

D A T A B A S E
U T I L I Z A T I O N

Y O U R
S Y S T E M S
G A M E P L A N

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Today we'll ask the questions...

- What's a database?
- Why do we need one?
- Who should use it?
- Where do we go from here?

What's a database?

da·ta·base *n* :

a usually large collection of data organized especially for rapid search and retrieval (as by a computer)

(Merriam-Webster OnLine)

What are people using?

Do you trust your data?

How much?

Why do we need a database?

- Constituent Management
- Gift and Pledge Maintenance
- Queries
- Reports
- Security

It's treated as a Pantry...

- Name
- Address (Home, Business, Seasonal)
- Phone Numbers
- E-mail Addresses
- Spouse/Partner
- Event Attendance
- Giving History
- Affiliations
- Mailing History
- Prospect Information

But it can function like a Super-Market!

- Target Your Audience
- Automate Processes
- Segment Donors
- Mine Your Data
- Comparative Analysis
- Motivation Performance Analysis
(Management Reports)
- Queries

Who should use the database?

- Development
 - Directors
 - Managers
 - Event Planners
 - Support Staff
- Executives
 - Presidents
 - Vice Presidents
 - Executive Directors
- Finance/Business
- Information Technology

Where do we go from here?

- Evaluate Your System
 - Current Functions
 - Demographics Storage
 - Gift Processing
 - Capabilities
 - Reporting
 - Planned Giving
 - Prospect Research
 - E-mail
 - Remote Access
 - Campaign Planning

Where do we go from here?

- Establish Your Needs
 - Standards
 - Best Practices
 - Policies
 - Procedures
 - Training
 - Security
 - Microsoft Office Integration
 - Correspondence Tracking
 - Customizable Reports

Where do we go from here?

- Develop a Database Vision Statement

“Our vision is to supply our clients, both internal to the College and external constituents such as alumni, parents, and friends, with information generated in the most efficient, consistent and accurate manner. Maximizing our data storage options, all Benefactor files and fields will be utilized appropriately, in a standardized format, which is both well-documented and communicated to super and passive users of our systems. A streamlined infrastructure will ensure that each individual, department, school or unit will be provided Benefactor data and generated reports specific to their needs, which honor the division’s mission of creating and strengthening effective relationships.”

Where do we go from here?

- Create an Action Plan
 - Project Name
 - Description
 - Vision Link
 - Main Contact
 - Start and End Date
 - Estimated Cost
 - Benefits/Outcome

Where do we go from here?

- Establish Data Targets
 - Constituents of Record
 - with Current Address
 - Solicitable Constituents of Record
 - with Employer
 - with E-mail Address
 - with Current Phone

Questions?

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Gift Processing, Crediting, Reconciliation
Demographics Processing
Address Standardization
Manuals, Policies & Procedures
Training
Action Planning
Custom Reporting