Checklist

Is Your Database Campaign Ready?

A working database is critical to the success of any philanthropy program. While there are a variety of viewpoints on the definition of a true working database, most are based on user proficiency, program sophistication and the consistency of information loaded into the tool. Regardless of an organization's resources and staff, a database should be more than an archive of information; it should be the leading tool in the development of a relationship-based giving program. The ideal goal, especially when preparing for campaign, is to have a database that stores and delivers critical information for nimble decision making and action.

As we move forward in this ever-changing environment, many have discovered wave campaigns are a great way to continue donor engagement and project funding. However, before beginning any campaign, it is vital to ensure your database is campaign ready. How do you get there?

First, conduct an audit in which you evaluate the current state of your database and identify key findings in data processes, data hygiene and data outcomes. Once your team completes the initial audit, it is beneficial to share the findings among local and system teams before diving directly into potential solutions. Getting input can result in varying perspectives, multiple creative solutions and even cost savings. For example, if you are part of a system and your local foundation already successfully pulls names for wealth screening, perhaps you expand the services to include names from other foundations within the system to alleviate additional contracts. This preserves the local focus on philanthropy while sharing efficiencies in vendor use across a large system.

After reporting results, audit findings and determined solutions must be prioritized. Consider how you will implement immediate data-cleaning measures, enhance the effectiveness of routine information provided through reports and boost the quality of added information that proves beneficial for mission achievement.

It's important to note that although the initial audit and prioritized follow-up work is a big project, especially when done for the first time, these should be ongoing activities that will become a more manageable part of your routine. Monitoring the health of your database with data hygiene checks and program enhancements will produce a much more efficient and effective way to approach donor engagement.

How do you ensure your database is in optimal campaign-ready condition? Consider the strategic initiatives your campaign(s) will advance. Then review this checklist of questions that will help you determine areas of strength and areas to improve before starting any new or large endeavor:

INFRASTRUCTURE

- ☐ Is data consistently entered? If not, how can you improve this process?
- ☐ Does the database collect all core content for each prospect? Are there any additional fields that should be considered? What do you need to do or purchase to add these fields? Is this feasible and if so, by when?
- ☐ How many records do you have? Are the spouses and families linked? When was the last time your ran a National Change of Address (NCOA) and how often is it run? How often do you screen for deceased contacts, what tool do you use and how often?
- ☐ What process do you use to ensure your database securely and appropriately handles HIPAA data?
- ☐ What is your plan for data management and maintenance moving forward?

PROSPECT MANAGEMENT

- ☐ Is your database being effectively used to practice relationship-based giving?
- ☐ Is every record, or selected records, screened for wealth periodically, and if so, what is the process and timeframe?
- ☐ Does everyone with a rating over $1 million (or amount to be agreed upon) have an assigned relationship manager? If not, how soon can these be assigned?
- ☐ Does anyone with a giving history over $250,000 (or amount to be agreed upon) have a relationship management plan created and posted in the database? What is the follow-up process?
- ☐ Are you tracking, in a reportable way, prospects' interest, capacity and affinity?
- ☐ Can you pull reports that show giving history, gift purpose, gift frequency and gift size over the course of each relationship with you? How often is this run? What is the process for follow up?

VOLUNTEER MANAGEMENT

- ☐ Are all your board members, committee members and volunteers tracked in your database with dates of service and roles?
- ☐ Are you using the relationship management tools to create and grow a pipeline of volunteers?
- ☐ Are you capturing the connections between your volunteers - including physician and clinician allies - and engagement with prospects? If not, how can this be tracked?
- ☐ Are you able to report on amounts raised through ally engagement or volunteers, to express gratitude for those efforts and to inspire others to give their gifts of time?

CASE AND COMMUNICATIONS

- ☐ Can you run reports based on gifts and affinity to certain funds (for example, cancer or cardiac service lines) to determine prospects' areas of interest? What is the process to connect these passions to strategic priorities?
- ☐ Can you run reports on dollars raised for each campaign so you can share success stories and steward donors who support those initiatives? Regular and purposeful stewardship communications are critical for successful engagement throughout campaigns and beyond.

Campaigns bring attention and necessary funding to strategic priorities while encouraging conversations around your health care organization, the needs of your community and your donors' top philanthropic priorities. Philanthropy can be the connection between all of these areas that results in transformative giving in any community. Meaningful conversations and other Transformative Philanthropy™ factors will likely not move the needle on your mission without consistent, quality data. Forward motion can be stagnated if you are unable to report results to celebrate or advance strategy. Philanthropy teams must assume responsibility to not only enter all data but to also keep that information protected, used appropriately and applied strategically to the betterment of the organization and overall community. Focusing on data processes, data hygiene and outcomes based on consistent information will allow your database to successfully work for you and your community.

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