

donorperfect online

Integration Yields Automated Giving System for HCR Manor Care

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Email:	rsimpson@yahoo.com *
Phone:	215-628-0400 *
Address:	2522 Main Street *
City:	Philadelphia *
State:	PA *
ZIP:	19115-3309 *
Country:	USA *
Please fill out the following fields so that we may bill your credit card.	
Card Type:	VISA *
Card Number:	4328580923751990 *
Name on Card:	Roger Simpson *

Donor Type:	Individual
Last Name:	Simpson
First Name:	Roger
Address:	2522 Main Street
Address 2:	
City State:	Philadelphia PA
Zip:	19115-3309
Address Type:	Home
Country:	USA
E-Mail:	rsimpson@yahoo.com
Home Phone:	(215)628-0400

Web Site Integration

DonorPerfect Online's XML interface allows HCR Manor Care to use the same look and feel of their web site while connecting information fields directly and securely to DPO.

Every nonprofit wants to maximize the efficiency of processing gifts & pledges -- and effective integration with existing software, web sites and other departments is the key to minimizing work. With over 75,000 donor records, most of whom are employees, efficiency was an urgent necessity for HCR Manor Care. This leading healthcare provider was looking for a fundraising system to manage their two nonprofits, which receive contributions from over 60,000 employees, as well as family, friends and others. Little wonder that they wanted it to work seamlessly with their human resource system, web site, and other systems.

The Mission

The Heartland Hospice Memorial Fund enables memorials & honorariums to be made on behalf of Heartland Hospice patients, and The Hug Fund was created as a way for employees to help other employees with financial assistance when confronted with an unexpected catastrophic event.

The Needs

HCR Manor Care needed all the normal fundraising capabilities to manage gifts, pledges, thank-yous and reporting, but they also wanted to allow employees to manage their own accounts via the web. According to Bill White, Business Systems Specialist for HCR Manor Care, "Having employees manage their own contributions via the web eliminates the need for a lot of data entry resources, which saves lots of time and money."

So they turned to SofterWare's web-based DonorPerfect Online (DPO) fundraising system. DPO allows them to manage, analyze and report on all their donors and fundraising efforts, but also offers the tools to allow them to integrate with a variety of their existing systems.

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– Bill White, HCR Manor Care

Contact your SofterWare regional account manager at **1-800-220-8111** to answer your questions about DonorPerfect. For more information visit: www.donorperfect.com

donorperfect online

Client Profile: HCR Manor Care

Workplace Giving

A key feature of HCR employees managing their accounts online was being able to log in with their employee ID to make both one-time donations and monthly payroll deduction pledges. This required setting up an automated process to transfer employee data from their PeopleSoft Human Resource system to DPO, as well as an automated process to transfer the preauthorized pledge transactions back to payroll. This was accomplished using DPO's import and export utilities, and was fully automated with a few simple custom procedures.

Web Site Integration

To integrate with the Hug Fund website, HCR worked with SofterWare's consultant team to use DPO's XML interface, which provides an intelligent 'back-door' to the Hug Fund web site. Contributors experience the same look and feel of The Hug Fund's web site, but the fields of information are tied directly and securely to DPO, eliminating the need for a separate web database and avoiding possible issues with data redundancy. The integration is completely transparent to their web site's users, and takes place behind the scenes – in real time. SofterWare even created an online payroll calculator so that employees can determine how much they could afford to give over the course of the year.

Bill noted "Our web site also allows employees and non-employees to make one-time donations by credit card, and SofterWare assisted us in using the same XML interface to integrate with our credit card processor".

Anyone who donates receives an on-screen receipt they can print, and via integration with the HCR email system, contributors receive an automated email receipt as well. "We also use DPO's acknowledgment tools to send several different types of thank you letters automatically. For example, if your aunt donates on behalf of your mother who passed away, your aunt receives a thank you letter, and you receive a letter notifying you of your aunt's contribution in your mother's honor. It's all set up ahead of time and done automatically, which is a huge time saver when you consider the numbers we're dealing with."

Offline Donations

"We promote the Hug Fund and Heartland Hospice Memorial Fund giving web sites via email and in printed materials, but some donors prefer to contribute offline. SofterWare setup a special gift entry screen so we could add donors/gifts/pledges on just one page, speeding our data entry time. The fact that DPO is so flexible and can be customized so easily enabled us to streamline each process and reduce costly mistakes," observed Bill.

The Results

"With DPO, we're able to automate virtually the entire process. And, the integration of DPO with our web site, PeopleSoft, Word®, email, and credit card processing has enabled us to create a web-based system that is nearly flawless, with close to zero defects. If we were forced into a one-size-fits-all system, without the flexibility and customization that DPO provides, we would have been sunk." Fortunately, this was not the case. As Bill mentioned, "We started collecting donations and awarding grants in June 2005. In fact, we were able to help employees affected by the hurricanes."

When asked if he was satisfied with DPO and the integrated system fundraising solution, Bill said, "The service, support and results ensure that we'll be with DPO a long, long time."

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– Bill White, HCR Manor Care

DonorPerfect's integration tools are helping other clients to create effective solutions with a wide variety of third-party accounting and other specialized non-profit systems. To learn more about DonorPerfect and how it can help meet your fundraising objectives, call us at 800-220-8111.