Background

Opportunities Industrialization Center West (OICW), a non-profit community-based job-training center, opened its doors in East Menlo Park, California nearly 40 years ago. OICW has since helped more than 72,000 people "who are most in need to succeed" by providing a large variety of accredited job training classes, after-school classes, counseling and placement services, teen programs, evening courses, and child development centers. OICW places hundreds of people each year in jobs with good wages.

Problem

OICW employs teachers from a variety of fields, and relies in large part on volunteers and donors to manage and support their day-to-day operations. As with any nonprofit, it is vital that OICW preserves low operating costs and maintains effective communication with their current and future donors. To help raise funds, OICW hosts several large fundraising events each year to further promote the organization and communicate with its donors.

"Overall, OICW has a database of more than 10,000 donor records, 3,000 of which we contact on a regular basis," stated Amanda Byrd, director of development at OICW. "Sustaining personalized donor communications can be a difficult and time-consuming task, especially when you consider the myriad events and programs we have available. But, effective donor management is absolutely essential to supporting the daily functions and future of OICW."

OICW historically relied on several different programs to manage the influx of donor information. For example, the organization has relied on Telosa Software's MacTRAC products since 1996, to manage its most critical donor information. In addition, OICW managed its annual fundraising events in different databases across the organization. As a result of multiple databases, information gathered during these events, such as donor contact information, pledges, sponsors, and table assignments, left OICW with the task of managing duplicate data entry, or facing inconsistent donor information across the organization.

Solution

In the summer of 2002, OICW upgraded to Exceed! *Premier*, Telosa Software's flagship fundraising and donor management software solution, to centralize its donor information by incorporating and managing its fundraising events — and resulting event-driven donor information — in one central repository. OICW is now confident that the information gathered from its annual fundraising events is consistent across the board, enabling OICW staff to further streamline communications and virtually eliminate the tedious job of duplicate data entry.

Results

"Our transition from MacTRAC to Exceed! *Premier* has been seamless," commented Byrd. "The ease of data conversion paired with Telosa's superior customer service and training, allowed the organization to upgrade its information management processes, and operate with virtually no down-time."

In addition, OICW reaps the benefits of more accurate reporting functionality, and can now analyze and optimize its fundraising campaigns. "We can now track which board members have contacted donors to thank them for gifts, and run follow-up reports so that the same board member contacts the same donor next year."

"In the nonprofit world, nothing is more important than relationships," added Byrd. "For the past seven years, Telosa Software has enabled us to manage our donors in a way we never thought possible. Working with Exceed! *Premier*, we have taken our donor information management one step further by incorporating the management of our event-related activities. This saves the organization an average of 20 hours per month on duplicate data entry during the ramp-up to events, and countless dollars on complete donor information."