

Salesforce Report 'Recipes' for Donor/Member Retention



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Salesforce Report 'Recipes'

③ 'LY's Income by Gift Type



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First, Last Year's Income by Gift Type may be readily available from your organization's accounting records.

If your organization uses the Campaigns/Events tracking for all of its donations, you can run a summary or a matrix report in many combinations: for all campaigns, for all events.

If your organization does not use the Campaigns/Events tab, or doesn't use it for all types of donations, you can still run summaries by donation type for general donations, memberships and grants. This could be combined into an Excel spreadsheet.

Don't overlook recording donations such as grants and in kind gifts into your Salesforce database.



Salesforce Report 'Recipes'

④ 'LY's income by Donor Type

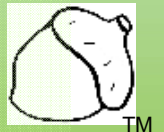


④ 'LY's Income by Donor Type

This information can vary widely between organizations and not all organizations track donors by class beyond the requirements of the Form 990 and this information may only be contained in your organization's accounting records.

Salesforce offers many options for tracking types of donors. The primary standard field for sorting donor types is by account type which includes individual and multi-person households and a variety of organizations.

Some organizations track either the standard or their own custom membership status. Custom donor type fields can also be created. Summary and matrix reports can tally donations by donor types, providing they are consistently entered into Salesforce.



Salesforce Report 'Recipes'

- ⑤ 'LY's & 'AY's Donors by Town and/or Zip



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Variations of the LYBNT and SYBNT matrix reports can additionally be sorted by either town or zip or for a large city, zips within a town.

For some organizations there may be the need to create an additional location field beyond either town or zip. For instance, a watershed group may want to indicate the specific watershed or branch of a watershed. Perhaps a river group wants to track donors and potential donors who own property directly on the river.



Salesforce Report 'Recipes'

⑥ 'LY's Total New Donors/Members



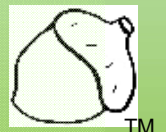
⑥ 'LY's Total New Donors/Members

New Donors and Members can be tracked by Contact and/or Account Created Date.

This field may not be useful for new databases where many records have been transferred into Salesforce recently, often on a single day.

Creation dates may not be equal to a donor or member if your organization inputs leads, trial or complimentary members.

In fact, you may want to compare this field's total count to other fields for new donor/members to calculate your donor/member conversion rates, depending on your organization's data entry practices.



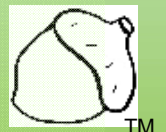
⑥ 'LY's Total New Donors/Members

Another field option is the Account: First Donation Date.

Membership start and end dates, the initial membership start dates can all be useful for organizations using membership features in Salesforce.

Summary and matrix reports can sort these fields across calendar years, quarters or custom time periods.

Your organization may want to add a 'join date' and donor or member type pick lists to aid in sorting and tracking categories of donors and members and their relative support of your organization.



Salesforce Report 'Recipes'

⑦ 'LY's Total 'Dropped' Donors/Members



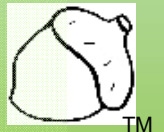
⑦ 'LY's Total 'Dropped' Donors/Members

Tracking last year's dropped members is very dependent on your organization's database policies and practices.

Organizations using membership fields can utilize the Current Membership End Date.

Organizations can also use the Last Donation Date.

Summary and matrix reports can sort these fields across calendar years, quarters or custom time periods.



⑦ 'LY's Total 'Dropped' Donors/Members

Another useful option is to create a 'Lapsed' member or donor field where you note the date a contact became inactive. Another picklist could note the cause.

As contacts move, die or quit this field gets updated throughout the year.

Some organizations drop inactive contacts periodically. It's not as meaningful this is done once every couple of years – review should be annually at a minimum.

Note that if inactive or other 'lost' contacts are routinely deleted from your Salesforce database, you will lose the ability to report and compare your organization's turnover relative to growth over time within Salesforce.



Salesforce Report 'Recipes'

⑧ Total Donors/Members



⑧ Total Donors/Members

Total Donors and Members would seem to be a straightforward summary or matrix report or every account or contact in Salesforce.

However, this total depends on your organization's own definition of the 'active' contacts and organizations.

For a financially meaningful tally, you may want to exclude any contact or household without a donation or membership in the past year.

Organizations need to consider contacts or organizations in their Salesforce database who are not donors, perhaps volunteers, vendors or partners, to be sure that the report excludes these contacts and accounts from the tally of givers.



The End

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