

Case Study

TALISMA®



“ Talisma software has helped us raise the bar each year for donations and we’re much more efficient with our time. ”

Lori Webster
Senior Analyst
Carroll Hospital Center



Challenges

- ▶ Managing three nonprofit organizations without adding more databases and hardware
- ▶ Producing reports on giving histories to increase campaign effectiveness
- ▶ Eliminating duplication of efforts

Solutions

- ▶ Talisma® Fundraising software from Campus Management
- ▶ Honors and memorials module
- ▶ Special events module
- ▶ Major gifts module

Results

- ▶ Giving analysis transparency for over 32,000 contact records
- ▶ One golf event netting an impressive \$270,000
- ▶ Dashboards that are constantly updated to reflect campaign effectiveness
- ▶ Managing events much more efficiently and strategically

Carroll Hospital Center Foundation

Profile

Carroll Hospital Center was founded in 1961 and is based in Westminster, Maryland, north of Baltimore. With three primary entities — Carroll Hospice, the Carroll Hospital Center Foundation, and the Carroll Hospital Center Auxiliary — the Center enjoys a strong and growing presence in the community.

Fundraising is an integral part of the success story at the Carroll Hospital Center. The ability to solicit and manage contributions from thousands of individuals, corporations, and organizations is critical to providing quality health care to the community.

At the center of the fundraising efforts is an efficient and effective fundraising software solution, Talisma Fundraising (formerly Donor2) from Campus Management, a solution that Carroll Hospital Center has used as its exclusive strategic donor management and fundraising solution for more than 10 years.

Goals

Lori Webster, senior analyst in the Carroll Hospital Center development office, serves as the primary on-site user of Talisma Fundraising products, and has been with Carroll Hospital Center for the past six years.

“I love the Talisma Fundraising modules,” Webster says. “They enable us to dig deeper and capture the most extensive information about our donors.”

“Talisma gives us a 360 degree view of our donors, which is exactly what we need.”

Carroll Hospital Center uses several modules to track and manage fundraising, including the honors/memorials, event management, and major gift modules. Webster and her team worked with Campus Management to receive the proper training for each module and integrate the modules into the Carroll Hospital Center system.

“Without the knowledge we have gained through Talisma training, we couldn’t meet our fundraising goals,” she says.

When Webster arrived six years ago, the Talisma Fundraising (Donor2) solution was already in place at Carroll Hospital Center, but it was not always used to maximum benefit. “The potential seems limitless. Even after six years, it seems we’re only scratching the surface of what Talisma Fundraising products can do for greater efficiency in our fundraising efforts,” says Webster.

“We currently track 32,000 records across the three organizations, but we are able to manage it all within Talisma. The software gives us a 360 degree view of our donors, which is exactly what we need.”

Challenges

One of the big challenges for the development staff was that it manages three nonprofit organizations from the same database. Each organization stores its profiles in the same system. “Rather than go through the expense of adding additional databases, hardware, software, or development staff, we wanted to maximize our existing resources,” says Webster. This meant finding fundraising software that could mine the vast number of contact records in our system for likely supporters of our outreach efforts, campaigns, events, and other fundraising initiatives. The software had to enable the development team to easily determine giving histories and giving potential, as well as track the effectiveness of campaigns.

“We weren’t going to purchase three databases to achieve this,” says Webster.

As with all technology, the modules are subject to periodic upgrades. This is where positive customer support and great communications come into play. Webster appreciates the fact that her wish list of enhancements to the software typically shows up in the next release. “The feedback leads to dialogue which, in turn, leads to greater enhancements to the modules — and a more efficient system. An open dialogue is necessary to make sure we create the best system possible for capturing and managing donations and meeting our fundraising goals,” adds Webster.

Results

Carroll Hospital Center hosts three signature events each year. The Silvery Moon Ball benefits the Auxiliary; the Carroll Golf Classic benefits the foundation; and the Taste of Carroll restaurant and wine tasting event benefits the Carroll Hospice. Each fundraising event nets more than \$100,000, according to Webster, with the golf event netting an impressive \$270,000 in 2009. She says that magnitude of success would not be possible without the efficiency and accuracy of Talisma Fundraising software.

“The software has helped us raise the bar each year for donations and we’re much more efficient with our time,” she says. “We are using the major gifts module like never before. Now we are tracking all of our prospects and suspects through the system. We automate our next steps, starting with a process that includes contact reports based on keywords, solicitations, phone calls, and one-on-one visits. All of our contract strategies are tracked for better accuracy and efficiency.”

Webster credits Talisma Fundraising in part for the overall success of Carroll Hospital Center’s fundraising, particularly

because of the software’s ability to drill down into the specifics of donor relationships.

“With Talisma Fundraising software we manage our events much more efficiently and strategically,” says Webster. “We are tracking everything down to the person’s menu preferences, what table they are sitting at, who they want to sit with and who their sponsor is for the event. We’re able to identify spheres of influence for a more comprehensive view of events, and that’s a great benefit to fundraising.”

Better analysis of donor relationships and demographics helps Carroll Hospital Center target solicitations, limit wasted effort, and maximize opportunity at events designed to boost donations.

“Our giving analysis is used for transparency and the dashboard is constantly updated to reflect campaign effectiveness,” Webster says. “It’s a great tool. It lets you enter the actual and budgeted expenses, track how many people responded to giving solicitations, and how many gifts were made.”

Building on success and sustaining momentum are very important to the Carroll Hospital Center. Patients, families, and the community depend on its programs. “We are always comparing this year to last year,” Webster says. “I know that the cost per dollar raised for each event is much lower now than it has been in the past. We are more efficient and more effective with our fundraising efforts. The Talisma Fundraising products give a more comprehensive picture of factors leading to the success of a campaign,” she continues. “All the data is there for us to make the right decision.”

About Campus Management Corp.

More than 1,700 colleges, universities, foundations, and other nonprofit organizations rely on Campus Management Corp® enterprise software products and services. For over 25 years, philanthropic organizations of every size and mission have turned to the company's Talisma brand (formerly Donor2) to build awareness, increase donations and memberships, and enhance visibility into campaigns and constituent profiles. Talisma products deliver measurable results across the spectrum of nonprofit organizations, including health care, higher education, arts and cultural, faith-based, and community services. Campus Management's ecosystem of products includes solutions for finance, HR, payroll, Web portals, Constituent Relationship Management (CRM), hosting, and IT managed services.



777 Yamato Road
Boca Raton, FL 33431

T: 866.397.2537
www.talisma.com