

Women's Nonprofit Now Spends 40% Less Time Managing Donor Records

A nonprofit women's organization has found a way to save at least 40% of the time it previously spent managing donor records. The Women's Fund in Houston, Texas did this by moving to new software that delivers superior data management.

The functionality of the custom software the organization used in the past was limited to just maintaining a list of contributors. "We went looking for a tool that could help us organize our entire fund-raising effort with both individuals and foundations, including mailings, events, tracking contributions, etc.," said Barbara Devetski, the Executive Director.

Their search led them to select **resultsplus!** software from Metafile Information Systems, Inc., based in Minnesota. The software tracks nearly every aspect of the organization's development efforts, providing a complete history of every contact with each donor including a detailed record of past contributions. It provides many other data management features not available with their former custom software. "The new software has so many more capabilities it touches nearly all of our development activities -- donor, foundation, corporate, events, and outreach," Devetski said. "It saves us a

huge amount of time that we can now devote to proactive contacts with contributors, grant applications, and event planning, which greatly increases the effectiveness of our development efforts."

Founded in 1979 with the purpose of furthering study and research into the medical problems of women, the goals of The Women's Fund

Historical photo from the first membership brochure of The Women's Fund in 1979



are to educate the public, obtain funds for research, and distribute these funds to institutions striving to find new information and solutions concerning women's health. To date, 153 research grants have been funded for a total of over \$1,000,000. Several outreach service programs with far-reaching effects have also been funded. The Women's Fund publication, *Women and Health: A Primer on Women's Health*, has provided current health information to women since 1985. In 1999 The Women's Fund recognized and answered the need for a comprehensive health education guidebook for girls ages 12-16, which they now publish in English and Spanish.

Limitations of previous software

Devetski said their previous database software had been so-called "customized" for them. "The program was designed to track our membership records, but that's all it did," Devetski said. "Having just a single list hampered our efforts. Producing any type of intelligent mailing or call list required printing out our entire mailing list and then manually cross-checking it against the paper records we used to track contributions, attendance at events, and other items."

"We made the decision to invest in new software, had narrowed our choice down to two packages, and were in the process of interviewing users of the software when I spoke to an executive at The Kronkosky Charitable Foundation in San Antonio, Texas. The Foundation had researched fund-raising software and had narrowed down their selection to the same two packages I was looking at.



The Women's Fund
For Health Education and Research

CUSTOMER

The Women's Fund

PROFILE

Headquarters
Houston, TX

Type of Business
Health Education

Web site
www.thewomensfund.org

They had come to the conclusion that **resultsplus!** offered the best combination of functionality and ease of use. The Kronkosky Foundation had made an arrangement with Metafile to purchase the software for over 150 nonprofit organizations in the San Antonio area. Hearing about the success of these companies with the software convinced us to make the same decision."

After Metafile converted their data, Devetski and her staff began using **resultsplus!** to track and manage their entire fund-raising process. Step One was to clean up their membership list and enter the contributions of each person into their database.

"The much larger amount of information tracked by the new software greatly increases the value of our database by making it possible to create targeted lists that we use for every aspect of the process," Devetski said. "The software also lets us customize the address line so we can send a letter to our donors exactly as they prefer to be addressed. We can track multiple people at corporations, e.g. the CEO, someone in Public Affairs, and someone in the Corporate Giving Department."

Tracking every contribution and contact

"Even more powerful is the ability of the software to track every contribution and every contact we have with our donors. I can see their complete giving history and get a handle on what they like and don't like," Devetski continued. "I can look at a person and see that she has attended a lot of our events, but has never given us any money. I might see that another person contributes to our education programs but nothing else, so I will eliminate her from mailings that she obviously has no interest in. Better yet, I can query the database for all of the people who meet certain criteria -- such as having given a certain type of contribution, or number of contributions, or over a certain dollar amount. The software will instantly pull up a list of everyone who meets those criteria. I can then generate a mail merge letter to them, and possibly call the people I have a personal relationship with and ask them to participate."

"**resultsplus!** has greatly improved the way in which we work with foundations and corporations," Devetski said. "We now have an electronic record of every grant application and the grant results in our database. So I can look up a foundation and, at a glance, see what their activity is. If we have a new program we're trying to fund, I can quickly scroll through our database to look for foundations that have funded similar efforts in the past." Devetski noted that **resultsplus!** "puts information at our fingertips that we used to have to spend unproductive time searching through files to find."

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*- Barbara Devetski,
Executive Director*

"Event planning is another area where we have seen major improvements," Devetski said. "We used to have to choose between inviting the entire database or picking invitees one at a time by looking at their file, which takes forever. Now we can quickly generate a carefully-selected and qualified list for each event, based upon our selected criteria. The query can be as sophisticated as we want, for example: everyone who has ever attended this event in the past, *plus* everyone who has ever purchased a full table at any event, *plus* anyone who has ever contributed to a similar program."

"Finally, I'd like to add that the support from Metafile for their software has been fantastic and is a major reason for our success. They call me back very quickly whenever I have a problem and they are very good at explaining the right way to do things despite the fact that I am far from being a computer expert."

