

Software Helps Independent Colleges of Indiana Increase Fund-Raising Efficiency

Switching to new software has helped the Independent Colleges of Indiana Foundation, Inc. (ICIF), Indianapolis, Indiana, substantially increase the efficiency of its fund-raising staff. ICIF is a nonprofit corporation that represents 30 accredited independent colleges and universities in the state. When Terry (T.J.) McGovern, Director of Donor Services, joined the organization, he felt that the software ICIF was then using for fund-raising was deficient in tracking contacts with donors. He also felt that the reports it generated were not in the format that management and member institutions wanted to see them. "I was familiar with results*plus!* from my work for a different institution and felt that it would fit our needs here perfectly," McGovern said. The institution now uses the new software to manage its entire relationship with donors by scheduling and tracking mailings, newsletters, calls, and visits. The program has more than 200 standard reports, and custom reports are easy enough to produce that non-technical users do it on a regular basis. "It's difficult to put an exact dollar figure on the improvements, but it's clear that the productivity gains provided by the new software have helped to significantly increase the level of contributions, McGovern said.

s a i d . McGovern took the time to thoroughly understand the software and gradually spread what he had learned throughout the



organization. For example, an advanced mail merge makes it possible to target mailings at specific individuals within corporations and to attach gifts and pledges to either an individual, for separate giving histories, or the household or corporation, for combined giving histories. The software can process tribute, in-kind, effective value, split, matching, and online gifts, as well as soft credits. Standard reports can be tailored to the needs of an organization, or users can start from scratch and create their own reports while accessing all of the information stored in the database.

Founded in 1948, ICIF is the oldest organization of its kind in the United States. The foundation solicits and receives gifts from corporations and foundations. When McGovern was hired at ICIF about two years ago, the organization was using custom software that had been created specially for it. "One of the first things I noticed when I joined was that the custom software was providing only a fraction of the capabilities that I was used to getting at my previous employer," McGovern said. "The custom software was also so difficult to use that most of the fund-raisers used it rarely, so it had very little impact on the process. Instead, our fund-raisers kept their notes on paper, such as who they had called and who was to be called next. Of course, these notes were easy to lose or misunderstand; and when a solicitor left the company, we generally had

CUSTOMER

Independent Colleges of Indiana Foundation, Inc. (ICIF)

PROFILE

Headquarters
Indianapolis, Indiana

Type of Business
Education

Web site
www.icif.edu



Independent Colleges of Indiana Foundation

Experience with another institution

McGovern gained his understanding of the importance of automating fund-raising activities when he previously worked as Alumni Director for a different educational institution. "They were using results*plus!* there when I was hired, but weren't taking advantage of its full capabilities," he

to start from scratch. Another problem with the old software was that it was very hard to get information out of the system. Even the simplest change to a report required the services of a consultant at a cost of over \$100 per hour. But perhaps the biggest problem was that we faced continual problems keeping the custom software running. We would often have a consultant out for two or three days to fix a problem that had cropped up. So when I suggested moving to a different package, management was receptive."

Selecting the right tool

"While I had good feelings about the software that I had used in the past," McGovern said, "it was my fiscal responsibility to consider all the alternatives. I looked at a wide range of different packages and felt that the capabilities of two -- resultsplus! and one other -- stood above the rest. The other software cost three times as much as resultsplus! so the final decision was easy to make." McGovern said the software is now used to track and manage the entire fund-raising process. "It

tracks every contact with each donor, including mailings, newsletters, Christmas cards, solicitation letters, etc.," he said. "We can easily see how many times we have touched the donor and schedule them for a follow-up which will pop up in the solicitor's calendar. Every day when our people come in they automatically have a list of things to do...call Mr. Jones or send a letter to Mrs. Smith. When we create a mailing, we can ask for all records that meet certain criteria, or we can pick records one by one. Another great benefit is that each donor record has a Notes Page where the solicitor can record information such as: 'Had a nice visit with Mr. Jones. His daughter is attending Valparaiso University.' The software works just like a Goldmine®

or an ACT®, but it is specifically designed to meet the needs of nonprofit organizations."

"Now that we are using resultsplus!, there are no more questions over who is doing what or when was the last time we called one of our donors," McGovern said. "Instead, everyone knows exactly what they are supposed to be doing and management is able to direct the efforts of the solicitation staff where they will have the most impact. We can schedule campaigns that include mailings, emails, and phone calls that are automatically managed by the software. The software provides a wide range of built-in reports that handle most of our

needs. A good example is the 'Last Year But Unfortunately Not This Year' (LYBUNT) report for donors who have given in the past year but not yet in the current year. That report provides a valuable tool to guide our fund-raising efforts. Another very valuable standard report is one that shows the new donors we obtained last year.

Producing custom reports

McGovern said ICIF also frequently produces its own custom reports to meet special requirements. "The frustration level with this software package is next to nothing because the developer supports it so well. I call in to their tech support and leave a message and get a call back within 30 minutes. All in all, this software has saved us money by eliminating the need to maintain custom software. But even more important, it has helped us generate more contributions for our member colleges by improving the productivity of our fund-raising staff."



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