

# A Stronger Database = A Stronger Donor Base

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Whether you refer to your Access database of donor information as simply your 'mailing list' or you have specialized development software for 'constituent relationship management', the records you keep provide the lifeline between you and your donors. Investing the proper time and effort in maintaining whatever system you use for donor records management will result in happier, more generous donors and volunteers. It is certainly an investment worth making.



Here are 10 tips to strengthen your database to help build a strong donor base:

## **1) Limit the number of record keeping sources.**

If you keep your mailing list in Outlook, track donations in DonorPerfect, and have a spreadsheet of volunteers who help with the annual walk-a-thon, you are guaranteed to have inaccurate, duplicate, conflicting, and outdated information, probably in all three places. With limited time and resources, do not ask staff and volunteers to make address corrections in more than one system; instead invest time (and money, if necessary) to integrate them. It will be time consuming to consolidate your records at first, but will save a lot of time and produce much better - and accurate - results later.

## **2) Standardize data entry procedures.**

Even if your database contains thousands of records, it is not too late to start standardized data entry. It will help you find information when you need it, change information quickly, reduce confusion, and decrease the risk of offending a donor or volunteer. Create a one-page document with the 'rules' that make sense for your organization. As time allows, go back and correct previous entries. Think about abbreviations, punctuation, required fields (titles, alternate contact information, etc.), how to handle missing information (leaving field blank, coding as N/A, etc.), and how to record the date the file was most recently updated so you do not have to revisit it for a while.

## **3) Minimize data "enterers", provide training, and set expectations.**

It can be tempting to hand off data entry to anyone willing to do the job. Whether a staff member or a volunteer, be sure they are adequately trained with a very thorough understanding of data entry standards and that they realize accuracy is critical.

**4) Schedule periodic reviews of data.**

Think of it as "spring cleaning". At least twice a year, run different reports from your database to help look for problems with the data. Duplicate entries and records missing zip codes or street addresses are two common issues that can cost money (postage) and time (writing in missing information on mailing labels). Commit to finding them and to fixing them.

**5) Back up files.**

Employ any software features or ask an IT friend to help you create a copy of your database on a different server. Save your database to a portable media device and store it outside of your office in case of theft, fire, or other hazard. The key is to do this frequently so that if you need to restore your database from a file, you will not need to re-enter more than a week or so of information.

**6.) Enter all volunteers, donors, clients, employees, sponsors, service providers, media contacts, elected officials, etc. in your database.**

When you hear someone has moved, married, changed employers, or even died, do not delay in updating their records. If you struggle to find time for this, place a basket on your desk for collecting change requests. Mark your calendar so that each Friday you empty the basket.

**8) Annually, put "Address Correction Requested" on your newsletter address page.**

Newsletters that do not reach their destinations will be returned, and you have the opportunity to update your records. Then, be sure to resend newsletters to recipients at their correct addresses.

**9) Make the move from Outlook or Access to specialized software.**

As your organization grows, so will data management and reporting needs. Early on, investigate the many products available for tracking donors, volunteers, special events, etc. Weigh the expense with the benefits and carefully consider your options. If you do purchase a new tool, make a commitment to training and making a clean start by reviewing all records as they are imported.

**10) Ask for help!**

*do good's* consultants are trained and experienced "constituent relationship management" professionals and routinely provide database analysis for local organizations. A few hours of our time can save weeks of headaches on your end - and a lot of money for your group in the long run. [Contact us today!](#)