



## A Daily Dose of Technology Helps Smaller Nonprofits Accomplish Their Goals

### Background

For more than two decades, the Doran Center has been helping the blind and visually impaired of Santa Cruz County, California gain independence and prevent the social isolation that can often accompany blindness. The Doran Center has many distinct programs to target the individual needs of its clients by examining the extent of vision loss in conjunction with an assessment of their personal goals and living requirements. For example, the Doran Center provides independent living skills training through personalized instruction to ensure that its clients are learning to live independently. Additionally, the Doran Center provides orientation and mobility training including correct usage of a white cane, safe and independent travel, bus travel, orientation to the environment, as well as Braille instruction.

### Problem

The Doran Center's mission is to preserve independence for the blind and visually impaired. To successfully achieve its goals from year-to-year, the organization relies largely on the donor community to support its programs and services. But like most small nonprofit organizations, the Doran Center has limited resources to cover administrative tasks that go hand-in-hand with donor information management - one of the most important operations necessary for the continued success of nonprofit organizations. For years, the Doran Center relied on Microsoft Excel spreadsheets to store and manage their valuable historical donor information. However, this process soon became unruly and resulted in the loss of institutional memory over time.

"We were storing 10 years of donor information including greetings, addresses, and gifts in over 26 different Excel spread-

sheets with anywhere from 25 to more than 1,000 names per database," recalls Alla Zeltser-Fitch, development director at the Doran Center. "With disparate information throughout the organization, it was difficult to understand the giving history of our donors, and as a result we weren't effectively cultivating the donor relationships we desired."

As a result of contrasting and often times duplicate donor information, the organization ran into problems with mailings and was unable to effectively target many of its donors during fundraising campaigns. This was especially prevalent when determining the giving history of its donors including programs they supported, and even the simplest task of assigning the appropriate greeting to donors within a household, proved to be problematic.

The Doran Center recognized the value that software can play in streamlining operations and donor information management, but was continuously discouraged with the options available in the marketplace. "Evaluating and searching for technology solutions was a daunting task. Most software programs on the market today are extremely pricy, or they just don't offer the donor management tools and technical support we, as a small organization, were looking for," added Alla.

### Solution

In the summer of 2003, the Doran Center was offered the opportunity to take part in a beta test program for Telosa Software's new product - Exceed! Basic. Designed specifically for smaller nonprofit organizations, Exceed! Basic is a compact version of Telosa's successful flagship product - Exceed! Premier. Exceed! Basic provides organizations with the essential tools needed to manage the day-to-day opera-

tions giving smaller nonprofits the power of fundraising and donor management software common at larger nonprofit organizations.

Today, the Doran Center uses Exceed! Basic to manage its entire donor database in one centralized repository. This means that the organization - for the first time - can track the giving history of donors, likes and dislikes, and gifts to more effectively communicate with this important audience. Furthermore, Exceed! Basic enables the Doran Center to quickly analyze which donors are responding to different campaigns and events, allowing the organization to optimize future endeavors. In addition, the organization is saving time on mailings due to Telosa's mailing and data export functionality.

"The Doran Center is a perfect example of a small organization that has suffered due to the high costs and inaccessibility of good fundraising and donor management software," said Alla. "For only \$499, Telosa Software's Exceed! Basic has helped us to streamline our donor management processes, and focus on cultivating donor relationships like we never thought possible."