

Dexter Southfield School Personalizes Messaging in a Successful \$12.6 Million Dollar Campaign Using ImportOmatic



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—Carlene Johnson,
Director of Advancement Services,
Dexter Southfield School

THE CHALLENGE

Dexter Southfield School was using a limiting donor management system that didn’t allow them to make use of the extensive data they had on potential donors.

THE SOLUTION

The school implemented Raiser’s Edge and used ImportOmatic to import massive amounts of spreadsheet data into Raiser’s Edge.

THE RESULTS

Being able to access and use the data enables the school to personalize messaging in targeted appeals, which is essential to a successful campaign. The school recently wrapped up a highly profitable \$12.6 million dollar campaign as a result.



Dexter Southfield School, a private Pre-K-12 school in Brookline, Massachusetts, right outside of Boston, began in 1926 as a boy’s school, called Dexter School. A claim to fame: JFK attended the school. In 1992, a school for girls was built, called Southfield School. The two merged in 2013 and today the institution serves all students. The school relies on donors to keep the historic school functioning at the high level of quality it’s become known for.

THE CHALLENGE

When Carlene Johnson, Director of Advancement Services and a Raiser’s Edge Power User since 1996, first started at Dexter Southfield, the school was using Senior Systems as their donor management system. Carlene knew that the school needed to make better use of their data if they were going to increase revenue, but Senior Systems couldn’t provide what they needed. Carlene sold the school on using Raiser’s Edge and Omatic tools to go with it. She says, “In any position I have, it will be mandatory to use Raiser’s Edge and ImportOmatic. I feel like I can’t do my job without Omatic Software. I’m a big Omatic fanatic!”



The school's initial focus was alumni. They had all kinds of valuable data living outside of Raiser's Edge, including in yearbooks, archives, and paper lists, which needed to be entered into Raiser's Edge in order to access it quickly and easily.

THE SOLUTION

The school utilized an intern and a team of volunteers to digitize the disparate data by entering the information into spreadsheets that they could then import via ImportOmatic into Raiser's Edge. ImportOmatic ensured that the data was clean and going in accurately and consistently. Carlene used business rules to convert data to the proper casing and dictionaries to translate abbreviations, which previously had to be dealt with by hand.

The export function in ImportOmatic also allowed her to create reports with just a few keystrokes, without having to find and replace abbreviations and jargon. Managing the data was not only simple, it was much faster thanks to ImportOmatic, saving Carlene valuable time that she could then devote to other important work.

She says, "There are aspects of my job that, quite frankly, can't be done by using the standard import tools provided by Blackbaud, but ImportOmatic allows me to get creative. It saves me time and money while increasing accuracy of my data. We have a number of disparate systems on campus yet I am able to take data from any system or spreadsheet and work out a template to bring the data into Raiser's Edge."

THE RESULTS

With the data easily findable and accessible, the school can now do segmented outreach. They recently wrapped up a \$12.6 million dollar campaign for an athletics initiative. They were able to identify which alumni were hockey players at the school and offer them the opportunity to buy a seat in the new rink.

It was an ideal offering for younger alumni who couldn't afford a major gift but wanted to support the school. Dexter Southfield was also able to create an alumni portal with affinity groups, giving alumni the ability to connect while allowing the school to collect additional information. All of this data enables the school to personalize messaging in targeted appeals, which is essential to a successful campaign.

Carlene has this advice for other institutions considering Raiser's Edge and Omatic: "I'd evaluate not only the type and number of imports done regularly but also the amount of hand-entry which could be converted to an import if one had the correct tool. Not only does ImportOmatic work for constituent data, but it also works for gifts, so there is opportunity to streamline gifts processing particularly if one uses a caging service."