

THE FIRST MONDAY REPORT
Thoughts on Fund Raising for Campus Ministry
Office of Lutheran Campus Ministry Advancement
1407 North Cleveland
St. Paul, MN 55108

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“DATA MANAGEMENT: How to Know What You Need to Know”

“You wouldn’t put all your clothes from your whole life in one room and try to get dressed or even try to organize them.” Maria Petulla

Every once in a while it strikes me that life would be a lot simpler if I could just get my head and hands around all of the ‘stuff’ that flies at me on any given week. I’m not terribly consistent, thus the usually cluttered look of my desktop, my car trunk and my workshop. It’s all “stuff” that I need to know, or that I need to locate in hurry, or that I might need someday (unless the rapture arrives sooner than I expect, in which case *disorder* will be the rule of the day!). I want to think with you in this installment of the First Monday Report about data management, particularly about the names and information of individuals who you want to retain as part of your ongoing community of supporters.

First, let’s think about what you want to save and what you want to release into the wind. When you develop a database you are building a constituency base of supporters. So you aren’t “managing data” but relating to friends of the ministry. You will want to be deliberate about who makes up this circle of friends, what is important to know about them, and why. You will want to take as much care with these names as you would with your close associates. Imagine writing to your Aunt Kate and calling her Gertrude. Or think about the frustration and expense of having 10 percent of your mailing returned to you because of outdated addresses. Begin with being careful.

Some of you have the arduous task of trying to build a database from scratch. As you page through those endless repositories of ancient minutes and scrapbooks, you might think about prioritizing the growing list of names, so that you work first on obvious leaders, second on regular attendees, etc. Unless you have a very short list, it will take some time to locate many of these lost alums and friends. A good way to work online is to use one of the many search engines, such as the ones listed below:

www.whitepages.com
www.switchboard.com
www.ussearch.com
www.knowx.com
www.find.intelius.com
www.anywho.com

You can search for a variety of information on these and other websites. Beyond the simple search for an address and phone number, be prepared to pay between \$2.95 and \$9.95 for detailed information. This is another reason to prioritize your search list. You will have to ask how important a name is and what you are willing to pay or do to know more.

Important individuals you will want to keep updated files on are:

- ✓ Active students in your ministry, currently
- ✓ Students who were active, but now have graduated and moved on in life
- ✓ Students who were perhaps not very active, but who benefited from your ministry
- ✓ (e.g. a student who went on a mission trip or someone who you married or helped through a difficult time in life. They may be grateful for your ministry a bit later in life.)
- ✓ Board members, current and past
- ✓ Pastors who are supportive
- ✓ Persons in other ministries who share common goals or mission
- ✓ Faculty and staff with whom you have a good working relationship
- ✓ Volunteers who assist you in ministry projects
- ✓ Members of area congregations who respond to your ministry, attend an event, talk with you after a presentation or worship service, etc.
- ✓ Parents of students who are/were active in your ministry
- ✓ Extended family members, including your own
- ✓ Vendors who you work with, such as printers, office suppliers, and local businesses

All of these individuals, and more if you think about it, are potential donors and certainly cheerleaders and friends for you, because they know and understand your ministry.

You will want to keep your files updated on a regular basis, especially these days, when addresses, phone numbers and email addresses change so rapidly. As you work to keep student alums in the loop, you will want to know where they are employed, if they marry, when they have families, and if there is a public notice of awards or accomplishments. Some of this information you can glean from the newspapers or church newsletters. Some of it will come from Christmas letters or personal correspondence. One ministry I know about has a couple of volunteers who keep track of this information for them and report any news items of interest.

Perhaps it needs to be said at this point that it's OK to remove some names from your list. If someone hasn't responded to your appeal in five years, attended an event or given you feedback of any kind, isn't it time to place them in the "attic file?" Meaning that somewhere you still keep the name, but you don't include them on your active mailing list. It's better to work with a close circle of friends than a wide association or acquaintances.

Second, you will want to think about how to organize all of this information in a way that makes sense to you now and for those who follow you. If you are the new campus pastor and on the second day at work you are handed a file folder crammed with sticky notes and cryptic scribbles, you will find it of little use, even though it may have made perfect sense to your predecessor. If you are doing all of your data management by computer, as most are by now, be sure to keep backup files and/or hard copies, so that you can re-build your database if, God forbid, something goes awry with your computer system. At least one among us may now be able to laugh at that one terrible day when the secretary left and forgot the code word she had created to lock the files. So as you set up your system, think about others who will use it and what will make sense to them. And, because you may be dealing with sensitive information, be sure that you are able to secure your files against the probing of the casual browser.

Third, for each prospective major donor on your database, you will want to know more than you will for your general fund donor. Each potential major donor ought to have a special page or

dedicated file. Be sure that this information is secure and available only to specifically designated persons. On each donor page you will want to record:

- All address information, including email, if available
- Name before married
- Birth dates
- Business address
- Gift history to your ministry
- Gift history to other organizations
- Professional title/position
- Career track
- Business affiliations or memberships
- Political affiliations
- Religious affiliations
- Civic/cultural affiliations
- Military service
- Educational background
- Special interests
- Awards/honors
- Family history
 - Children in college
 - Elderly or dependent family member
 - Divorce or re-marriage
- Close friendships/relationships
- Investments or encumbrances
- Other income sources
- Property-location and value

You will not be able to keep an extensive file on every individual, but the more you know about your supporters, the better you will be able relate to them when it comes time for a personal visit or a contact for a major gift. In fact, if you listen attentively as you engage in conversation with your ministry friends, you will glean much of what you need to know to keep the relationship vital. Place what you know in your database, so that later on you or your successor can easily refer to it when the next opportunity for conversation arises.

Fourth, step back from the software that you are currently using to manage your database and ask whether or not it's doing the job for you. Many of you are probably dogging along with software that is terribly outdated or difficult to use. You may have to create each new field, as you need it. It most likely doesn't keep track of gifts on a cumulative basis, track pledges or send you a notice when it's time to send a pledge reminder or thank you note. Software like *Access*, *Act* and *FileMaker Pro* may be usable, but people I have spoken with find them slow and cumbersome. Reality may set in when you begin to look at alternatives. Most high-end fund raising software is very expensive and even more expensive when you add in the training components. Ask the questions: What information is currently missing? What reports do you need? How can data management be made simpler and more focused?

Some non-profits are finding Web based data management services to be helpful. An Application Service Provider (ASP) is a technology company that develops and delivers software tools over the Internet, usually for a monthly fee. Of the over 300 ASPs in existence, most are for-profit companies, but a small number are not-for-profit. There is a high learning curve to deal with when you consider an ASP. To be considered are the expenses of staff and management time to do the planning, selection and implementation, costs to work with the ASP

and improve the technology infrastructure of your agency. If you are interested, you can try out an ASP such as www.etapestry.com

If you are convinced that you need new database software, here are some things to consider:

1. Unlimited fields and codes. Fields are the categories you will need to store your information about your donors and later use to sort donors to create reports or affinity groups. For example, you will need fields for board members, year of graduation, mission trip participants, etc.
2. Name capacity. Start with the number of names you currently have and imagine how that will expand within the next several years as you do your data gathering. Be sure the database can accommodate this number and more.
3. Different types of donors. Can the program handle listing all of the different names that may need to be entered, such as singles, families, corporations, foundations, congregations, etc? What about couples with hyphenated last names or couples whose last names are entirely different?
4. Sorting/Queries/Extractions. This is the ability to sort information using more than one piece of information. For example, how many persons responded to last year's appeal and gave \$50 or more each time?
5. Multi-user capability. How many persons will be using your database at any one time. Can it be accessed from more than one computer? Does it cost more for multi-users?
6. Information transfer. Can the data on your current system be transferred easily to the new one? Some software companies charge a small fee for re-formatting your data and can do it for you via email.
7. Accounting capability. Gifts need to be tracked as they are received and a cumulative record needs to be kept over time. How can your new program save, store and organize your donor gifts, pledges, payments, and thank you letters? Is there a need to be compatible with your financial accounting program?
8. Data entry. Is the process for entering data relatively easy and quick? Is it easy to make the entries uniform, such as capitalizing the first letter of each name? Does the program let you know of errors?
9. Cost and effort. Beyond the initial expense of the software, are there additional expenses for training, technical support or hardware upgrades? How much of an expert does one need to be to keep the system running at maximum functionality?

A RECOMMENDATION

(For PC Users, Windows 95 and up)

Although I get absolutely no kickback from this software company, I want to recommend a product called *LifeLine*. It sells for just under \$500, which is a bargain in these times (\$795 for multiple users). The program is very intuitive and requires no formal training beyond spending time walking through it to see how it operates. It is a small company with excellent, responsive tech help. They seem almost glad when you call for assistance. When we purchased it for our offices, we sent our *Access* files to them for re-formatting. It cost us only \$50 for this service, which we accomplished very quickly over the Internet. The system will handle up to 1 million names, so you are not likely to max it out in the near future. If you would like a sample of the entire program, you can call LifeLine at 802/865-0480 or order your trial CD by going to www.straightforwardsoftwareinc.com

Other options on the pricier side are:

GiftMaker Pro, which sells for \$795 for a single-user, limited record (1,500 names) version or \$2,990 for an unlimited record version. Go to www.campagne.com for more information.

FundRaiser Basic, Junior and Professional, which sells for between \$89 and \$5,450. For information call 800-880-3454, ext. 200 or go to www.fundraiser-software.com

I wish you well in your data management. Do it carefully and do it well. It will make all of the rest of the fund raising task much more enjoyable.

Advent blessings,
Galen Hora