

No staff works harder than the employees of the Pennsylvania State University Division of Development and Alumni Relations. Keeping up with the 146,000-plus enthusiastic members of Penn State's Alumni Association (the largest such organization in the country), and keeping track of their generous gifts to the University is no small feat. Like colleges and universities around the country, the Division of Development and Alumni Relations at Penn State solicits donations from alumni association members. Unlike other universities, however, Penn State actually had a problem dealing with the overwhelming response it received.

Development and Alumni Relations processes more than 210,000 donations annually. The division originally had an extremely cumbersome manual system of processing gifts. The gift card and accompanying check were sorted and photocopied, and the information on the card was keyed in. As the alumni gift responses increased, it became harder for the staff to keep up.

"We knew that we needed a technology solution that would allow us to do more with less, so we could continue to expand our gift processing capacity as the University grew," explains Peter Weiler, Associate Vice President of Development and Alumni Relations. As it turned out, the answer they were looking for was very close at hand.

Another Penn State department, the Office of Physical Plant, was using OCR for Forms™ software from Microsystems Technology, a Tampa, Florida-based developer, to automate its forms processing. Mark Rudloff, Senior Systems Analyst in the Division of Development and Alumni Relations, says, "We had been looking at several OCR solutions, but when we saw OCR for Forms in action it impressed the hell out of us."

What impressed Rudloff and others was OCR for Forms' ability to capture data from forms that didn't look like impersonal, traditional OCR-able forms with boxes and bubbles. OCR for Forms made it possible for the division to redesign letters and gift cards to look and feel like individual solicitations. The results look personal and professional but still include subtle features to make them OCR-friendly.

**OCR for Forms™
has been a
valuable tool
for us. We have
achieved a 99.98%
accuracy rate over
the last fiscal year.**

Penn State offers alumni donors a variety of choices with their gifts: dollar amounts, targeted disbursement of gifts, and multiple payment methods. All these variations are available on every gift card, and each card is personalized for an individual alumnus. For example, a graduate of the Smeal College of Business Administration who was also on the football team and went to school at the University Park campus would receive a completely different card than a chemistry graduate who was in the marching band and went to Penn State Harrisburg.

The division's completely automated solution uses two Kodak scanners, a 2500 and 3500 model, to scan all the incoming gift cards and turn them into digital images. The images are then indexed by OCR for Forms, capturing all the required data. The images and data are stored in the Optical Image Technology system for long-term storage, retrieval, and workflow.

With OCR for Forms, only four templates are needed to capture up to 21 fields of data from each scanned donor gift card, including name, amount, and credit card information. Manual data entry is only necessary if an alumnus writes a comment or request on the gift card; the operator uses a Key-from-Image screen to enter the notes that appear on the card's scanned image. Almost 75 percent of the gifts scanned by Development

and Alumni Relations are automatically processed by the software without any staff intervention. Before implementing OCR for Forms, the division had forecast an increase in staff over the next five years, but now staffing levels may remain the same indefinitely.

Development and Alumni Relations has even used the OCR for Forms system for special events. The famous Nittany Lion Club, supporters of Penn State's twenty-nine varsity sports, designed their annual donation request with OCR for Forms in mind. In the past, football donations were overwhelming, requiring overtime. With the automated approach, a full 90% of the gifts were scanned and processed with almost no manual intervention; every card was scanned

and processed as it arrived in Gift Processing. The process took half the time, required no overtime, and saved the division a great deal of money. "We were able to come up with a unique design and make the Nittany Lion Club very happy," says Weiler, "but we were even happier with what the new system meant for us."

Weiler says, "We are the only university in this country doing this type of automated gift processing. OCR for Forms has been a valuable tool for us. We have achieved a 99.98% accuracy rate over the last fiscal year. That's an impressive increase in efficiency, which has allowed us to focus our people on improving other areas within the department."

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