

Impacting positive relationships with Raiser's Edge™

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ADRP Regional Conference

Toronto, Ontario

April 10, 2015

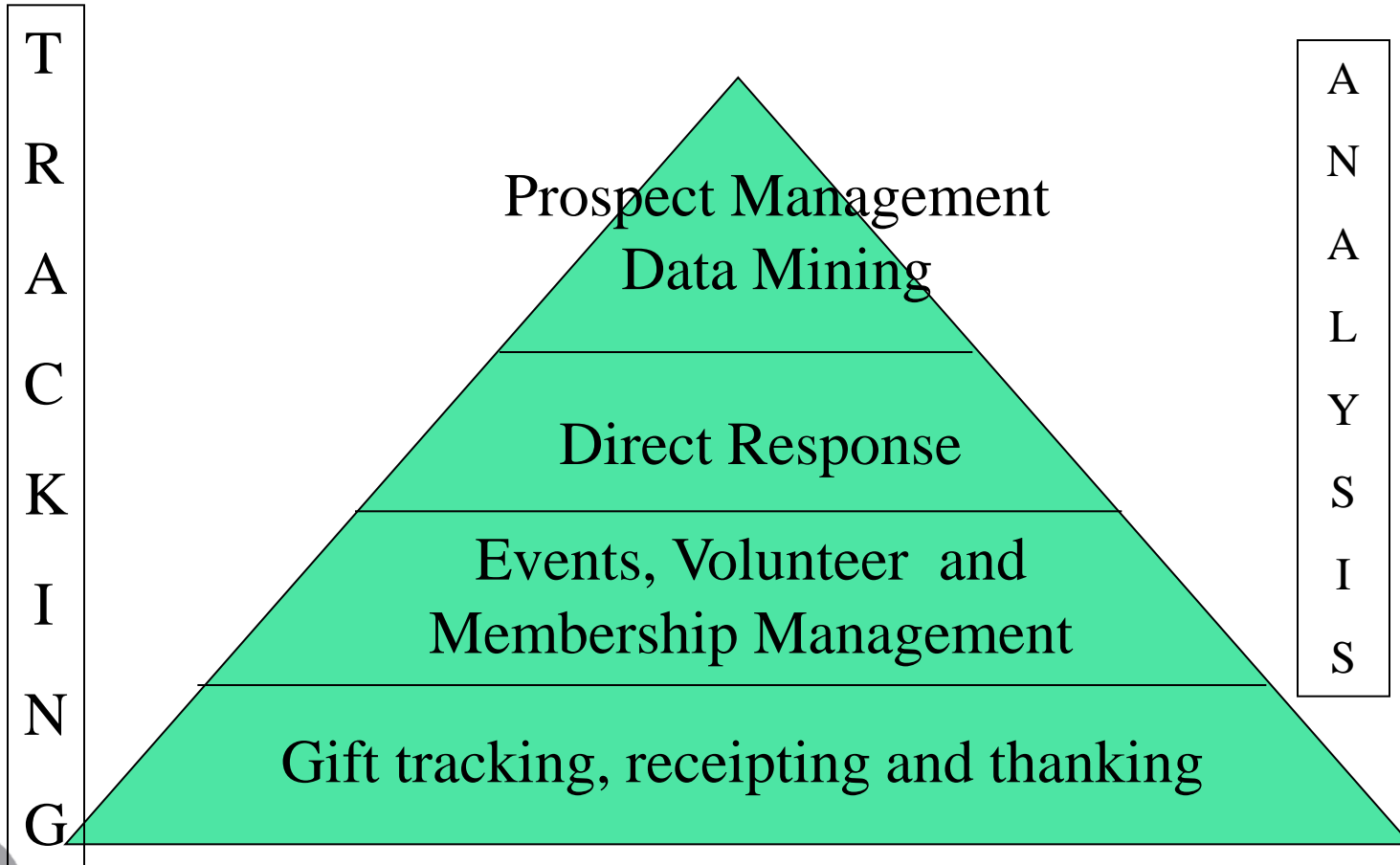
Agenda

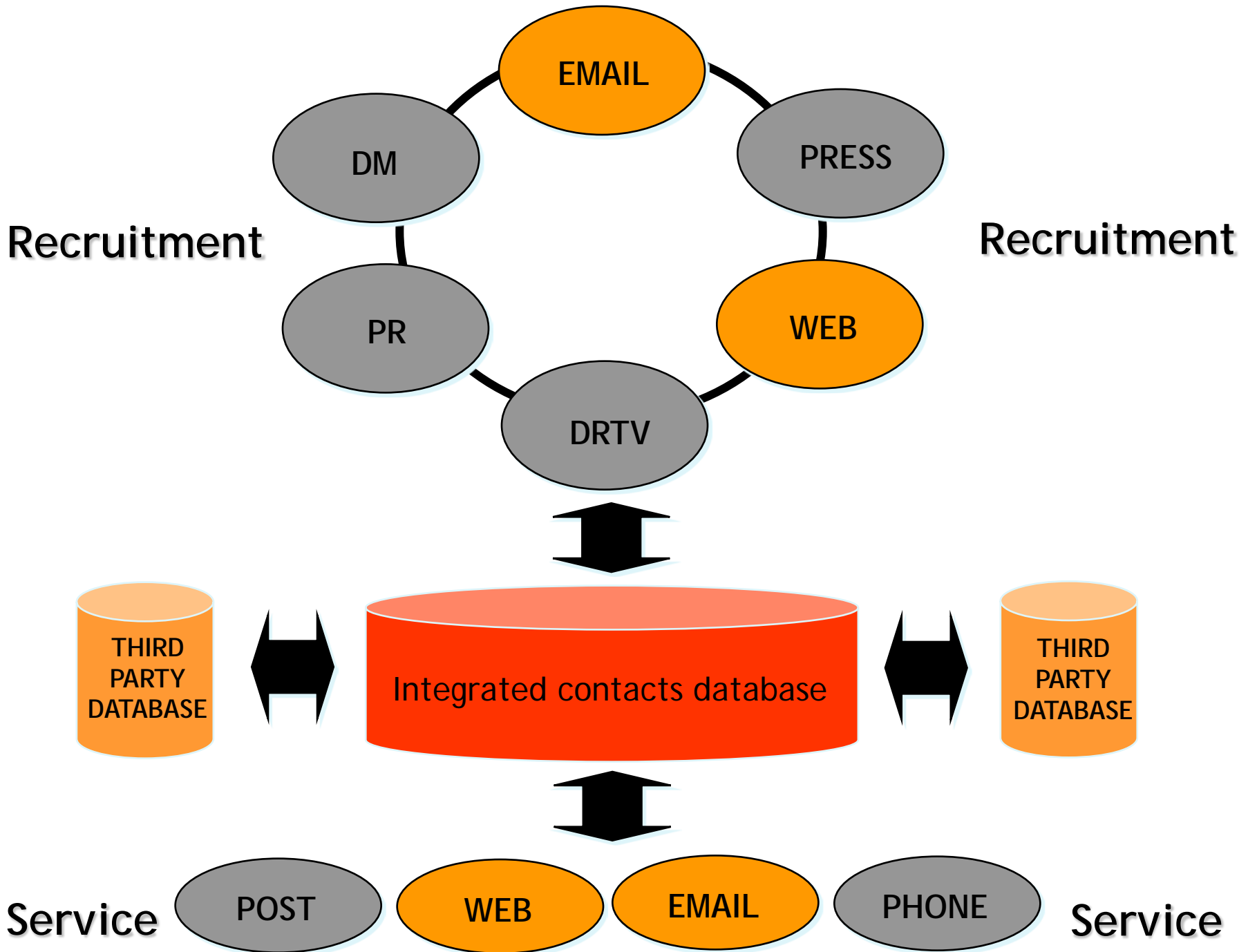
- ▶ Raiser's Edge and Donor Relations
 - Database Excellence
- ▶ What is Donor Development
- ▶ Solicitor / Relationship Tracking
- ▶ Notes / Media Management
- ▶ Action / Tickler Management
- ▶ Automating Stewardship Plans with Action Tracks
- ▶ Using Dashboards in RE
- ▶ Online Dashboards
- ▶ The Future – RE NXT

Jeff Gignac, CFRE, bCRE-Professional

- President of JMG Solutions since 1998
- Started consulting with RE in 1992
- Earned CFRE in 2002
- Earned Raiser's Edge Associate Certification 2013 and Professional Certification in 2014
- Frequent speaker, author and professor at Humber College
- Over 700 client projects
- Leads a team helping clients use databases and technology better and more effectively

Database Excellence





What is Donor Development

- ▶ Moves management, relationship building and more - every way you “touch” people
- ▶ Building an evolving, two way relationship
- ▶ Guide them to the next level of giving
- ▶ Aim to increase support, over longer periods including a planned gift
- ▶ Getting to know them better and give opportunities for them to know you better
- ▶ Tracking all fundraising activities and contact – both fundraising and organizational

Prospect / Proposal Tabs

- ▶ Used to track philanthropic giving
- ▶ Used to track financial information
- ▶ Proposals
 - Ability to track multiple proposals
 - Good historical information
 - Can link to actions for reporting

Prospect Information

New Proposal | Open | Delete...

- General
- Gifts to other Organizations
- Financial Information
- Financial Information Graph
- Proposal
- Ratings
- Chronology

Last proposal:	03/25/2005	Last action:	06/04/2015
Amount asked:	\$200,000.00	Last Gift:	03/27/2015
Amount funded:	\$150,000.00	Total given:	\$289,284.99

Classification: Individual

Prospect status: Active

Philanthropic Interests	Comments
<input type="checkbox"/> Medical Research	All areas of medical research, but ...
<input type="checkbox"/> Science/Technology	
<input type="checkbox"/> Children's Issues	This is Robert's chief concern whe...
<input type="checkbox"/> Relief Efforts	

Will Not Give To	Comments
<input type="checkbox"/> General Operating	

Proposal Information

New Proposal Open Delete... <No Filters>

Proposal Name	Purpose	Status	Amount Asked	Date Asked	Campaign
Relief Proposal	Provide relief for flood vi...	Stewardship	\$200,000.00	03/25/2005	RELIEF

- General
- Gifts to other Organizations
- Financial Information
- Financial Information Graph
- Proposal**
- Ratings
- Chronology

Proposal for Robert C. Hernandez

File Edit View Proposal Help

Save and Close

General Action Media Attributes Notes

Name: Relief Proposal Status: Stewardship

Purpose: Provide relief for flood victims Reason: General

Campaign: RELIEF Type of gift: Cash

Fund: DISASTER Instrument: Cash

Solicitors: Mohammed Rahman Rating:

Deadline: 06/01/2015 Date rated: 01/03/2015

Amounts

Amount asked: \$200,000.00 Date asked: 03/25/2015

Amount expected: \$140,000.00 Date expected: 05/01/2015

Amount funded: \$150,000.00 Date funded: 04/10/2015

View Gifts Amount funded from gifts: \$150,000.00

Proposal is inactive

Original amount asked: \$200,000.00 Original date asked: 01/25/2000

No Prospect Module?

- ▶ Use Sample database
- ▶ Review information in prospect and proposal tabs then use that to structure your needs
- ▶ Create attribute and notes to capture the same information
- ▶ Review reporting needs and create custom ones where needed

Solicitor / Relationship Tracking

- ▶ Tracking friends/colleagues
- ▶ Employment / Organizations
- ▶ Each prospect can have multiple solicitors
- ▶ Who is the “door opener”
- ▶ Who is the “asker”
- ▶ Who is the internal/staff solicitor

Ensure all possible linking of relationships to constituents is happening

- 6 Degrees of CRM
- Track as many individual relationships as you discover them
 - Spouses, friends, relatives
- Track as many organizational relationships as you need
 - Clubs, churches, synagogues, subsidiaries
- Use Relationship Tree



Relationship Tree for Robert C. Hernandez

Show: <All relationships>

- Robert Hernandez
 - Hernandez, Wendy (Wife)
 - + Audrey Lorenz (Staff)
 - Christopher Young (Golf Partner)
 - Young, Mary (Spouse)
 - + Anne Sinclair (Annual)
 - + Cole Hensley (Membership)
 - Joseph Diresta (Campaign)
 - + Angela Diresta (Spouse)
 - Abrahms, Joseph (Father)
 - David Murphy (Campaign)
 - + Margaret Murphy (Wife)
 - Un42 (Education/School)
 - Diresta, Steven (Brother-in-law)
 - + Joseph Sinclair (Benefactor)
 - Ke17 (Education/School)
 - Ke18 (Education/School)
 - Noble, Chris (Friend)
 - Un35 (Education/School)

Show number of records for each group

Open
Find...
Print...
Legend
Filters...
Expand All
Close

Notes / Media Tracking

- ▶ Notes are not just stories on your constituents
- ▶ Useful for Foundation / Corporate info
- ▶ Stories from Web/Facebook/Twitter
- ▶ Should be easily searchable
- ▶ Call reports from board / committee meetings as notes or media

Action / Tickler Management

- ▶ Tickler to “to do” area
- ▶ Which meetings/mailings/phone calls/emails/tasks are up coming
- ▶ Track which solicitor is assigned to perform the action
- ▶ Notify staff of the action
- ▶ Email tickler reports to solicitors
- ▶ Which “Last Step” / “Next Step” appears on custom reports

Action for Robert C. Hernandez

File Edit View Action Favourites Tools Help

Save and Close

General Attributes Notes

Name: Robert Hernandez ID: P96 **Not Completed**

Category: Phone Call Meeting Mailing Email Task/Other

Action type: Board Meeting

Action date: 06/04/2015

Start time: 6:30 PM End time: 9:30 PM

Auto-Remind

Notify Supervisor

Set reminder for 2 week(s) beforehand

Solicitors: No solicitors have been assigned

Priority: High Normal Low

Status: Continuous

Action completed on

Location: Board Room

Campaign:

Fund:

Proposal:

View Track Template

04/09/2015

Automating Stewardship Plans with Action Tracks


- ▶ Predefined set of actions
- ▶ When action is completed, next action automatically created
- ▶ Can assign any constituent to any step in track

Size of Gift	Send Thank You letter and Tax Receipt	Call from CDO	Call from President	Call from Board Member	Call from Board Member Chair	Send \$100+ Donor Report
\$0-\$999	✓	✓				
\$1,000 - \$9,999	✓	✓				
\$10,000 - \$99,999	✓		✓			
\$100,000 - \$499,999	✓		✓	✓		✓
\$500,000+	✓		✓		✓	✓

Define Constituent Action Track

Track name: **Stewardship Track** 6 action(s) in track Track is inactive

- Stewardship Track
 - Phone Call - Send Thank You Letter
 - Phone Call - Phone Call from CDO
 - Phone Call - Phone Call from Presid
 - Phone Call - Phone Call from Board
 - Phone Call - Phone Call from Board
 - Phone Call - Send 100K Donor Rep

Phone Call - Send 100K Donor Report 

Use date action is created

Solicitors: First active solicitor for constituent
Priority: Normal Status:

Base on: Phone Call - Send Thank You Letter
Conditions: Action Completed equals Yes

New Open Delete... ↑ ↶ OK Cancel

New Action for Stewardship Track

File Edit View Track Action Help

Save and Close

General Conditions Attributes Notes

The creation of this action can be based on when this track is assigned, or when specific conditions of another action in this track are satisfied. If you choose to base it on when the track is assigned, place the track name in the "Based on" field. If you choose to base it on another action in the track, place that action in the "Based on" field, and select an action query with criteria as the conditions that must be satisfied.

Based on: Phone Call - Send Thank You

Action query: Action Track: Completed = Yes

When this action is created, how should the action date be determined?

Use date action is created

Use [] [] from date action is created




Use 6 month(s) from date of Phone Call - Send Thank You



Dashboards

- ▶ What is a Dashboard?
 - Real Time information in Raiser's Edge
 - Panels showing different slices of data
 - Can automatically refresh (RE 7.94)
- ▶ Dashboard Examples
 - Top Prospects List
 - Upcoming Birthdays
 - First Time Donors

Dashboard Sample



Dashboard - Sample Data

Donor Relations Dashboard ▾ Customize  New Select Shared Dashboards Save As...  Delete... Sharing 

A Prospect  

As of 04/09/2015 12:19:16 AM

Row	Name	Prospect Rating Category	Last Gift Date	Last Gift Amount	Last Action Date	Last Action Type
1	Lisa Haas	A Prospect	12/01/2009	\$75.00	12/09/2009	Letter
2	Robert Carlos Hernandez	A Prospect	03/27/2015	\$99.99	02/19/2009	Brochure/Invitation
3	Alicia Russano	A Prospect				
4	Christopher Todd Young	A Prospect	04/30/2008	\$150.00	01/15/2009	Lunch Meeting

Birthdays This Month  

As of 04/09/2015 12:19:16 AM

Row	Name	Birth Date	Business Email Number	E:mail 1 Number	Em
1	Joseph Patrick Diresta	04/23/1965			JPdires
2	Joseph Patrick Diresta	04/23/1965			adiresta
3	Elizabeth Ann Ashton	04/27/1956			
4	Virginia Francis Morrison	04/11/1962			
5	Marlena Nodason	04/08/1951			
6	Neil Allen Osborne	04/22/1967			
7	Chad Patterson	04/03/1975			
8	Cynthia Beth Urban	04/13/1958			cbu@h
9	Michelle Erin Wagner	04/08/1968			
10	Collin Dubose	04/12/1945			
11	Meredith Alexander Tirrito	04/22/1959			
12	Doreen Andrea Wilson	04/08/1955			

First Time Donor

First Time Donors



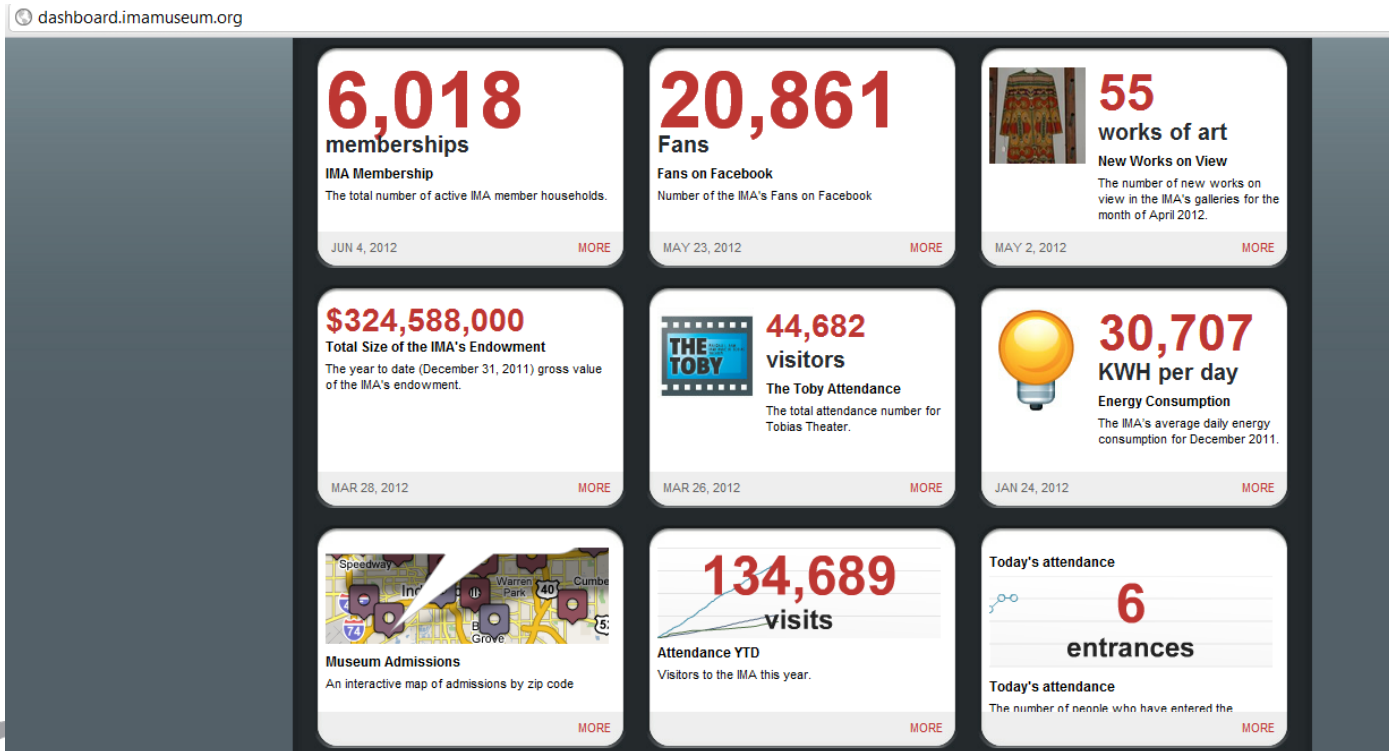
As of 04/09/2015 10:31:06 AM

Row	Name	First Gift Date	Business Email Number	Email Number	First Gift Amount	First Gift Fund Description
1	Jason Douglas Campbell	03/12/2015			\$50.00	2002 Membership Fund
2	Marg Simpson	03/03/2015			\$100.00	Library Fund

Online Dashboard

- Create a dashboard for real time tracking
- Dashboard could be in your CRM
- “Indianapolis Museum of Art” has a web based dashboard
- <http://dashboard.imamuseum.org/>
- Report to your donors online
- McGill University – Campaign McGill Final Report
- <http://www.mcgill.ca/campaign/by-the-numbers>
- <http://www.mcgill.ca/campaign/meet-our-donors>
- Queens University – Advancement News
- <http://www.queensu.ca/advancement/index.html;jsessionid=E1B9F815209AAD69BF97EEEA13C0C1D4>

Dashboard Indianapolis Museum of Art



The Future RE NXT

- ▶ Next Generation of Raiser's Edge
- ▶ 100% cloud based
- ▶ HTML 5 Access to constituents
- ▶ More prospect information loaded automatically
- ▶ Fundraising view launched later this year

