



*Alice Aguilar, Program Director
Progressive Technology Project
www.progressivetech.org*

Fundraising?

A Database can be your Best Friend

ReadyTalk Call info: 1-866-740-1260

Access code: 7242600

Topics

- Why the Database?
- Making sense of your data and keeping it clean
- Tips in setting your data based on your Fundraising Plan
- What do you really need to track in your database?
- Tips in pulling out data from your database
- Do you have all the tools and skills to run your fundraising campaign?

Why the fuss about a Database?

- Build to scale, but keeping it personal (we can work with large quantities of data)
- Catalogue & Track history of people's interaction with your organization and what they do
- Prioritize and target people for contact
- Analyze effectiveness of campaigns, engagement, outreach & communications, fundraising – ORGANIZING WORK

Making Sense of your data & Keeping it Clean

Keep it Clean (data, that is!)

- Make field values consistent and meaningful

Missing info?

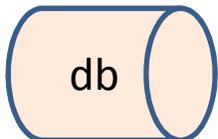
Incorrect info?

Data in the wrong fields?

Fields or values not used?

- Lessen human data-entry errors

Use pick lists, default values, required fields



Making Sense of your data & Keeping it Clean

- Standardize Addresses – USPS standards

Publication 28:

<http://pe.usps.com/text/pub28/welcome.htm>

Easier for searches, and to create walkable walk-lists

Making Sense of your data & Keeping it Clean

Example 1: Search for people living in a city MN, but city is entered:

- St. Paul
- Saint Paul
- St Paul

Example 2: Search for street and apartment numbers, data entered:

- 100 Main Court, Apartment 3
- 100 Main Ct., Apt. 3
- 100 Main Ct APT 3
- 100 Main Ct #3

Making Sense of your data & Keeping it Clean

- Validate data periodically
- Document
 - How you use database
 - How to do data-entry (e.g. adding a new contact, adding contributions, etc.)
 - Fields and values in your database
- Train Staff

Tips in setting up your data needs

It's all in the Planning!

- Go back to your Fundraising Plan

What are your goals and objectives?

What will be your activities or strategies?

Tips in setting up your data needs

- What are the major activities or events you will do as part of your fundraising work?
 - For each activity, answer the following questions:
 - What data sources (**Information IN**) do you need to bring together to create the inputs for that activity?
 - What outputs (**Information OUT**) do you need to create/come out of that activity?
 - Do you know/understand what you need so that you can create those inputs and outputs?
 - What other questions do you have about the work associated with this activity?
 - What other support do you need?

Tips in setting up your data needs

Let's look at the Database Planning Worksheet

Always plan your database and data needs in conjunction with your fundraising planning (as well as during your communications planning and organizing campaign planning)

Tips in setting up your data needs

Working your Lists:

- Merging your lists - excel is great for this
- List enhancements – voter data, Melissadata.com, get good phone and addresses
- Import list into your db – remember those Unique ID's
- Dedupe and merge information in db

What do you really need to track in your database?

Define your terminology:

who is a current, lapsed, new donor?

who is a a major donor?

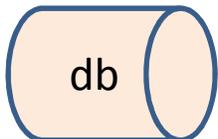
who is a member?

what does it mean to be active?

What do you really need to track in your database?

Look at your Database Planning Worksheet again and refine

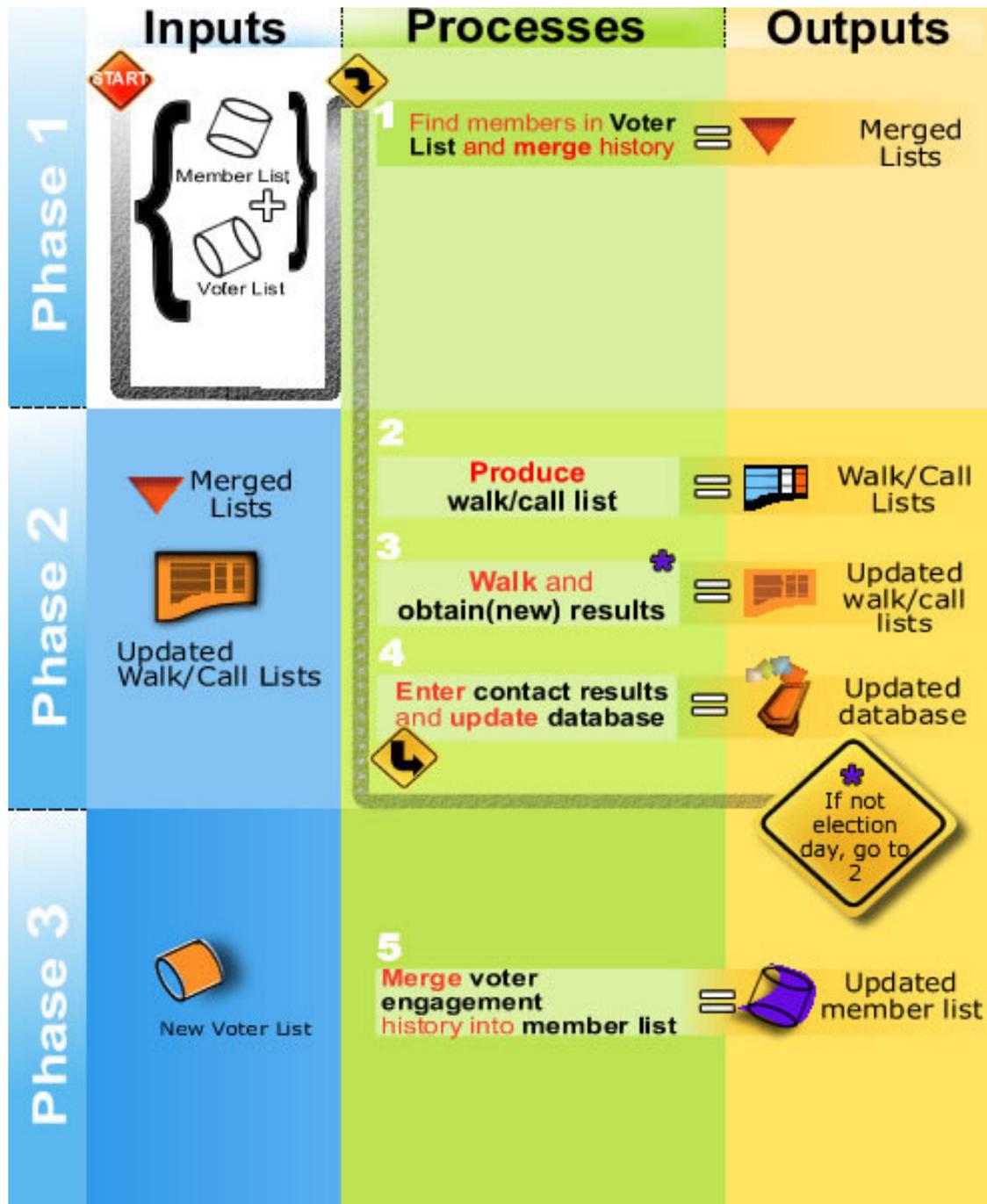
- Tracking: Issue interests; volunteer opps; activities; relationships, events, email, mailings, etc.
- Track Contributions: Amount given, Date given, Type of gift (dues, donation, event fee, etc.), transaction type – check, cc, cash, etc., method given (direct mail, door knock, phone bank, special event, one-to-one); source code (id of specific campaign); who made the ask?



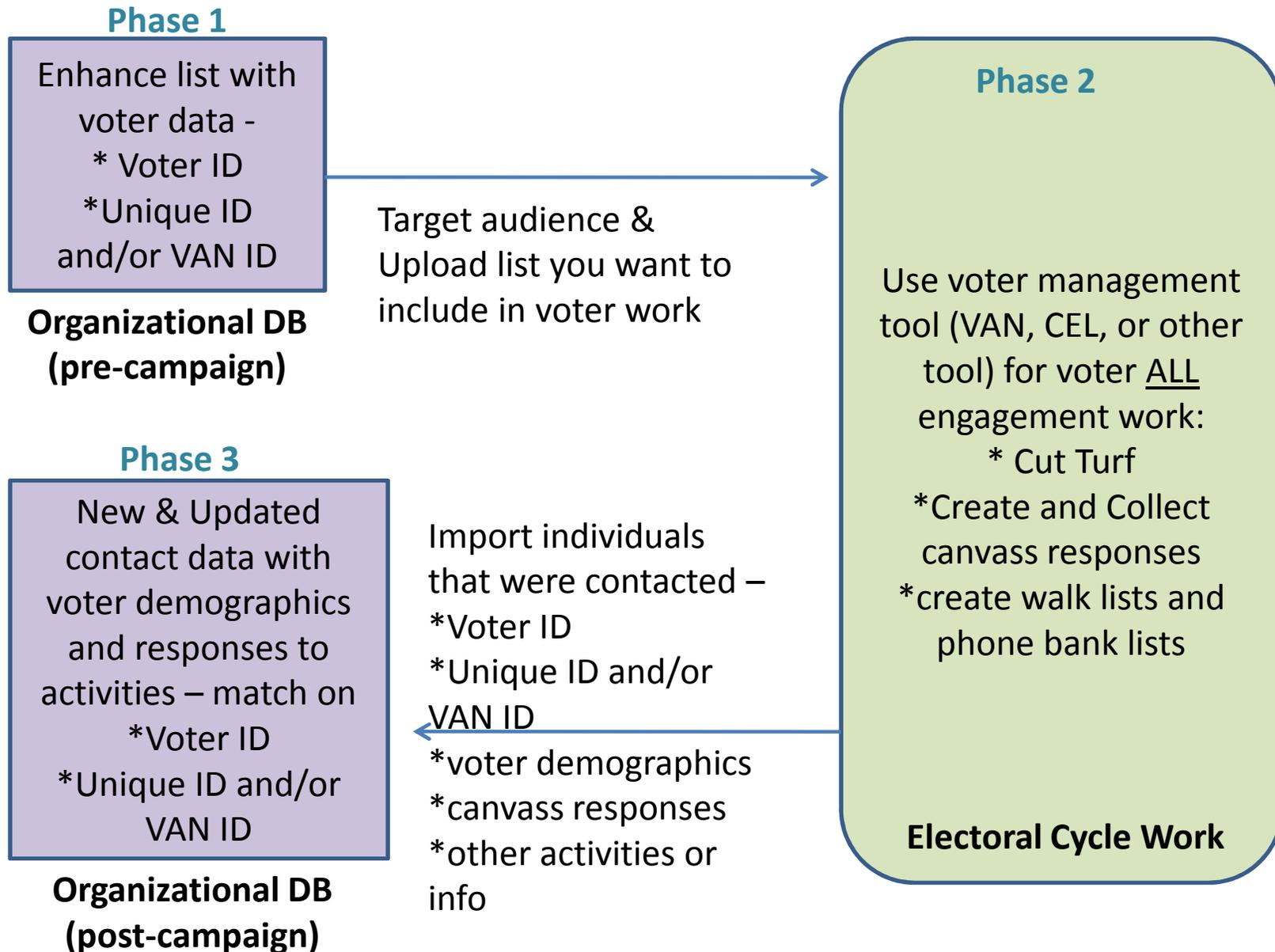
What do you really need to track in your database?

What about Voter Engagement Activities?

- VAN (Voter Activation Network database)
- CEL (tool by Center for Community Change)
- Other voter management tool



Voter Engagement Data Cycle



Tips in pulling out data for Reporting, Searching, Analysis

- Let's refer to “Useful Fundraising Reports”

Now let's look at

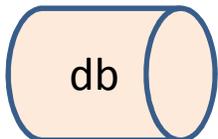
“Database Information Processing Worksheet”

Tips in pulling out data for Reporting, Searching, Analysis

What reports can your database generate?

Remember LYBUNT, SYBUNT?

Can you generate detailed and summary
contribution reports?



Tips in pulling out data for Reporting, Searching, Analysis

Can't generate specific reports in your database?

There's always Microsoft's Excel or OpenOffice's Calc

- Export info you need for reports; manipulate and analyze information and create reports with another tool

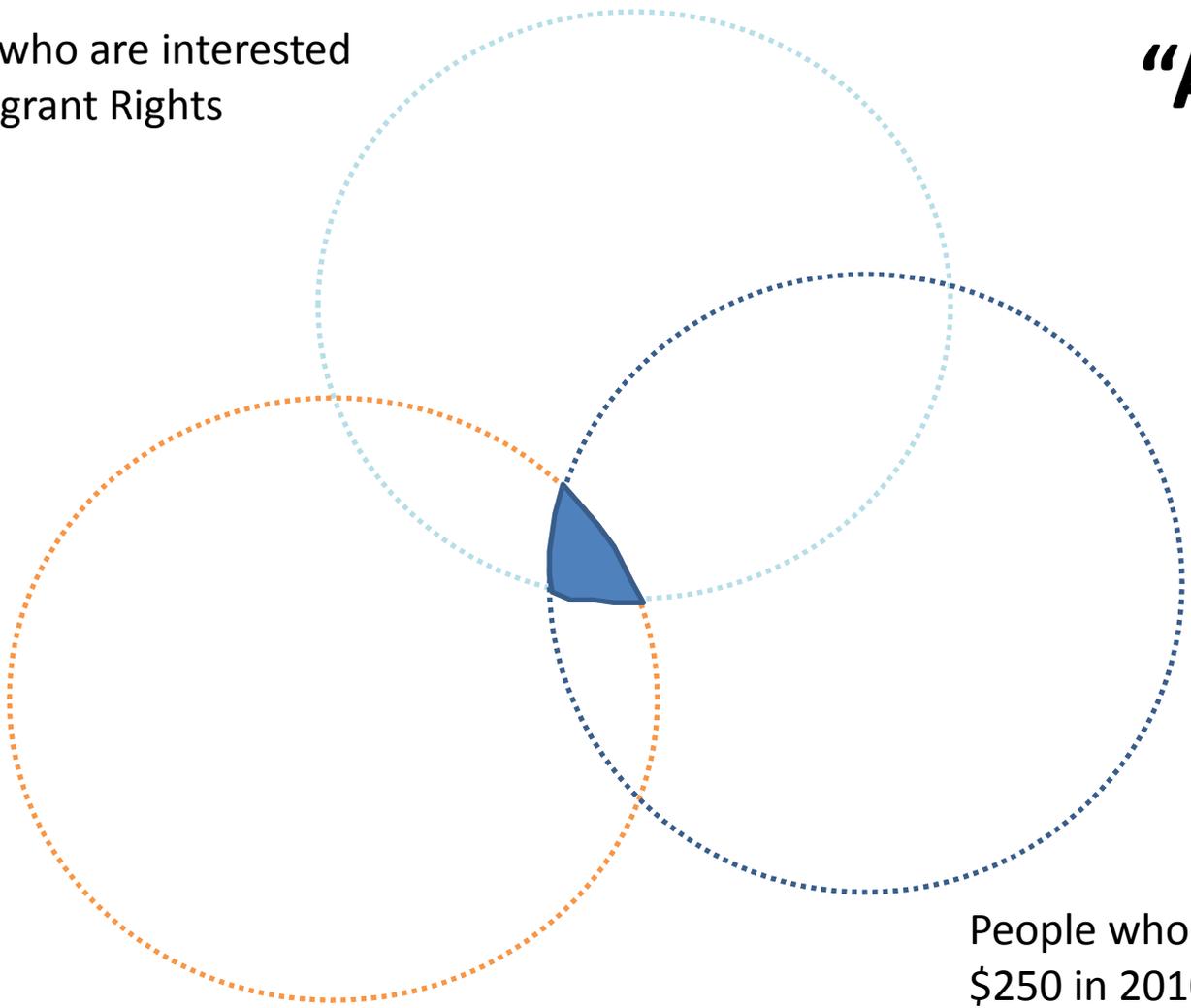
Tips in pulling out data
for Reporting, Searching, Analysis

Really get to know how to do searches in
your database

Know your And's, Or's, and Not's

People who are interested
in Immigrant Rights

“AND”

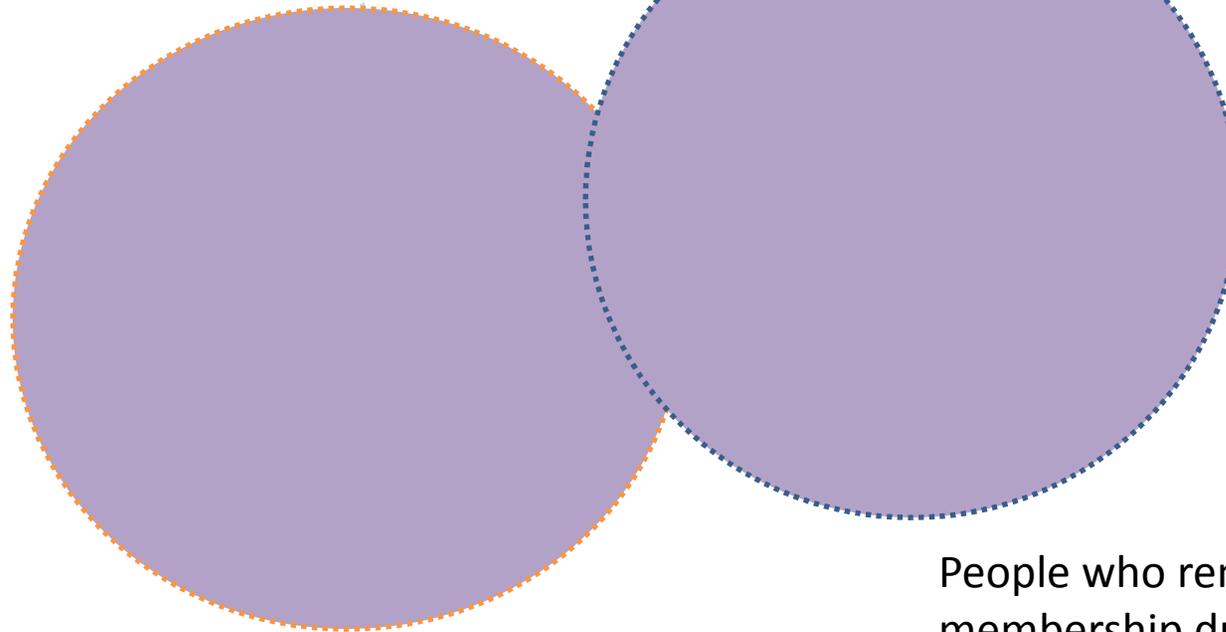


People who where FIRST
TIME donors in 2010

People who donated over
\$250 in 2010

People who are interested
in Immigrant Rights

“OR”

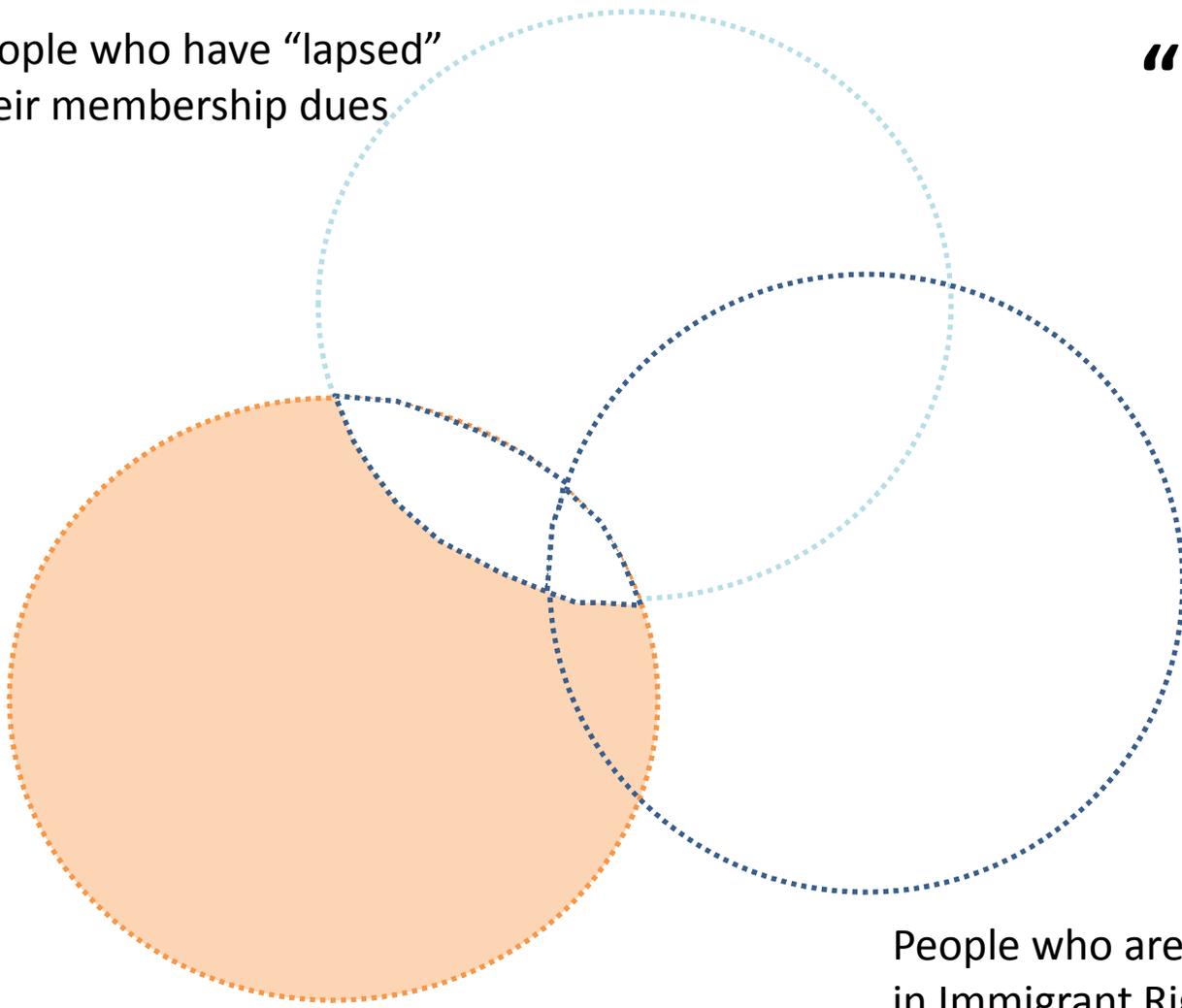


People who attended
2010 Annual Dinner

People who renewed their
membership dues in 2010
YTD

People who have "lapsed"
their membership dues

"NOT"



People who are registered
for the 2010 Youth
Leadership conference

People who are interested
in Immigrant Rights

Do you have all the tools and skills to run your
Fundraising Campaign?

Let's take a look at the "Technology & Fundraising Tool"

And also check out the "Guidelines for Using Technology
in Community Organizing"

Questions?

Resources

Other useful online tech trainings on the Power On Network,

<http://network.progressivetech.org>:

- Webinar: data cleaning tips -
<http://network.progressivetech.org/sessions/database/power-base-webinar-data-cleaning-tips>
- Techcamp: mailmerge (mac) -
<http://network.progressivetech.org/trainings/ms-word/techcamp-online-mail-merge-in-word-2008-macs-october-2010>
- Techcamp: mailmerge (windows) -
<http://network.progressivetech.org/trainings/ms-word/techcamp-online-mail-merge-2007-windows>

Resources

Other useful online tech trainings (cont'd):

- Techcamp: Intermediate excel (mac) Part 1 – <http://network.progressivetech.org/trainings/ms-excel/techcamp-online-intermediate-advanced-excel-2008-mac-part-i-august-19th-2010>
- Techcamp: Intermediate excel (mac) Part 2 - <http://network.progressivetech.org/trainings/ms-excel/techcamp-online-intermediate-advanced-excel-2008-mac-part-ii-august-19th-2010>

Resources

Other useful online tech trainings (cont'd):

- Techcamp: Intermediate excel (windows) Part 1 – <http://network.progressivetechnology.com/trainings/ms-word/techcamp-online-intermediate-advanced-word-2008-macs>
- Techcamp: Intermediate excel (windows) Part 2 – <http://network.progressivetechnology.com/trainings/ms-excel/techcamp-online-intermediate-advanced-excel-2007-windows-part-ii>

Resources

Voter Engagement Tips:

- Webinar: surviving voter integration - <http://network.progressivetechnology.org/sessions/voter-engagement/surviving-voter-data-integration-a-power-on-network-presentation-by-henry->
- PTP's Voter Tech Kit: <http://votertechkit.progressivetechnology.org/>

Resources

PTP Technology and Fundraising worksheets & guides:

- Fundraising & Technology Tool worksheet
- Guidelines for Using Technology in Community Organizing
- Database Planning Worksheet
- Database Information Processing Worksheet

Resources

Fundraising worksheets by Rona Fernandez, Holly Fincke, and Stephanie Roth:

- Prospect Identification Worksheet
- Grassroots Fundraising Strategy Chart
- Useful Fundraising Reports to Generate
- CCOC Organization Fall Fundraising Drive
- Next Steps to Fundraising Success
- Working Smarter Not Harder: Integrating Fundraising into your Program

Audio / Visual Recording of this session will be posted in 24 hours on:



<http://network.progressivetech.org>