Qgiv®

Orange County School of the Arts

Journey to Fundraising Automation Streamlines Manual Processes for BIG Savings
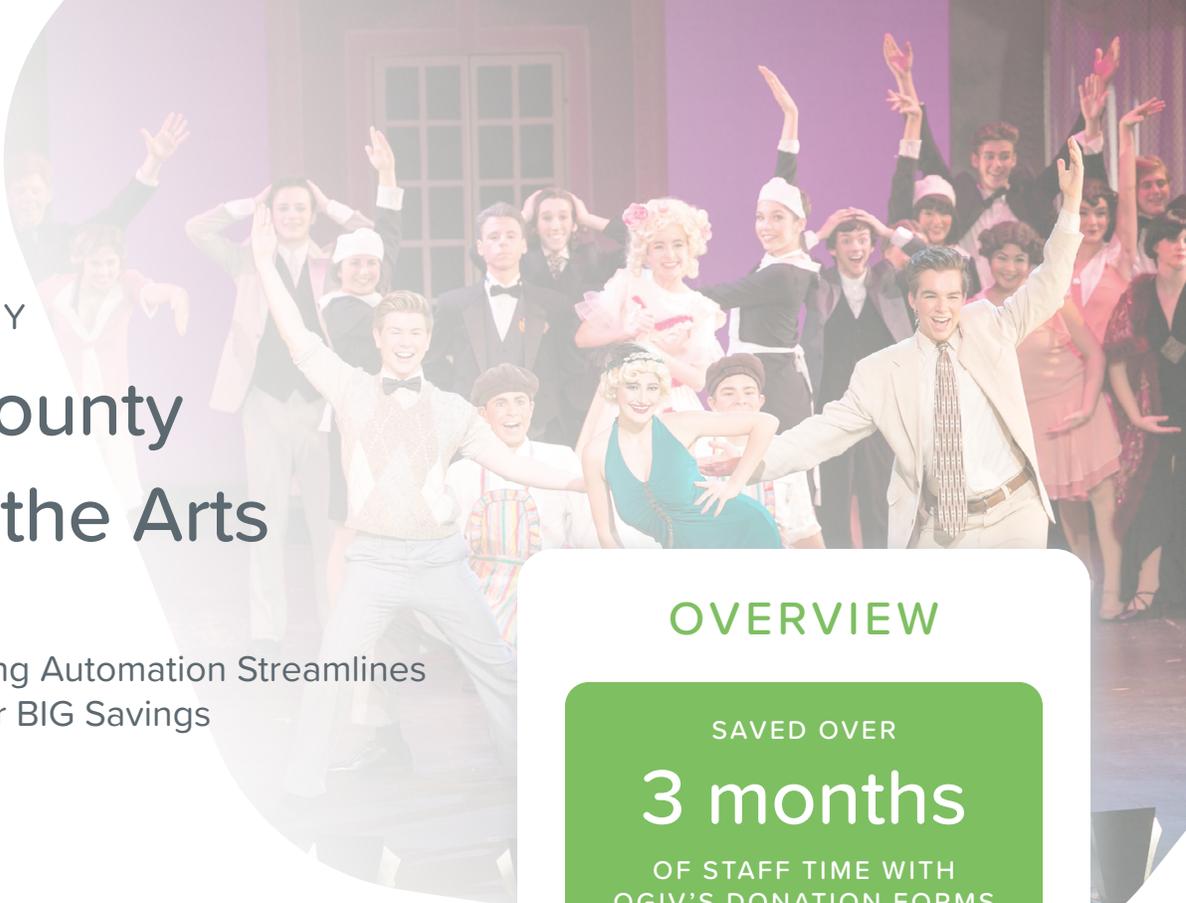
OVERVIEW

SAVED OVER

3 months

OF STAFF TIME WITH QGIV'S DONATION FORMS

ABOUT

Orange County School of the Arts (OCSA) was founded in 1987, and its sister school, California School of the Arts – San Gabriel Valley (CSArts-SGV), was founded in 2017. What started as one small after-school arts program has now grown into two of the premier arts schools in the nation. Located in Southern California, OCSA and CSArts-SGV provide arts and academic education to students in grades 7-12, through a combined total of thirty-three specialized programs focusing on performing arts, visual arts, literary arts, culinary arts, and more.

OrangeCountySchoolof the**Arts**

Challenge:

+ Orange County School of the Arts and California School of the Arts – San Gabriel Valley recognized they needed to streamline their funding process. They needed:

  ✓ To replace Raiser's Edge
  ✓ To automate and streamline pledge, payment, and reporting process
  ✓ Robust online forms
  ✓ Enhanced Integration with DonorPerfect
  ✓ Pledge processing capabilities

Solution:

Donation Forms

Peer-to-Peer Fundraising

Integrations & Reports

CHALLENGE:

Orange County School of the Arts (OCSA) and California School of the Arts - San Gabriel Valley (CSArts-SGV) recognized they needed to streamline their funding process. As tuition-free, donation-dependent public charter schools, each year they must raise funds to support the operational costs of the different arts conservatories. Approximately 80% of their funding comes from the State of California and they work hand-in-hand with their students' families to support and fundraise the remaining 20% of their funding each year.

> *"We have to fundraise to support the thirty-three arts programs, and if you liken that to a football team, we have thirty-three football teams we have to support!" shares John Grainger, OCSA Director of Information Systems.*

Each year the two schools hold an annual parent meeting where they review plans, present funding needs on screen, and have parents complete a lengthy, two-part form, in which they would pledge an amount to the school. Throughout the school year, there were additional asks of parents to fund student opportunities fully or partially, where they were given options to donate additional money, buy advertising, solicit sponsorships, or acquire matching gifts to help offset and reduce the amount owed. Between registration and additional asks, they would

mail thousands of hard copy invoices and receipts, after they downloaded data and placed it in an Excel spreadsheet, which they would then use to do a mail merge. Pledges were mailed in, with the school team keying in data, processing pledges, posting checks, credit cards, EFT, and ACH payments. They processed those thousands of checks, donations, and notes that were mailed back to them to be posted into their platform, Raiser's Edge. They then created electronic EFT batches to manually process and balance. After all that, they created reports for Accounting and Administration and provided paper tax receipts annually.

This manual and very laborious process took almost three months of every school year to process! In addition, there was a very large mailing supply and postage cost.

The team realized they needed to move the parent funding form online and made the decision to replace Raisers Edge.

> *John Grainger adds "We needed to enter the 21st century and decided to look for a vendor that would support online forms and websites. We tried Google Forms, mail merge documents, text files, even Raiser's Edge's version of online forms. None worked well from a pledge perspective."*

SOLUTION:

Part of OCSA and CSArts-SGV's solution was finding DonorPerfect, a comprehensive fundraising growth platform built for nonprofits to manage donations, contacts, receipts, reporting, email, and fundraising initiatives.

Eager to start working with DonorPerfect's CRM, they realized they would need more advanced forms than DonorPerfect offers. "We were going to resign ourselves to do paper forms for the rest of our lives!" That's when DonorPerfect suggested Qgiv's fundraising platform as the missing piece in OCSA's fundraising puzzle.

"OCSA and CSArts-SGV needed robust forms, particularly Qgiv's pledge processing capabilities, as they wanted to give school parents the ability to set up pledges with specific start dates and a fixed number of payments. Qgiv made a lot of custom changes for them, and that solution became the catalyst for enhanced API with DonorPerfect, where Qgiv manages the pledge and updates the pledge record in DonorPerfect and the organization sees all the pledge parameters in DonorPerfect seamlessly," recalls DonorPerfect Account Representative, Andrew Shaw.

Working together, DonorPerfect and Qgiv helped solve the school's unique fundraising needs. Chris Morata, Vice President of Product at Qgiv, notes "Together we produced creative solutions that helped them achieve their goals through existing donation form functionality, a custom DonorPerfect Integration, and a few custom development pieces. By partnering with them throughout the process, we understood what they needed to accomplish through the launch, and we continue to work closely on new enhancements.

With Qgiv's fundraising platform, the schools were able to start tackling the conservatories' funding challenges. Part of the solution was the creation of custom landing pages routing donors to the right conservatory donation form. Automated pledge gift fulfillment now invoices donors for their school payments and event sponsorships. Additionally, there is now one global donation form, with each conservatory embedding their own donation form on their respective webpage. "From a technical

perspective, you create a widget that points to the specific fund for a specific conservatory and embed that form," shares Grainger.

In addition to enjoying Qgiv's donation forms, the schools utilize restrictions, hidden fields, and optional mappings in many of their forms. Restrictions allow for certain information to be populated and pre-filled on their forms. Hidden fields help them with reporting, while optional mappings give them a bulk upload option for their data. In addition, they also enjoy a "cornucopia of receipts" for donations, thank yous, payment processing, refunds, and much more. According to John Grainger, Qgiv's global receipts have been "a lifesaver," as they replaced the need to create thirty-three versions of each receipt and manage changes. Changes are now made on one receipt and automatically updated to all others. The OCSA and CSArts-SGV team is also using Qgiv's peer-to-peer platform and donation forms
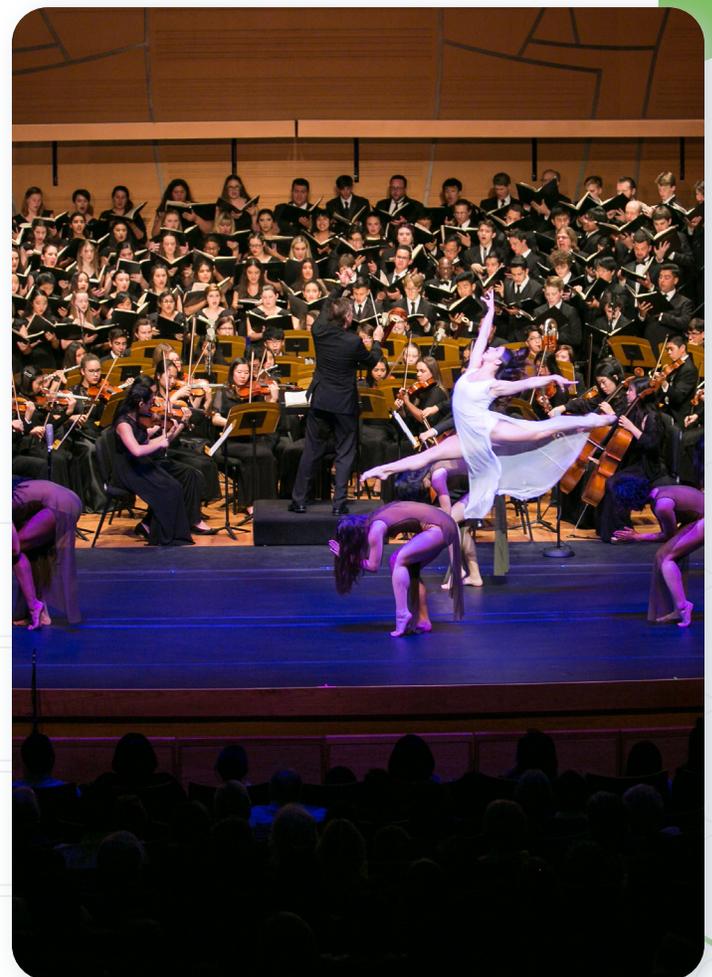
for the multiple events each conservatory hosts each year. They have student performances, where parents are asked to donate to help offset costs associated with items such as costumes, set design, and other items. Moving these requests to a P2P format allowed students' families to crowdfund their performance fees. According to John, "Our parents have appreciated it because it allows them to spread the wealth, and get the word out to family and friends, as well as put it on their Facebook page. We've got a 108% success rate so far!"

They use Qgiv's Fundraising Hub to group each conservatory's fundraising and events together in one place. In addition to helping them easily organize each conservatory's events, it helps them manage all the funds being collected and support student families in their efforts. In addition, they are integrating their email marketing with another Qgiv and DonorPerfect

partner, Constant Contact. They now can segment their communications and send conservatory-specific emails with greater ease.

The schools utilized the direct integration between Qgiv and DonorPerfect to export online and offline donations and directly append them to existing donor records or automatically create new records in DonorPerfect, including those who gave restricted or recurring gifts. "It takes a lot less time to import and process all the forms...by hundreds of hours!"

Compared to their previous process of manually transferring data into Raiser's Edge, they estimate the Qgiv to DonorPerfect integration saves their staff over three months of work each year.

THE RESULTS:

Partnering with Qgiv and DonorPerfect has helped OCSA and CSArts-SGV to eliminate the cumbersome paperwork and streamline the pledge, payment, and reporting process.

"With electronic invoicing through Qgiv, we eliminated sending out monthly invoices. We used to print thousands of pages of invoices and receipts annually, plus the envelopes, postage, and labor—it cost us about $1.50 per envelope." Now they email invoices with both a link and a pdf attachment, giving parents the choice of paying online or printing out and mailing a check. They estimate that about 90% of payments are done online now.

"I appreciate the ability for donors to complete their pledges with Qgiv's online forms and like the automation of that information going into DonorPerfect. Our new system saves us both time and money," shares Becky Parsons, OCSA Family Liaison.

"The whole genesis of moving systems was to find a system that allowed us to collect online pledge information from parents. We wouldn't have moved our systems if we didn't find a solution to this online processing."

THE TAKEAWAY:

Sometimes you need to go outside of your organization, grow your partner network, and rely on their expertise to bring growth through solutions to the equation.

"Qgiv is a leader in fundraising tools for nonprofits. Their peer-to-peer solution extends the functionality of what we can offer our clients. A fully integrated API interface streamlines the flow of data between our two systems, enabling clients' data to flow smoothly. This integration gives them two best-in-class solutions—DonorPerfect's CRM fundraising software and Qgiv's online fundraising platform," Daryl Moser, Business Development Manager at DonorPerfect.

Explore the full suite of digital fundraising tools

Donation Forms	Text Fundraising	Integrations & Reports	Peer-to-Peer Fundraising	Auctions	Event Registration