

# Connect, Engage and Accelerate Giving

WITH EVENT TECHNOLOGY AT DUKE UNIVERSITY

February 19, 2019

Duke

# Presenter Information



## **Kim Garcia**

- Senior Director of Development Special Events
- 20 years with Duke
- Focus Area: Insights into the evolution of event technology within University Development to support the entire event lifecycle.



## **Mark Wienants**

- Operations Coordinator for the Duke Alumni Association
- 5 years with Duke
- Focus Area: Insights into the evolution of the Duke Alumni Network, current best practices, and plans for the future.

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# Duke University Overview

# About Duke University

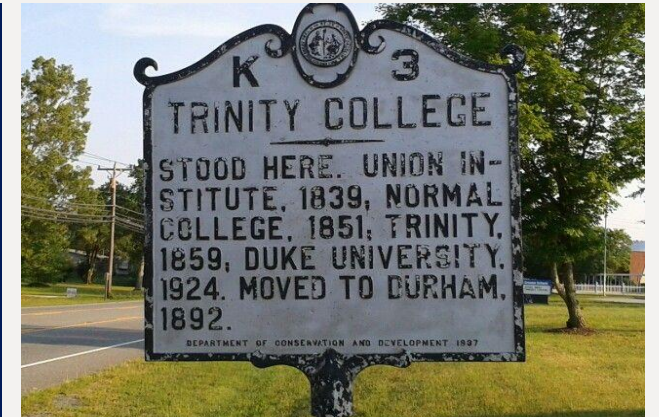


Located in Durham,  
North Carolina



Established  
in 1924 by  
James  
Buchanan  
Duke

#8  
National Ranking



**15,892**  
**students**



**6,994**  
undergraduate  
(52% women)

**8,898** graduate  
and professional  
students

**49**  
States

**50**  
Countries

**3,774**  
Faculty



**39,525**  
Employees



**167,848**  
Active Alumni



**\$8.5b**  
Endowment



# Roles and Functions



## DEVELOPMENT

### Development Special Events:

- Large Fundraising Events (dinners, cocktail parties)
- Stewardship Events (donor recognition)
- Multi-Year Campaigns (Duke Forward)



## ALUMNI ASSOCIATION

### Operations Team:

- Engaging more than 20,000 Duke alumni each year
- Working with alumni and regional directors in bringing events to life
- Marketing events
- Managing, expanding and enhancing the Duke Alumni Network

## COLLABORATIVE INITIATIVES

- Multi-year campaigns
- International
- Current President Events
- Women's Impact Network and Women's Forum
- Young Alumni Development Council

# Duke University: Alumni

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**75,110**  
have a  
undergraduate  
degree

**159,437**  
Alumni Globally (162 countries)

**18,991**  
have a Duke  
graduate degree

**56,986**  
have a Duke  
professional  
degree

**10,000**  
come back to  
Duke for on  
campus events

**20,000**  
participate in  
regional programs  
around the world  
each year

# Duke University: Development



**\$3.85 BILLION  
RAISED OVER  
SEVEN YEARS**

(exceeding goal of \$3.25 billion)

**2010 – 2017**

Largest fundraising  
campaign in Duke  
University history

Record giving  
by more than  
**315,000 DONORS  
AND FOUNDATIONS**

## **BENEFICIARIES:**

all 10 Duke's graduate and  
undergraduate schools

[Duke Athletics](#)

Duke Libraries

[Duke Health](#)

University-wide initiatives and programs

[Physical campus transformation](#)

Funded financial aid, faculty development,  
research and patient care and hands-on  
learning opportunities for students



# Focus on Event Technology

# Event Technology Across the Institution

Increase the reach, impact and ROI of your events across the student lifecycle with integrated outreach, engagement and reporting tools.



Enrollment Management



Academic & Student Affairs



Advancement & Alumni Relations

Introduce efficiency and scale with an enterprise event technology platform that combines seamless event management with sophisticated data and insights.



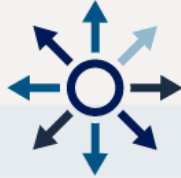
Continuing Education



Communications & Marketing



Information Technology



Procurement

# History of Event Technology at Duke University

**Early 2000s**

**University Development**  
Board Meetings

**2010**

**Business and Law Schools**  
Joint International Events across

**Trinity College**  
Board Meetings

**2016**

**Alumni Association**  
Regional Events

**Information Technology**  
Access for all Alumni and  
Development Offices Across Duke

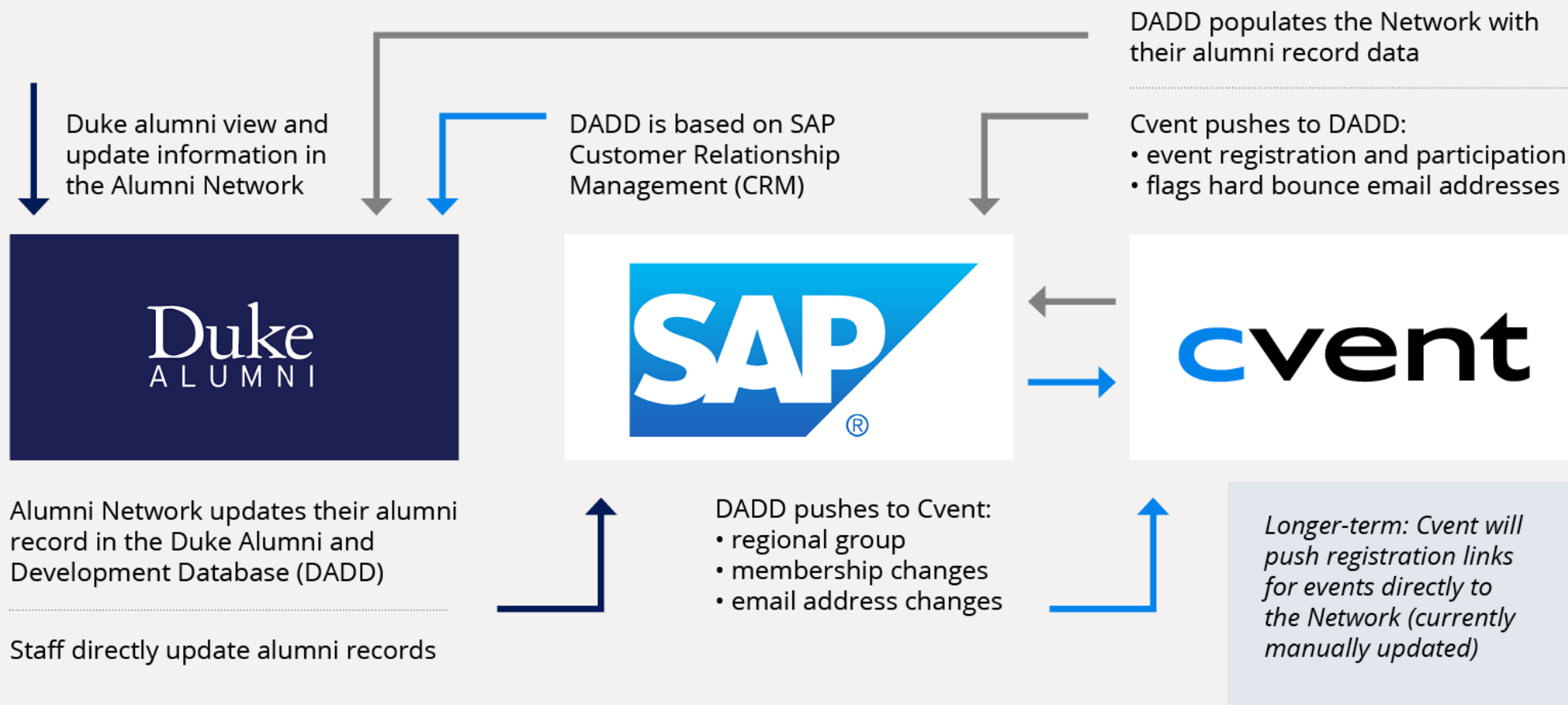
**University Development**  
Fundraising Events

**Alumni Association**  
Duke Alumni Network

**2019+**

**Alumni Association  
and University  
Development**  
Data-Driven Event  
Engagement Strategies  
Across Alumni and  
Development

# Event Technology Infrastructure



# Event Technology & Alumni Engagement

# Alumni Association Overview



## Core Initiatives/Priorities

- Bring faculty to regions
- Volunteer-driven events around Duke Alums Engagement
- Arts and Culture events
- Regional Alumni Engagement



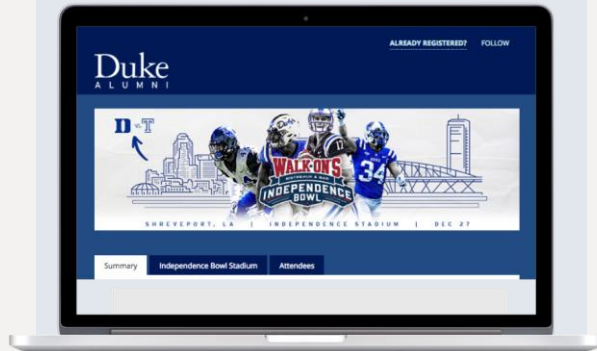
## Event Program Challenges

80% of traffic going into the Duke Alumni Network were people looking for events – and a central list for events

Wanted an alumni network housed inside of Duke to allow students to connect to alumni, to each other and organically

# Event Technology for Alumni Engagement

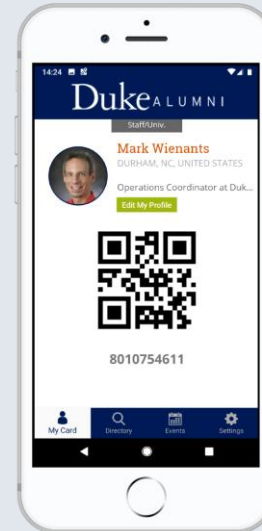
## Branded Event Websites



## Onsite Solutions



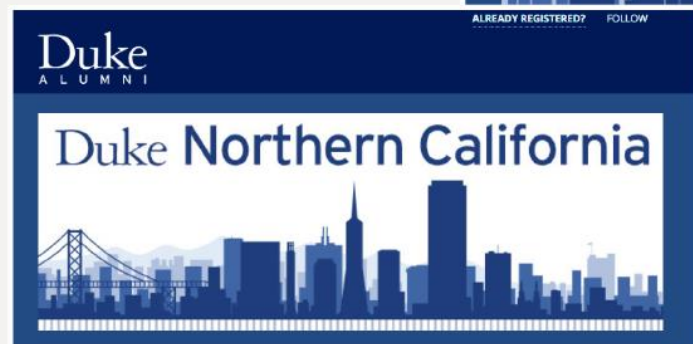
## Attendee Engagement Tools



## Integration with Core Systems



# Event Technology for Regional Events



Duke





# How It Works: Regionally Hosted Events

## STEP 1

Regional Alumni Board Member requests event in region and works with Regional Director

## STEP 2

Regional Director sends Meeting Request Form to Alumni Association

## STEP 3

Alumni Association creates event and list and email

## STEP 4

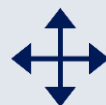
Alumni Association and Requestor reviews, edits and approves launch

Integration with Duke Alumni Association and Development Database (DADD)

### BENEFITS:



**Efficiency:** time savings with the automation of manual processes



**Scale:** ability to support 600+ events with lean staff

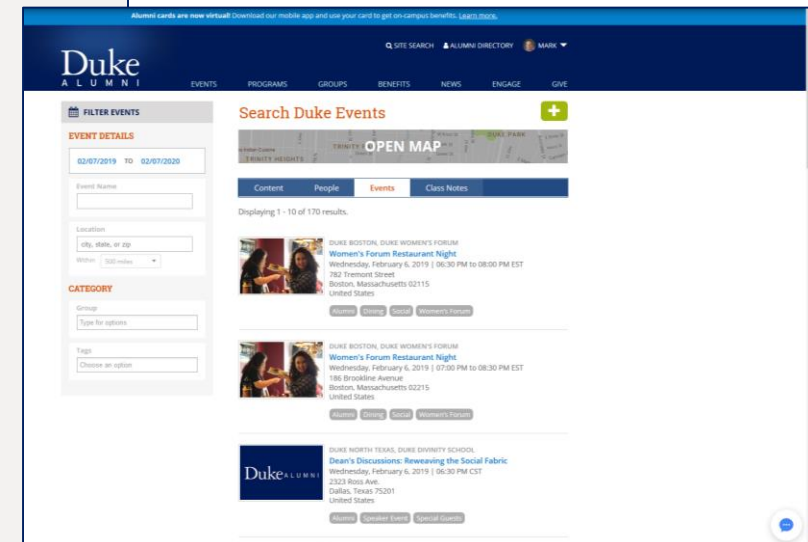
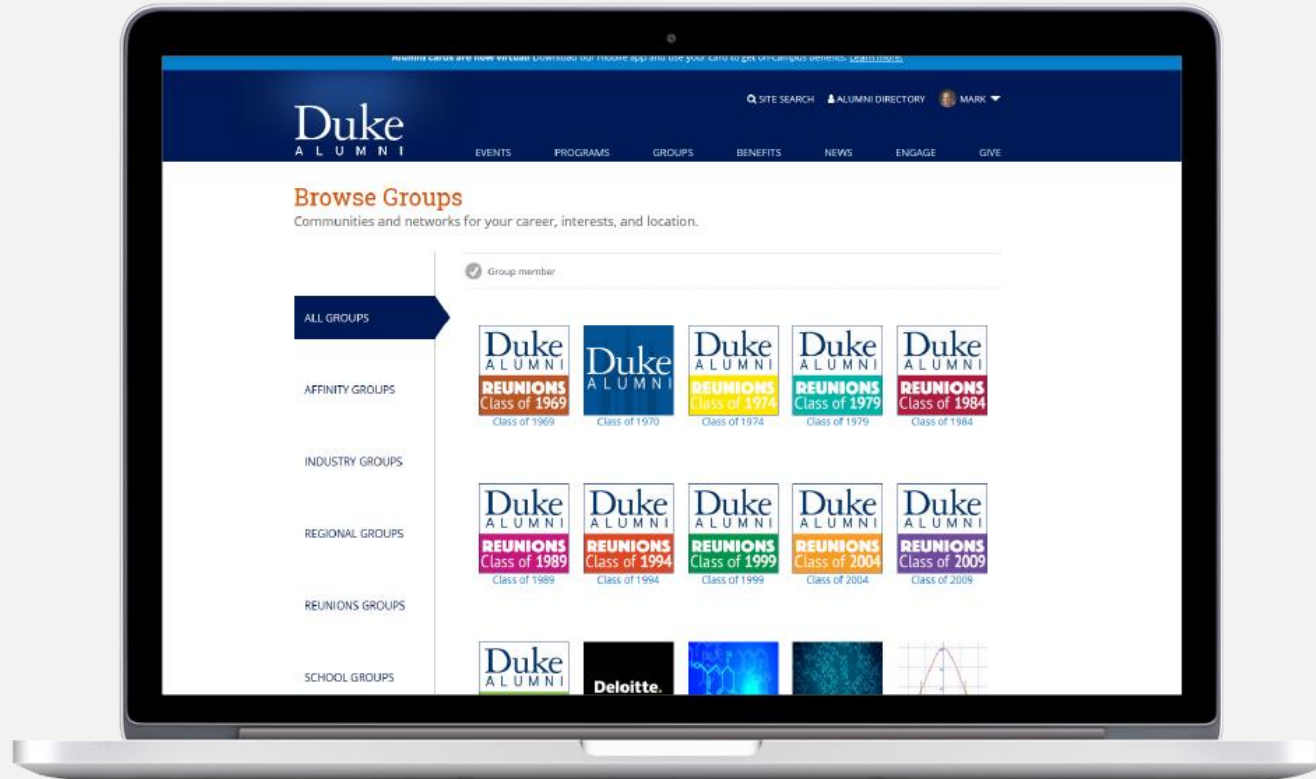


**Data & Reporting:** visibility into registrations, declines and reach and impact of events

# Then & Now: Regional Events Evolution

	BEFORE	AFTER
Receive request (6 weeks out) – via Qualtrics	Manually pull list	<b>Cvent Begins API list feed</b>
Event Creation	Manual	<b>Automated</b>
Email Creation	Manual	<b>Automated</b>
Email Deployment	Manual	<b>Automated</b>
Invite Reminder Emails	Repeat steps	<b>Automated</b>
Event Reminder Emails	Manual	<b>Automated</b>
Reporting	Manual, Basic	<b>Automated, Advanced</b>
Onsite	Manual finding and distribution of badges	<b>Automated, Simplified</b>

# Duke Alumni Network Spotlight



# Event Technology & University Development

# Development Special Events Overview



## Core Initiatives/ Priorities:

- 140 events a year
- 25 large fundraising events
- Management of logistics for 6 development boards
- Manages a staff of 6



## Event Program Challenges:

- Overreliance on manual processes for outreach, registration and onsite management for all types of events.
- Unpredictability in staffing needs for onsite events



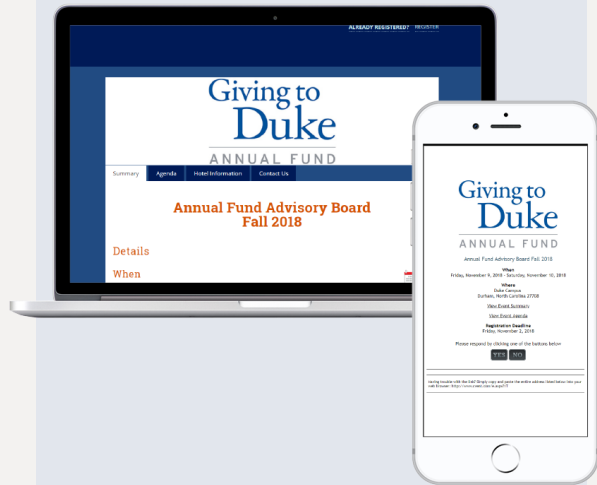
### Pre-Cvent

- Registration emailed and faxed back
- Data entry in Excel
- Leaving room for human error

**Now 95% of people can get the invite from Cvent and do the data entry themselves.**

# Event Technology for Development

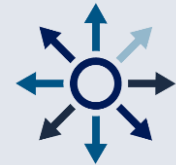
## Branded Event Websites



## Onsite Solutions



## Integration with Core Systems



# Event Technology for Development Events

**Duke** TRINITY COLLEGE OF ARTS & SCIENCES

SUMMARY AGENDA ACCOMMODATIONS CONTACT US

## 2018 Trinity College Board of Visitors Meeting

**WHEN**  
Thursday, November 8, 2018 - Saturday, November 10, 2018

**WHERE**  
Duke University  
Durham, North Carolina 27708  
USA

Event Contact

Duke Development Special Events

**DUKE** THE GRADUATE SCHOOL

ExampleContact@firstName,  
You are invited to the **Spring 2019 Graduate School Board of Visitors Meeting**.

**WHEN:** Friday, March 1, 2019 - Saturday, March 2, 2019  
**WHERE:** Duke University, Durham, North Carolina 27708  
**ATTN:** Business Casual  
**REGISTRATION DEADLINE:** Friday, February 22, 2019

Click here for the [event agenda](#).

Please RSVP by selecting one of the responses below:

Questions? Please contact [Stacy.Balton@duke.edu](mailto:Stacy.Balton@duke.edu)

SUMMARY AGENDA SPEAKERS HOTEL INFORMATION CONTACT US

## Duke University's Donor Recognition Weekend

Duke University's Donor Recognition Weekend is an annual gathering of members of the James B. Duke Society, Braxton Craven Fellows, and Founders Society to honor and acknowledge their generous support to all areas of Duke University. Please consult the agenda page for information and locations of the events occurring this weekend. The deadline to register for this event is Monday, October 8.

**WHERE**  
Duke University  
Durham, North Carolina 27708  
919.684.2123

Event Contact  
Bair Altman  
Staff Associate, Development Special Events

**DUKE** forward **DUKE DUETS: PARTNERSHIPS THAT MOVE THE WORLD FORWARD**

SUMMARY AGENDA ATTENDEES LOCATION CONTACT US

## Duke Forward In New York City

**What**  
Duke Forward returns to New York City! Join us in Duke Duets: Partnerships That Move the World Forward, a new program featuring inspiring talks and conversations with Duke faculty and students.

**When**  
Thursday, September 22, 2018

**Event Contact**  
Eyer, Elizabeth  
Duke University Special Events  
919.684.2123

**Duke** TRINITY COLLEGE OF ARTS & SCIENCES

## 2018 Trinity College Board of Visitors Meeting

**When**  
Thursday, November 8, 2018 - Saturday, November 10, 2018

**Where**  
Duke University, Durham, North Carolina 27708, USA

[Click here to view the event summary.](#)  
[Click here to view the event agenda.](#)

**Registration Deadline**  
Friday, November 2, 2018

Please respond by clicking one of the buttons below.

Duke

**DUKE** THE GRADUATE SCHOOL

SUMMARY AGENDA HOTEL INFORMATION CONTACT US

## 2019 Graduate School Board of Visitors Meeting

**WHEN**  
Friday, March 1, 2019 - Saturday, March 2, 2019

**WHERE**  
Duke University  
Durham, North Carolina 27708  
USA

**PLANNER**  
[Success Stories](#)

**DUKE FORWARD CAMPAIGN CELEBRATION WEEKEND**

SUMMARY AGENDA ATTENDEES SPEAKERS HOTEL AND TRANSPORTATION CONTACT US

## Duke Forward Campaign Celebration Weekend

This event is closed. If you have any questions, please contact the planner directly.

**What**  
Join us for an extraordinary weekend celebrating Duke's path forward and all we have accomplished together. President and Mrs. Howard W. Goldhead and Duke Forward Co-Chairs Anne E. Jones Papp, Bruce A. Kohn '72, and David M. Rosenbaum '92 cordially invite you to join them for the Duke Forward Campaign Celebration Weekend.

**Please RSVP by April 1, 2017.**  
Early registration is encouraged, as capacity at the Duke Forward Golf Club is limited.

**When**  
Friday, April 21, 2017 - Sunday, April 23, 2017

Event Contact

**Giving to Duke** ANNUAL FUND

SUMMARY AGENDA HOTEL INFORMATION CONTACT US

## Annual Fund Advisory Board Fall 2018

**Details**  
**When**

**Giving to Duke** ANNUAL FUND

Annual Fund Advisory Board Fall 2018

**When**  
Friday, November 9, 2018 - Saturday, November 10, 2018

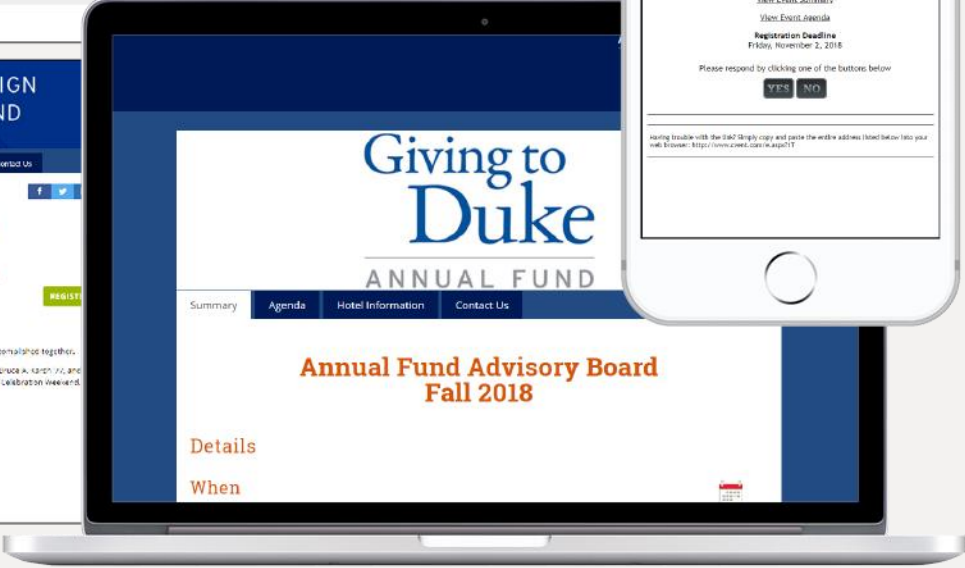
**Where**  
Duke Campus  
Durham, North Carolina 27708

[View Event Summary](#)  
[View Event Agenda](#)

**Registration Deadline**  
Friday, November 2, 2018

Please respond by clicking one of the buttons below.

Having trouble with the QR? Simply copy and paste the web address listed below into your web browser: <https://www.duke.edu/gift>



# How It Works: Large Fundraising Event

## EXAMPLE:

### Roadshow Event for Duke Forward Campaign in NY

**1100 registrants**

Team worried about ability to staff event of this magnitude, with high stakes attached to their fundraising goal

Manual processes required the running of 1100 nametags, printing them out, putting them in badges, etc.

Technology removed the burden of onsite logistics so team was able to focus on strategic attendee engagement

**Integration with Duke Alumni Association and Development Database (DADD)**

## BENEFITS:



**Efficiency:** time savings with the automation of manual processes



**Data & Reporting:** visibility into data and results instantly



**Engagement Score:** provide engagement score based on participation in events



# Vision for the Future

# Vision for the Future: Data Driven Approach

## Data Driven Alumni & Development Operations

- **Targeted Marketing:** Data gathered in Duke Alumni Network will inform Alumni and Fundraising initiatives for targeted marketing around events and their interests
- **Solicitations:** Cross-reference interest areas and engagement levels of Alumni based on their activity with Alumni and Development programs and use to inform ratings.



# Q&A

Contact Information:

Kim Garcia: [kim.garcia@duke.edu](mailto:kim.garcia@duke.edu)

Mark Wienants: [mark.wienants@duke.edu](mailto:mark.wienants@duke.edu)