

Case Study

TalismaFundraising
Powered by Campus Management™



“ The solution was so important that our campaign and its dramatic results would have been severely hampered without it. ”

Melanie Delap
Director of Development Services
Jacksonville State University



Challenges

- Records for alumni and giving were scattered and difficult to access
- Limited sharing of data across departments
- Delays in obtaining timely and accurate reports

Solution

Talisma® Fundraising

- Integrated database accessible by multiple departments
- Flexible, on-demand reporting
- Smart mail merging
- Detailed individual records on alumni, donors and supporters
- Proposal tracking
- Event planning tools
- Financial analysis and graphs

Results

- Easy to implement, learn, and use
- Improved communications and correspondence
- Increased sharing of information and resources between departments
- High user satisfaction

Jacksonville State University

Profile

Proud to be known as “The Friendliest Campus in the South,” Jacksonville State University (JSU) is located in Jacksonville, Alabama. Over 9,000 students attend JSU, and the 1,000 staff members serve the school and its community, where a 2005 economic impact statement shows JSU exerts a robust influence of \$325.4 million to the economics of its neighboring two counties.

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Although multiple departments needed to share information, it was the Jacksonville State University Foundation (JSUF) that took the initiative in investigating the possibility of bringing a new software solution on board to manage alumni records and fundraising initiatives. The foundation is the fundraising arm of the university and is organized as an independent, nonprofit 501(c)(3) corporation. It is the preferred channel for private gifts to JSU and organizes annual giving programs, planned gifts, capital campaigns, and other special-purpose campaigns.

Goals

According to university administrators, their large volume of alumni records was scattered and difficult to find and access. Another challenge was the need to share data across departments. The foundation, alumni affairs, development services, athletic development, vice president of institutional advancement, and the university president’s office all require access to these records for different reasons.

The foundation began searching for a suitable advancement solution in 2004. The selection committee had already narrowed the field to three vendors when Melanie Delap, director of development services and executive director of the JSU Foundation, came on board. Delap made special efforts to choose the vendor based on interviews, company longevity, and the kind of support available. “I went and Googled all the candidates and visited user newsgroups. I cold-called some users behind the scenes to find out what they really thought,” said Delap. “Ease of use was a very important criterion for us. We had to be able to look up information immediately.”

The selection committee also required accounting for various cost centers, as well as a moderate degree of customization. Departments such as alumni affairs needed to send out acknowledgement letters within 48 hours. Gift officers needed to be able to pull reports on top donors and view the data through various filters. They also needed the ability to track proposals. Ideally, the system would be flexible enough to allow multiple departments to access the data, update information, and communicate efficiently within and outside of the university.

Solution

When the selection was made, Campus Management stood out because its value proposition and customer support were stronger in JSUF’s eyes. “Support was something I couldn’t compromise on,” said Delap. “Since the university’s IT department was too stretched to support a new application, I needed to find a vendor with excellent customer service.”

Among the first assignments facing Delap and JSU’s administrative team was the task of converting twelve years of giving history to Talisma Fundraising. With 55,000 donor records and a database of 41,000 reachable alumni, the

team needed a way to standardize information while retaining important aspects of individual donor records such as multiple degrees and varsity sports.

Results

Campus Management assembled an experienced implementation team that worked with the committee and administrators to customize the solution to JSU's needs. "They quickly converted 51,000 records in 4 weeks," said Delap. "Campus Management was totally customer-service oriented, they basically did all the work."

Improved Communications

Talisma Fundraising was used to streamline many processes across multiple departments. For example, Tammy Sallee, administrative assistant to Melanie Delap, who oversees the letter generation processes, said "it cuts down the letter generating process considerably because it does the work for you. It has made my job so much easier."

Improved Personalization and Timeliness

JSU began to use Talisma Fundraising's mail merge capabilities to send personalized letters more quickly. Nancy Turner, alumni affairs, administrative assistant to the director, said, "it makes it faster and easier to personalize correspondence from our own office rather than previously sending our needs to a 'queue' for the word processing clerk to prepare."

More Effective Data Mining for Major Gifts

Among the groups accessing the database is the Institutional Development Office. Sissy Spence, major gifts officer, said the solution helps her keep track of many aspects of communications and interactions. "We work with other groups on campus such

as the alumni association, and the software is very helpful when planning an event. We'll know beforehand who will be there, and we can use the solution to do some research on them. We can see a wide range of information in one view such as their rating level and their donation history."

High Level of Executive Satisfaction

Talisma Fundraising also helps departments collaborate, yielding results that university executives value. Joseph Serviss, vice president of institutional advancement, said, "we're in a capital campaign, so representatives of different departments meet once a week. At the round table, we fully utilize the wide range of reports the solution offers." Of the support JSU has received, he noted, "Campus Management staff has been knowledgeable and have worked closely with us. They know how to listen—and that's refreshing."

Exceeding Campaign Management Goals

In a fundraising environment, a "dashboard" type interface is especially useful to users to maintain the enthusiasm and focus needed to reach challenging goals. With Talisma Fundraising, JSU team members can see up-to-the-minute donation totals in a colorful graph from the moment they log on. The solution is a key part of managing JSU's \$20 million capital campaign. During the first part of the campaign, the foundation received pledges totaling over 80% of the goal. The system also supports the Fall Phonathon, a three-month campaign which recently brought in over \$125,000.

The foundation's overall fundraising results have grown from \$3.7 million in 1989 to over \$20 million today. The rate has jumped 452% since the capital campaign gained traction in 2005. The campaign raised \$3,591,180 in 2005, compared to \$794,454 raised in 2003.

Jacksonville State University

About Campus Management Corp.

Campus Management is a leading provider of software, strategies and services which enable institutions of higher education to offer dynamic models of engagement & delivery. Over the past 27 years, Campus Management has supported higher education, both proprietary and traditional institutions, as well as foundations and other organizations through its cutting-edge student information system; constituent relationship management (CRM) software; and finance, human resources and payroll solutions.

Campus Management's solutions are specifically designed to provide institutions the flexibility they need to compete in the ever-changing higher education landscape by offering products that support changes in education delivery, recruitment, financial aid, finance, human resources, payroll, and regulatory compliance. Today, nearly 2,000 campuses in 18 countries utilize Campus Management to unite campuses and workflows, improve student outcomes and achieve goals.



5201 Congress Ave.
Boca Raton, FL 33487

T: 800.548.6708
www.campusmanagement.com