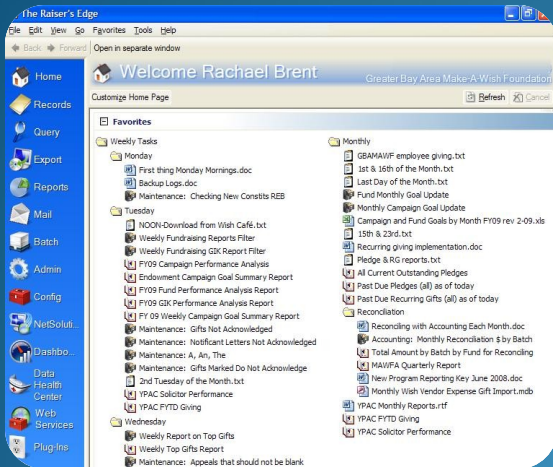


For Fundraisers Too! Development Mailings and Your Fundraising Database (Not Just for Database Administrators)



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AFP – Golden Gate Chapter Fundraising Fundamentals
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Session Description

Does your organization struggle to get the data for mailings accurately, efficiently and in a timely manner? We'll talk about general principles that **fundraisers, communication staff** and the database and support staff should know and remember to help make those mailings get out correctly and on time. **An accurate and timely mailing is just as much about what is asked for as what happens in the database.** Join us as we talk about: coding records to ensure proper inclusion and exclusion; the kinds of criteria to consider about records, names, addresses and other fields when requesting and generating mailings; reviewing draft files for accuracy; safely handling draft and final files to protect your constituent's sensitive data; NCOA gotchas to watch out for; and ...

Four Steps

1. What is the final output format you need?
2. Which constituents should be in the results?
3. What fields are needed for these constituents?
4. What content should be in those fields?

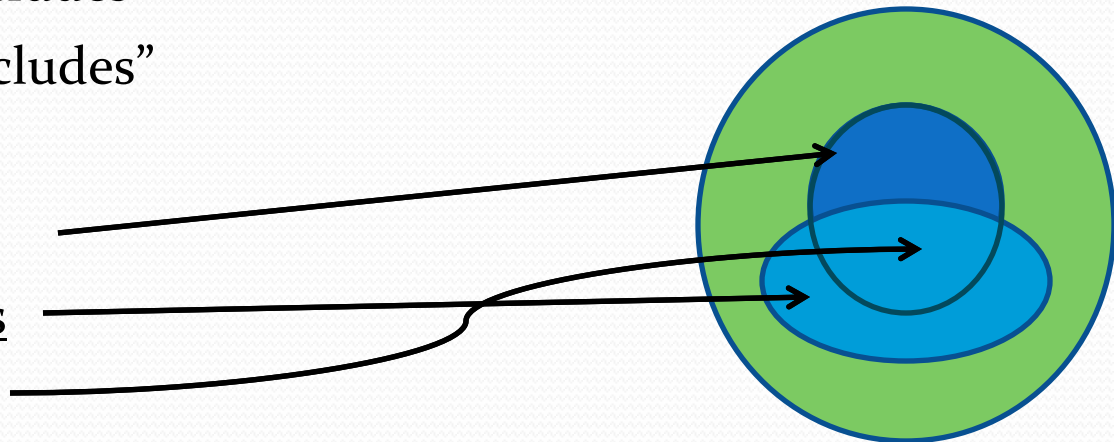
Step 1: Output Format

- Standard printed result such as labels and envelopes
 - Customized mail merge
 - Data file for a mail house
 - Data for an email program
-
- Provide specific details and contact information

Step 2: Recipients

- Divide this answer into two parts
 - The “includes”
 - The “excludes”

Includes
- Excludes
Results



The Database

Step 2: Inclusion Criteria

- There are usually many “OR” statements
- Watch uses of “AND” and parenthesis
- There should probably be no “Not” operators used
- One per household or one per person?
- Organizations?
 - What if no contact name?
 - What if multiple contacts?
- What if individual is contact?

Step 2: Inclusion Criteria

- Giving history
- Membership history
- Event history
- Volunteer history
- Donor types and roles, e.g., board
- Misc. “mail to send” recipients?

Step 2: Inclusion Example

Filters

- Constituent Specific Attributes Approach Inclusions Description one of E - Wine & Wishes--Send Invitations, E - Send
- OR Constituent Specific Attributes Event Description one of Croquet Invitational 2004, Wine and Wishes 2004 Rest
- OR Constituency Code one of Advisory Council, Board Member, Board Prospect, VIP, MAWFA Leadership
- OR Appeal Description one of E54 Monterey Bay Event, E54 Monterey Bay Gala 2005, E55 Wine & Wishes 2002-20
- OR (Gift Amount greater than or equal to \$400.00
- AND Gift Date between 1/1/2003 AND 12/31/2007
- AND Gift Type one of Cash, Pay-Cash, MG Pay-Cash, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, F
- OR Total Amount of Gifts_1 greater than or equal to \$100.00
 - Gift Date greater than or equal to 1/1/2008
 - AND Gift Type one of Cash, Pay-Cash, MG Pay-Cash, Stock/Property, Stock/Property (Sold), Pay-Stock/Propel
- OR Event Name one of Monterey Bay Gala 2005
- OR (Event Name one of Croquet Invitational 2004, Wine & Wishes 2004
- **AND Participation one of Corporate Sponsor, Registrant, Attendee]**

Step 2: Exclusion Criteria

- Many “OR” statements again
- Be careful with “not,” “AND”, and parenthesis
- Inactive, Deceased and Has no valid address (can’t get)
- Solicit codes (don’t want)
- Donor Types (too important, not appropriate)
- Giving History (already gave)
- Major donors (too important for this mailing)
- “Last” gift – be careful!

Step 2: Exclusion Example

Filters

- (Constituency Code one of Advisory Council, Board Member, MAW Employee, VIP, Young Professional Advisory Council
..... AND Constituency Date To blank)
- OR (Constituency Code one of Advisory Council, Board Member, MAW Employee, VIP, Young Professional Advisory Council
..... AND Constituency Date To greater than 10/3/2008)
- OR (Gift Type equals Recurring Gift
..... AND Gift Status one of Active, Held)
- OR Constituent Specific Attributes Approach Restrictions Description one of Do Not Contact - All types, Do Not Contact
- OR (Preferred Country not blank
..... AND Preferred Country does not equal United States)

Step 3: Fields

- ID
- Addressee
- Position and organization name
- Address lines 1-5
- City, State, ZIP
- Country
- Salutation
- Other fields
- Sort field

Step 4: Field Content

- What version of the name?
- Which address?
- Which contact(s) at organizations?
- Gift criteria

Other Points

- Be sure staff uses right tools
- Data entry procedures and coding are also key
- Do NCOA, but be careful with it
 - Reliable?
 - Format?
 - Update process

Other Points continued

- Review drafts of mailings in advance
 - Look for duplicates
 - Clean up in database
 - Store securely
- Store files securely
- Transmit files securely
- Mark those who received the mailing
- Document!

Q&A/Contact Information

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Recently released book: *Fundraising with The Raiser's Edge: A Non-Technical Guide* (Wiley, March 2010). More information on content and ordering available at www.billconnors.com.

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