

# How Software Can improve Your Organization's Membership and Donations

RI Land and Water Partnership Workshop

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Donor Management Software

I have been working at SKLT since March. Before that I worked for the YMCA to help them with a 10 million capital campaign, and where I facilitated others in using Raisers Edge, a high-end donor management software database. What I know is that having a database, at whatever its price tag, is only a tool to help you get to your end goal.

So, what is the role of a database?

Will it raise money for you? No, you still have to do that. But it will help you organize the data you probably already have, to make you more effective at raising money. Will it cost money to run? Yes, but Rupert has worked hard to make sure it doesn't cost us very much. Will it take time to learn? Yes, but Helen is working on how to make that go easier. Will it be tedious? Somewhat, But it can save you time and energy, and leave a lasting record of your good efforts, and the generous people who have supported you.

So why do you need one? Well, let's think about what it is we do.

We protect open space, right? But in the process of that, we have acquired different silos of information at our organization: The index cards of the people in your legacy society, and the notebook of people who gave to your capital campaign? Are they differently filed than your stewardship volunteers and your donors? Do just one or two people in your organization know who gave what land or major gift to your organization? Join the club! What we do, is often segmented: Land acquisition, membership, major gifts, special events, stewardship projects, capital campaign management, prospect research OR simply printing labels. So what do we need?

Need:

- 1) You need to know how to be in touch with your people: for lots of reasons member/donor/steward/committee / board member/ lessees.
- 2) To produce reports to help you make informed decisions and develop realistic development plans.
- 3) Help your organization grow in their fundraising efforts, long after you have been there.
  - 1) Seems obvious enough. We have folks in our data base who use e-mail, those who don't and those who only use face book, or phones. Data base has that info in one place. Now we can write to them in a way they desire.
  - 2) Different kinds of report answer different questions:

**Assessment Reports:** What happened? How many donors were mailed to in the last mail or online appeal? How many responded? What was the average gift size? How did our special events do this year? Did they bring in a higher ratio of money to expense? How does our annual letter do compared to our Major donor letter?

**Acknowledgments:** were they sent?

**Donor category reports:** Who gave \$50 or more over the last year? Guess what, we have a special event for them!

**Pledge reports**—who has paid who hasn't? You need to know so that you can follow up.

**Giving History Reports** Who responded, at what level, to which solicitation? Has Joe been giving you \$100 for 25 years? You need to invite him to an estate planning workshop.

With these reports you can start to see some trends that will help you define your strengths and rethink your weaknesses. For instance, are you looking for new board members? Look up the giving histories. Lapsed members? Have a volunteer get on the phone. People give for all sorts of reasons, to all different aspects of your organization.

And most important to me:

Keeping information in regards to donors: Tracking our actions with members. Who gave to what, who asked them, what did they give: sponsorship, art, time and talents? Who came to what event—or better yet, who didn't and still gave us a gift? Have they ever been chairs of that event, are they past board member? Who are their friends, who lives near them. Of course you never include anything in the database that you would not want them to read. The more space for notes in the database, and the better we do at coding our members so that we can retrieve them easily, the better. Our collective institutional knowledge is only as good as our written notes! It also helps if you can code the donor to their files, or other transactions. Once you have a record of the relationship of that person to your organization, you have provided the road map for their future involvement.

And like most things in life...its all about the relationships.

Some things to keep in mind: People in America have given more money to charities each year since 1968 in this country—except 1987. We might be in for another one, but not two in a row. Be ready.

One thing is for sure, if you don't ask, you won't get anything . So, remember that they are not giving to your family vacation, they are giving to something you think is very important, and they think so also, so don't be surprised if you get a gift—it might be smaller, but it might not be. There is still an enormous amount of wealth in this state, and open space is a very strong cause. So, get your data base and start targeting your solicitation letters to meet the needs of your donors.