sharon Geva – ITS
  • Barb Gomez – OUD
  • Larry Jonas – Michigan Radio
  • Linda Kline – OUD
  • Darwin Matthews – OUD
  • Kim McDade – Cancer Center
  • Julie Niedbala – OUD
  • Chris Ososki – ITS
  • Carson Rizor – Michigan Radio
  • Bobbie Simson – Engineering
  • Sheryl Szady - OUD

Thomas Madden – ITS (Co-Lead)
Jean Rauchholz - FinOps (Co-Lead)
  • Jennifer Barnett – Treasurer’s Office
  • Shelly Crundwell - Engineering
  • Lisa Harris - ITS
  • Christina Luo – Law
  • Lori Maddix de Hernandez - SNRE
  • Darwin Matthews - OUD
  • Ken Witherspoon - ITS

REVENUE DESIGN HIGHLIGHTS

Revenue Design teams reviewed:
  • Pledge accrual
  • Processing of gifts and pledges
  • Matching Gifts
  • Recurring Gifts
  • Benefits/Premiums
  • Coding gifts for the General Ledger
  • Short Codes/Designations/Allocations
  • Donor intent
  • Donor challenges
HIGHLIGHTED REVENUE CAPABILITIES

Better tracking of Donor Intent

- **Current State:**
  - Unspent gifts due to difficulty in tracking specific purposes
  - Difficulty identifying donor intent (spreadsheets or imaging)
  - Supporting documents found in imaging

- **Future state in DART: Assign attributes to each gift fund**
  - Standards & free form attributes will be available.
  - Will be able to query attributes, e.g., merit based or need based scholarships.
  - Big Win – DART users get at the core intent of the gift quickly
  - Financial users will have access to revenue information

QUESTIONS?
COMMUNICATIONS & RESOURCES

○ Recent Communications
  - July/August Project Update
  - Talking Points
  - Change Management Plan
  - Unit Liaison Program
  - Financial Community Update
  - DART Frequently Asked Questions

○ Upcoming Communications
  - September DART Newsletter
  - September Project Update
  - Talking Points

○ Get information online:
  - DART website (http://tiny.cc/dart_project)
  - RSS feeds (subscribe to updates)