resultsplus!™

Fund-Raising Software Helps Private School Increase Donors and Gifts

"I turn on results*plus!* before I turn on the lights," says Pat Brosious, Director of Development at Trinity High School in Camp Hill, Pennsylvania. It has become that vital to managing her day. "The software has helped us organize our fund-raising operations to a much higher level than was possible in the past. I am now spending much less time shuffling paper and more time calling the people with the most potential to give. I also have much more information about them at my fingertips, which helps to make my calls more effective. Since we have implemented the software, we have seen a significant increase in the number of donors and have achieved the highest percentage of alumni giving ever."
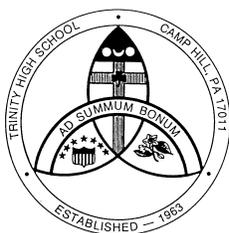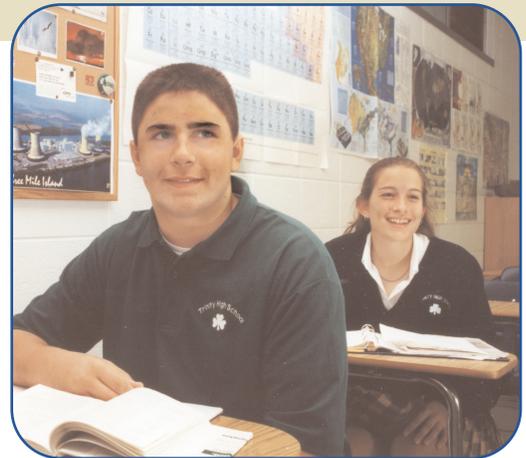
Founded in 1963, Trinity High School serves parishes across the river from the state capitol, Harrisburg, Pennsylvania. Trinity's college prep program focuses on their mission of encouraging lifelong learning and developing learning skills that will benefit the students long after they graduate. Switching to using data management software, instead of their previous paper-based system, has helped this award-winning parochial high school increase its donors and contributions by improving the efficiency of its fund-raising.

Problems with previous system

In the past, using a paper-based system to track fund-raising, it was possible that a call to a potential donor or a thank-you letter was missed. The old system required a considerable amount of manual labor to track donors and contributions. Brosious had to sort through paper files in order to identify donors who had given in past years but not in the current year. It was easy to overlook or misplace a file, which meant the donor might not be called. And, if a donor called with a question, Brosious had to put them on hold or call them back so she could look for their files. It also took considerable time to create mailing lists and it was almost impossible to generate a targeted list of people who met certain criteria.

The Chairman of the Development Board, who was also CFO of an architectural firm, encouraged the school to purchase a software program in order to automate the school's fund-raising operations. He even volunteered to help Brosious select the right package for the institution. "We looked at a number of different software packages and talked to some of their users, particularly private schools," Brosious said. "The results*plus!* users convinced us to purchase the software by telling us how easy it is to use and how it does so much of the tedious work, freeing their time for the creative and interpersonal aspects of development."

The Development Director and Board Chairman found that results*plus!* is designed for managing donors, prospects, tributes, and solicitors by tracking information on gifts, pledges, contacts, grants, and solicitations. Information is entered on easy-to-use, customizable forms that automatically transfer data to donors' permanent records. results*plus!* interfaces seamlessly with industry-standard word-processing (either Microsoft® Word or Corel WordPerfect®) to generate direct mailings and with MAPI-compliant email programs to generate email correspondence. The product's powerful wizards and built-in functionality help both novice and expert users. Its 200+ standard reports can be tailored by using the award-

CUSTOMER

Trinity High School

PROFILE

Headquarters
Camp Hill, PA

Type of Business
Education

Website
www.trinityhs.k12.pa.us

winning Crystal Reports ® software that is included with results**plus!**.

Organizing each day's activities

Brosious now tracks all donor activity in results**plus!**. "It helps me organize and track my entire day's activities," she said. "For example, right now I am calling a list of past donors who gave $250 or more the previous year but haven't yet given this year. It takes just a minute or two to create the list and the software tracks who has been called and who remains to be called." Each time she runs the query the most current information is retrieved, so the list can easily be refreshed with updated information.

"Before I pick up the phone, I look at the database record and previous contacts so I have their complete updated history at my fingertips. Having all the facts makes it possible to have a more personal conversation, too. The software tracks every contact with each donor including phone calls, mailings, newsletters, solicitation letters, etc. I can easily generate lists for phone calls or mailings to thank donors."

Brosious said the software makes it much easier to send out mailings. "In the past, producing a mailing was a long, involved process," she explained. "Now all we have to do is generate a query that has the exact people we want from our list. For example, we recently ran a list of the class of 1997 for the people who are planning the reunion. In another case, we did an appeal letter for a scholarship program where we were asking for a $1,000 contribution or larger. Obviously, not every donor can give a contribution of this size. To avoid wasting postage, we queried the database for a list of donors who had given contributions of $500 or more in the past three years. We have done personalized appeal letters to specific groups, such as alumni from a certain class or donors living in a certain area. The ability to easily generate this type of personalized, segmented appeal has added a new

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dimension to our fund-raising effort."

Useful in planning events

Brosious also uses results**plus!** as part of the school's event planning process. "We recently sponsored a golf tournament to raise money for a program that provides scholarships to our students. I figured we would have a better response if we targeted our invitations to people who have already shown interest in tuition assistance. So I generated a query for everyone who had previously given to our Tuition Assistance Program, living in a four-county area. We customized our letter to read, 'We would love to see you at the tournament, but even if you don't golf, we would appreciate your gift anyway.' The tournament turned out to be a big success, which would have been impossible without the ability to easily generate a list of appropriate invitees. We also use the software to generate an invitation list for our annual donor recognition luncheons."

"Besides improving the efficiency of our fund-raising, results**plus!** helps track the success of our efforts," Brosious continued. "I can easily generate reports that show how much we have received in the latest quarter or year, broken down by different programs or appeals. I can also produce reports that look behind the numbers to show what percentage of our alums have given in the most recent period and how that compares to the past. Despite the tough economic times, we have been very successful over the last few years and results**plus!** is one the major reasons why. It has helped us greatly improve the quality of our database and made it much easier to get the information we need out of it."

"By the way," Brosious added, "I don't want to forget to mention how much I appreciate the excellent people who support the software. They always get back to me very quickly and don't give up until they solve my problem." **rp!**