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

TRACKING

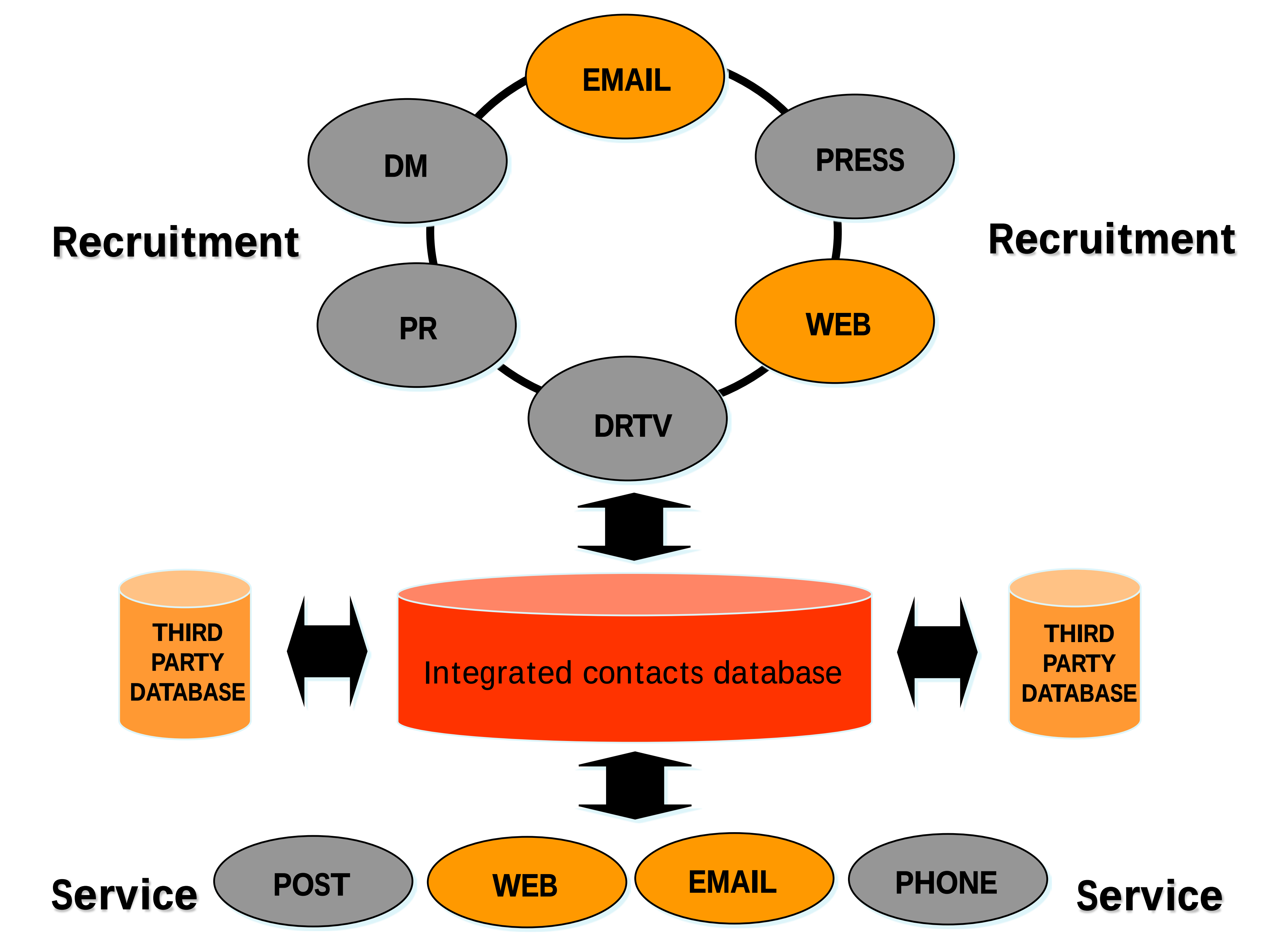
Prospect Management
Data Mining

Direct Response

Events, Volunteer and
Membership Management

Gift tracking, receipting and thanking

ANALYSIS


EMAIL
DM
PRESS
Recruitment
Recruitment
PR
WEB
DRTV
THIRD PARTY DATABASE
Integrated contacts database
THIRD PARTY DATABASE
Service
POST
WEB
EMAIL
PHONE
Service

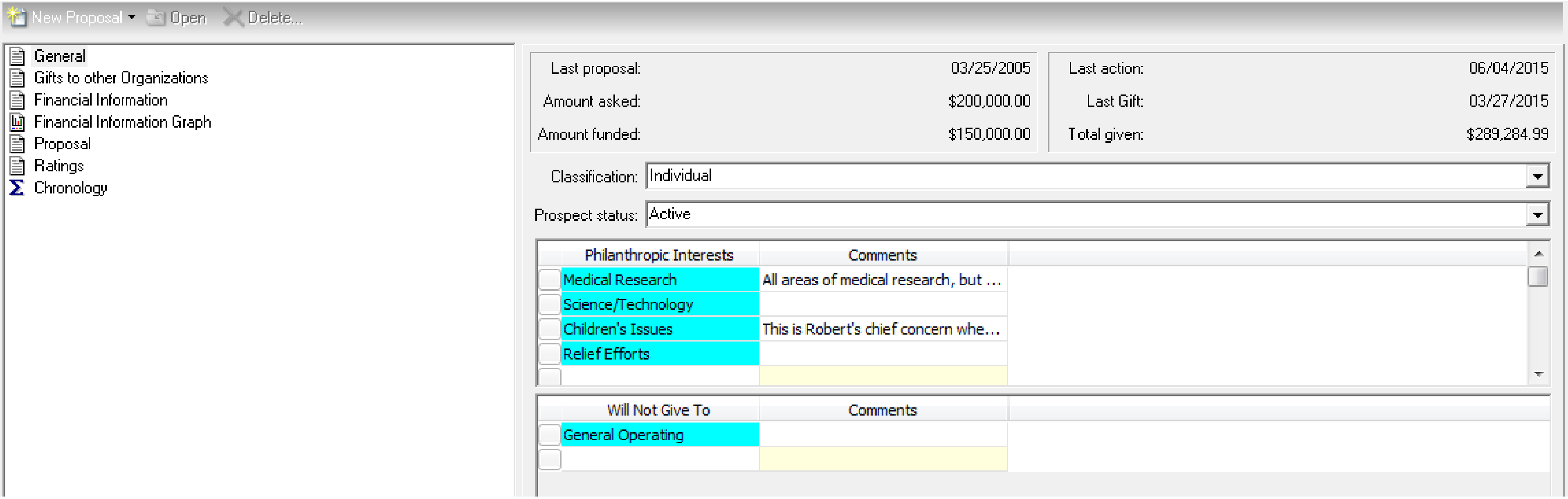
What is Donor Development

- 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



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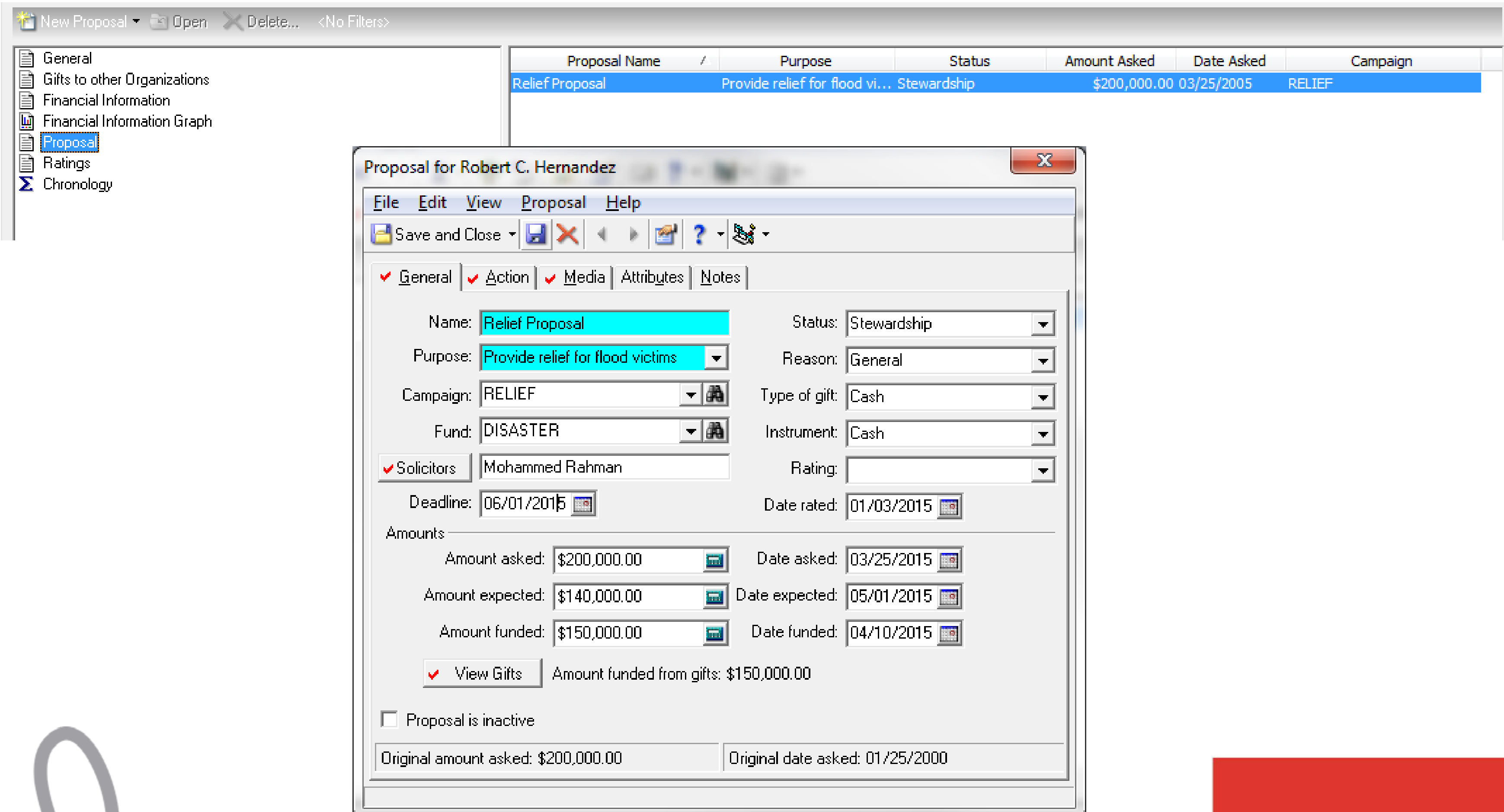
Proposal Information



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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

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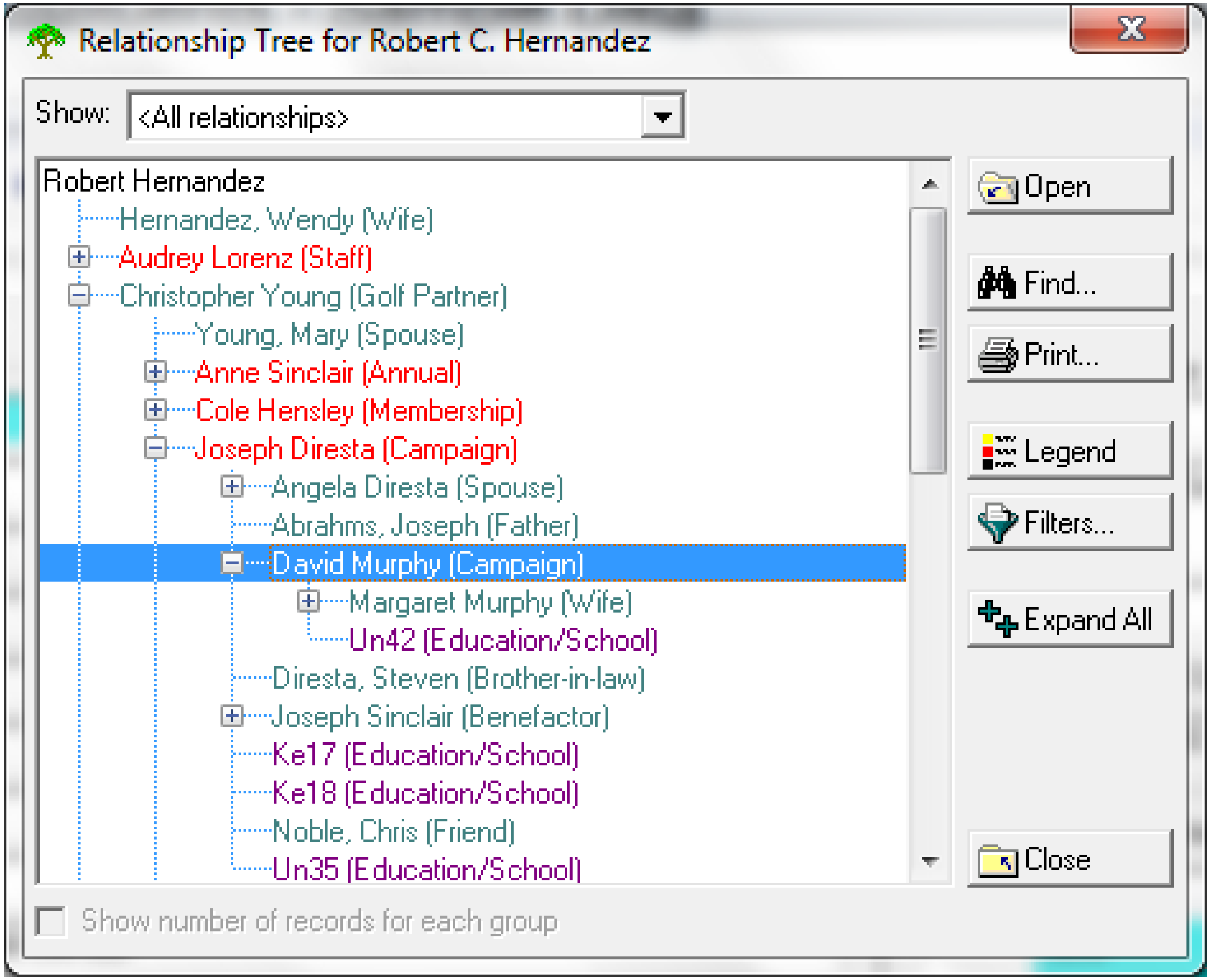

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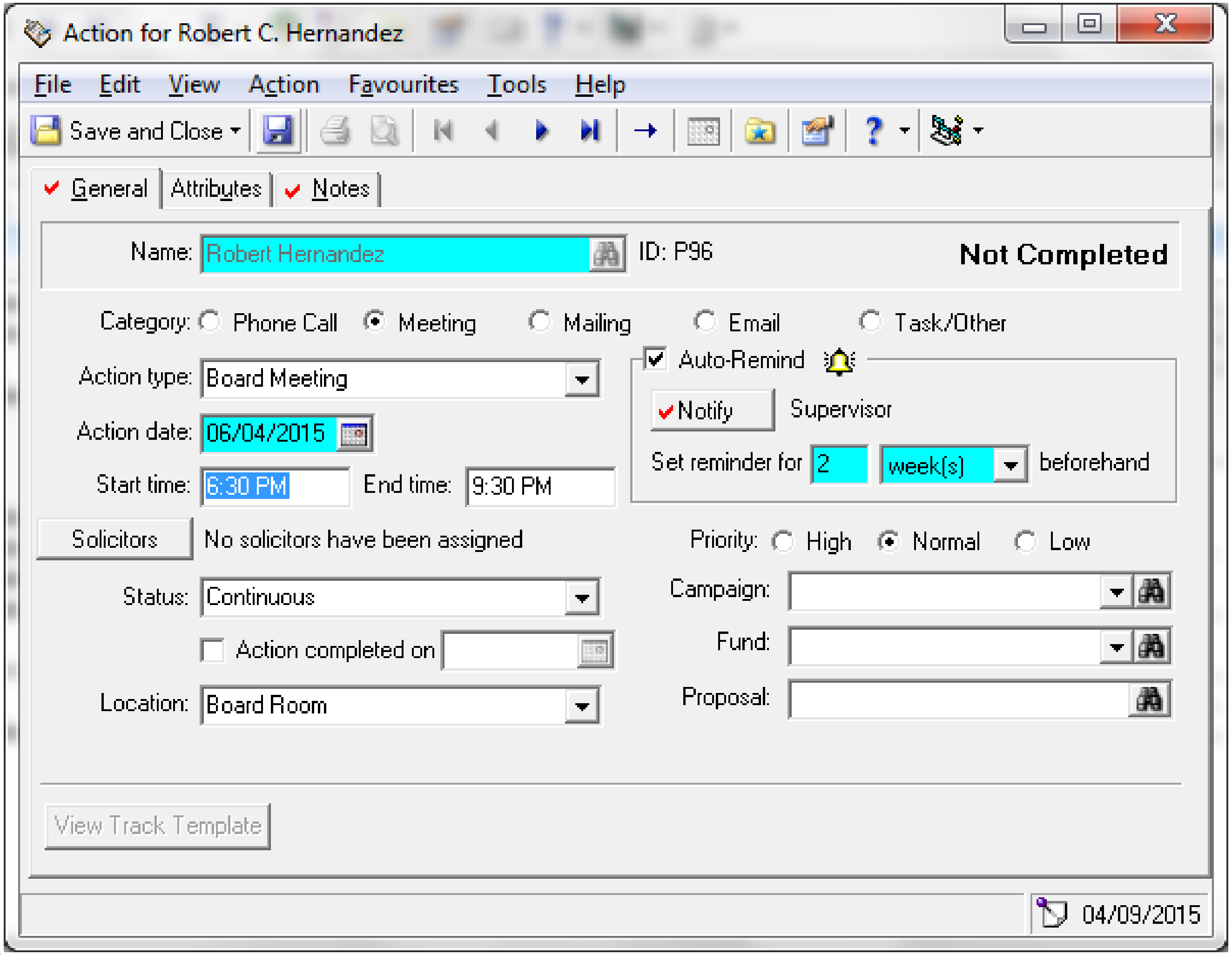
Notes / Media Tracking

- 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



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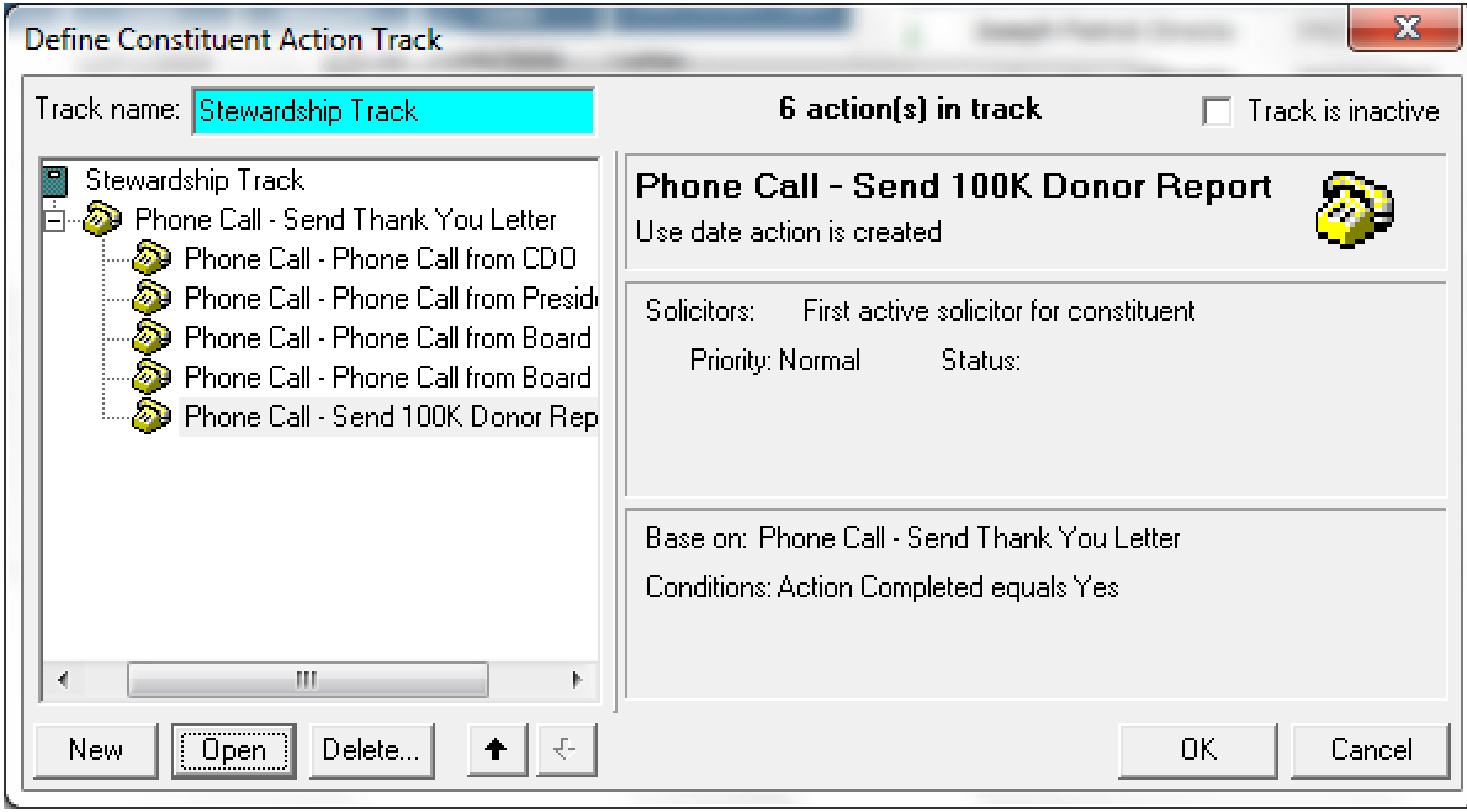
Automating Stewardship Plans with Action Tracks

- 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

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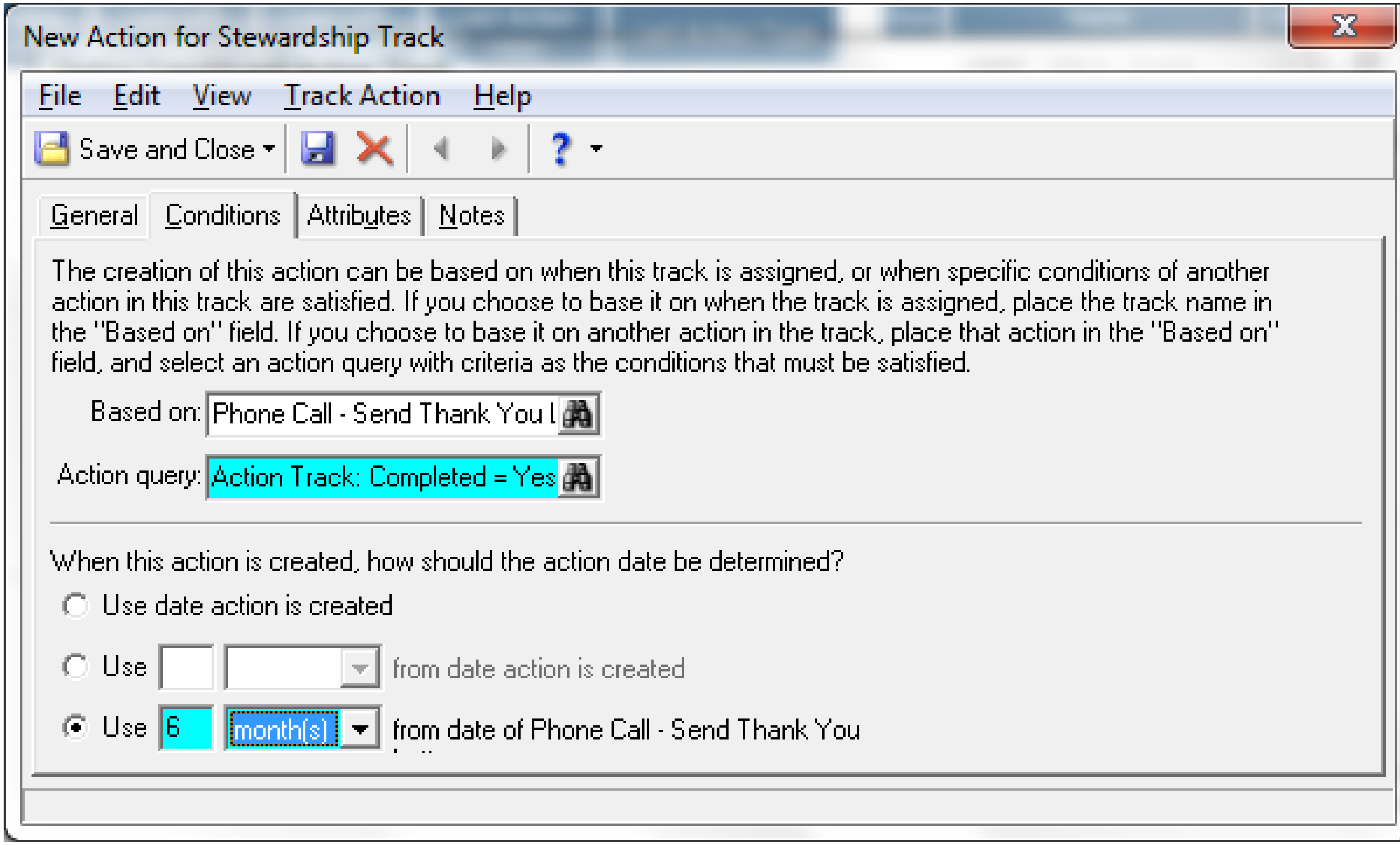

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Dashboards

- 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

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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			

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First Time Donor

First Time Donors

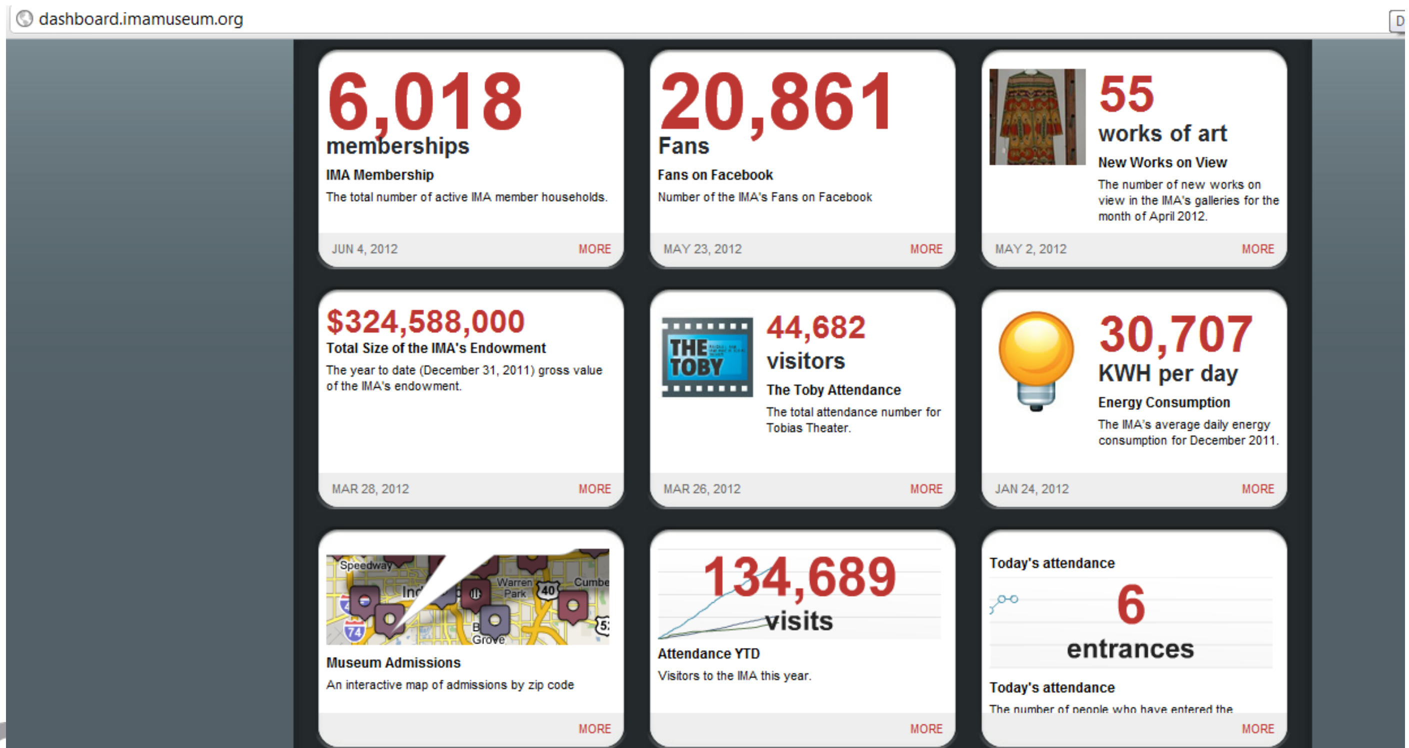
As of 04/09/2015 10:31:06 AM

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
- "Indianapous 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 – Advanement 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

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