

Background

Glide Memorial Church is one of the largest human services providers in San Francisco and has been operating a broad range of social service programs including substance abuse recovery, job counseling, family services, global ministry, computer skills training and health care services to local residents since 1963. Glide's 10,000 members include gays and lesbians; people of African, Asian, Middle Eastern, Hispanic, Native American and European descent; Jews, Buddhists, Muslims, agnostics and atheists, as well as Christians. Glide depends largely on donations and volunteers to support the operation of its 41 different social service programs.

Glide has grown dramatically in the past five years. A staff of 200 runs the church's outreach programs, up from 60 staffers four years ago. In recent years, its budget has increased from \$6 million to \$11 million as the number of outreach programs has doubled.

Problem

This growth prompted a need to raise additional funds by attracting new donors and maximizing Glide's relationships with their existing benefactors. And with increased fundraising activity came expanded administrative responsibilities related to fundraising, including donor mailings, reporting, and tracking. This, in turn, required Glide to spend significant staff time on managing administrative duties, ultimately pulling from resources that would otherwise be in the field serving the church's mission more directly.

In an effort to streamline its operations, Glide historically relied on generic database software systems which were not designed with its unique needs in mind. Due to limited functionality, the system could not adequately track information on Glide's ever-growing donor base and manage the influx

of data associated with fundraising campaigns. The organization spread donor and volunteer information across six different databases. With no effective means in place to track their most important constituents, Glide's professional staff didn't have the tools to maximize the value of the donor history it collected. Additionally, as Glide strove to continuously become more efficient and effective with its fundraising efforts, it was unable to analyze past campaigns given the relatively unsophisticated reporting capabilities in the software.

Glide recognized that these operational inefficiencies ultimately prevented the organization's fundraising effort from reaching its full potential.

Solution

"With the dramatic growth we've experienced comes a need for improving our infrastructure. That will help ease our administrative burden, while at the same time bring us closer to our important constituents," said John Warner, associate development director with Glide Memorial.

Glide reviewed several software vendors before ultimately selecting Exceed! Premier – Telosa's flagship fundraising and donor management software solution – to track, manage, and cultivate its donor relationships. Glide chose Exceed! Premier for its affordability, enhanced features and functionality, and its dedicated technical support team.

In 1999, Glide implemented the new software and integrated the plethora of donor databases into Exceed! Premier – one centralized donor repository – giving Glide the ability to review and analyze its entire donor database in a single view and in turn make fundraising decisions accordingly. "With one centralized donor repository, we can better manage our relationships. As an example, many of our donors contribute to more than one of our

social service programs and in some cases they volunteer for others. We can easily track this type of information to ensure that our communication is consistent with the history of that donor," added Warner.

Given the easy-to-use tracking and reporting features in Exceed! Premier, Glide can analyze its fundraising efforts and make adjustments and changes as necessary to its campaigns, in turn optimizing and streamlining communications with Glide donors.

Unlike other donor management software, Exceed! Premier provides Glide with the flexibility to maintain multiple people in a household or organization – with independent contact and gift tracking information – on a single record. "Given our extremely diverse donor base, we needed a means for connecting with multiple donors within one household," added Warner. "Now we can make fundraising decisions and communicate with unmarried couples living together, married couples with different last names and gay couples, based on the history and preferences of individuals, not households."

Results

Today Glide is recognizing the long-term benefits associated with information management. With the ability to manage and cultivate donor relationships from a single source, Glide is operating more efficiently and making informed fundraising decisions based on historical donor information and individual preferences.

"By using Exceed! Premier, we estimate that Glide staffers save about five to ten hours a week on administrative tasks associated with tracking and managing donors," added Warner. "Thanks in part to technology, Glide now has the infrastructure in place to focus more staff time and attention to the missions of the church."