

Ball State Streamlines Fundraising with XtenderSolutions

Case Study



The Challenge

Handle increased volume with limited staff and workspace.

The Solution

Scanning and indexing the gifts and pledges saves space and time.

Products Used

APPLICATIONxtender
COLDXtender

“We have increased our capacity to handle gifts and pledges to the University without increasing staff and without requiring additional space.”

— Tom Heck
Foundation Treasurer and
Vice President of Operations
Ball State University Foundation

Ball State University Foundation

The Ball State University Foundation receives, invests, and administers gifts from private sources made for the support of the University. Each year, the Foundation staff processes tens of thousands of donations.

The Challenge and the Solution

Increasing Efficiency to Maximize Existing Resources

When the Ball State University Foundation moved into a new Alumni Center in the late 1990s, it was clear that workspace would be limited. At the same time, the University was undergoing a fundraising campaign to increase the annual volume of gifts and pledges coming into the Foundation. In order to ensure that the Foundation could handle the increased volume—in terms of both staff and space limitations—the University turned to Imaging Office Systems, a full-service provider of imaging and document management systems, for assistance.

Scot Laudicina of Imaging Office Systems recommended LEGATO’s COLDXtender® and ApplicationXtender®, which would enable scanning and online storage of—as well as desktop access to—gift and pledge documents. Now, says Tom Heck, Foundation Treasurer and Vice President of Operations, “We have increased our capacity to handle gifts and pledges to the University without increasing staff and without requiring additional space.”

Eliminating Data Entry

With COLDXtender and ApplicationXtender, the Foundation has imageenabled its host system, streamlining the processing of gift and pledge documents. By incorporating document imaging into its current data entry process, the Foundation has shed the need for a separate step to index images. There is no longer a need to make copies of every incoming check, and the scanning of all incoming documents has eliminated filing requirements.

Now, the Foundation bar codes its pledge reminders, so when a pledge comes in the system automatically builds a gift record and indexes the images appropriately. This, Heck remarks, “eliminates the majority of manual data entry and filing. We are saving space and man hours.” Indeed, Foundation staff can now process hundreds of gifts in a couple of hours—versus an entire day.

An Enterprise-wide Solution

The Foundation’s use of XtenderSolutions is actually part of a larger effort throughout the entire University. Imaging Office Systems also worked with the University’s Business Affairs Office, which now distributes reports through the system rather than relying on an antiquated microfiche system.

Heck explains, “When the Foundation first began looking for a solution, the Business Affairs Office was also looking at COLD applications. We merged our thinking, formed a committee with several departments, and issued an RFP for a comprehensive system that could be implemented incrementally across the entire campus. Imaging Office Systems’ proposal of XtenderSolutions was the clear winner.”

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