



Apex Management & Special Events, Inc. Case Study

Service: *Database Creation & Management*

Situation:

A nonprofit, whose mission focuses on patient services, public education and promoting awareness of a rare autoimmune disease to healthcare professionals, has a database of 5,000 donors. Approximately half of the donors have been segmented as “active” and are being communicated to. The other half is “inactive” and has received no communication for at least two years. The Board is unsure of how the donors were acquired or why the database was split.

Existing database limitations **and** imprecise data input result in:

- Active donor communications being addressed “Dear Friend”
- Donors receive the same appeal regardless of donation history or situation
- Donations are not attributable to specific appeals and/or campaigns
- Thank you letters do not list the donation amount
- Identifying trends, detailed tracking of donor sources and specific grouping of donors is impossible

Solution:

Apex acquires Giftworks, a software / database system designed specifically for nonprofits. The donor identifying information – name, address, phone, etc – is imported from the old database to the new. Specific donations, dates, account status, fund and referral source are manually reviewed and entered into the new database. Although this was a time-consuming undertaking, clean data is crucial to the success of the entire fund raising and donor relationship cycle.

The new software, combined with clean data results:

- Six specific donor groups are identified and appeal strategies developed
- Customized appeal letters provide an 8% increase in donation dollars over a 4-month period
- Donor base is increased by 30%; slightly lower donation per donor but increased lifetime value
- Thank you letters are specific, listing donation amount
- A process for identifying and tracking trends, testing appeals and understanding donors versus patients is in place.

Benefits

Apex Management approached the client situation in an integrated fashion, gaining an understanding of its history, goals, challenges, successes and knowledge gaps. A customized database (one piece in the overall strategy for the client) resulted in:

- **Administrative time savings** on routine tasks so staff is more productive, spending more time on patient programs, public education and medical community awareness.
- **Higher total donations, broader and deeper permeation of donor base** and the ability to target lapsed donors, increasing lifetime value of each donor
- **More relevant, current patient service** provided as a result of time savings and efficient, segmented communication methods with donor base.