

Fundraising Well



A newsletter about fundraising effectively in today's world

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Editor's Note

Spring is in the air, and nonprofit professionals' thoughts turn to...data cleanup? If yours don't, maybe they should! For many organizations, spring means the office slows down a little, offering a perfect opportunity to get your database in order!



Of course, then the challenge is to keep it that way. Read on for suggestions on how to clean up and maintain the constituent data that is essential to your organization.

If you have a comment or suggestion — or would like to contribute an article — please send an e-mail to fundraisingwell@blackbaud.com!

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Take Time for Spring Cleaning

by **Anthony Powell, CFRE**
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For nonprofits, the holiday season is often the busiest time of the year, which means that while development officers scramble to accept and record donations, host holiday events and spend time with friends and family, database integrity often suffers.

Not to worry, though. The spring and summer months aren't nearly as hectic, allowing you time to clean up your database. While getting down and dirty with duplicate records, tidying up data-entry errors and sorting through years of stagnant development information isn't exactly fun, the time you spend optimizing your technology investment will pay off with an increase in the success rate of solicitations throughout the rest of the year.



- The first step in your database cleanup — or any other major change to your system — is to backup your system and test the archive file. Backing up your database on a regular basis will spare you data-loss headaches over the long run.
- Start your database cleanup with a review of your most important constituent information: the records for board and committee members, staff, solicitors, major donors, high-priority

prospects and other key individuals. If necessary, solicit new or updated information on these individuals to ensure your organization stays on top of important details.

- Archive the records for inactive and deceased constituents so they won't show up in reports, mailings and other queries. Save these records for historical purposes, but segregate them from active records to streamline your data, simplify reporting and provide a more accurate picture of your development base.
- Go ahead and write off long-overdue pledges and delete unused queries, outdated reports and anything else data-entry packrats have kept around "just in case." Purging this stagnant information—including unwanted clutter from prior conversions and legacy systems—will simplify daily operations and can improve system performance.
- Run a search for duplicate records in your database and merge any redundant records. Having surplus records for the same constituent wastes money on postage and materials, clutters your filing system and complicates data-entry processes by spreading information out among multiple records.

If your database has an inordinate amount of duplicate records, outdated information or other errors, try to figure out why. These problems may be indicative of issues within your organization that need to be addressed. Would extra training for data-entry personnel improve the quality of your data? Could a policies and procedures manual help to reduce these problems in the future? Are you taking full advantage of all that technology has to offer your organization?

Details like this may seem small but will make a big difference in reducing future clutter, simplifying day-to-day activities, improving the accuracy of reporting and increasing your fundraising capabilities. Yet, these steps are just a sample of what you can do to maximize the potential of your database.

Tips for a Policies and Procedures Manual

Your policies and procedures manual is a set of documents that defines your organization's guidelines for employee behavior (policies) and describes the methods used to implement those policies (procedures). A policies and procedures manual will help you keep your development data clean and can also be an essential human resources tool.

Here are ten tips for creating a manual for your nonprofit:

- Include job descriptions for everyone in your organization. What jobs must be done? How should they be done? Who should do them?
 - Plan for contingencies. What happens to daily procedures when someone is sick, on vacation, or leaves the organization?
 - Pull together all existing documentation, both formal and informal. Be sure to either respect or refute — but not simply ignore — any preceding standards.
 - Establish and record important database administration information, such as your security policy and backup procedure.
 - Formalize your data entry procedures. What fields must always contain data? What format do you use for titles, salutations and addresses? How do you code constituents?
 - Include a reports section, listing your weekly, monthly, and annual reports and their parameters.
- Involve everyone in the process. Divide the manual into logical sections and allow time for each department to review and buy-in. Identify individuals to maintain each section.



- Once the document is complete, get approval from your board. Then to assist in human resource issues, ask employees to sign an acknowledgement form and keep it on file.
- Work with your technology staff to add your finished policies and procedures manual to your intranet or network and save a shortcut to it on every desktop.
- Remember to update your manual when a new situation arises. It can only be effective as a living, relevant document!

Latest and Greatest

▶ **Looking for help with your spring cleaning?** For more ideas or guidance on cleaning up your development database, [visit our Web site](#) or contact Blackbaud's Professional Services Division.

▶ **Blackbaud's 2003 Symposium on Philanthropy is coming soon!** Join us in San Diego, May 4-6, for more than 40 sessions on topics vital to today's nonprofit community. [Learn more and register.](#)

▶ **Blackbaud announces zero percent financing!** For a limited time, Blackbaud will pay the interest on financed purchases of *The Raiser's Edge*, *The Financial Edge*, and *Academy*. This means you can implement the software you need now and pay as you raise, for no additional cost. [Visit Blackbaud's Web site for more information.](#)

▶ **Fundraising Funnies!** This month's story comes from a fundraiser who's also a real gentleman:

"On a fundraising trip to Colorado for a children's organization, I was asked to dinner by a donor who was well into her eighties. On our way to the restaurant, she mentioned she had had cataract surgery. Upon asking her when, she replied, "about 10 this morning and I will need your help guiding me." Sure that I was in for it, I guided her to the restaurant. Once there, she asked to excuse herself to go to the restroom but then never moved. Seems she had lost her shoes under the table ...so I dutifully went under the table and put her shoes back on her feet. By the end of the night I was exhausted, but delighted. The donor gave me \$1,000 for our program as her first gift!"

Do you have a funny story to share with your fellow fundraising professionals? We'd love to publish it! Please send your fundraising funnies to fundraisingwell@blackbaud.com.

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