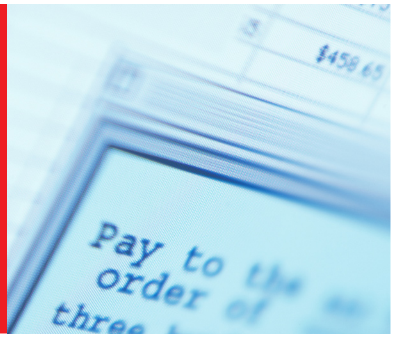
INFORMATION BUILDS

PeopleSoft Enterprise Contributor Relations



ORACLE
HIGHER EDUCATION

Tap the potential of your donor community.
Cultivate lifelong relationships with your supporters.
Empower your constituents to manage their own giving.

INFORMATION BUILDS

Your institution's success depends on personal interaction with the alumni and other supporters. That personal relationship—the final and longest phase in the student lifecycle—is what will separate you from the many other organizations vying for contributions. And it is that relationship that will sustain donor loyalty over the years, and even over the generations.

Developed in collaboration with our higher education customers, Oracle's PeopleSoft Enterprise Contributor Relations streamlines your administrative tasks so you can focus time and resources on maintaining and cultivating personal, lifelong relationships with your constituents.

PeopleSoft Contributor Relations encourages your constituents to work together to advance the goals of your institution. Powerful functionality lets you manage donor relationships via the internet, track diverse constituents, process gifts and pledges, build member organizations, organize events, manage fund-raising campaigns, create strategies for use in the cultivation of prospects, evaluate volunteer activity, and track planned gifts.

Maintain Constituent Information

Your constituents include both individuals and organizations. You need to maintain complete and accurate information about them, and you need to organize and analyze that information. The Constituent Information module in PeopleSoft Contributor Relations puts the information you need about all of your constituents right at your fingertips.

- Track general information such as names, multiple addresses, and phone numbers.
- Store biographic information, including birth date, citizenship, and marital status.
- Capture financial information about an organization.
- Track matching gift regulations such as minimum/maximum gifts and eligible/ineligible programs.
- Track information about contacts within an organization, including name, address, e-mail, phone, and contact type.
- Enter special handling instructions about constituents.
- Relate constituents to other individuals and organizations.
- Track multiple categories of constituent involvement.
- Generate mailings with the appropriate salutation.
- Maintain a complete communications summary.
- Enter academic information including institutions, degrees, programs, majors and minors, dates, and reunion years.

Track Constituent Giving

Instantly retrieve comprehensive giving information for constituents. View lifetime commitments, open pledges, gifts and payment, and year-to-date and past giving. Links lead to detailed information about historical giving activity.

Enter Commitments and Analyze Giving History

Evaluating and monitoring every commitment made to your organization is vital for your organization's future planning and constituent cultivation. The Gift and Pledge module enables you to accurately record and track commitments from your constituents so you can acknowledge and analyze them.

- Process gifts and payments, including gifts-in-kind, cash, and securities.
- Process pledges and set up pledge payment schedules.
- Process gifts made in other currencies.
- Set defaults for posting, if desired, by department, college, or other business unit.
- Recognize donors through hard, soft, and vehicle credits.
- Split transactions among multiple designations.

- Handle tribute and memorial gifts.
- Track transactions to general ledger.
- Handle matching gifts, including automatic calculation of matching gift potential.
- Enter donors into the appropriate giving club automatically.
- Automatically generate and track acknowledgment letters.
- View commitment history for donors, including open pledges and expected matching gift amounts.
- View donors by designation.
- View a campaign's top donors.
- Generate the CAE (Council for Aid to Education) report.

Manage Prospects

The Prospect Management module gives you prospect information and planning tools so you can constantly monitor and revise your strategies.

- Assign resources to prospects.
- Track ratings, including vendor, staff, peer, giving capacity, and household income.
- Track personal assets such as real estate, securities, and personal property.
- Create strategies and actions, including cultivation steps, contact reports, and to-do lists for your staff, volunteers, and units.

Plan Events

With the Event Manager module, you can plan, implement, and analyze your organization's events, while effectively managing event goals.

- Track basic information such as event type, subevents, location, time, description, expected attendance, responsible staff, and required resources.
- Track budget and expense information.
- Create invitations, generate lists, track responses, and generate reminders.
- Track and manage attendance and registration.
- Create an event communication plan and define target audiences.

Manage Campaigns

Optimizing the effort that your organization puts into its fund-raising campaigns can reduce the burden on your staff and volunteer resources. Plan, manage, and analyze fund-raising programs of different sizes and with various goals with the Campaign Management module.

- Track basic information, such as campaign names, levels, phases, dates, assigned staff, goals, budget, target audiences, and related initiatives.
- Create a full public relations plan, including messages, channels, dates, and more.
- Track commitments, outstanding commitments, progress against goals, and related events.
- Monitor assignments including volunteer, staff, and units.

Manage Volunteers

Track, monitor, manage, and evaluate volunteer activity with the Volunteer Management module.

- Track assignments by type and by staff assigned.
- Track responsible staff and board involvement.
- Track support information, such as action lists, prospect files, and contacts.
- Monitor progress and effectiveness.

Manage Membership

The Membership Management module lets you meet the needs of your members while you support, maintain, and enhance your membership programs.

- Track members, including benefits, types, levels, and dates of memberships.
- Manage membership campaigns, including goals, percent-to-goal, subgoals, budgets, and expenses.
- Track dues history and premium information.
- Establish defaults for dues posting.
- Process dues paid in other currencies.
- Track communications with members.

View Details About Each Constituent

PeopleSoft Contributor Relations lets you display a 360-degree view of a constituent on one "Person Profile" summary page. You can easily access biographic and demographic information as well as donor commitments and participation information.

Track Planned Giving

With the Planning Giving module, you can manage, track, and report on the planned giving information about your constituents.

- Track general information, including gift type, contacts, and assigned staff.
- Record financial information for trusts, pooled income funds, gift annuities, and bequests.

Generate Involvement

Giving your constituents targeted information about their relationship with your institution can make a lasting impact when they visit your Web site. PeopleSoft Contributor Relations gives your contributors anytime, anywhere access to information on their historical and current contribution activities, and lets them respond instantly to your campaigns with a credit card.

PeopleSoft Contributor Relations brings service, information, and transactions together in one view. Your constituents get the information they need, when they need it, and can act on it when they choose.

- **Commitment summary.** Lets users review lifetime giving and commitment totals, view their total annual contributions, confirm the number of years they have been donors, and verify the number of consecutive years they have made donations. Donors can also review annual pledge balances and recognition credits history, and see detailed account information describing their commitments.
- **Membership history.** Displays information about each constituent's membership history, including membership level and status.
- **Giving club progress.** Presents current and year-by-year information on gift club enrollment.
- **Credit card payment.** Lets your constituents use any Web browser to make authorized, authenticated, and secure online credit card gifts and pledge payments.

Extend Contributor Relations with Self Service

PeopleSoft Campus Self Service extends the functionality of PeopleSoft Contributor Relations so you can operate more efficiently. It integrates seamlessly, providing instant self-service functions to your development staff and letting them

- Add, update, and view campaign strategies; link actions to those strategies; and log results
- Create individual staff to-do lists
- Display information about actions linked to certain donors and the status and results of those actions
- Access a wide variety of online reports such as interests, involvement, giving history, personal assets, and donor appreciation summaries

CONTACT US

For more information on Oracle's PeopleSoft Enterprise Contributor Relations, please visit **oracle.com/industries/education** or call **+1.800.ORACLE1** to speak to an Oracle representative.

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