

# Case Study

TALISMA®



“ The software is so intuitive that people can pick it up in a short amount of time and be up and running. ”

Helen Yuen  
Manager of Annual Giving  
Grameen Foundation

## Grameen Foundation

### Challenges

- ▶ Lack of integration between development and finance resulting in inaccurate reporting
- ▶ No user-specific customization capabilities

### Solution

- ▶ Talisma Fundraising (formerly Donor2) from Campus Management
- ▶ Integrated database customizable by individual user
- ▶ Flexible, on-demand reporting
- ▶ Financial analysis and graphs for automated projections

### Results

- ▶ Easy to implement, learn, and use
- ▶ Improved internal and external communications
- ▶ Streamlined processes
- ▶ Accurate and accessible reporting
- ▶ Integration between development and finance departments
- ▶ Continued support from Campus Management

# Grameen Foundation

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## Profile

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**“Empowering people. Changing lives. Innovating for the world’s poor.”**

This powerful motto represents the goal of the Grameen Foundation, the not-for-profit organization whose purpose is to empower the poor around the globe to lift themselves out of poverty.

Rather than supplying financial support alone, the organization provides both financial resources and timely information to a global partner network of microfinance institutions that empower the poverty stricken to start their own businesses, setting them on a path toward financial stability.

To look at its size today, one would never guess that the Grameen Foundation began through the generosity and dedication of a small group of friends who were inspired by the work being done by the Grameen Bank. Two men in particular have helped shape the Grameen Foundation into what it is today: Alex Counts, founder and president of the foundation, and Muhammad Yunus, founder of the Grameen Bank, founding board member of the Grameen Foundation, and the winner of the Nobel Peace Prize in 2006.

Since 1997, when the Grameen Foundation was founded, its programs, resources, and fresh ideas have helped more than 45 million poor people in 27 different countries improve their lives. As the organization grew, however, it became apparent that its fundraising software was insufficient. When the

Grameen Foundation was founded, the original software purchased suited its needs, as the organization was small and had no in-house technician of its own.

Initially, the company that provided the software housed all of the Grameen Foundation’s data on its own servers, simplifying administration. However, as the organization expanded and became more sophisticated in development outreach, the database proved too limiting.

The foundation needed new software to expand its donor base, while still enabling quick and accurate data analysis. Additionally, the software needed to manage complex data, since many of the gifts received by the foundation are soft credits, and therefore more complicated than standard hard credits. Likewise, they were seeking a system that would integrate with Great Plains, their general ledger, to guarantee accuracy in financial reporting.

## Solution

The Grameen Foundation chose Talisma Fundraising (formerly Donor2) software from Campus Management for its user-friendly interfaces and solid reputation. As Helen Yuen, manager of Annual Giving, points out:

**“The software is so intuitive that people can pick it up in a short amount of time and be up and running. That widespread intuitive interface created strong buy-in from the beginning.”**

Matt Mechenbier, development IT officer, adds that the software is affordable. He says, “for the functionality you get, it’s the best [software] out there.” The Grameen Foundation originally engaged Campus Management in June 2006. It went through the conversion process in October 2006, and went live one month later — the entire conversion lasting approximately six weeks. Though the fall is commonly a busier time for donations, 2006 proved to be the busiest donation period the foundation had ever experienced, in response to the announcement that Muhammad Yunus won the Nobel Peace Prize. The resulting publicity led to an unanticipated spike in donations, an increase that occurred at the same time the Grameen Foundation had chosen to change software solutions. What might have been a disaster for the foundation proved to be quite the opposite. As Mechenbier explains, “it’s a testament to how robust the software is and how well thought out the system is that we were able to flip the switch during that very trying time, and to actually be able to carry through with our processes. It was painless.”

## Results

Talisma Fundraising enabled the Grameen Foundation to streamline processes around communications and reporting. The foundation raises in excess of \$13 million each year through an estimated 4,000 gifts. Most of these gifts, however, are received through online donations, each transaction requiring a series of actions. The software was able to streamline the processes around online giving and receipt generation, aiding the staff in their external communication efforts. The customization that the software makes possible also plays a key role for the staff members at the foundation. The software allows you to customize the way a donor’s screen is viewed, enabling you to choose from over 100 summary screens to create the user interface that best suits the needs of that user.

As Yuen explains, “our major gift person can customize their home page so that they are able to track their top prospects. I can customize my home page so that it tracks the general funds, and the unrestricted funds. The customization plays a major role in our day-to-day work.” Not only does the customization allow for personalized viewing, it also enables those users to generate customized reports more quickly. “In our last system,” says Mechenbier, “if someone needed a report on a periodic basis every week, that report had to be pulled every time [and] the filter had to be amended every time. In contrast, this software allows for different [views] for different people with different priorities, allowing them to get the information they need with essentially one click.”

Reporting is more accurate thanks to the integration between development and the finance department. Before, the two systems were not able to speak to one another, leading to double entry and difficulty balancing shared data.

Mechenbier says, “with the Great Plains integration, we are able to cut down on time spent on reconciliation. Between development, which brings in the money, and finance, which commits the money and keeps audited financial data, we are now in balance, which cuts down on hundreds of hours of work.”

“Before, creating snapshots of how much money we had raised would take a lot of time and effort. Now we have much higher data integrity and can produce reports quickly that align with the records in the finance department. This has allowed us to focus on our mission rather than on reconciling data,” says Yuen.

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## A Continued Partnership

Campus Management has developed processes for upgrades, consultation, support and continued education of the staff and executives in order to ensure success in all areas of reporting and data management. “The support is very good, very accessible,” notes Mechenbier. “You speak with a very knowledgeable person on the other end of the line. I’ve never had a problem that could not be fixed either directly on the spot... or in the next release.” Mechenbier is also pleased with how the application has helped the foundation with its processes. “The software actually helped our processes, which is rare. You usually build your processes around the tool. We experienced a spike in terms of load, and the software really helped us through the process.”

## About Campus Management Corp.

More than 1,700 colleges, universities, foundations, and other nonprofit organizations rely on Campus Management Corp<sup>®</sup> 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.



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