



# For Fundraisers Too!: The NON-Technical Knowledge a Fundraiser Should Have to Interact with and Manage the Fundraising Database Staff

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HONORING

*Our  
Past*

INSPIRING

*Our  
Future*

**BALTIMORE MARYLAND**

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**47TH AFP INTERNATIONAL CONFERENCE ON FUNDRAISING**



## Objectives: As Fundraisers, how do we...

- Interact with our database staff so they have the information they need to give us what we need accurately and on time
- Manage the database staff to ensure they are properly fulfilling their roles on behalf of the development department
- Be more comfortable with the fundraising database and technology without having to become techies



## Agenda

- Organizing fundraising in the database for reporting
- Donor and prospect data entry direction and involvement
- Understanding gifts and gift processing
- Direct marketing and other mailings
- Special processes: major gifts and events
- Reporting and lists
- Hiring, managing and retaining the database administrator



## Introduction

- My background
- This is database neutral
- This is a non-technical session primarily intended for fundraisers
- We have 2 hours
- I understand some of you may need to leave early for travel
- The “database administrator”
- Chocolates!



## Organizing Fundraising

- Codes aren't just for gift entry
- The common questions fundraisers ask:
  - How much needs to be raised for each purpose?
  - How is that money going to be raised?
  - From whom is it going to be raised?
  - Who is going to raise it?
- Keep in mind the need to integrate with accounting



## Avoid the “Fruit Bowl” in Coding and Reports

- Board
- Major Gifts
- Direct Mail
- Tribute
- Bequests
- Special Events
- Corporate
- Foundation



## Constituent Data Entry Direction

- Who should be in the database
- Who should be the constituent
- Spouse and partner details
- Coding “donor type” for key reporting
- Protocols for name entry for mailings
- Managing and supporting address entry
- Overall: what’s valuable to record and will be used



## What Fundraisers Should Do

- Look up biographical, contact and gift information
- Enter constituent interactions
- Enter notes
- Run pre-established output
- Understand the concepts, terminology, capabilities and needs of the database and database staff and work with them





## Asking for Gift Information

- *Completely* define what you are looking for:
  - Specific date range
  - Gift types and associated details
  - Amount ranges; single gift or cumulative?
  - Campaign, fund and appeal filters
  - Handling of soft credits and matching gifts
  - Handling of anonymous donations



## Understanding Gift Types

- Cash: checks, credit cards, debits, currency
- Pledge
- Stock/Property
- Gift-in-Kind
- Recurring Gift
- Planned Gift
- Other



## Other Gift Details

- Fundraisers should only have View rights to gifts
- Gift dating
- Receipting and acknowledging
- Accessing and understanding giving totals



## Gift Processing

- Opening mail and grouping gifts
- Entering batches of gifts into the database
- Posting to accounting
- Receipting and acknowledging
- Reporting to development staff
- Changes to gifts
- Reconciling with accounting



## Direct Marketing – 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?

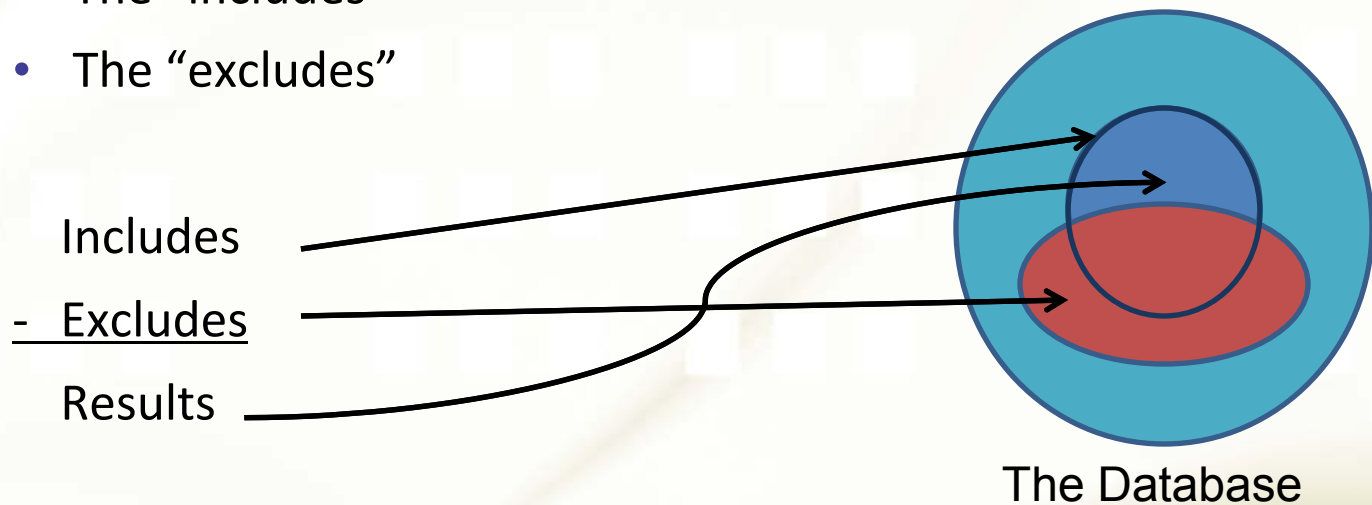


## Direct Marketing Step 1: Output Format

- 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

## Direct Marketing Step 2: Recipients

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





## Direct Marketing 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?





## Direct Marketing Step 2: Inclusion Criteria

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



## Direct Marketing 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 Resta
- ..... 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/Prope
- ..... 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)



## Direct Marketing 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!



## Direct Marketing Step 2: Exclusion Example

### Filters

..... (Constituency Code one of Advisory Council, Board Member, MAW Employee, VIP, Young Professional Advisory Cou  
..... AND Constituency Date To blank )  
..... OR (Constituency Code one of Advisory Council, Board Member, MAW Employee, VIP, Young Professional Advisory  
..... 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 Cont  
..... OR (Preferred Country not blank  
..... AND Preferred Country does not equal United States)



## Direct Marketing Step 3: Fields

- ID
- Addressee
- Position and organization name
- Address lines 1-5
- City, State/Province, ZIP/Postal Code
- Country
- Salutation
- Other fields



## Direct Marketing Step 4: Field Content

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



## Direct Marketing: Final Points

- Be sure staff uses right tools
- Refer back to discussion earlier regarding coding
- Do NCOA, but be careful with it
- Review drafts of mailings in advance
  - Look for duplicates
  - Clean up in database
  - Store securely



## Direct Marketing: Final Points continued

- Store and transmit final files securely
- Mark those who received the mailing
- Document!





## Major Gifts and Grants

- Manage the data and the process in your fundraising database
- Determine and document your major gifts methodology
- Determine with your database staff how it can be done in the database
- Document that process
- Implement it and lead by example
- “If it’s not in the database, it didn’t happen”
- True for individual and institutional fundraising



## Basic Major Gifts Tools in Your Database

- Constituent records
- Relationships
- Solicitors
- Notes
- Interactions



## The 7 Stages of a Major Gifts Donor

1. Identification
2. Research
3. Strategy
4. Cultivation
5. Solicitation
6. Negotiation
7. Stewardship

source: [www.brakeley.com](http://www.brakeley.com)



## Events

- Understand the larger context
- Do not allow Excel to be used; use the database
- Be careful with other products for auctions and “a-thons”
- At least record
  - Invitations
  - Constituent updates
  - Donations and purchases
  - Attendance



## Reporting and Lists

- Ensure your staff understand the tools and options
- Establish a schedule
- Daily
  - Today's gift activity
  - Today's things to do with constituents



## Reporting and Lists

- Weekly
  - Fundraising performance
  - Verify top gifts
  
- Monthly
  - Past due pledge review
  - Staff activity review
  - Solicitor performance



## Reporting and Lists

- Annual report and other recognition needs
  - Donors by giving level
  - Pie chart by donor type
  - Tribute listings
  - Giving by class year



## Reporting and Lists

- Other yearly reports
  - LYBUNTs and SYBUNTs for prospects
  - Annual giving statements
  - VSE Survey
  
- Custom reporting





## Database Oversight

- Development or IT?
- There should be a database administrator
- There should only be one database administrator



## Database Administrator: Technical Oversight

- Backups
- Technical maintenance
- Protecting the data on the backend
- Fundraising database upgrades
- Other software upgrades



## Database Administrator: User Oversight

- Security
  - Good security groups
  - Good user account practices
- Training: new users, ongoing, upgrades
- Documentation
  - Written for the DBA and power users
  - Assumes reader knows the software
  - Organized by your organization's processes



## Database Administrator: Data Oversight

- Running maintenance queries
  - Weekly
  - Monthly
  - Yearly
- Supporting the routine reporting procedures
- Managing the configuration and setup areas of the database
- Maintaining the relationship with the vendor



## Hiring a Fundraising Database Administrator

- Create an attractive job position
- Posting: online, AFP and CASE, local consultants and trainers on nonprofit technology, the vendor's resources
- Interviewing
  - By phone: ask technical questions
  - In person: assign tasks to do in a sample version of the database



## Retaining a Database Administrator

- Pay competitively
- Treat as an integral part of the development team
- Provide training opportunities
- Encourage conference attendance
- Encourage participation in the industry: vendor user groups, email lists and websites; CASE advancement services resources; AASP ([advserv.org](http://advserv.org)); [Fundsvcs.org](http://Fundsvcs.org); other nonprofit technology groups, conferences and websites; and reading



## Summary: As Fundraisers, we can...

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