

Checklist

Getting the Most from Your Database

Your database is only as good as the information that it infers. Mining your database for a new initiative can be an overwhelming process, especially with limited time and resources. Do you have a plan to review your list of contacts and determine who has affinity, capacity or potential to be a partner with your organization? What trends, such as philanthropy's role in addressing the social determinants of health, can you identify that build a case around donor opportunities? Here is a brief checklist to get you started:

BUILD THE LIST

- Request a comprehensive list of past unassigned donors from the last ten years.
- Analyze the donor base for trends within constituencies, event attendees and campaign donors.
- Review possible affinities to various funds and service lines.
- Prioritize donor lists by marrying names to existing analytics, such as modeling scores or capacity ratings, or implement an easy RFM model. Keep in mind if you are going to use a RFM—recency, frequency, monetary—model, you will need to request summary data for each year, including number of gifts per year and dollars donated per year, in addition to the most recent gift date.

MAKE THE PLAN

- Determine a time frame for implementing the qualification process based on the number of team members involved.
- Tier master donor list into at least three levels: A (top priority), B and C.
- Agree on database tracking methods such as coding various outreach attempts and connections by type and attempt count.
- Develop consistent processes and timelines for outreach to each level of prospects starting with your A tier.

DIVIDE AND CONQUER

- Determine your DOD's existing availability for qualification work.
- Allocate and assign appropriate resources for operations, frontline work and communications.

- Provide space and time for gift officers to connect, collaborate, debrief and support each other's efforts, such as a biweekly zoom meeting.
- Evaluate results and report meaningful metrics on a monthly basis to DOD and team.

Starting your new initiative, campaign or project with database mining and qualification doesn't have to be overwhelming. This checklist can help you optimize your database and qualify donors to be future partners with your organization.

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