

ART CENTER FOR YOUTH CUTS REPORTING TIME, IMPROVES FUNDRAISING EFFORTS WITH CRYSTAL REPORTS

“Business Objects worked with us to create a system that really works for us – making us more effective in our work processes – and especially in our fundraising. With Crystal Reports, the ability to track the expected results of our fundraising campaign has improved dramatically and at the same time has become less time-consuming, allowing us to offer more free programming for young people.”

Scott Elliott, Director of Development, Arts Umbrella



Industry

Not-for-profit art institute for young people

Business Process

Planning, budgeting, needs analysis

Challenge

Producing critical reports became a difficult, time-consuming process that left Arts Umbrella staff and board members with little confidence in the resulting numbers.

Why Business Objects?

Crystal Reports integrated with Arts Umbrella's current database, Raiser's Edge, in a way that made reports available with the click of a mouse, eliminating time-consuming entries into Excel spreadsheets.

Business Objects Products and Services

Crystal Reports

CHALLENGE

Arts Umbrella is Canada's preeminent arts institute for young people, ages 2 to 19. The not-for-profit began operating in a small rented space in 1979, with 45 children attending. Today, Arts Umbrella operates in a 22,000-square-foot facility in Vancouver, British Columbia, and has numerous partnerships with other organizations across the province of BC. Arts Umbrella estimates that, during 2006 and 2007, more than 36,000 children attended classes, workshops, and outreach performances. Arts Umbrella has more than 150 staff and faculty members, making it the second largest employer of artists in the province. In addition, over 300 volunteers assist in a variety of ways, predominantly in fundraising efforts.

While Arts Umbrella has grown steadily to become a world-class art center, technology in general at the organization has been a slow-going process. In the year 2000, Arts Umbrella changed its database system over to Raiser's Edge, a database used primarily by not-for-profits in the fundraising sector. "Unfortunately," says Scott Elliott, director of development at Arts Umbrella, "we didn't have the capacity in-house to run that system properly. And we had no training. So we floundered around, not able to pull any reports out of the database at all."

Arts Umbrella requires the production and distribution of a variety of reports, but two reports are especially critical – on a weekly basis. One is a forecast report, which summarizes the other report needed: a full listing of who the organization's canvassers are, who the canvassers' prospects are, what kinds of funds are expected from these prospects, and so on. Compiling these reports was a difficult, time-consuming process. "I would export pretty much raw numbers from Raiser's Edge into an Excel file," says Elliott. "And then I'd spend literally days massaging those numbers to get them into some kind of report. I never had any confidence in the finished report. Another problem was that I wasn't able to correct errors in a quick manner because we were running two systems. Whatever I had in the Excel system, I had to re-input back into Raiser's Edge. It just wasn't dynamic at all."

APPROACH

Because Arts Umbrella had already been working in partnership with the Business Objects Foundation, which funds core curriculum and technology programs for children and youth, the organization had heard about Crystal Reports® and its effectiveness within other organizations. "We knew we had to come up with a better solution," Elliot says, "so we began talking to Business Objects about how Crystal Reports could be integrated with Raiser's Edge."

And so, a new partnership began between Arts Umbrella and Business Objects, an SAP company. "The Business Objects team was great in walking us through what we needed," says Elliott. "They worked with us, helping us build the kind of reports we needed. And key people from our organization started attending Crystal Reports training, so we now have in-house experts who know what questions to ask the in-house experts at Business Objects. We learned that good training was absolutely essential to the success of this deployment."

RESULTS

Today, with Crystal Reports, says Elliott, his “fundraising life” has improved significantly. For example, he says, “We can now better project our annual campaign. We worked with Business Objects to identify the three or four characteristics that, when tracked, are great indicators of the likelihood that a pledge will or will not actually close. This ‘probability formula’ helps us predict – with a high degree of accuracy – who’s going to eventually give and who isn’t.”

This level of reporting, Elliott says, allows Arts Umbrella to motivate its canvassers by being able to say, “You have this prospect, and they’re currently at a 10% chance of coming through with their pledge. Here’s what you need to do to move them up to 70%.” So what Crystal Reports has done “very clearly,” says Elliott, “is increase our efficiency – not only within our office, but also with our canvassers. We have the tools now to evaluate our situation midpoint, rather than waiting until it’s too late. We can now react quickly as a business and fix things before they become a major problem.”

Another difference is the reaction of the board when it receives reports. “They have a trust level that’s significantly higher than it used to be,” says Elliott. “Before, they would literally go through and read every single name and look for errors. They don’t do that anymore.”

“And just being able to customize our reports,” Elliott says, “is huge – to get our data out and formatted in the way we need it formatted. Reports that used to take hours or days to produce are now available with the click of a mouse.”

“Working with Business Objects has been great,” says Elliott. “We feel that we have a true partnership with them. They worked with us to create a system that really works for us – making us more effective in our work processes – and especially in our fundraising. With Crystal Reports, our fundraising has increased significantly, allowing us to offer more free programming for young people.”

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